(For Internal Agency Use Only)

MBE PROGRAM SUBGOAL WORKSHEET

Effective August 1, 2020

This Worksheet must be completed for all procurements that have an overall goal. It requires the approval of the Procurement Officer and the MBE Liaison, who also must sign the Worksheet. Each unit must maintain a copy of the Worksheet as a part of the Procurement Review Group (PRG) documentation for the procurement.

Procurement information and approvals

Agency/Unit: _____

Project Description: _____

Solicitation No. _____

Approvals:

Signature of Procurement Officer: _____ Date: _____

Signature of MBE Liaison: _____ Date: _____

Subgoal determination steps

1. What is the expected value of the procurement (excluding options)? $ _____

2. Does the expected value of the procurement equal or exceed $200,000? ☐ Yes ☐ No

- If **YES**, completion of the rest of this Worksheet to determine the appropriate MBE Program Subgoals, if any, is mandatory.
- If **NO**, the unit may, at its discretion, determine that subgoals will not be set for the procurement. If, however, the unit determines that subgoals should be set, the rest of this Worksheet must be completed to determine the appropriate subgoals, if any.

3. Select, from Table 1 below, the Major Industry Category for the procurement based on the definitions in COMAR 21.01.02.01. _____

4. What is the Combined Industry Category, from Table 1 below, based on the Major Industry Category selected for the procurement in Step 3? _____

TABLE 1 – INDUSTRY CATEGORY CONVERSION CHART

Major Industry Category	Combined Industry Category
Architectural & Engineering	AE-CRS
Construction	Cons
Construction Related Services	AE-CRS
Human, Cultural, Social & Educational Services	Serv
IT Services	IT
IT Supplies & Equipment	IT
Maintenance	Main

Major Industry Category	Combined Industry Category
Services	Serv
Supplies & Equipment	CSE

5. Check the appropriate column for the Combined Industry Category in Table 2 below based on the answer to Step 4.

6. What is the Subgoal Total Plus 2% Margin shown in the last line of Table 2 below for the Combined Industry Category? _____ %

7. What is the overall MBE participation goal for the procurement? _____ %

8. Does the overall MBE participation goal for the procurement equal or exceed the Subgoal Total Plus 2% Margin? (Compare Steps 6 and 7) ☐ Yes ☐ No

- If **YES**, proceed with the remaining steps in this Worksheet.
- If **NO**, do not set any MBE Program subgoals for the procurement.

9. For Column 9 in Table 2, insert the number of certified firms available to perform the work of the procurement for each Subgroup that has a Recommended Subgoal. (NOTE: For purposes of determining the number of certified firms in a Subgroup, count dually certified firms as being owned by a member of the relevant racial or ethnic Subgroup, not as a woman-owned firm.)

10. For column 10 in Table 2, insert a “Y” (for Yes) or “N” (for No) to indicate whether the number of certified firms in a Subgroup that has a Recommended Subgoal equals or exceeds 3 firms.

TABLE 2 – RECOMMENDED MBE SUBGOALS

Subgroups	9. # of Firms	10. ≥ 3 Y/N	Cons	AE-CRS	Main	IT	Serv	CSE
Combined Industry Category (Check appropriate column per Step 5.)			☐	☐	☐	☐	☐	☐
African American			8%	7%	9%	10%	—	6%
Hispanic American			—	—	3%	—	2%	2%
Asian American			—	—	2%	—	3%	—
Women			11%	10%	—	10%	10%	8%
Subgoal Total			19%	17%	14%	20%	15%	16%
***Subgoal Total Plus 2% Margin**			21%	19%	16%	22%	17%	18%

***_The Subgoal Total Plus 2% Margin_ is the sum of the Recommended Subgoals plus 2%.**

- **Refer to Table 2 above. If there are 3 or more certified firms in a Subgroup for the work of the procurement (indicated by a “Y” in Column 10), the Recommended Subgoal for the Combined Industry Category in Table 2 should be set for that Subgroup unless an explanation is provided in Step 11.**
- **A subgoal may not be set if the number of certified firms in that Subgroup is less than 3**

(indicated by an “N” in Column 10).

11. The following Recommended Subgoals have not been set because:

Document information

Governor’s Office of Small, Minority & Women Business Affairs, MBE Program Subgoal Worksheet