Maryland
DEPARTMENT OF SOCIAL AND ECONOMIC MOBILITY
OFFICE OF SMALL, MINORITY & WOMEN BUSINESS AFFAIRS

MBE REPORTING MANUAL

Prepared by the Office of Small, Minority & Women Business Affairs

Updated July 1, 2026

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MBE REPORTING DEADLINES

Due Date	Report	Submission	Authority	Frequency
As Issued	MBE Waiver Determinations (PRG over $25mil reference the directive or any amendments to MBE contracts)	compliance.gosba@maryland.gov	COMAR 21.11.03.11	As Issued
*Submit Annual Report instead on 08/30	No MBE 4th Quarter Report is due for the Quarterly MBE Report Forms, instead turn in the Annual Report no later than 8/30*	mbereports.gosba@maryland.gov	COMAR 21.11.03.17	Quarterly
07/31	MBE Waivers Report (Annual)	Sent to BPW with copy sent to compliance.gosba@maryland.gov	COMAR 21.11.03.17 (3)	Annual
08/30	MBE Annual Report cumulative data July 1 – June 30	mbereports.gosba@maryland.gov	COMAR 21.11.03.17; SF&P 14-305	Annual

Due Date	Report	Submission	Authority	Frequency
10/31	MBE 1st Quarter Report of cumulative data and Compliance Check-In Survey (July 1 – Sept 30 data)	mbereports.gosba@maryland.gov	COMAR 21.11.03.17	Quarterly
01/31	MBE 2nd Quarter Report of cumulative data and Compliance Check-In Survey (July 1 – Dec 31 data)	mbereports.gosba@maryland.gov	COMAR 21.11.03.17	Quarterly
04/30	MBE 3rd Quarter Report of cumulative data and Compliance Check-In Survey (July 1 – Mar 31 data)	mbereports.gosba@maryland.gov	COMAR 21.11.03.17	Quarterly
06/30	FY26 Procurement Forecast Template	compliance.gosba@maryland.gov	COMAR 21.11.03.17	Annual
10/15	MBE 4th Quarter Report of the cumulative procurement activity data and the Compliance Check-In Survey (July 1 - June 30 data)	mbereports.gosba@maryland.gov	COMAR 21.11.03.17	

*MBE Reauthorization https://mgaleg.maryland.gov/2026RS/Chapters_noln/CH_82_hb1578t.pdf

The State Finance and Procurement Articles for Minority Business Enterprise (MBE) 14-303, Small Business Reserve (SBR) 14-505, and Veteran-Owned Small Business Enterprise (VSBE) 14-604, reporting deadlines have been changed. COMAR will be updated to align once statutory changes take effect.

Effective immediately, annual agency reports for MBE must be submitted within sixty (60) days of the fiscal year close. The annual reporting deadline is now August 30, replacing the previous ninety (90) day, September 30th deadline. Given that this reporting deadline falls on a Sunday, the reporting deadline will be the next business day, Monday, August 31.

Extensions may be granted through September 30th on a case-by-case basis through written requests to your MBE Compliance Manager.

MBE Reporting Guidelines Overview

All procurement units are required to submit their individual MBE Reports to the Office of Small, Minority & Women Business Affairs (OSBA).

Accordingly, this document is meant to be used as a guideline to assist all reporting agencies:

I. All state procurement units are reminded to take great care in reporting MBE contract participation and waiver data. Procurement units should not report any MBE data (prime or subcontract dollars) in their MBE reports that is not adequately supported by auditable contract documentation.
II. All procurement units must report MBE prime contract and MBE subcontract award data, MBE compliance data, actual payments made to MBE prime and MBE subcontractors during the fiscal year, and MBE procurement activity data.
III. OSBA will provide technical assistance and support through the MBE Report Help Desk. You can quickly reach the help desk by e-mailing tiara.randolph@maryland.gov or calling 410-697-9608 and asking for the MBE Report Help Desk.

MBE Annual Reporting Requirements

The following reporting process will be in effect for FY2026 Annual submissions.

I. Annual reporting is MANDATORY and timely submission of data is critical. Participating procurement units that fail to submit the required data will be reported as non-responsive.

II. MBE Annual Reports are due on or before August 31, 2026* (see page 4 for updates regarding new submission deadline).
III. Procurement units will submit a completed MBE Annual Report via email to mbereports.gosba@maryland.gov with the following templates attached:
    i. FY2026 Annual Report Forms Template (Form #1 & #2)
    ii. FY2026 MBE Contracts Inventory
    iii. FY2026 Compliance Assessment Requirement
        i. If the unit is not submitting an assessment because it did not have any contracts with MBE goals close out within the FY being reported for, be sure to indicate this within the email submission.
        ii. A signed PDF copy of the 'Compliance Report Tab' is required within the email submission
    iv. Form #3 Payment Portal Submission
        i. Payment data is required to be submitted via the Form #3 Payment Portal; procurement units should confirm submission of payment data by attaching the Prime Payments by MBE and Sub Payments by MBE reports from the portal within the email submission
    v. Backup data for awards and payments in excel format
IV. OSBA will conduct a review of the submitted report and will contact the agency for corrections (if needed). When the report is deemed complete by OSBA, the agency will receive a summary statement with their final report numbers. The procurement units Secretary, University President, or procurement unit Head and the Chief Financial Officer must review/confirm the final numbers, sign, and submit this form to the Office of Small, Minority & Women Business Affairs. A signed hard copy original scanned into PDF for submission via email or electronic copy of the signed document is acceptable.
V. Procurement units are required to submit their annual MBE report electronically in the specified file formats, using the most current OSBA-approved report templates.

FY2026 Annual Data Requirements

Backup Data

Detailed backup data is required with the MBE Annual Report submission. Procurement units should not submit summary data in their MBE reports that are not adequately supported by auditable contract documentation. PDFs are not accepted as backup data.

Awards and Outreach Data

Form Name	Data Requirements	Submission Format
Form #1	• Total Contract Awards by Procurement Categories • All reportable contract awards including MBE prime/subcontract awards • All MBE waiver activity	Excel Spreadsheet Format Template Name: FY2026 Annual Report Forms
Form #2	• Total MBE Prime Contract/MBE Subcontract Awards by MBE Classifications and Procurement Categories • Total Dollar Value of all MBE Prime Contract/MBE Subcontract Awards	
Outreach Data	• Total Number of outreach events your unit conducted or participated in by type of event, live or virtual • List of resources your agency has available to help businesses know how to do business with your agency • Evaluation by procurement unit of the success of its MBE program	
Contracts Inventory	• Detail report of all contracts awarded to MBE prime and MBE subcontractors including their name, MBE Certification #s and MBE classifications • Procurement category of each contract award • Total dollar value of each contract award • Contract number of each contract award	Excel Spreadsheet Format Template Name: FY2026 MBE Contracts Inventory

Payment Data

Form Name	Data Requirements	Submission Format
Form #3	• Total MBE Prime Payments/MBE Subcontractor Payments including their name, MBE Certification #s and MBE classifications • Contract award details that each payment was made towards including award amount, start/end date, and MBE goal percentage • Total Dollar Value of payments made within the FY being reported for • Total Dollar Value of payments made Contract to date	Payment Portal Submission (Instructions for either importing data or manual entry of data have been provided in a separate section in this document.)

Compliance Data

Form Name	Data Requirements	Submission Format
MBE Compliance Assessment (Detail report of MBE compliance metrics)	•Contract award details for MBE contracts that have closed out within the FY being reported for including the contract number, award date, award amount, expiration date, prime contractor name, all subcontractor names (including MBE and non-MBE subcontractors), procurement category, and description of work • Payment data for prime contractors, and all subcontractor payments (including MBE and non-MBE subcontractors) • Description of factors leading to compliance below 100% (if applicable)	Excel Spreadsheet Format Template Name: FY2026 Compliance Assessment Requirement Compliance Report Tab PDF Signed Copy: The summary spreadsheet is located within the template and requires signatures prior to submission. Please Note: If your agency did not have any MBE contracts close out within the FY being reported for be sure to address within the email submission that your agency did not require a compliance assessment.

MBE Quarterly Reporting Requirements

The following reporting process will be in effect for FY 2026 Quarterly Report submissions.

VI. Quarterly reporting is MANDATORY and timely submission of data is critical. Participating procurement units that fail to submit the required data are identified in OSBA's statewide quarterly report that is submitted to the Governor, Lt. Governor, Board of Public Works, and Cabinet.

VII. MBE Quarterly Reports templates and due dates:

- FY2026 MBE Quarterly Report Forms are due no later than 30 days after the quarter being reported for and should contain cumulative data from the start of the fiscal year. No 4th quarter report is due, the full fiscal year is reported in the Annual report.
- FY2026 Quarterly MBE Procurement Activity Report is due no later than 30 days after the quarter being reported for and should contain cumulative data from the start of the fiscal year. This report requires a 4th Quarter submission which includes data from July 1, 2025 – June 30, 2026, due by October 15, 2026.
- Quarterly reports are cumulative and follow the following due dates for Quarters 1, 2, and 3:
    - Quarter 1
        - Required for submission:
            a. FY2026 MBE Quarterly Report Forms
            b. FY2026 Quarterly MBE Procurement Activity Report
        - Date range reporting for: July 1, 2025 - September 30, 2025
        - Due date: October 30, 2025
    - Quarter 2
        - Required for submission:
            a. FY2026 MBE Quarterly Report Forms
            b. FY2026 Quarterly MBE Procurement Activity Report
        - Date range reporting for: July 1, 2025 - December 31, 2025

- Due date: January 30, 2026
- Quarter 3
  - Required for submission:
    a. FY2026 MBE Quarterly Report Forms
    b. FY2026 Quarterly MBE Procurement Activity Report
  - Date range reporting for: July 1, 2025 – March 31, 2026
  - Due date: April 30, 2026
- Quarter 4
  - Required for submission:
    a. FY2026 Quarterly MBE Procurement Activity Report
  - Date range reporting for: July 1, 2025 – June 30, 2026
  - Due date: October 15, 2026

VIII. Procurement units will submit a completed MBE Quarterly Report via email to mbereports.gosba@maryland.gov with the following templates attached:
- FY2026 Quarterly MBE Procurement Report
- FY2026 Quarterly Procurement Activity Report

IX. OSBA does not conduct reviews of quarterly data submissions. Procurement units are responsible for submitting data that has been verified for accuracy.

X. Procurement units are required to submit their Quarterly MBE report electronically in the specified file formats, using the most current OSBA-approved report templates.

XI. Procurement Units will be responsible for attesting to the completion of required compliance measures, through a short electronic quarterly Compliance Check-in survey. The survey link is made available on the MBE Reporting Toolkit. The survey will request that units confirm required submissions to OSBA for the quarter, such as:
- Submission of PRG documentation for procurements valued at $25 Million or more
- Submission of Waiver determinations
- Any other required compliance documentation

FY2026 Quarterly Data Requirements

FY2026 Quarterly MBE Report Forms Requirements:

This report requires the submission of (1) excel template which includes award, payment and outreach data.		
Form Name	**Data Captured**	**Submission Format**
Form #1	• All reportable contract awards including MBE prime/subcontract awards • All MBE waiver activity	Excel Spreadsheet Format Template Name: FY2026 MBE Quarterly Report Forms
Form #2	• Total number of all MBE Prime Contract/MBE Subcontract Awards • Total dollar value of all MBE Prime Contract/MBE Subcontract Awards • Total dollar value of all MBE Prime Payments/MBE Subcontractor Payments by MBE Classification	
Outreach Data	• Total Number of outreach events your unit conducted or participated in by type of event, live or virtual	

FY2025 Quarterly MBE Procurement Activity Report Requirements:

This report requires the submission of (1) excel template which includes procurement activity in relation to contract awards, modifications, and renewals.		
Form Name	**Data Captured**	**Submission Format**
Contract Awards	• All contract awards are issued including identification number, contract award value, MBE goal percentage (if applicable), and if the prime contractor awarded is an MBE prime	Excel Spreadsheet Format Template Name: FY2026 Quarterly MBE Procurement Activity Report
Contract Modifications	• All contract modifications issued including identification number, contract award value, MBE goal percentage (if	

This report requires the submission of (1) excel template which includes procurement activity in relation to contract awards, modifications, and renewals.		
	applicable), whether the MBE goal was met at time of modification (if applicable) and if the prime contractor awarded is an MBE prime	
Contract Renewals	• All contract renewals are issued including identification number, contract award value, MBE goal percentage (if applicable), whether the MBE goal was met at time of renewal (if applicable) and if the prime contractor awarded is an MBE prime	

Regulatory Authority

I. In accordance with COMAR 21.11.03.17 MBE Reporting, each procurement unit shall make a report annually to the Office of Small, Minority & Women Business Affairs that includes:

a. The total number, value, and description of its procurements from State-certified MBEs as prime contractors, and separately as subcontractors, by business name and specific MBE classification.
b. The percentages, by specific classification of MBE, represent the total number and value of its procurements for the fiscal year just ended.
c. The number of MBE waivers granted; and
d. An evaluation by the procurement agency/department of the success of its MBE program, which evaluation shall include a brief description of the procurement agency/department's outreach efforts to MBE prime contractors and MBE subcontractors.
e. Each procurement agency/department shall furnish any other information or periodic reports requested by the Office of Small, Minority & Women Business Affairs and the Agency/Department of Social and Economic Mobility in connection with MBE certification and procurement, or any other matters related to the administration, effectiveness, or continuation of the Minority Business Enterprise Program.
f. The Office of Small, Minority & Women Business Affairs shall prepare an annual report summarizing certified MBE participation throughout the State, for submission by the end of each calendar year to the Board of Public Works, the Legislative Policy Committee of the Maryland General Assembly, and to each procurement agency/department.

Definitions

I. Architectural Services COMAR 21.01.02.01* Definitions - Professional or creative work that is performed in connection with the design and supervision of construction or landscaping, and that requires architectural education, training, and experience. Architectural services include consultation, research, investigation, evaluation, planning, design, document preparation, and coordination of services furnished by structural, civil, mechanical, and electrical engineers and other consultants.
II. Certification COMAR 21.01.02.01* Definitions - The process of ensuring that a legal entity is an MBE via a determination by the Maryland Agency/Department of Transportation (MDOT) per procedures outlined in COMAR 21.11.03*.
III. Construction COMAR 21.01.02.01* Definitions -The process of building, altering, repairing, improving, or demolishing any structure, building, or other improvement to real property.
IV. Construction Related Services COMAR 21.01.02.01* Definitions - A service that is necessary for construction and maintenance of a public improvement project. These services include feasibility studies, surveying, construction management, inspection, energy audits, interior design, design, and installation of telecommunication systems, etc.
V. Engineering Services COMAR 21.01.02.01* Definitions - Professional or creative work that is performed in connection with structures, utilities, machines, buildings, equipment, and processes which require engineering education, training, and experience in the application of special knowledge in the mathematical, physical and engineering sciences.
VI. Human, Social, Cultural & Educational Services COMAR 21.01.02.01* Definitions - Contractual services procured by the Agency/Department of Health & Mental Hygiene, Human Resources,

Labor, Licensing and Regulation, Juvenile Justice, and Aging in order to provide support, care or shelter directly to third party clients. All procurements meeting this description must be reported in this category regardless of the dollar amount.

VII. Information technology COMAR 21.01.02.01* Definitions - Means all electronic information-processing hardware and software, including:

- Maintenance
- Telecommunications; and
- Associated consulting services

VIII. Maintenance COMAR 21.01.02.01* Definitions - Any work necessary for the continued operation or maintenance of a facility, structures, building, grounds, or building systems. This includes, but is not limited to janitorial services, landscaping services and trash removal.

IX. Minority Business Enterprise (MBE) COMAR 21.01.02.01* Definitions - Any legal entity, other than a joint venture, organized to engage in commercial transactions, which is at least 51% owned, managed, and controlled by one or more MBE(s).

X. Minority Business Status COMAR 21.11.05.08* Definitions - In calculating compliance with the certified Minority Business goals under COMAR 21.11.03* and for reporting purposes under COMAR 21.11.03.17* a procurement agency/department May exclude from its total annual procurements the annual dollar value of its contracts with Maryland Correctional Enterprises.

XI. Minority Person COMAR 21.11.03.03* Definitions- A member of one of the following socially or economically disadvantaged groups:
    - African American (not of Hispanic origin)
    - Asian American
    - Hispanic American
    - Native American
    - Women
    - Individual with disability owned businesses

XII. Service COMAR 21.01.02.01* Definitions - (excluding Architectural, Construction Related, Engineering, Human and Maintenance Services) - the rendering of time, effort or work, rather than the furnishing of a specific physical product other than reports incidental to the required performance. It includes, but is not limited to, the professional, personal and/or contractual services provided by attorneys, accountants, physicians, consultants, appraisers, land surveyors, advertisers, and exterminators. It is also associated with the provision of expertise or labor in areas such as property management, security, waste disposal, pest control, trash removal, window cleaning, computer hardware, snow removal and office equipment.

I. Supplies & Equipment COMAR21.01.02.01* Definitions - All tangible personal property, including equipment leases, insurance, printing, food, building materials, office supplies and materials, and other items needed to support normal operations.

Handling of Statewide, Master, and Delegated/Non-Delegated Contracts

I. In accordance with COMAR 21.11.03.15* Certification - General, the Maryland Department of Transportation is the agency/department designated to certify, recertify, and decertify minority business enterprises. A procurement agency/department may not permit a business to participate in procurement as a certified MBE unless the Maryland Department of Transportation has certified it as a minority business enterprise.

II. Pursuant to COMAR 21.11.05.08* Minority Business Status, in calculating compliance with the certified Minority Business Enterprise goals under COMAR 21.11.03* and for reporting purposes under COMAR 21.11.03.17*, a procurement agency/department may:

a. May exclude from its total annual procurements the annual dollar value of its contracts with Maryland Correctional Enterprises (MCE).

b. Per the changes made by Chapters 605 and 343, Laws of Maryland 2013 which excluded nonprofit organizations from the definition of MBE, state agencies will no longer count

participation by nonprofit organizations as part of the State's MBE achievement. This announcement was made in 2015 and included those nonprofits which served the needs of individuals with disabilities who had obtained MBE certification. MCE, BISM and other nonprofit community services providers under Maryland Works would thereby be excluded from both the denominator and numerator for MBE participation calculations.

*Please note that COMAR language will be updated once the promulgation process has been completed.

III. DGS Contracts: Regarding AWARDS, unit-specific commodities and maintenance contracts awarded by or through the Department of General Services (DGS) should be included in the unit's annual report on Forms 1 and 2.
    a. Non-delegated DGS contracts (i.e., Statewide, Capital Construction, etc.) should be excluded from Forms 1 and 2, as DGS will report these awards.
    b. Regarding EXPENDITURES, all MBE expenditures from DGS statewide contracts and delegated contracts should be included on the procurement units Form #3 Payments/Subcontractor Utilization Database
    c. DoIT/DBM Master Contracts: Certain Department of Budget and Management (DBM) and Department of Information Technology (DoIT) master contracts have been DELEGATED to the procurement unit for purposes of MBE compliance and reporting. All task order awards made from these delegated contracts should be included on Forms 1 and 2 by the procurement unit. Payments made to task order contractors (MBE prime and MBE subcontractor) during FY2026 are to be reported by the procurement unit on Form #3.
    d. Noted on the DBM and DoIT websites:
    e. Multi-year contracts: The full value of a multi-year contract should be reported on Forms 1 and 2 in the year that the multi-year contract was awarded. Ex: A 3-year contract for $4,000,000 was awarded on November 12, 2021, by Unit X. The contract includes 2 one-year option periods and has a 25% MBE subcontracting goal. For FY 2022 Unit X should include the entire $4,000,000 award on Form #1, and the $1,000,000 subcontract amount on Form #2 in the appropriate MBE categories.
    f. Contract modifications: Changes to contracts that increase the overall contract value (i.e., change orders, extra work orders, supplemental agreements, contract amendments, etc.) are part of the unit's contract award activity and are to be reported in the year in which the modification is issued. Any MBE participation associated with the modification amounts should be included. Unfortunately for both FMIS and non-FMIS users gathering this MBE Subcontractor information is a manual process, so please be mindful to allocate time to do this research. Decreases are not reported in subsequent fiscal year.
    g. Direct Vouchers: Direct Vouchers are considered one-time-only procurement purchases which should be reported as both awards (Forms #1 and #2) and as payments (Form #3). However, direct vouchers that represent DGS statewide master contract purchases or non-delegated DBM or DoIT contracts should only be reported as payments (Form #3). Do not report these voucher amounts as awards (Forms #1 and #2), as the control unit has already reported these contracts on Forms #1 and #2 of their annual MBE report. Refer to the tables in items a. & b. above.
    h. Corporate Purchasing Cards: P-card procurement purchases are to be reported as awards (Forms #1 and #2), and as payments (Form #3) with the following exception: P-card purchases for all non-delegated DBM, DGS, and DoIT contracts should be excluded from Forms #1 and #2, as the control unit (DBM, DoIT or DGS) has already reported these contracts as part of their annual MBE report.
        i. MBE Prime Contracts: PLEASE NOTE: For Forms #1 and #2 only, MBE subcontractor participation associated with an MBE prime contract award may not be reported twice. If the procurement unit reports the full value of the MBE prime contract in the MBE Prime Awards section on Form #2, the value of the MBE subcontract participation for that contract cannot be included in the MBE Subcontract Awards section of Form #2. See page 22 for illustrated example

DGS Contracts	Form #1 & #2 - Awards	FORM #3 - Payments
DGS Procurement Unit Specific (Delegated)	Procurement Unit Reports	Procurement Unit Reports
DGS Non-delegated (i.e. Statewide Contracts, Capital Construction, etc.)	DGS Reports	Procurement Unit Reports

“As of October 1, 2020, delegated procurements under the control agencies of the Departments of General Services, Budget and Management, and Information Technology move under the delegated control of the Department of General Services Office of State Procurement. The Departments of Budget and Management and Information Technology are no longer primary procurement units. Policies and procedures established by the control agencies will not change immediately; however, all procurement functions now go through the Office of State Procurement rather than the individual departments.

For details on conducting procurements, using Statewide Contracts, submitting award recommendations for approval, procurement training, and accessing eMaryland Marketplace Advantage, refer to the State’s Procurement website: https://procurement.maryland.gov/”

For remaining NON-DELEGATED DoIT/DBM Statewide contracts, units should report only expenditures to MBEs in the Form #3 Payments/Subcontractor Utilization Database. (See the DBM website https://dbm.maryland.gov/contracts/Pages/statewide-contracts/home.aspx and the DOIT Master Contracts https://doit.maryland.gov/contracts/Pages/AllMasterContracts.aspx for the most current list of statewide contracts.

DoIT/DBM Procurements	Form #1 & 2 - Awards	FORM #3 - Payments
Delegated	Procurement unit reports	Procurement unit reports
DGS Non-delegated	DGS Reports	Procurement unit reports

Handling of Multi-Year Contracts, Contract Modifications, Direct Vouchers, Credit Cards, and MBE Prime Contracts

Form #3 MBE payment/subcontractor utilization data for multi-year contracts should reflect the actual payments disbursed to all MBE prime contractors and MBE subcontractors during: a) the current fiscal year reporting period, and b) contract-to-date. (NOTE: This data input is very important as it is the basis for the compliance calculation.)

FY26 Annual MBE Reporting Instructions

This section provides detailed instructions on how to complete the required awards, payment, outreach, and compliance data for FY2026 MBE Annual Report.

Backup Data Preparation, Scrubbing, and Submission Instructions

Backup documentation supporting the annual report data provided must be submitted to OSBA. (FMIS using agencies should include RECONCILED* electronic copies of the reports used to generate award and payment data and any other relevant supporting documentation. Non-FMIS using agencies should include reports from their systems that validate the figures being reported.) This documentation should be submitted via email, Google Drive or FTP to mbereports.gosba@maryland.gov by August 31, 2026* (see page 4 for updates regarding new submission deadline).

*Reconciled means spreadsheets downloaded from ANSWERS/your procurement units financial or procurement system that contain (a) original raw data set, (b) scrubbed data set (normalized and cleansed data with exclusions removed), (c) various sorts of data that support entries on the required templates. SHOW YOUR WORK!

Steps on how to prepare backup data

**Report preparers are strongly encouraged to download and utilize the Supplemental Reporting Guidance that is available within the manual and as a separate document on the MBE Reporting Toolkit.

This guidance clearly defines which data procurement reports are required for reporting, exact cell references on where to enter each type of data within the OSBA-approved excel templates and best practices. **

1. Prior to entering awards and payment data in the required templates, the report preparer will need to download the necessary detailed data from the procurement and accounting system of record. (i.e. ANSWERS, iFMIS, PeopleSoft)
2. Once data is pulled from the database be sure to organize the data by award, payment, and waiver data
3. Ensure quality assurance and thoroughly review data for errors and omission (ex. system errors, clerical errors)
4. Data scrubbing is required to ensure that all necessary line items are reported accurately. For guidance on how to properly identify reporting exclusions for the MBE program participation data reports reference the Socioeconomic Data Reporting Guidance available in the MBE Reporting Toolkit
5. Once data scrubbing is complete, the report preparer will transfer the summarized data totals into the necessary data template
6. Procurement units are required to download the OSBA-approved Excel spreadsheet templates here: https://gomdsmallbiz.maryland.gov/Pages/Reporting-Tool-MBE.aspx
7. Once the templates have been downloaded, identify which templates require award or payment data and enter them accordingly
8. Once data input is complete for all awards, payment, waiver, outreach, and compliance data requirements your agency will conduct a final review, verification, and quality assurance of the data prior to final submission to OSBA (Utilize the Annual MBE Report Submission Checklist located within this manual to ensure all necessary documents are submitted)
    - 9. Data Submission Requirements: All electronic Excel versions of the required annual reporting templates must be completed and submitted to OSBA by close of business on August 31, 2026* (see page 4 for updates regarding new submission deadline). Do not submit an altered or procurement unit developed spreadsheet (except for the IAC), or a PDF copy of the spreadsheet. PDF signed Form #1 and MBE Compliance Assessment reports can be submitted with the excel version but not as your sole submission. Altered spreadsheets and PDF copies cannot be used to compile the Statewide report. Therefore, your altered submission will be returned to your procurement unit, and you will be considered non-compliant with the MBE reporting requirements.

Once the data is entered and saved, email the completed spreadsheets, along with the other required documentation, as an attachment to: mbereports.gosba@maryland.gov.

Annual MBE Report Submission Checklist

Procurement units should utilize this checklist to ensure the final submission of the FY2026 MBE Annual Report is completed in its entirety.

- OSBA Procurement Awards and Outreach Data FY2026 Annual Report Forms Excel spreadsheets – 1 file (please note that the ANNUAL Report Excel file is slightly different from the quarterly version), send this document to OSBA in Excel format.
    - Include Awards Delegated from DGS
    - Include Awards that may not have been posted in timely manner from June BPW Agendas
- OSBA “MBE CONTRACTS INVENTORY”– 1 file, send to OSBA
- OSBA Form #3 data entry OR import into web portal.
- Download and send the OSBA Form #3 Reports Prime and Subcontractor payment reports from the portal to OSBA.
- Backup Documentation supporting the annual report awards and payments submitted to OSBA. (FMIS using agencies should include RECONCILED* electronic copies of the reports used to

generate award and payment data and any other relevant supporting documentation. Non-FMIS using agencies should include reports from their systems that validate the figures being
- reported.) This documentation should be submitted via e-mail, by August 31, 2026.
- A Completed Annual Agency MBE Compliance Assessment Report in Excel format. (E-mailed to OSBA)
- A completed Annual MBE Compliance Report (pdf version) signed by Procurement Unit Head or designee (Emailed to OSBA)
- Reviewed and obtained signatures for the finalized Summary Statement sent by OSBA. Must be signed by three representatives and submitted to OSBA within 5 days of receipt, so please plan accordingly. To facilitate a timely submission, make an educated estimate of the time needed to obtain all three signatures after the report is completed (E-mailed to OSBA)

You can find forms, templates, and manuals under the MBE Program Reporting Toolkit:



www.gomdsmallbiz.maryland.gov

All submissions must be in electronic format.

Awards and Outreach Data Reporting Instructions

The required awards and outreach data reporting Excel spreadsheet templates provided by OSBA include:

- FY2026 Annual Report Forms
- FY2026 MBE Contracts Inventory

Completing the FY2026 Annual Report Forms Template

OSBA provides the FY2026 Annual Report Forms Excel spreadsheet for procurement units to use for submitting MBE Awards and MBE Outreach data. The FY2026 spreadsheet file contains three spreadsheets named: Form #2, Form #1, and Outreach Data.

The Form #1 and Form #2 are linked with formulas that will calculate contract awards by (1) MBE Classification and (2) Procurement Category. The spreadsheets are password protected to prevent the accidental overwriting of formulas needed to calculate the minority participation totals and percentages.

The Outreach Data spreadsheet provides data input fields for (1) Total # of outreach events your unit conducted/participated in (2) List of resources your unit has available to help businesses know how to do business with your agency (3) Evaluation by procurement unit of the success of its MBE program.

- The yellow cells of the spreadsheet are the areas designed for data input. (Please note: If data is pasted into the yellow cells, you must paste as plain text to avoid disrupting the formatting)
- The blue cells contain formulas and are write-protected.

Please Read: The following spreadsheets are used to enter contract awards data. This data is different than actual payments data.

- “Form #1 - Contract Awards” are the anticipated amount of the base period of the contract when it was first awarded or renewed.
- “Form #2 - MBE Subcontract Awards” are the prime contractor’s MBE commitments when the contract was first awarded or renewed.
- Unlike Form #1 & #2, “Form #3 - Actual Payments” are the confirmed MBE payment amounts actually paid for services rendered or products purchased.

Avoid Double Counting AWARDS!

BEWARE OF DOUBLE COUNTING AWARD TO MBE PRIME WITH MBE SUBCONTRACTOR:

1. Count as follows:
   x% MBE Prime Award
   Y% MBE Subcontractor Award
   100%

Our office requires that your procurement unit report MBE Prime awards and MBE Subcontractor awards separately as shown above. This is because our office calculates and publicly reports the total percentage of MBE awards that are awarded to subcontractors.

Make sure you are using the most current Form 1 & 2 Template!!!



Submit

ANNUAL REPORT TEMPLATES

in EXCEL FORMAT

Instructions for Form #2 Spreadsheet

It is recommended that units complete Reporting Form #2 first. Prior to entering MBE data make sure that you enter the required information in the yellow cells located above and below the data grids. Please enter the following information in the appropriate locations:

- Reporting Agency/Department – The name of the agency/department (Top- See Figure 1)

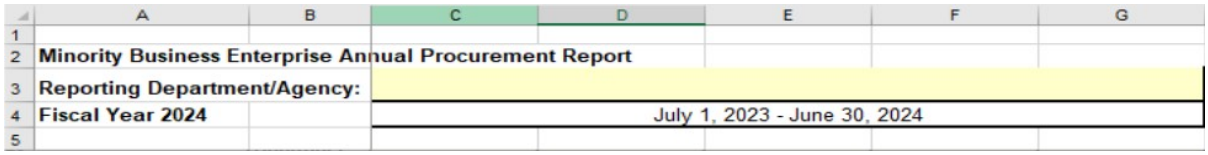


Figure 1

- Authorized by – The name and title of the agency/department head (Bottom- See Figure 2)
- Date – The authorization date (Bottom- See Figure 2)
- Prepared by – The name and title of the person who prepared the report (Bottom- See Figure 2)
- Date – The date that the report was prepared (Bottom- See Figure 2)
- Telephone – The telephone number of the preparer (Bottom- See Figure 2)
- Email address – The email address of the preparer (Bottom- See Figure 2)

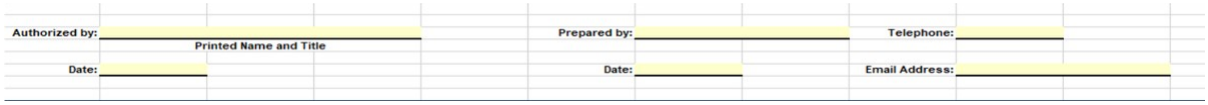


Figure 2

Please make sure to save the file after you have entered the data on the spreadsheet

This spreadsheet is subdivided by (1) MBE Classification and (2) Procurement Category. These subdivisions are listed below. Units are to continue providing data for dually certified firms and certified disadvantaged firms.

MBE Classification – Column Titles

- African American
- Asian American (includes Sub-Continent & Pacific Asian)
- Hispanic American

- Native American
- Woman
- African American Woman
- Asian American Woman
- Hispanic American Woman
- Native American Woman
- Disabled
- Disadvantaged

Procurement Category – Row Titles

- Architectural
- Engineering
- Construction
- Construction-Related Services
- Maintenance
- Services
- Supplies & Equipment
- IT Services
- IT Supplies & Equipment
- Human, Cultural, Social & Educational Services
- Corporate Credit Card (MBE Prime Only)
- Direct Voucher (MBE Prime Only)

The yellow cells of this spreadsheet are the areas designed for data input. (Please note: If data is pasted into the yellow cells, you must paste as plain text to avoid disrupting the formatting) The blue cells contain formulas and are write-protected. In addition, the worksheet is also write-protected to avoid unauthorized alterations.

The top input area is entitled “Total Subcontract Awards by MBE Classifications and Procurement Categories.” This is where you will enter the MBE subcontract awards data. Enter the subcontract awards data in the yellow cells as appropriate. For example, if you have African American subcontract award data for “Construction”, you will enter the total dollar value of all African American construction subcontracts awarded during the fiscal year. Next, you would enter the total number of all African American construction subcontracts awarded during the fiscal year. The same would be completed for each MBE classification and procurement category as appropriate (see Figure 3).

Figure 3

Procurement Category		African American	Asian	Hispanic	Native American	Women	African American Women	Asian Women
Architectural	Total Dollars	$56,000	$0	$0	$0	$0	$0	$0
	# of Contracts	2	0	0	0	0	0	0
Engineering	Total Dollars	$0	$35,000	$0	$0	$0	$0	$0
	# of Contracts	0	7	0	0	0	0	0
Construction	Total Dollars	$0	$0	$246,578	$0	$5,000,000	$0	$0
	# of Contracts	0	0	3	0	55	0	0
Construction Related Services	Total Dollars	$23,450	$5,607,890	$0	$560,000	$0	$0	$0
	# of Contracts	2	1	0	4	0	0	0
Maintenance	Total Dollars	$45,678	$0	$0	$0	$0	$0	$0
	# of Contracts	7	0	0	0	0	0	0
Services	Total Dollars	$611,838	$345,890	$2,869,073	$0	$2,214,638	$929,684	$120,203
	# of Contracts	4	2	2	0	3	3	1
Supplies & Equipment	Total Dollars	$26,000	$20,000	$30,000	$45,000	$65,900	$0	$0
	# of Contracts	1	2	3	4	5	0	0
IT Services	Total Dollars	$65,000	$34,500	$0	$0	$0	$0	$0
	# of Contracts	1	3	0	0	0	0	0
IT Supplies & Equipment	Total Dollars	$0	$98,765	$0	$0	$0	$0	$0
	# of Contracts	0	8	0	0	0	0	0
Human, Cultural, Social & Educational Services	Total Dollars	$25,000	$0	$0	$0	$0	$0	$0
	# of Contracts	1	0	0	0	0	0	0
Totals	Total Dollars	$852,966	$6,142,045	$3,145,651	$605,000	$7,280,538	$929,684	$120,203
	# of Contracts	18	23	8	8	63	3	1

The next input area is entitled “Total Prime Contract Awards by MBE Classifications and Procurement Categories.” This is where you will enter the MBE prime contract awards data. Enter the MBE prime contract awards data in the yellow cells as appropriate. For example, if you have African American awards data for “Construction”, you will enter the total dollar value of all African American construction prime contracts awarded during the fiscal year. Next, in the cell below the dollar value you would enter the total number of all African American construction prime contracts awarded during the fiscal year. The same would be completed for each MBE classification and procurement category as appropriate (see Figure 4).

Figure 4

Procurement Category		African American	Asian	Hispanic	Native American	Women	African American Women	Asian Women	Hispanic Women	Native American Women	Disabled	Non-Profit (Certified)	Community Service Provider	Disadvantaged
Architectural	Total Dollars	$0	$567,892	$0	$0	$0	$0	$0	$0	$0	$0			
	# of Contracts	0	2	0	0	0	0	0	0	0	0			
Engineering	Total Dollars	$105,200	$0	$0	$0	$0	$0	$0	$0	$0	$0			
	# of Contracts	1	0	0	0	0	0	0	0	0	0			
Construction	Total Dollars	$0	$0	$0	$0	$2,069,314	$0	$0	$0	$0	$0			
	# of Contracts	0	0	0	0	13	0	0	0	0	0			
Construction Related Services	Total Dollars	$0	$0	$0	$26,598	$0	$0	$0	$0	$0	$0			
	# of Contracts	0	0	0	1	0	0	0	0	0	0			
Maintenance	Total Dollars	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0			
	# of Contracts	0	0	0	0	0	0	0	0	0	0			
Services	Total Dollars	$44,395	$213,960	$1,652,369	$0	$2,923,398	$236,834	$26,070	$0	$0	$0			
	# of Contracts	4	5	1	0	16	19	2	0	0	0			
Supplies & Equipment	Total Dollars	$5,688	$77,262	$5,507	$0	$84,079	$0	$19,756	$0	$0	$0			
	# of Contracts	4	37	7	0	15	2	1	0	0	0			
IT Services	Total Dollars	$128,945	$43,158	$0	$0	$0	$0	$0	$0	$0	$0			
	# of Contracts	1	1	0	0	0	0	0	0	0	0			
IT Supplies & Equipment	Total Dollars	$42,580	$19,687	$0	$0	$205,631	$0	$0	$0	$0	$0			
	# of Contracts	1	3	0	0	1	0	0	0	0	0			
Human, Cultural, Social & Educational Services	Total Dollars	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0			
	# of Contracts	0	0	0	0	0	0	0	0	0	0			
Corporate Credit Card	Total Dollars	$12,219	$52,537	$1,949	$0	$92,050	$32,049	$0	$0	$0	$0			
	# of Contracts	18	30	9	0	104	37	0	0	0	0			
Direct Voucher	Total Dollars	$42,507	$36,500	$1,588	$0	$11,452	$103,596	$1,699	$0	$0	$0			
	# of Contracts	94	1	2	0	7	43	4	0	0	0			
Total	Total Dollars	$381,474	$1,010,986	$1,661,403	$26,598	$5,885,524	$362,479	$47,525	$0	$0	$0			$0
	# of Contracts	123	79	19	1	156	101	7	0	0	0			0

IMPORTANT NOTE: The addition of the dual-certification categories eliminates double counting of firms certified as Women and one of the other ethnic categories. For example, awards to firms certified as “Hispanic/Female” in the DoSEM MBE Directory would be included in the “Hispanic Women” column of the input areas. Similarly, awards to firms certified as “Female/Asian” in the MBE Directory would be included in the “Asian Women” column.

When you have entered all the information by MBE classification and procurement category as appropriate, the blue cells will calculate total dollars awarded and total contracts awarded. This

information will be calculated by MBE Classification in the bottom blue cells and calculated by Procurement Category in the blue cells to the far right. Figure 5 illustrates the blue calculated fields previously discussed.

The “Total MBE Prime and Subcontract Awards by MBE Classifications and Procurement Categories” table does not require any data entry, and all the cells are in blue to indicate that it calculates the total MBE prime & subcontract awards entered in the previous tables.

Figure 5 illustrates automatic calculations.

Figure 5

Procurement Category		African American	Asian	Hispanic	Native American	Women	African American Women	Asian Women	Hispanic Women	Native American Women	Disabled	Non-Profit (Certified)	Community Service Provider	Disadvantaged
Architectural	Total Dollars	$56,000	$567,892	$0	$0	$0	$0	$0	$0	$0	$0			$0
	# of Contracts	2	2	0	0	0	0	0	0	0	0			0
Engineering	Total Dollars	$105,200	$35,000	$0	$0	$0	$0	$0	$0	$0	$0			$0
	# of Contracts	1	7	0	0	0	0	0	0	0	0			0
Construction	Total Dollars	$0	$0	$246,578	$0	$7,569,314	$0	$0	$0	$0	$0			$0
	# of Contracts	0	0	3	0	68	0	0	0	0	0			0
Construction Related Services	Total Dollars	$23,450	$5,607,890	$0	$586,598	$0	$0	$0	$0	$0	$0			$0
	# of Contracts	2	1	0	5	0	0	0	0	0	0			0
Maintenance	Total Dollars	$45,678	$0	$0	$0	$0	$0	$0	$0	$0	$0			$0
	# of Contracts	7	0	0	0	0	0	0	0	0	0			0
Services	Total Dollars	$656,173	$569,850	$4,521,432	$0	$5,138,036	$1,156,518	$146,273	$0	$0	$0			$0
	# of Contracts	8	7	3	0	19	22	3	0	0	0			0
Supplies & Equipment	Total Dollars	$31,688	$97,262	$35,507	$45,000	$149,979	$0	$19,756	$0	$0	$0			$0
	# of Contracts	5	39	10	4	20	2	1	0	0	0			0
IT Services	Total Dollars	$193,945	$77,658	$0	$0	$0	$0	$0	$0	$0	$0			$0
	# of Contracts	2	4	0	0	0	0	0	0	0	0			0
IT Supplies & Equipment	Total Dollars	$42,580	$118,452	$0	$0	$205,631	$0	$0	$0	$0	$0			$0
	# of Contracts	1	11	0	0	1	0	0	0	0	0			0
Human, Cultural, Social & Educational Services	Total Dollars	$25,000	$0	$0	$0	$0	$0	$0	$0	$0	$0			$0
	# of Contracts	1	0	0	0	0	0	0	0	0	0			0
Corporate Credit Card	Total Dollars	$12,219	$62,537	$1,949	$0	$92,050	$32,049	$0	$0	$0	$0			$0
	# of Contracts	18	30	9	0	104	37	0	0	0	0			0
Direct Voucher	Total Dollars	$42,507	$36,500	$1,588	$0	$11,452	$103,596	$1,699	$0	$0	$0			$0
	# of Contracts	94	1	2	0	7	43	4	0	0	0			0
Total	Total Dollars	$1,234,440	$7,153,040	$4,907,054	$631,598	$13,166,462	$1,292,163	$167,728	$0	$0	$0			$0
	# of Contracts	141	102	27	9	219	104	8	0	0	0			0
% of Contract Awards		1.08%	6.28%	4.22%	0.55%	11.56%	1.13%	0.15%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Total Contract Awards from Form 1		$113,847,885												

Instructions for Form #1 Spreadsheet

It is recommended that agencies complete Reporting Form #1 next. A snapshot of the spreadsheet with sample data is shown in Figure 6.

Figure 6

Minority Business Enterprise Annual Procurement Report — Reporting Form #1

Reporting Department/Agency: Agency Name — DO NOT MODIFY ANY OF THE EXISTING FIELDS OR MOVE ANY TABS IN THIS TEMPLATE

Fiscal Year 20XX July 1, XXXX - June 30, XXXX — Data can only be entered in the Yellow Cells — Data in the Blue Cells auto-populate from Form 2

Total Contract Awards by Procurement Categories

Procurement Category	Total # All Prime Contracts (Including	Total All Prime Contracts Dollar Value Awarded (Including MBE)	Total # of Prime Contract Waivers	Total Dollar Value of Prime Contract Waivers	Total # MBE Prime Contracts Awarded	Total MBE Prime Contract Dollar Value	Total # MBE Subcontracts Awarded	Total MBE Subcontract Dollar Value Awarded	Total # of MBE Contracts Awarded- Prime & Sub	Total $ of MBE Contracts Awarded- Prime & Sub	Total MBE Participation Percentage
Architectural	0	$0	0	$0	0	$0	0	$0	0	$0	0.00%
Engineering	1	$4,592	0	$0	0	$0	0	$0	0	$0	0.00%
Construction	1	$43,160	0	$0	0	$0	0	$0	0	$0	0.00%
Construction Related Services	1	$3,434	0	$0	0	$0	0	$0	0	$0	0.00%
Maintenance	4	$19,350	0	$0	2	$19,350	0	$0	2	$19,350	100.00%
Services	2	$54,640	0	$0	1	$50,000	0	$0	1	$50,000	91.51%
Supplies & Equipment	1	$3,541	0	$0	0	$0	0	$0	0	$0	0.00%
IT Services	1	$4,381	0	$0	0	$0	0	$0	0	$0	0.00%
IT Supplies & Equipment	4	$12,570	0	$0	0	$0	1	$1,000	1	$1,000	7.96%
Human, Cultural, Social & Educational Services	1	$6,110	0	$0	0	$0	0	$0	0	$0	0.00%
Corporate Credit Card	9	$2,524	0	$0	1	$1,078			1	$1,078	42.71%
Direct Voucher	7	$35,201			0	$0			0	$0	0.00%
Totals	32	$189,503	0	$0	4	$70,428	1	$1,000	5	$71,428	37.69%

Note(s):

Authorized by: Chief Financial Officer — Printed Name and Title — Date: September 25, XXXX

Prepared by: MBE Liaison — Printed Name and Title — Date: September 25, XXXX — Telephone: 410-XXX-XXXX — Email Address: XXX@maryland.gov

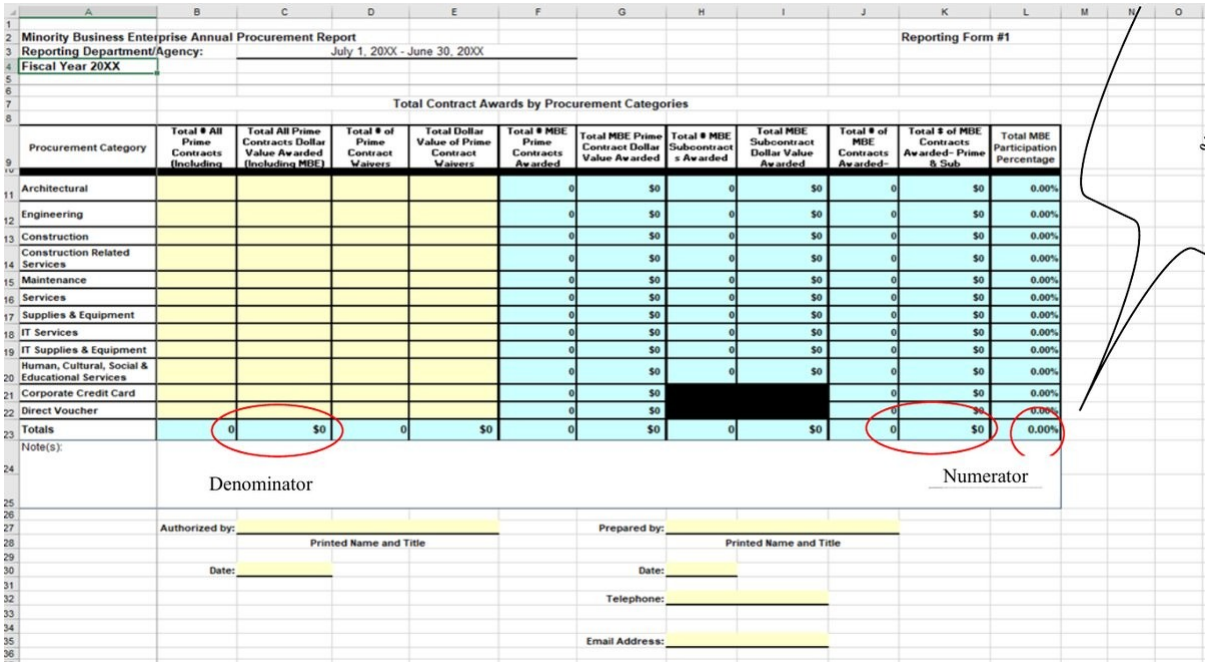
The yellow cells of this spreadsheet are the areas designed for data input. (Please note: If data is pasted into the yellow cells, you must paste as plain text to avoid disrupting the formatting) The blue cells contain formulas and are write-protected.

Note: You must enter data in the appropriate yellow data cells of this spreadsheet for the MBE participation percentages to calculate. Data entry, by Procurement Category, must be entered in the yellow cell columns identified below.

- Total # All Prime Contracts (Including MBE) – Enter the total number of all prime contracts awarded by your procurement unit for the fiscal year. This would include the total number of prime contracts awarded to non-MBE and MBE contractors.
- Total All Prime Contracts Dollar Value Awarded (Including MBE) – Enter the total dollar value of all prime contracts awarded by your procurement unit for the fiscal year. This would include the total dollar value of prime contract awards to non-MBE and MBE contractors.
- Total # of Prime Contract Waivers – Enter the total number of all prime contracts, including MBE prime contracts, which received MBE Participation Goal Waivers by your procurement unit for the fiscal year.
- Total Dollar Value of Prime Contract Waivers – Enter the total dollar value of all prime contracts including MBE prime contracts that received MBE Participation Goal Waivers by your procurement unit for the fiscal year.
- MBE Participation Calculation Quality Control – For each procurement category Architectural through HCSE, the MBE participation should never be greater than 100%. If calculation is greater than 100%, double check your denominator to make sure it includes all reportable awards including the Awards to MBE Primes and MBE Subs.

Denominator

Numerator ator



Minority Business Enterprise Annual Procurement Report — Reporting Form #1

Reporting Department/Agency: July 1, 20XX - June 30, 20XX

Fiscal Year 20XX

Total Contract Awards by Procurement Categories

Procurement Category	Total # All Prime Contracts (Including	Total All Prime Contracts Dollar Value Awarded (Including MBE)	Total # of Prime Contract Waivers	Total Dollar Value of Prime Contract Waivers	Total # MBE Prime Contracts Awarded	Total MBE Prime Contract Dollar Value Awarded	Total # MBE Subcontracts Awarded	Total MBE Subcontract Dollar Value Awarded	Total # of MBE Contracts Awarded-	Total $ of MBE Contracts Awarded- Prime & Sub	Total MBE Participation Percentage
Architectural					0	$0	0	$0	0	$0	0.00%
Engineering					0	$0	0	$0	0	$0	0.00%
Construction					0	$0	0	$0	0	$0	0.00%
Construction Related Services					0	$0	0	$0	0	$0	0.00%
Maintenance					0	$0	0	$0	0	$0	0.00%
Services					0	$0	0	$0	0	$0	0.00%
Supplies & Equipment					0	$0	0	$0	0	$0	0.00%
IT Services					0	$0	0	$0	0	$0	0.00%
IT Supplies & Equipment					0	$0	0	$0	0	$0	0.00%
Human, Cultural, Social & Educational Services					0	$0	0	$0	0	$0	0.00%
Corporate Credit Card					0	$0			0	$0	0.00%
Direct Voucher					0	$0			0	$0	0.00%
Totals	0	$0	0	$0	0	$0	0	$0	0	$0	0.00%

Note(s):

Denominator

Numerator

Authorized by: _____ Printed Name and Title

Date: _____

Prepared by: _____ Printed Name and Title

Date: _____

Telephone: _____

Email Address: _____

MBE PARTICIPATION CALCULATION:

NUMERATOR (MBE AWARDS detailed on FORM #2)

_____

DENOMINATOR

(Total Reportable Awards FORM #1 which includes MBE Prime and Sub Awards)

New Awards and Option Renewals

Change Orders

Direct Vouchers and

Credit Card Purchases

Figure 7 shows a picture of the yellow input cells where the data discussed above is entered. Please remember that the MBE participation percentages will not be calculated if the appropriate information is not entered into the yellow cells as illustrated below.

Figure 7

Procurement Category	Total # All Prime Contracts (Including MBE)	Total All Prime Contracts Dollar Value Awarded (Including MBE)	Total # of Prime Contract Waivers	Total Dollar Value of Prime Contract Waivers
Architectural				
Engineering				
Construction				
Construction Related Services				
Maintenance				
Services				
Supplies & Equipment				
IT Services				
IT Supplies & Equipment				
Human, Cultural, Social & Educational Services				
Corporate Credit Card				
Direct Voucher				
Totals				

After you have entered all your MBE data into the appropriate yellow cells, make sure that you enter any notes your procurement unit will need to include to ensure OSBA is made aware of any data issues, discrepancies, or general notes about your procurement unit's MBE participation for the FY. The yellow Note(s) cell (See Figure 8) is located below the data cells.

Figure 8

Note(s):	

Please make sure to save the file after you have entered the data on Reporting Form #1.

Additionally, please remember to save a copy of the spreadsheet file for your records. If corrections are required, you can simply make those corrections and resubmit your corrected input to OSBA. Please indicate that you are re-submitting a corrected spreadsheet when you transmit your file.

Instructions for Outreach Data Spreadsheet

The yellow cells of this spreadsheet are the areas designed for data input. (Please note: If data is pasted into the yellow cells, you must paste as plain text to avoid disrupting the formatting) The blue cells contain formulas and are write-protected. In addition, the worksheet is also write-protected to avoid unauthorized alterations.

The top input area is entitled "Outreach Data." This is where the Total # of MBE outreach events conducted and/or participated will be entered by type of event and whether the event was live or virtual. Enter the total # of events in the yellow cells as appropriate. For example, if your unit conducted 3 virtual webinars and participated in 2 live exhibitor events you would enter the total # in the appropriate data input fields. The same would be completed for each MBE classification and procurement category as appropriate (see Figure 9).

Figure 9

Outreach Data							
# and type of organized outreach events your unit **conducted** (live or virtual)				# and type of organized outreach events your unit **participated** (live or virtual)			
Type of Event	Live	Virtual	Total	Type of Event	Live	Virtual	Total
Networking	5		5	Networking			0
Workshop			0	Workshop	1		1
Webinar		2	2	Webinar			0
Exhibitor	8		8	Exhibitor	10	15	25
Conference			0	Conference			0
Panelist	1	3	4	Panelist	2		2
Other			0	Other			0
Total	14	5	19	**Total**	13	15	28

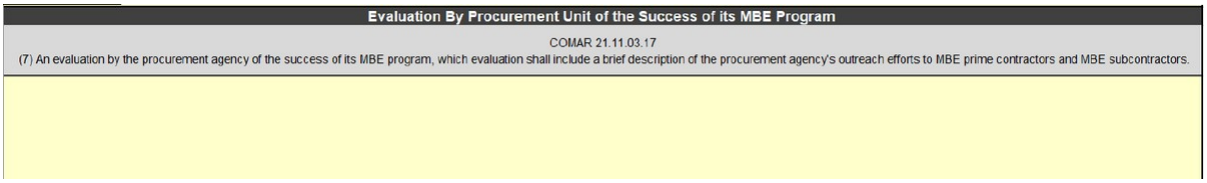
The next input area is entitled “Procurement Unit Resources Available to MBE Vendors.” This is where the list of resources your agency has available to help businesses know how to do business with your agency will be entered. For example, if your unit has a brochure that is used during outreach events or a section of your unit’s website highlights how to do business with your agency you would enter those in the data input field (see Figure 10).

Figure 10



The next input area is entitled “Evaluation by Procurement Unit of the Success of its MBE Program.” This is where the list of resources your agency has available to help businesses know how to do business with your agency will be entered. For example, if your unit has a brochure that is used during outreach events or a section of your unit’s website highlights how to do business with your agency you would enter those in the data input field (see Figure 11).

Figure 11



Completing the FY2026 Annual MBE Contracts Inventory Template

Pursuant to Senate Bill 849, passed during the 2010 General Assembly session and effective October 1, 2010, the Office of Small, Minority & Women Business Affairs is required to include in its annual report certain information on contracts awarded to MBE prime contractors and subcontractors.

Please be aware: The contracts inventory data should support the data on the Prime and Subcontractors tables of Form #2, make sure to include vendors from the direct vouchers and credit card payments too.

Instructions on completing the MBE Prime Contractors and MBE Subcontractors spreadsheets are as follows:

Instructions for MBE Prime Contractors Spreadsheet

Number of MBE Prime Contractors: Enter the total number of different MBEs that were awarded prime contracts by the reporting agency/department. Please only enter a Prime Contractor once for each contract.

Procurement Unit Name: Enter the name of the procurement unit reporting data.

MBE Prime Contractor Name: Enter the name of each MBE prime contractor awarded a contract by the agency/department.

Prime Contractor MBE Cert. #: For each MBE prime contractor, enter the DoSEM OMBE MBE certification number. (Format: 00-000)

Prime Contractor MBE Classification: For each MBE prime contractor, select ONLY from the drop-down list the MBE classification. (African American, African American Woman, Asian, Hispanic, Native American, Woman, African American Woman, Asian Woman, Hispanic Woman, Native American

Woman, Disabled, Disadvantaged)

Credit Card / Direct Voucher: For each MBE prime contractor, that was awarded through a Credit Card or Direct Voucher select ONLY from the drop-down list the transaction type (Credit Card or Direct Voucher). If the MBE prime contractor was not awarded through a Credit Card or Direct Voucher you would skip this data input field. (consolidate multiple payments per vendor).

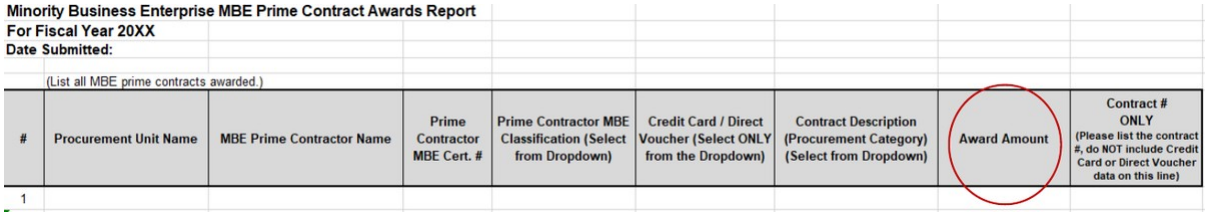
Contract Description (Procurement Category): For each MBE prime contract, select ONLY from the drop-down list the contract description. For this report, the contract description is the procurement category. Enter the appropriate procurement category: Architectural, Engineering; Construction; Construction Related Service; Maintenance; Service; Supplies & Equipment; IT Service; IT Supplies & Equipment; Human, Cultural, Social, & Educational Service.

REMINDER Award Amount: Enter dollar value of award. The dollar value of the award should reflect the total entered in Form #2. (See Figure 12)

Contract # ONLY: For each MBE prime contractor, enter all prime contract numbers awarded. (Contract numbers should not be duplicated). If your procurement unit has awarded a contract to several primes, contract numbers may be followed by letters or numbers such as -A or -2.

IMPORTANT Do not include Credit Card or Direct Voucher data in this column.

Figure 12



Minority Business Enterprise MBE Prime Contract Awards Report
For Fiscal Year 20XX
Date Submitted:

(List all MBE prime contracts awarded.)

#	Procurement Unit Name	MBE Prime Contractor Name	Prime Contractor MBE Cert. #	Prime Contractor MBE Classification (Select from Dropdown)	Credit Card / Direct Voucher (Select ONLY from the Dropdown)	Contract Description (Procurement Category) (Select from Dropdown)	Award Amount	Contract # ONLY (Please list the contract #, do NOT include Credit Card or Direct Voucher data on this line)
1								

Instructions for MBE Subcontractors Spreadsheet

Number of MBE Subcontractors: Enter the total number of different MBEs that were listed as subcontractors on prime contracts awarded by the reporting procurement unit.

Procurement Unit Name: Enter the name of the procurement unit reporting data.

MBE Subcontractor Name: Enter the name of each MBE subcontractor on a prime contract awarded by the agency/department. Include the names of MBE subcontractors on contracts awarded to non-MBE and MBE prime contractors.

Subcontractor MBE Cert. #: For each MBE subcontractor, enter the DoSEM OMBE MBE certification number. (Format: 00-000)

Subcontractor MBE Classification: For each MBE subcontractor, select ONLY from the drop-down list the MBE classification. (African American, Asian, Hispanic, Native American, Woman, African American Woman, Asian Woman, Hispanic Woman, Native American Woman, Disabled, Disadvantaged)

Procurement Unit Prime Contract #: For each MBE subcontractor, enter the agency/department's prime contract number for all prime contracts awarded where there were one or more MBE subcontractors.

Prime Contract Description (Procurement Category): For each MBE subcontract, select ONLY from the drop-down list the prime contract description, as indicated in the MBE Prime Contractors spreadsheet section above.

REMINDER Award Amount: Enter dollar value of award. (See Figure 13)

Figure 13

Minority Business Enterprise MBE Subcontract Awards Report
For Fiscal Year 20xx
Date submitted:

(List all MBE subcontracts awarded.)

Agency Name	MBE Subcontractor Name	Subcontractor MBE Cert. #	Subcontractor MBE Classification (Select from Dropdown)	Agency Prime Contract #	Prime Contract Description (Procurement Category) (Select from Dropdown)	Award Amount

Payment Data Reporting Instructions

The Office of Small, Minority & Women Business Affairs provides an online Form 3 Payment Portal. This portal is utilized by procurement units to submit their final MBE payment data for their annual report. When it comes time for your unit to enter the finalized MBE payment data you will have the choice of manually entering the data directly into the payment portal or utilizing the Form 3 excel template to import the data into the portal. Regardless of the choice your unit decides final submission must be made directly in the payment portal.

Please be aware when choosing a data entry method:

- Manual entry method- If your agency decides to use the manual entry method you will need to manually delete all outdated submissions from previous FY.
- Import method- When you upload the template into the portal it will automatically delete all previous submissions from previous FY.

Portal Link & Templates are located here: https://gomdsmallbiz.maryland.gov/Pages/Reporting-Tool-MBE.aspx

Be sure to link the MBE subcontractors to their Prime subcontractor!

You will only be reporting MBE payments (unless an MBE subcontractor is linked to a non-minority prime) units are not required to report non-MBE payment data.

DO NOT INCLUDE NON-MINORITY PRIME CONTRACTOR THAT IS NOT LINKED TO AN MBE SUBCONTRACTOR.



If your unit utilized the import method be sure to Submit the

FORM 3 REPORT TEMPLATE

in EXCEL FORMAT

Make sure your units final Form 3 submission is made directly in the Form 3 payment portal!!!

Accessing the Form 3 Payment Portal

Report preparers will need login credentials and connection to the Virtual Private Network (VPN) to access the Form 3 Payment Portal.

Form 3 Payment Portal Link

The link to the Form 3 Payment Portal is: https://doit.state.md.us/mbeform3/

This link works in both Internet Explorer and Google Chrome. If you should receive a certification error just manually type in the URL or remove the “s” from http.

Login Credentials

You must contact the MBE compliance manager via email to retrieve your procurement units Username and Password.

If you have trouble typing in your password, cut and paste it from your e-mail into the password box (see Figure 14).

Figure 14



Who To Contact for Technical Assistance Within Form 3 Payment Portal

Contact OSBA if:	**Contact DoIT Service Desk if:**
• Retrieving Username and Password • Unlocking account after too many login attempts • Re-opening submission for the FY if report has already been submitted and requires editing • Questions about importing	• Non-responsive pages/buttons • Overall system errors not related to importing data

Please note: It is important to notify OSBA of any issues that may arise to ensure that it is not a global issue.

-

Selecting Preferred Data Import Method for Payment Portal

Report preparers will need to decide which data method entry they will utilize for the FY2026 reporting period. Procurement units MUST choose 1 method prior to beginning reporting. Units cannot use both methods for the FY2026 reporting period. See below the requirements for both the manual and template import method to decide:

Manual Method Requires you to:

- Delete expired contracts one by one within the Form #3 portal
- Update contracts from prior years with new payment data one by one within the Form #3 portal
- Manually enter new contracts/payments one by one within the Form #3 portal
- Once all the necessary MBE payment data has been manually entered it will be ready for final submission within the Form #3 portal

For instructions on the Manual Method visit page 32

Template Import Method requires you to:

- Utilize the up to date excel template from the MBE reporting toolkit
- Follow template instructions (ex. Default data, correct designations)
- Be mindful, if you are using the import method, it will overwrite everything currently in the working data section of the Form 3 portal
- Once the template is complete with all necessary MBE payment data it will be uploaded to the

Form #3 portal for final submission

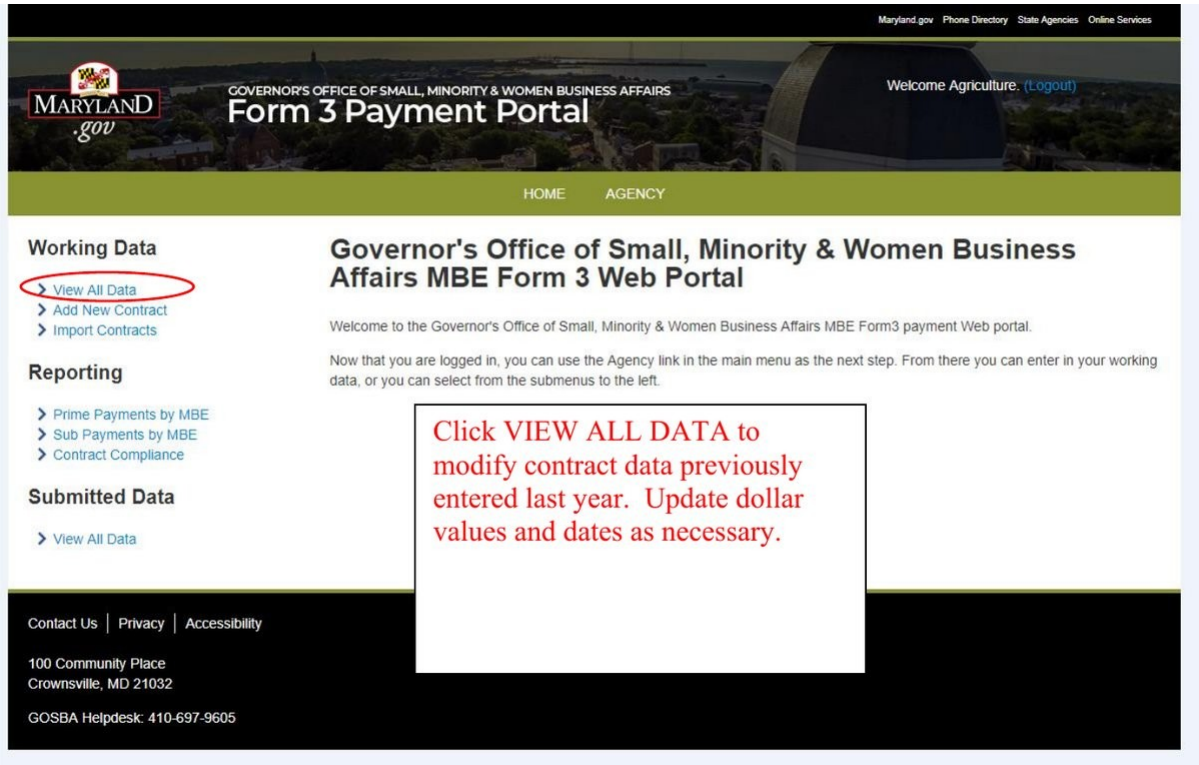
- Once the report preparer has logged into the Form 3 Payment Portal, they will need to complete the following actions:

For instructions on the Template Import Method visit page 41

Instructions for Manual Data Entry Form #3 Payment Web Portal

IMPORTANT

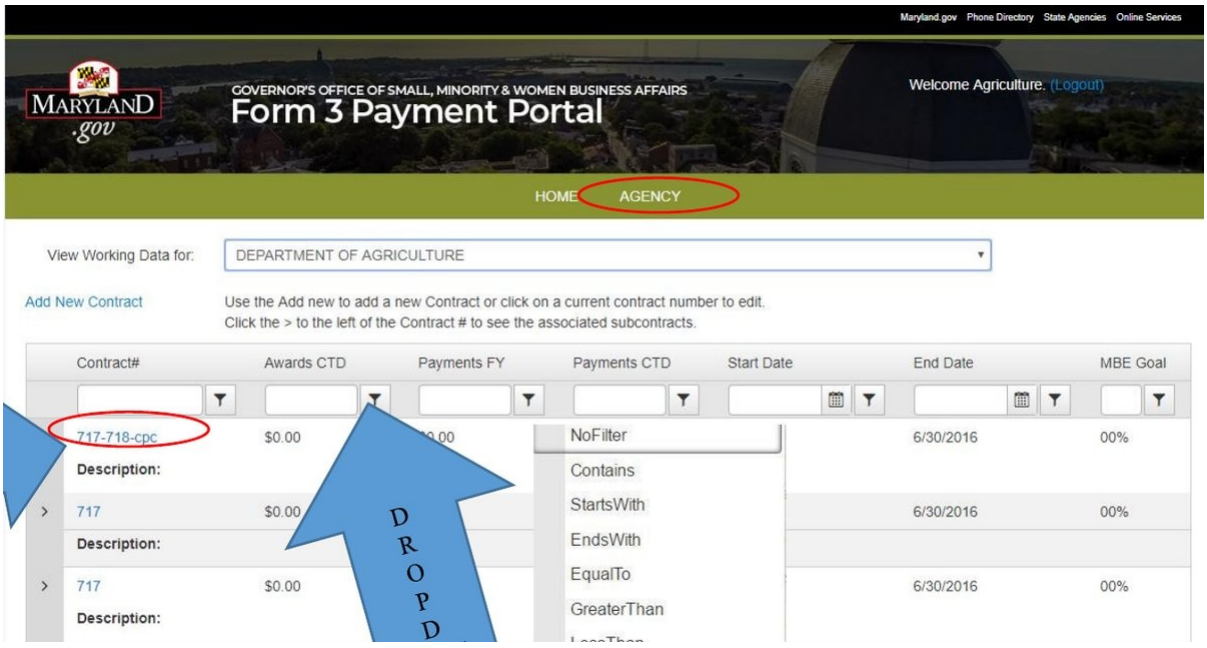
Update prime contractor data for a contract that was previously input:

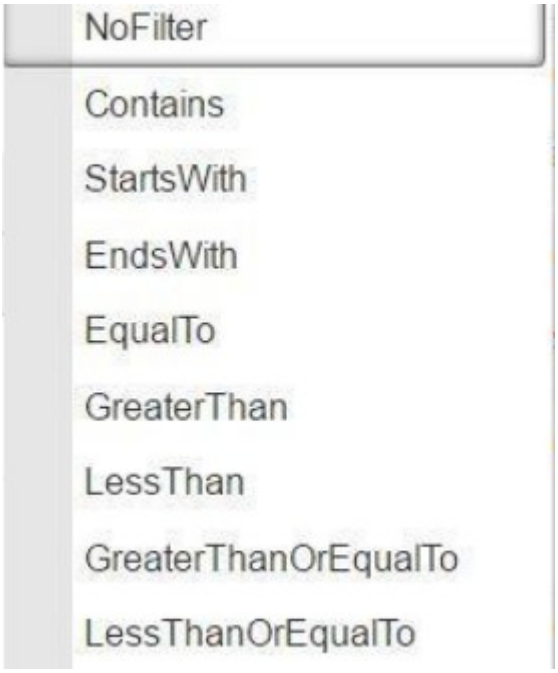


Click VIEW ALL DATA to modify contract data previously entered last year. Update dollar values and dates as necessary.

Click on the contract number and revise or delete expired data as necessary

Or search for contract number and select filter choice from the dropdown box:

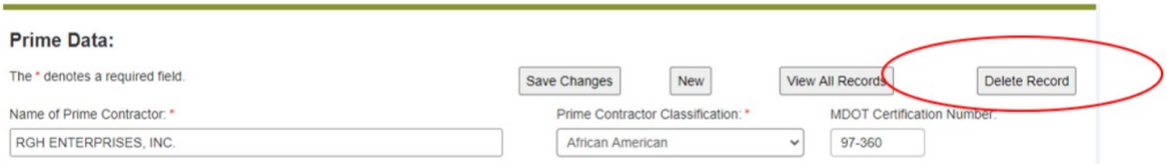




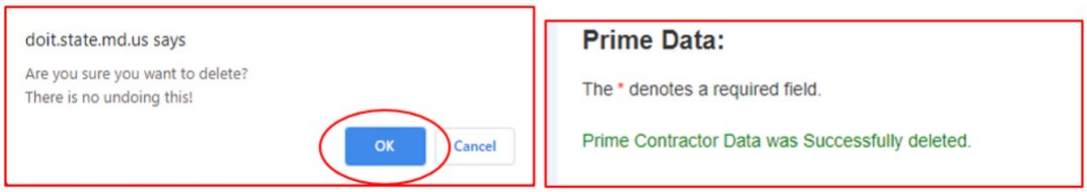
a. If the contract is no longer active and does not have payments during the fiscal year, delete the data.

When the record opens, either delete it or edit it per the instructions below:

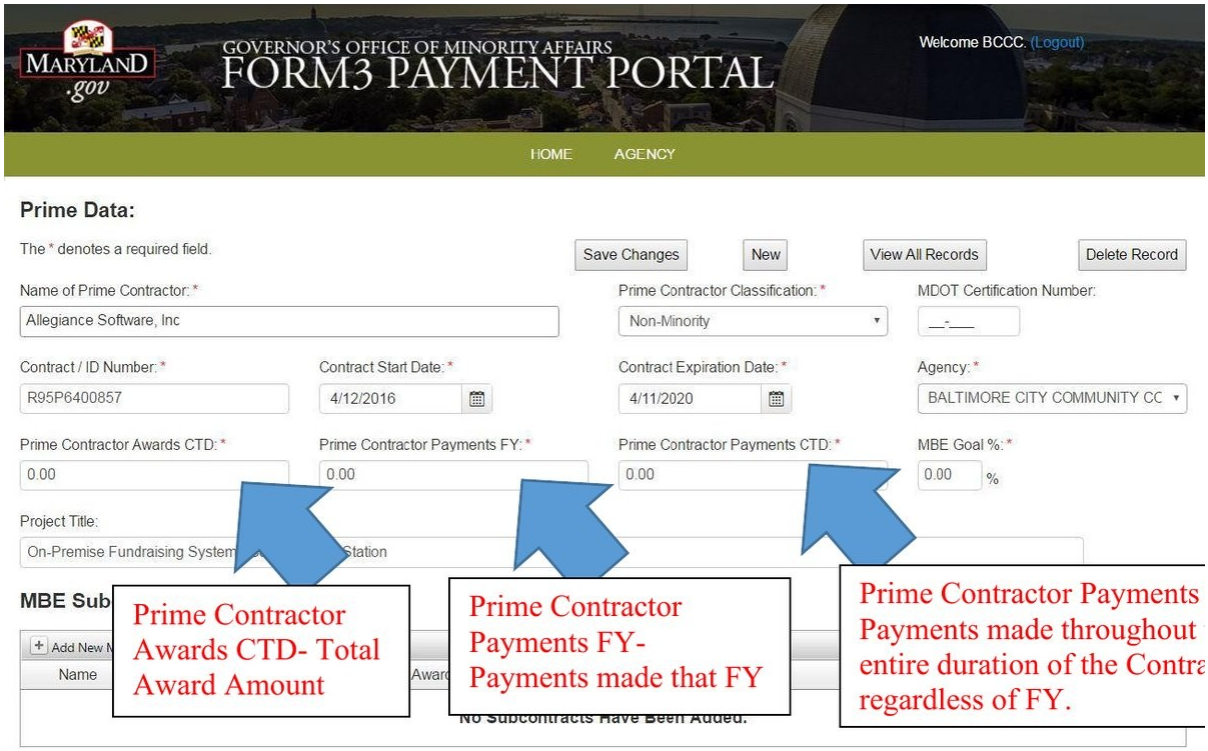
Click to delete the record,



Click OK to confirm deletion, you will get a success message. Then go on to the next record to delete.



a. If the contract is still active and/or had payments during the fiscal year, click to update the data.



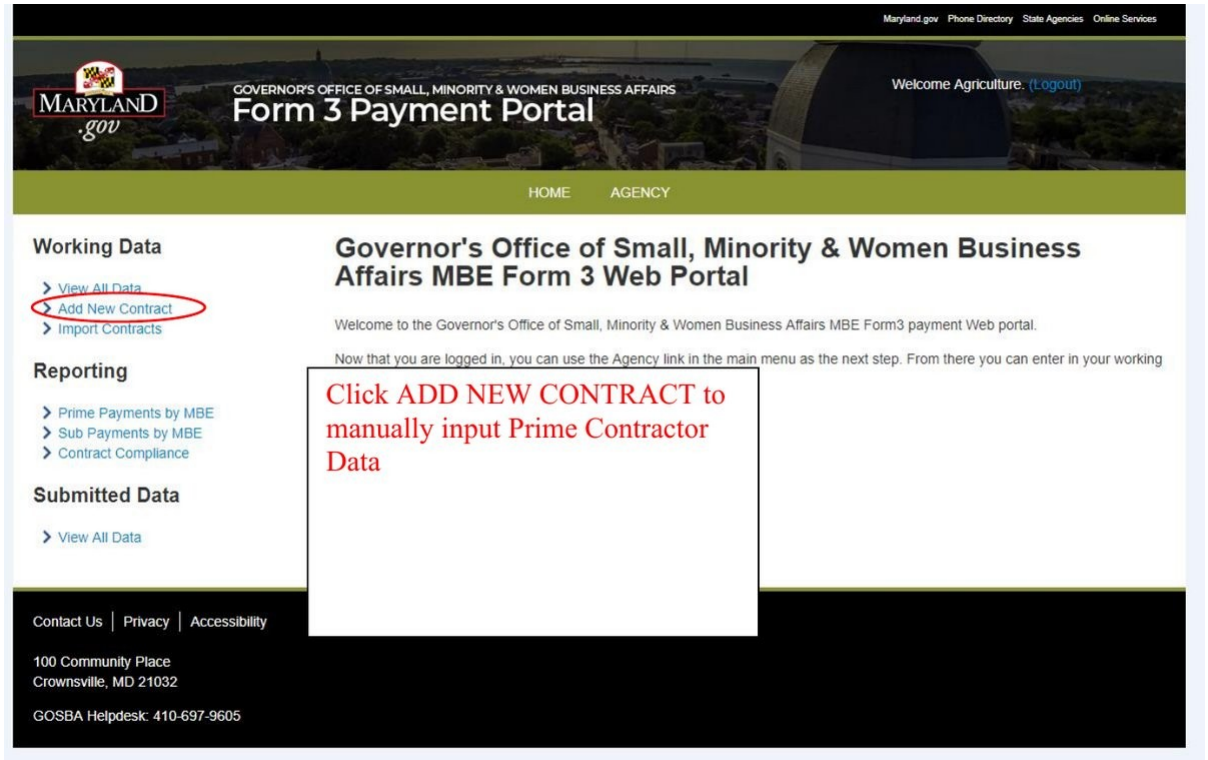
Prime Contractor Awards CTD- Total Award Amount

Prime Contractor Payments FY- Payments made that FY

Prime Contractor Payments CTD- Payments made throughout the entire duration of the Contract regardless of FY.

*Revise dollar amounts or dates as necessary

Input a brand-new contract:



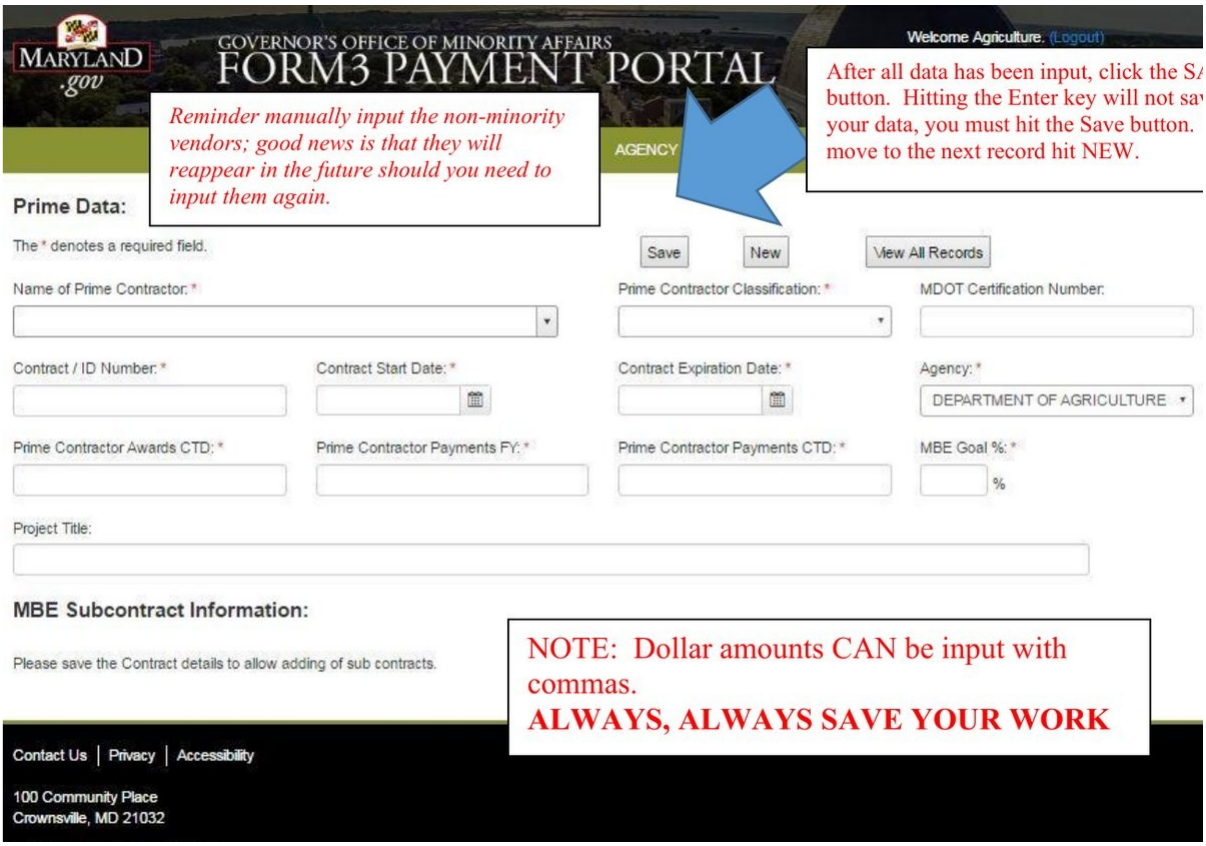
Click ADD NEW CONTRACT to manually input Prime Contractor Data

Input prime contractor data:

Input information, fields with red asterisk (*) are required.

Note: For direct voucher (DV) or credit card (CC) payments, consolidate multiple amounts for individual

vendors (i.e. Rudolph Office Supplies) and indicate in the contract ID the type of payment, DV or CC. Use FY dates for Start and Expiration Dates.



Reminder manually input the non-minority vendors; good news is that they will reappear in the future should you need to input them again.

NOTE: Dollar amounts CAN be input with commas.

ALWAYS, ALWAYS SAVE YOUR WORK

After all data has been input, click the SAVE button. Hitting the Enter key will not save your data, you must hit the Save button. To move to the next record hit NEW.

Add Subcontractor data:

Click “Add MBE Subcontractor”

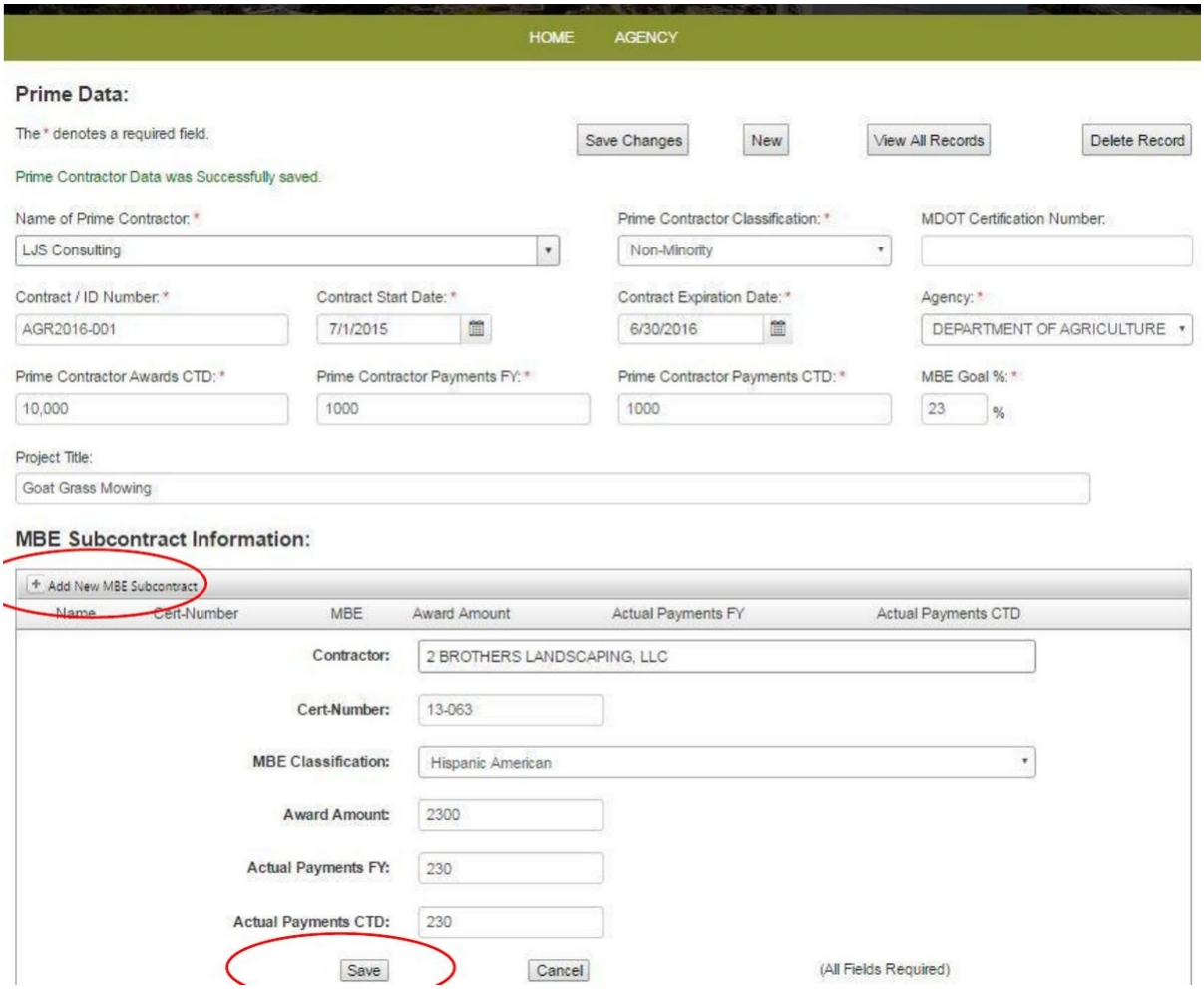
Input Subcontractor Data

CLICK “ADD NEW MBE SUBCONTRACT

Click SAVE

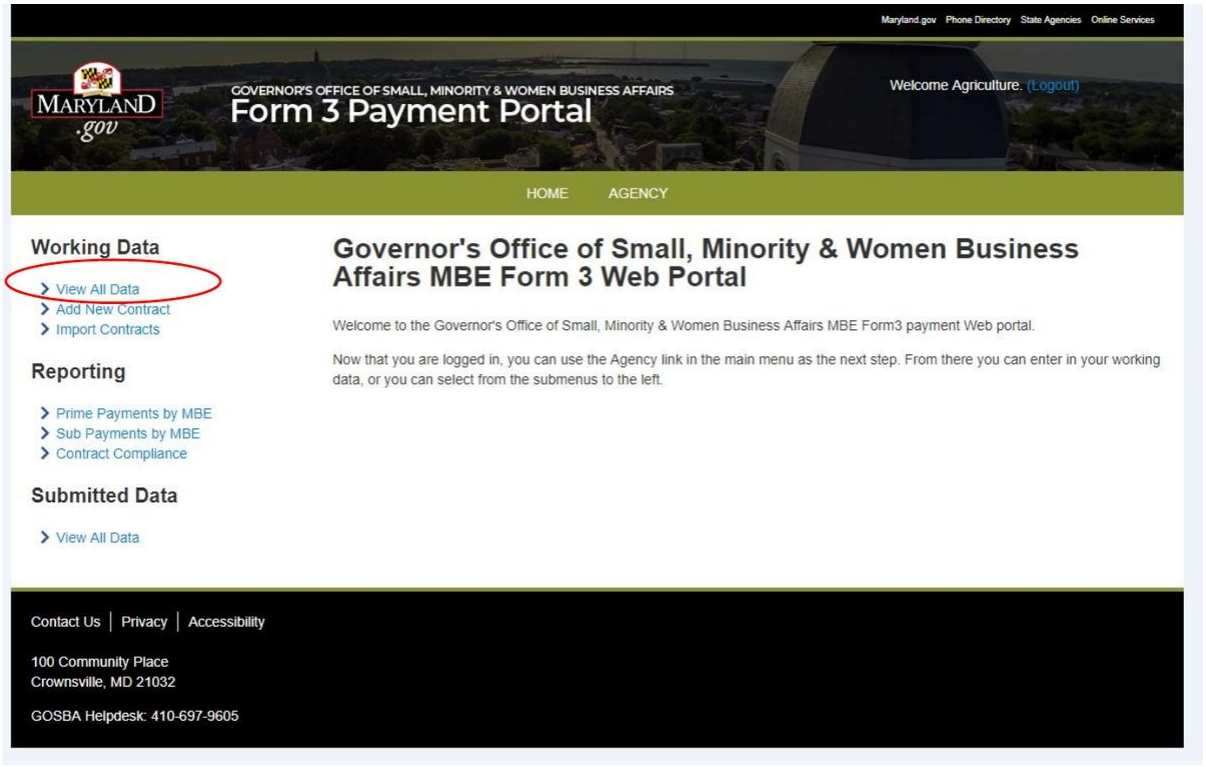
Note: If you can’t find an MBE in the drop down, search vendor in the MDOT Database https://mbe.mdot.maryland.gov/directory/ by certification number and confirm Vendor’s legal name.

There may be times when an MBE was decertified during the fiscal year. You can manually add them to the database. Contact DoSEM OMBE certification office (410)-865-1269 for the exact date of decertification, if needed.

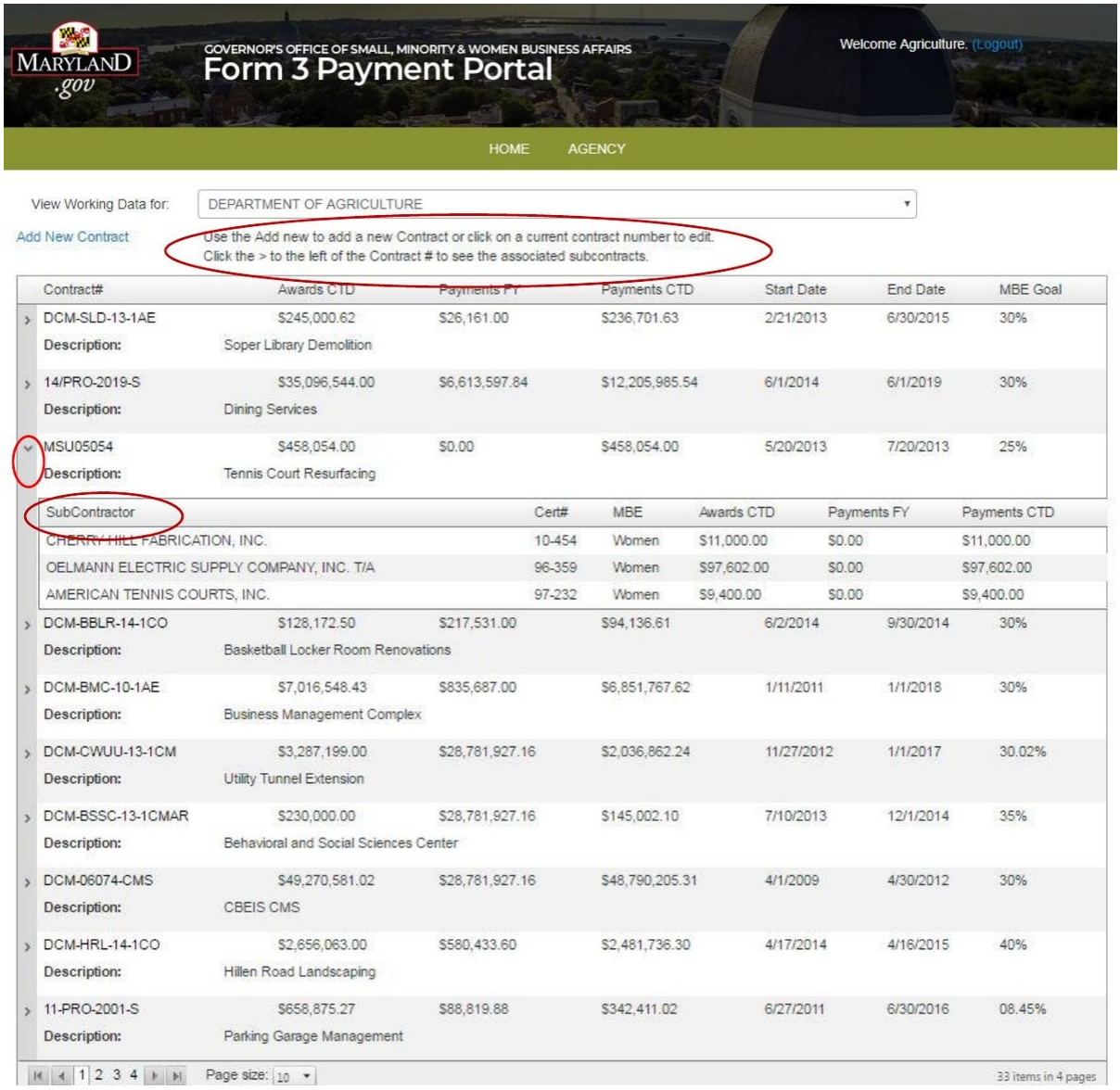


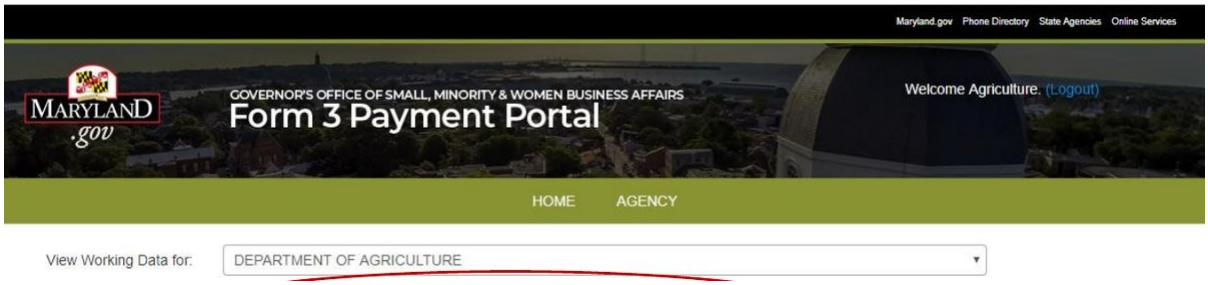
Review all data:

To see the data, you have input click “View All Data”



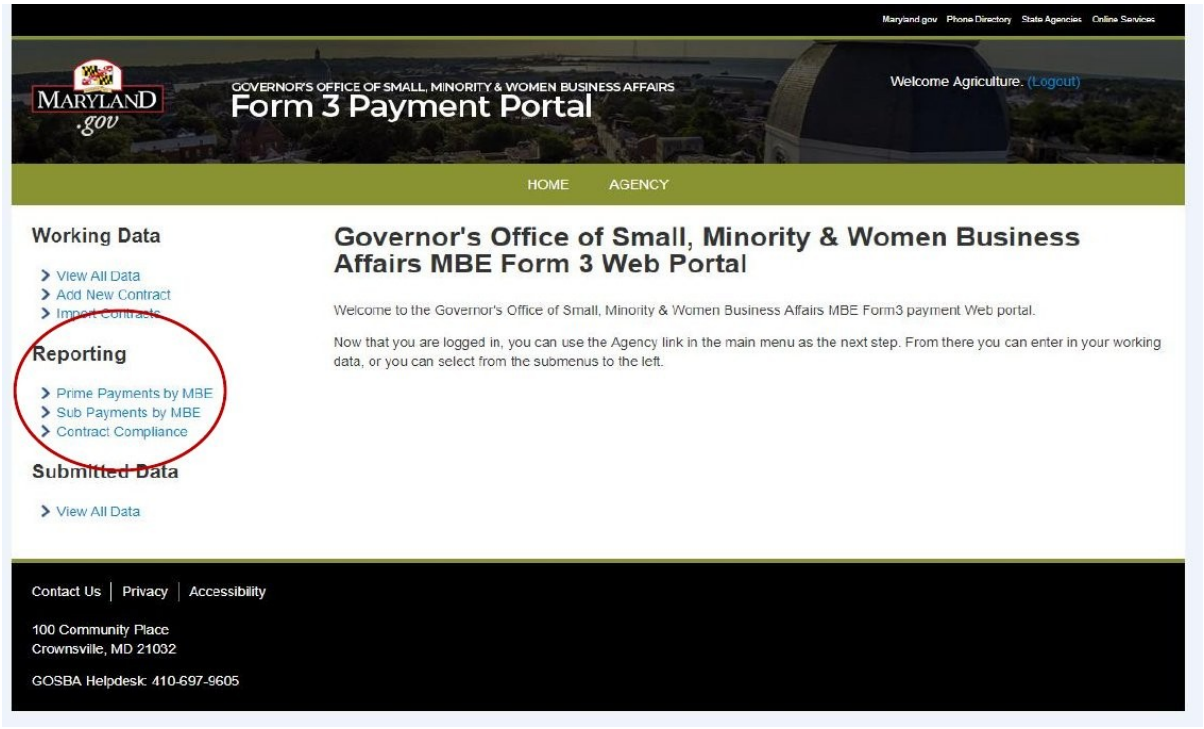
To view subcontractor data





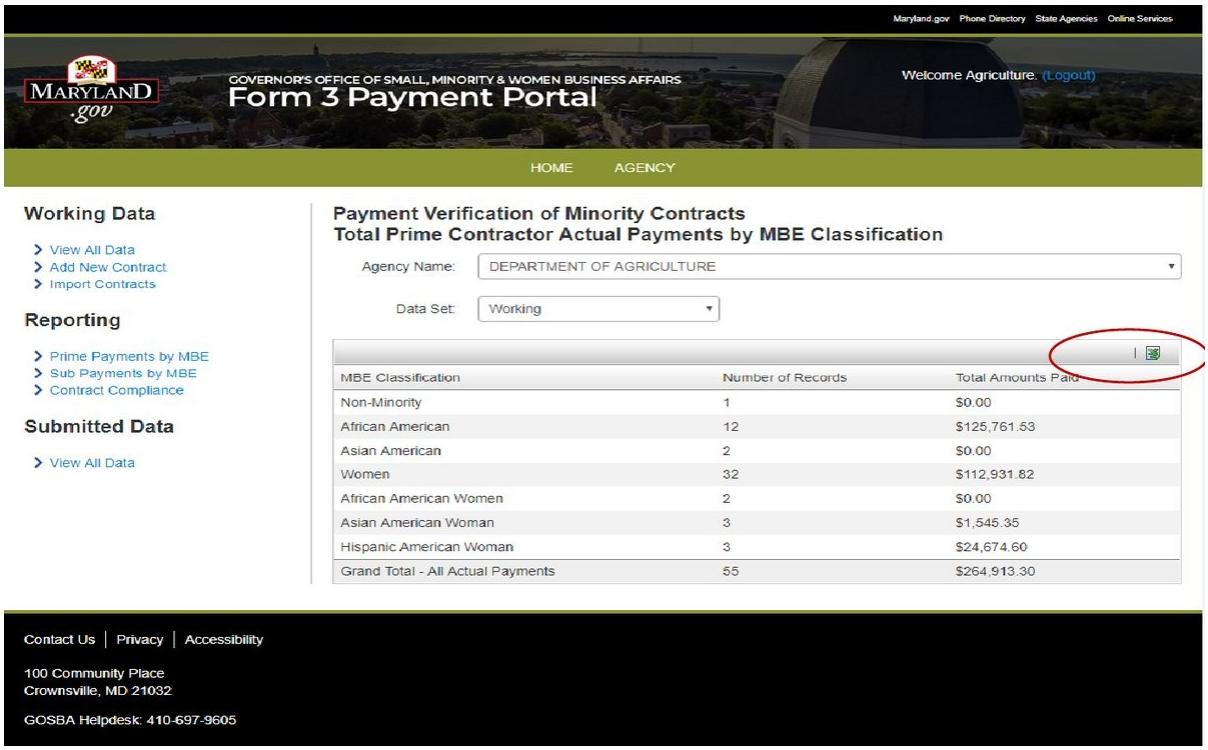
Export summary reports to Excel:

To export the data from any of the three reports under “Reporting”



Click the Excel icon and save your file.

The ‘Prime Payments by MBE’ and ‘Sub Payments by MBE’ downloaded excel reports should be included as an attachment in the final submission email sent to OSBA by August 31, 2026* (see page 4 for updates regarding new submission deadline).

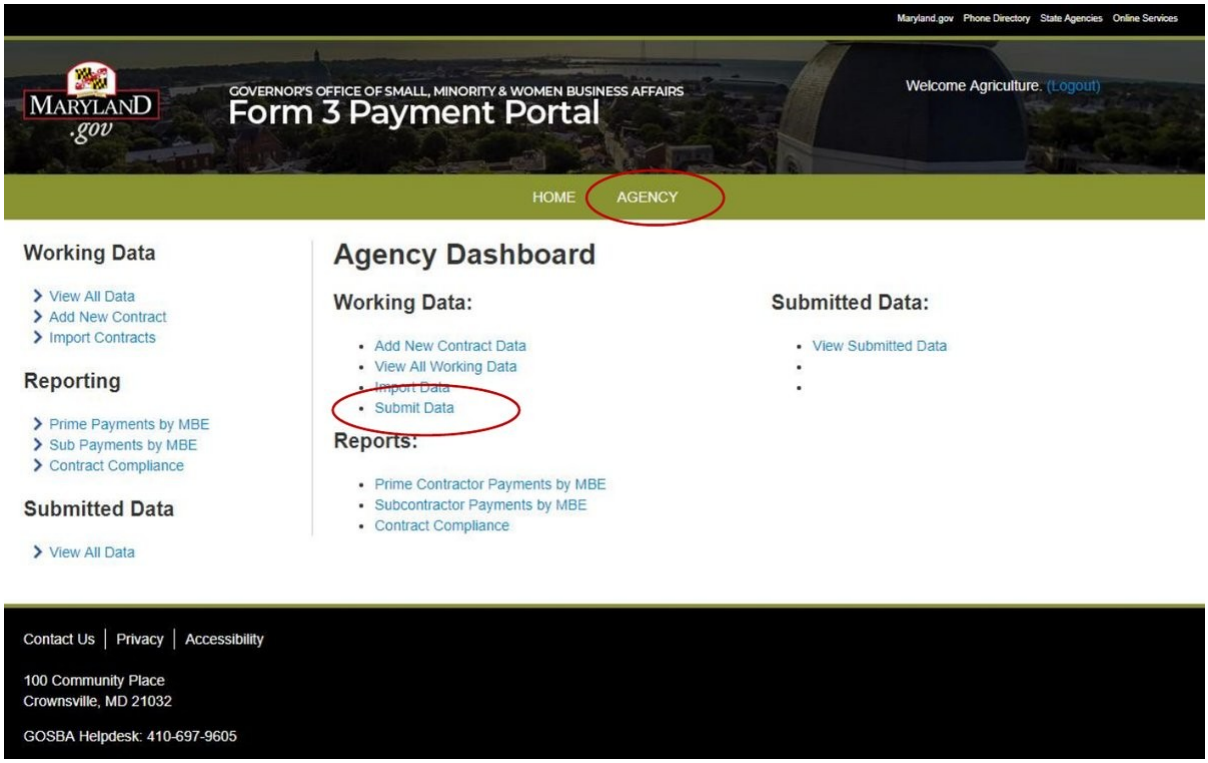


Submitting data to OSBA:

Click on Agency/Department (in the middle of top tool bar)

Under Working Data:

Click Submit Data - make sure you have exported data for your files before you submit data. Once you submit the data, you can view it but not make any further changes to the data. Contact OSBA Help Desk if you need to make any corrections.



1. Enter all the FY actual payments data within the template in the PRIMES and SUBS spreadsheets
2. Follow the necessary requirements and import the excel file into the Form #3 payment portal
3. If a data error message is received, each error will try and list which Excel sheet the error occurred in, and the Unique Identifier used to identify which row. You will need to fix the error within the sheet and attempt to re-upload the excel file.
4. Once the Form #3 template has successfully been imported and data has been reviewed, export summary reports via excel spreadsheet (the summary reports should be attached within the email when annual report is submitted)
5. Submit data to OSBA

Instructions For Template Import Method Form #3

Once the report preparer has downloaded the Form #3 Data Template from the MBE Reporting Toolkit on the OSBA website and has retrieved the procurement unit's login credentials for the Form #3 Payment Portal, they will need to complete the following actions:

*Important Note: Importing an Excel file will overwrite *ALL* existing working data. Should you need to edit that data, you can edit the Excel file and re-import it. You still need to submit the data for it to be final. If there are issues after data has been submitted, please contact your designated MBE Compliance Manager.

Instructions on Importing the Excel File

On the left-hand menu under the "Working Data" section, choose the Import Contracts link. This will get you to the Import page. The link is shown below.

Once you arrive on the import page you will:



Select the Agency/Department from the dropdown list (if not already selected).

Click on the “Select a File To Upload” button. A dialog box will pop up for you to select which Excel file you want to upload. Only one file can be uploaded at a time.

Once a file has been selected and completely uploaded, click on the “Import Excel” button.

A “wait” icon will display while the file is being processed. If everything goes well, you will be greeted with the following message:



If you receive an error, please see the section below for help resolving them. Once you have resolved the errors, try importing the Excel file again.

Requirements for the Worksheet (Excel File):

The worksheet must be either an .xls or .xlsx file type

The worksheet must not be locked otherwise it cannot be read.

The worksheet must contain two sheets with the following names:

Primes

Subs

The Primes Sheet

This sheet should hold all the prime contractor information.

It should contain a header row at the top

Columns are expected in order:

ID

Contractor Name

EFIN

MBE Designation

MDOT Cert

Contract#

StartDate

EndDate

Award Amount

Payments FY

Payments CTD

MBE Goal

Description

The ID column will not be stored in the database. It is just used to connect your subcontractors to their primes. You can use whatever naming convention you wish (Numbers or Letters). The ID's just need to be unique for every Contract (so every Excel row should be unique).

The optional columns are EFIN and Description. The rest are required.

For transactions that have no Start or End Date, you can use the Fiscal Year Start or End Dates. For transactions like Direct Vouchers and P-Card, the awards CTD, and the payments FY, and payments CTD will all be the same.

Subs Sheet

This sheet should hold all the subcontractor information.

This sheet should also contain a header row at the top.

Columns are expected in order:

Prime ID

Contractor Name

MDOT Cert #

MBE Designation

Award Amount

Payments FY

Payments CTD

All columns are required

The Prime ID column will link the subs to their primes. The ID doesn't need to be unique per row but must match one row in the Primes sheet.

Default Data

Some contracts may not have all the information. Like P Card may not have Start or End Dates. These can be resolved by using some default data. This must be done for the system to be able to differentiate between data that has no value and data that was just forgotten.

Some of the default data values, in the PRIMES tab only, can be:

Contractor Name – There is no default data that can be substituted. You need to type in the actual contractor's name.

MBE Designation – There is no default data that can be substituted. A valid MBE from the system must be input.

MDOT Cert# – You can use a Zero or a blank for non-minority.

Start Date – Use the Fiscal Year Start Date.

End Date – Use the Fiscal Year End Date.

Award Amount & Payments – There is no default data that can be substituted. You need the actual award and payment amounts.

MBE Designations

Here is a list of MBE Designations that are available in the system. The MBE Column must be one of the items from the list below.

Non-Minority

African American

Asian American

Hispanic American

Native American

Women

African American Women

Asian American Woman

Hispanic American Woman

Native American Women

Disabled

Disadvantaged

Errors and Resolutions

Below are common errors and some help on how to fix them. Each error will try and list which Excel sheet the error occurred in, and the Unique Identifier used to identify which row. Also included should be the Column Name (if applicable) to identify the column. Each Error will be listed as a bulleted list item in red text. An example is below. Don't worry, if you encounter any errors no data in the system will be overwritten until all the errors are fixed.

The following Errors were detected:

- Duplicate Prime Contracts with the same ID Found (Each row in the Primes sheet needs to be unique): TestDuplicatePrime

Duplicate Primes

- Duplicate Prime Contracts with the same ID Found (Each row in the Primes sheet needs to be unique): TestDuplicatePrime

The above error message results from the Prime contractor sheet having two prime contractors with the same ID string. Each ID string in the Primes sheet must be unique. To fix it you can rename the ID or completely remove one of the rows (if a duplicate). Don't forget to update any subcontractors that should be associated with the prime as well.

Missing Primes

- Subcontractors that have no matching ID in the Primes sheet were found: TestMissingSub

You will see the above error when a Prime ID string for a subcontractor does not match an ID string on the Primes sheet. Each subcontractor must have a matched ID. If not, the subcontractor is orphaned and cannot be attached. To fix this error you will need to either add the missing Prime contract row, update the Prime ID# string to either match one that is on the Prime sheet or remove the Excel row.

Invalid MBE Designation

- For Prime Contract# InvalidMBE, the MBE Designation didn't match an MBE from the list. (Entered Type is: Unlisted Designation)

The above error means that one of the MBE Designations was invalid (Does not match what is in the system). The error will state whether it was a Prime or subcontractor, and the relevant ID string to help you find the mismatched row. Also displayed in the parenthesis is the invalid MBE type that needs to be changed. Then you can change the MBE Designation string to one that matches. For a list of MBE Types, refer to the earlier section on MBE Designations. DoSEM OMBE MBE Categories should be converted over automatically.

Invalid DoSEM OMBE Cert# (formerly known as MDOT Cert)

- For Subcontract# InvalidCert, the MDOT Cert# is invalid. (Cert# is: 92-11)

The above error means that one of the DoSEM OMBE Certification numbers was invalid. The format should be either a plain zero or blank for non-minorities or be in the following format 00-000. To fix the error, you need to determine if your Cert # has too many or two few digits, or if the hyphen is in the wrong place. If the hyphen is in the wrong place, just move it to after the first two digits. If you are missing or have any extra digits, you will need to replace or remove them as needed to match the correct certification number for the contractor.

Missing Data

- For Prime Contract# MissingDataPrime, the Contractor Name is missing. It is a required field.
- For Prime Contract# MissingDataPrime, the MBE Designation is missing, it is a required field.
- For Prime Contract# MissingDataPrime, the MDOT Cert# is missing. It is a required field.
- For Prime Contract# MissingDataPrime, the Contract# is missing, it is a required field.
- For Prime Contract# MissingDataPrime, the Start date is missing a Date, it is a required field.
- For Prime Contract# MissingDataPrime, the End date is missing a Date, it is a required field.
- For Prime Contract# MissingDataPrime, the Award Amount is missing an amount, it is a required field.
- For Prime Contract# MissingDataPrime, the Payments FY amount is missing an amount, it is a required field.
- For Prime Contract# MissingDataPrime, the Payments CTD amount is missing an amount, it is a required field.
- For Prime Contract# MissingDataPrime, the MBE Goal % is missing, it is a required field.

The above (Or a subset of) will appear whenever a required column has missing data (a blank cell). The error message will hold whether it was a Prime or subcontractor, the relevant ID string, and the column that is missing the data. Just add or fix the corresponding data column. For contracts that may not have some of the data, you can fill in default data. See the section above for default data for missing data (E.g., a PCard might not have an end date).

*Important Note: You still need to submit the data for it to be final. If there are issues after data has been submitted, please contact your designated MBE Compliance Manager.

Export summary reports to Excel:

To export the data from any of the three reports under “Reporting”

Click the Excel icon and save your file.

Click the Excel icon and save your file.

Submitting data to OSBA:

Click on Agency/Department (in the middle of top tool bar)

Under Working Data:

Click Submit Data - make sure you have exported data for your files before you submit data. Once you submit the data, you can view it but not make any further changes to the data. Contact OSBA Help Desk if you need to make any corrections.

Compliance Data Reporting Instructions

Completing the FY2026 MBE Compliance Assessment Template

In the 2022 Legislative Session, HB389, Chapter 115 was passed, putting into place new Compliance Assessment Report requirements for procurement units participating in the MBE Program. The Compliance Assessment is used to collect FY award, payment, and compliance data. This will verify whether MBEs are meeting contract compliance requirements. Effective July 1, 2022 (FY2023) agencies are responsible for reporting, annually, their compliance data on contracts that were completed during the fiscal year to the Office of Small, Minority & Women Business Affairs.

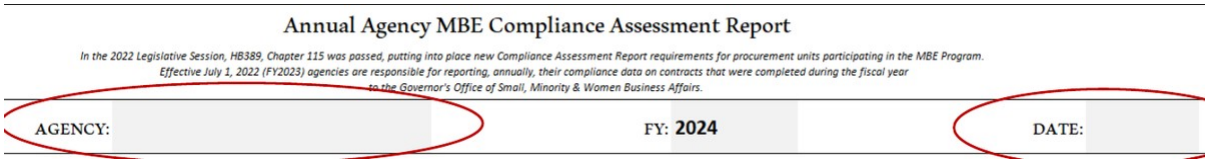
The Office of Small, Minority & Women Business Affairs provides an excel spreadsheet for agencies to use for submitting compliance data called the Annual Agency MBE Compliance Assessment Report. The assessment contains four spreadsheets which are linked with formulas that will calculate full contract compliance, MBE participation %, overall agency compliance rate, average award to subcontractors, # of completed contracts, # of MBE Subcontractors, and the average MBE goal across all contracts. The spreadsheet includes the instructions tab, PRIMES tab, SUBS tab, and the Compliance Report tab. The spreadsheets are password protected to prevent the accidental overwriting of formulas needed to calculate the compliance data and percentages.

- The white cells of the spreadsheet are the areas designed for data input.
- The blue cells contain formulas and are write-protected.

Instructions for the PRIMES Spreadsheet

Prior to entering MBE data make sure that you enter the required information in the white cells located above the data grids. Procurement Unit Name and Date. (see figure 15)

Figure 15



This spreadsheet contains several columns requiring all the necessary compliance metrics to assess MBE compliance. The columns that require data input have been identified below:

See Figure 16 for sample data examples from the PRIMES spreadsheet for the following columns:

Contract # (Column A) - All contracts that ended in the FY being reported are required.

Waiver % (Column B) - The portion of the MBE goal that was waived by the agency at the time of contract award. (if applicable)

MBE Goal % (Column C) - The goal that was set on the contract.

Award Date (Column D) - The date the award was awarded.

Award Amount (Column E) - The total amount awarded for the contract.

Expiration Date (Column F) - The date the contract expired.

Contract Completion Date (Column G)- The date the contract close out activities were completed. Which includes ALL payments made.

Prime Contractor Name (Column H) - The name of the Prime Contractors company.

Prime MBE Designation (Column I) - You will select the MBE designation with the dropdown provided.

Prime MBE Designation (Column I) - You will select the MBE designation with the dropdown provided.

Total Sub Payments (non-MBE) (Column J) - The payments that were made to subcontractors who were not MBEs throughout the duration of the contract.

Total MBE Sub-Payments (Column K) - Total payments made to MBE subcontractors throughout the duration of the contract.

Total Prime Payments (Column L) - Total payments made to the Prime Contractor throughout the duration of the contract.

Figure 16

Contract #	Waiver % (Hover over this cell for dataset explanation)	MBE Goal %	Award Date	Award Amount	Expiration Date	Contract Completion Date	Prime Contractor Name	Prime MBE Designation (Select from dropdown)	Total Sub Payments (non-MBE)	Total MBE Sub Payments	Total Prime Payments
A555105	5.00%	10.00%	9/1/2019	$10,800,000.00	8/31/2022	6/31/2023	Peleton Construction Company	Non-Minority	$50,000.00	$52,000.00	$10,779,000.00

See Figure 17 for sample data examples for the following PRIMES spreadsheet columns:

Procurement Category (Column P) - You will select the procurement category with the dropdown provided.

Description of Work (Column Q) - A description of the work that was required in this contract.

Description of Factors Leading to Compliance Below 100% (Column R)- The Procurement unit will describe and explain the factors that lead to a compliance rate below 100%

Figure 17

Procurement Category	Description of Work	Description of Factors Leading to Compliance below 100%
Construction	Retaining Wall and Storage facility construction	After the commencement of this project, the agency determined that the square footage of the storage facility had to be reduced in size, which reduced the scope of work initially awarded to MBE subcontractors.

Notes Section (see figure 18): This notes section should only be used for general notes.

All notes or comments for a specific contract with MBE compliance below 100% of the established contract goal must be identified in Column Q of the PRIMES tab.

Figure 18

Notes *(You may provide general notes only in the area below. Notes about specific contracts must be entered in the "Description of Factors Leading to Compliance*

Instructions for the SUBS Spreadsheet

This spreadsheet contains several columns requiring all the necessary subcontractor detailed data that supports the subcontractor payment totals entered in the PRIMES spreadsheet. All columns within the SUBS spreadsheet require data input.

See Figure 19 for sample data examples for these columns:

Contract Number (Column A) - This contract number must match the contract number of the prime contractor this subcontractor was working under.

Award Date (Column B) - The date the award was awarded.

Award Amount (Column C) - The total amount awarded for the contract.

Expiration Date (Column D) - The date the contract ended.

Subcontractor Name (Column E) - The name of the subcontractor's company.

MBE Designation (Column F) - You will select the MBE designation from the dropdown provided.

Total Subcontractor Payments (Column G) - Total payments made to the subcontractors throughout the duration of the contract.

Description of Work (Column H) - A description of the work that was required in this contract, relevant to this subcontractor only.

Third Tier Subcontractor (Column I) - You will select 'Yes' or 'No' with the dropdown provided. Third Tier Subcontracting is the process in which a prime contractor subcontracts a portion of an original contract to a subcontractor who in turn subcontracts a portion of a subcontract to a third party. This latter action is termed entering a third-tier contract.

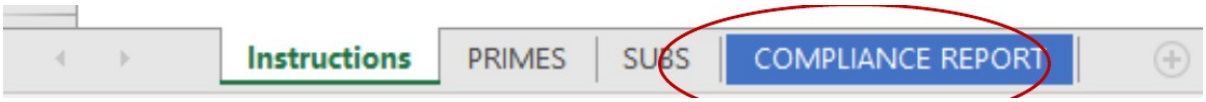
Figure 19

Contract Number (Hover over this cell for dataset explanation)	Award Date	Award Amount	Expiration Date	Subcontractor Name	MBE Designation (Select from dropdown)	Total Subcontractor Payments	Description of Work (Relevant to this subcontractor only)	Third Tier Subcontractor (Select from dropdown)
A555105	*9/1/2019*	*$10,500.00*	*8/31/2022*	*Applied Brick and Mortar*	*African American*	*$7,500.00*	*Retaining wall, masonry (i.e., block, brick, stone),*	*No*

Instructions for Compliance Report Spreadsheet

1. This tab will auto-populate data based on what you have entered in the PRIMES and SUBS tab. (see figure 20)

Figure 20



2. You will need to add the printed name of the preparer, approver, and the date on the bottom of the report on this tab. (see figure 21)

Figure 21



3. You will need to save the compliance report tab as a PDF document and/or print this tab to collect the signature of the approver of this document.
4. The Compliance Report should be approved (signed) by the Agency Head or Designee.
5. The completed and signed Compliance Report should be submitted in PDF format along with the completed excel version of the compliance assessment document.

FY27 Quarterly MBE Reporting Instructions

This section provides detailed instructions on how to complete the required awards, payment, outreach, and procurement activity data for FY2027 Quarterly report submissions.

Quarterly Report Submission Requirements

Procurement units will submit a completed MBE Quarterly Report via email to mbereports.gosba@maryland.gov with the following templates attached:

- FY2027 Quarterly MBE Procurement Report
- FY2027 Quarterly Procurement Activity Report

Quarterly Compliance Check-in Survey

Procurement Units will be responsible for attesting to the completion of required compliance measures, through a short quarterly electronic Compliance Check-in survey. The survey will request that units confirm required submissions to OSBA for the quarter, such as:

- Submission of PRG documentation for procurements valued at $25 Million or more
- Submission of Waiver determinations
- Any other required compliance documentation

Procurement units are required to submit their Quarterly MBE report electronically in the specified file formats, using the most current OSBA-approved report templates.

Awards, Payments, and Outreach Data Reporting Instructions

The required awards, payments, and outreach data reporting Excel spreadsheet template provided by OSBA is the:

- FY2027 Quarterly Report Forms

Completing the FY2027 Quarterly Reports Forms Template

OSBA provides the FY2027 Quarterly Reports Forms Excel spreadsheet for procurement units to use for submitting MBE Awards, MBE Prime/Sub Payments, and MBE Outreach data. The FY2027 spreadsheet file contains four spreadsheets named: Requirements & Deadlines, Form #2, Form #1, and Outreach Data.

Form #1 and Form #2 are linked with formulas that will calculate contract awards by (1) MBE Classification and (2) Procurement Category and MBE Prime/Sub payments by MBE Classification. The spreadsheets are password protected to prevent the accidental overwriting of formulas needed to calculate the minority participation totals and percentages.

The Outreach Data spreadsheet provides data input fields for (1) Total outreach events your unit conducted/participated in (2) List of resources your unit has available to help businesses know how to do business with your agency

- The yellow cells of the spreadsheet are the areas designed for data input. (Please note: If data is pasted into the yellow cells, you must paste as plain text to avoid disrupting the formatting)
- The blue cells contain formulas and are write-protected.

Avoid Double Counting AWARDS!

BEWARE OF DOUBLE COUNTING AWARD TO MBE PRIME WITH MBE SUBCONTRACTOR:

1. Count as follows:
   x% MBE Prime Award
   Y% MBE Subcontractor Award
   100%

Our office requires that your procurement unit report MBE Prime awards and MBE Subcontractor awards separately as shown above in the example. This is because our office calculates and publicly reports the total percentage of MBE awards that are awarded to subcontractors.

ANNUAL REPORT TEMPLATES

in EXCEL FORMAT



Submit

Make sure you are using the most current FY27 Quarterly Reports Templates!!!

Backup Data Preparation and Scrubbing

**Report preparers are strongly encouraged to download and utilize the Supplemental Reporting Guidance that is available within the manual and as a separate document on the MBE Reporting Toolkit. This guidance clearly defines which data procurement reports are required for reporting, exact cell references on where to enter each type of data within the OSBA-approved excel templates and best practices. **

1. Prior to entering awards and payment data in the required templates, the report preparer will need to download the necessary detailed data from the procurement and accounting system of record. (i.e. ANSWERS, iFMIS, PeopleSoft)
2. Once data is pulled from the database be sure to organize the data by award, payment, and waiver data
3. Ensure quality assurance and thoroughly review data for errors and omission (ex. system errors, clerical errors)
4. Data scrubbing is required to ensure that all necessary line items are reported accurately. For guidance on how to properly identify reporting exclusions for the MBE program participation data reports reference the Socioeconomic Data Reporting Guidance available in the MBE Reporting Toolkit
5. Once data scrubbing is complete, the report preparer will transfer the summarized data totals into the necessary data template
6. Procurement units are required to download the OSBA-approved Excel spreadsheet templates here: https://gomdsmallbiz.maryland.gov/Pages/Reporting-Tool-MBE.aspx
7. Once the Quarterly templates have been downloaded, identify which templates require award or payment data and enter them accordingly
8. Once data input is complete for all awards, payment, waiver, and outreach data requirements your agency will conduct a final review, verification, and quality assurance of the data prior to final submission to OSBA.
9. OSBA does not conduct reviews of quarterly data submissions. Procurement units are responsible for submitting data that has been verified for accuracy.
10. Data Submission Requirements: Do not submit an altered or procurement unit developed spreadsheet (except for the IAC), Altered spreadsheets and PDF copies cannot be used to compile the Statewide report. Therefore, your altered submission will be returned to your procurement unit, and you will be considered non-compliant with the MBE reporting requirements.

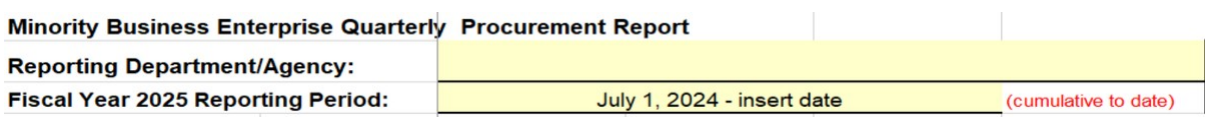
Once the data is entered and saved, email the completed spreadsheets, along with the other required documentation, as an attachment to: mbereports.gosba@maryland.gov.

Instructions for the Form #2 Spreadsheet

It is recommended that units complete Reporting Form #2 first. Prior to entering MBE data make sure that you enter the required information in the yellow cells located above and below the data grids. Please enter the following information in the appropriate locations:

- Reporting Agency/Department – The name of the agency/department (Top - See Figure 22)
- Fiscal Year 2027 Reporting Period - Date range for the QTR being submitted (Top - See Figure 22)

Figure 22

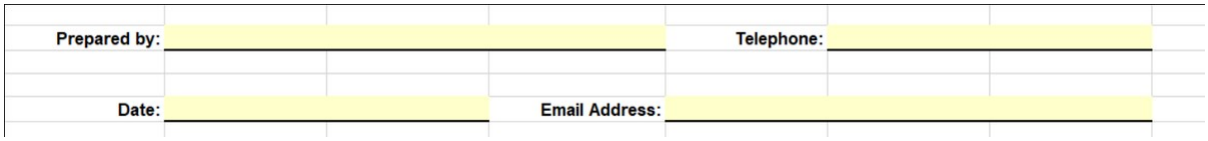


- Prepared by – The name and title of the person who prepared the report (Bottom - See Figure

23)

- Date – The date that the report was prepared (Bottom - See Figure 23)
- Telephone – The telephone number of the preparer (Bottom - See Figure 23)
- Email address – The email address of the preparer (Bottom - See Figure 23)

Figure 23



Please make sure to save the file after you have entered the data on the spreadsheet

This spreadsheet is subdivided by (1) MBE Classification and (2) Procurement Category. These subdivisions are listed below. Units are to continue providing data for dually certified firms and certified disadvantaged firms.

MBE Classification – Column Titles

- African American
- Asian American (includes Sub-Continent & Pacific Asian)
- Hispanic American
- Native American
- Woman
- African American Woman
- Asian American Woman
- Hispanic American Woman
- Native American Woman
- Disabled
- Disadvantaged

Procurement Category – Row Titles

- Architectural
- Engineering
- Construction
- Construction-Related Services
- Maintenance
- Services
- Supplies & Equipment
- IT Services
- IT Supplies & Equipment
- Human, Cultural, Social & Educational Services
- Corporate Credit Card (MBE Prime Only)
- Direct Voucher (MBE Prime Only)

The yellow cells of this spreadsheet are the areas designed for data input. (Please note: If data is pasted into the yellow cells, you must paste as plain text to avoid disrupting the formatting) The blue cells contain formulas and are write-protected. In addition, the worksheet is also write-protected to avoid unauthorized alterations.

The top input area is entitled “Total Subcontract Awards by MBE Classifications and Procurement Categories.” This is where you will enter the MBE subcontract awards data. Enter the subcontract awards data in the yellow cells as appropriate. For example, if you have African American subcontract award data for “Construction”, you will enter the total dollar value of all African American construction subcontracts awarded during the fiscal year. Next, you would enter the total number of all African

American construction subcontracts awarded during the fiscal year. The same would be completed for each MBE classification and procurement category as appropriate (see Figure 24).

Figure 24

Procurement Category		African American	Asian	Hispanic	Native American	Women	African American Women	Asian Women
Architectural	Total Dollars	$56,000	$0	$0	$0	$0	$0	$0
	# of Contracts	2	0	0	0	0	0	0
Engineering	Total Dollars	$0	$35,000	$0	$0	$0	$0	$0
	# of Contracts	0	7	0	0	0	0	0
Construction	Total Dollars	$0	$0	$246,578	$0	$5,000,000	$0	$0
	# of Contracts	0	0	3	0	55	0	0
Construction Related Services	Total Dollars	$23,450	$5,607,890	$0	$560,000	$0	$0	$0
	# of Contracts	2	1	0	4	0	0	0
Maintenance	Total Dollars	$45,678	$0	$0	$0	$0	$0	$0
	# of Contracts	7	0	0	0	0	0	0
Services	Total Dollars	$611,838	$345,890	$2,869,073	$0	$2,214,638	$929,684	$120,203
	# of Contracts	4	2	2	0	3	3	1
Supplies & Equipment	Total Dollars	$26,000	$20,000	$30,000	$45,000	$65,900	$0	$0
	# of Contracts	1	2	3	4	5	0	0
IT Services	Total Dollars	$65,000	$34,500	$0	$0	$0	$0	$0
	# of Contracts	1	3	0	0	0	0	0
IT Supplies & Equipment	Total Dollars	$0	$98,765	$0	$0	$0	$0	$0
	# of Contracts	0	8	0	0	0	0	0
Human, Cultural, Social & Educational Services	Total Dollars	$25,000	$0	$0	$0	$0	$0	$0
	# of Contracts	1	0	0	0	0	0	0
Totals	Total Dollars	$852,966	$6,142,045	$3,145,651	$605,000	$7,280,538	$929,684	$120,203
	# of Contracts	18	23	8	8	63	3	1

The next input area is entitled “Total MBE Subcontract Payments.” This is where you will enter the MBE subcontractor payment data by MBE classification. Enter the MBE subcontractor payments data in the yellow cells as appropriate. For example, if you have a Native American payments data, you will enter the total dollar value of all Native American payments made during the fiscal year. The same would be completed for each MBE classification as appropriate (see Figure 25).

Figure 25

Total MBE Subcontract Payments													
African American	Asian	Hispanic	Native American	Women	African American Women	Asian Women	Hispanic Women	Native American Women	Disabled	Non-Profit (Certified)	Community Service Provider	Disadvantaged	Total
$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00			$0.00	$0.00

The next input area is entitled “Total Prime Contract Awards by MBE Classifications and Procurement Categories.” This is where you will enter the MBE prime contract awards data. Enter the MBE prime contract awards data in the yellow cells as appropriate. For example, if you have African American awards data for “Construction”, you will enter the total dollar value of all African American construction prime contracts awarded during the fiscal year. Next, in the cell below the dollar value you would enter the total number of all African American construction prime contracts awarded during the fiscal year. The same would be completed for each MBE classification and procurement category as appropriate (see Figure 26).

Figure 26

Procurement Category		African American	Asian	Hispanic	Native American	Women	African American Women	Asian Women	Hispanic Women	Native American Women	Disabled	Non-Profit (Certified)	Community Service Provider	Disadvantaged
Architectural	Total Dollars	$0	$567,892	$0	$0	$0	$0	$0	$0	$0	$0			
	# of Contracts	0	2	0	0	0	0	0	0	0	0			
Engineering	Total Dollars	$105,200	$0	$0	$0	$0	$0	$0	$0	$0	$0			
	# of Contracts	1	0	0	0	0	0	0	0	0	0			
Construction	Total Dollars	$0	$0	$0	$0	$2,569,314	$0	$0	$0	$0	$0			
	# of Contracts	0	0	0	0	13	0	0	0	0	0			
Construction Related Services	Total Dollars	$0	$0	$0	$26,598	$0	$0	$0	$0	$0	$0			
	# of Contracts	0	0	0	1	0	0	0	0	0	0			
Maintenance	Total Dollars	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0			
	# of Contracts	0	0	0	0	0	0	0	0	0	0			
Services	Total Dollars	$44,395	$213,960	$1,652,369	$0	$2,923,398	$226,834	$26,070	$0	$0	$0			
	# of Contracts	4	5	1	0	16	19	2	0	0	0			
Supplies & Equipment	Total Dollars	$5,688	$77,262	$5,507	$0	$84,079	$0	$19,756	$0	$0	$0			
	# of Contracts	4	37	7	0	95	2	1	0	0	0			
IT Services	Total Dollars	$128,945	$43,158	$0	$0	$0	$0	$0	$0	$0	$0			
	# of Contracts	1	1	0	0	0	0	0	0	0	0			
IT Supplies & Equipment	Total Dollars	$42,580	$19,687	$0	$0	$205,631	$0	$0	$0	$0	$0			
	# of Contracts	1	3	0	0	1	0	0	0	0	0			
Human, Cultural, Social & Educational Services	Total Dollars	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0			
	# of Contracts	0	0	0	0	0	0	0	0	0	0			
Corporate Credit Card	Total Dollars	$12,219	$62,537	$1,949	$0	$92,050	$32,049	$0	$0	$0	$0			
	# of Contracts	18	30	9	0	104	37	0	0	0	0			
Direct Voucher	Total Dollars	$42,507	$36,500	$1,588	$0	$11,452	$103,596	$1,699	$0	$0	$0			
	# of Contracts	94	1	2	0	7	43	4	0	0	0			
Total	Total Dollars	$381,474	$1,010,986	$1,661,403	$26,598	$5,886,924	$382,479	$47,525	$0	$0	$0			$0
	# of Contracts	123	79	19	1	156	101	7	0	0	0			0

IMPORTANT NOTE: The addition of the dual-certification categories eliminates double counting of firms certified as Women and one of the other ethnic categories. For example, awards to firms certified as “Hispanic/Female” in the DoSEM OMBE MBE Directory would be included in the “Hispanic Women” column of the input areas. Similarly, awards to firms certified as “Female/Asian” in the MBE Directory would be included in the “Asian Women” column.

The next input area is entitled “Total MBE Prime Contract Payments.” This is where you will enter the MBE prime contractor payment data by MBE classification. Enter the MBE prime contractor payments data in the yellow cells as appropriate. For example, if you have Native American payments data, you will enter the total dollar value of all Native American payments made during the fiscal year. The same would be completed for each MBE classification as appropriate. (see Figure 27).

Figure 27

Total MBE Prime Contract Payments

African American	Asian	Hispanic	Native American	Women	African American Women	Asian Women	Hispanic Women	Native American Women	Disabled	Non-Profit (Certified)	Community Service Provider	Disadvantaged	Total
$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00			$0.00	$0.00

When you have entered all the information required in Form #2 by MBE classification and procurement category as appropriate, the blue cells will calculate total dollars awarded and total contracts awarded. This information will be calculated by MBE Classification in the bottom blue cells and calculated by Procurement Category in the blue cells to the far right. Figure 28 illustrates the blue calculated fields previously discussed.

The “Total MBE Prime and Subcontract Awards by MBE Classifications and Procurement Categories” table does not require any data entry, and all the cells are in blue to indicate that it calculates the total MBE prime & subcontract awards entered in the previous tables.

Figure 28 illustrates automatic calculations.

Figure 28

Procurement Category		African American	Asian	Hispanic	Native American	Women	African American Women	Asian Women	Hispanic Women	Native American Women	Disabled	Non-Profit (Certified)	Community Service Provider	Disadvantaged
Architectural	Total Dollars	$56,000	$567,892	$0	$0	$0	$0	$0	$0	$0	$0			$0
	# of Contracts	2	2	0	0	0	0	0	0	0	0			0
Engineering	Total Dollars	$105,200	$35,000	$0	$0	$0	$0	$0	$0	$0	$0			$0
	# of Contracts	1	7	0	0	0	0	0	0	0	0			0
Construction	Total Dollars	$0	$0	$246,578	$0	$7,569,314	$0	$0	$0	$0	$0			$0
	# of Contracts	0	0	3	0	68	0	0	0	0	0			0
Construction Related Services	Total Dollars	$23,450	$5,607,890	$0	$686,698	$0	$0	$0	$0	$0	$0			$0
	# of Contracts	2	1	0	5	0	0	0	0	0	0			0
Maintenance	Total Dollars	$45,678	$0	$0	$0	$0	$0	$0	$0	$0	$0			$0
	# of Contracts	7	0	0	0	0	0	0	0	0	0			0
Services	Total Dollars	$656,173	$559,850	$4,521,432	$0	$5,138,036	$1,156,518	$146,273	$0	$0	$0			$0
	# of Contracts	8	7	3	0	18	22	3	0	0	0			0
Supplies & Equipment	Total Dollars	$31,688	$97,262	$35,507	$45,000	$149,979	$0	$19,756	$0	$0	$0			$0
	# of Contracts	5	39	10	4	20	2	1	0	0	0			0
IT Services	Total Dollars	$193,945	$77,658	$0	$0	$0	$0	$0	$0	$0	$0			$0
	# of Contracts	2	4	0	0	0	0	0	0	0	0			0
IT Supplies & Equipment	Total Dollars	$42,580	$118,452	$0	$0	$205,631	$0	$0	$0	$0	$0			$0
	# of Contracts	1	11	0	0	1	0	0	0	0	0			0
Human, Cultural, Social & Educational Services	Total Dollars	$25,000	$0	$0	$0	$0	$0	$0	$0	$0	$0			$0
	# of Contracts	1	0	0	0	0	0	0	0	0	0			0
Corporate Credit Card	Total Dollars	$12,219	$62,537	$1,949	$0	$82,050	$32,049	$0	$0	$0	$0			$0
	# of Contracts	18	30	9	0	104	37	0	0	0	0			0
Direct Voucher	Total Dollars	$42,507	$36,500	$1,588	$0	$11,452	$103,596	$1,699	$0	$0	$0			$0
	# of Contracts	94	1	2	0	7	43	4	0	0	0			0
Total	Total Dollars	$1,234,440	$7,153,040	$4,807,054	$631,698	$13,166,462	$1,292,163	$167,728	$0	$0	$0			$0
	# of Contracts	141	102	27	9	219	104	9	0	0	0			0
% of Contract Awards		1.08%	6.28%	4.22%	0.55%	11.56%	1.13%	0.15%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Total Contract Awards from Form 1		$113,847,885												

Instructions for Form #1 Spreadsheet

It is recommended that agencies complete Reporting Form #1 next. A snapshot of the spreadsheet is shown in Figure 29.

Figure 29

Minority Business Enterprise Quarterly/Monthly Procurement Report										Reporting Form #1		
Reporting Department/Agency:								DO NOT MODIFY ANY OF THE EXISTING FIELDS OR MOVE ANY TABS IN THIS TEMPLATE.				
Fiscal Year 2025 Reporting Period:	July 1, 2024 - insert date	(cumulative to date)						Data can only be entered in the Yellow Cells		Data in the Blue Cells auto-populate from Form 2		
Total Contract Awards by Procurement Categories												
Procurement Category	Total # All Prime Contracts (Including	Total All Prime Contracts Dollar Value Awarded (Including MBE)	Total # of Prime Contract Waivers	Total Dollar Value of Prime Contract Waivers	Total # MBE Prime Contracts Awarded	Total MBE Prime Contract Dollar Value Awarded	Total # MBE Subcontracts Awarded	Total MBE Subcontract Dollar Value Awarded	Total # of MBE Contracts Awarded- Prime & Sub	Total $ of MBE Contracts Awarded- Prime & Sub	Total MBE Participation Percentage	
Architectural					0	$0	0	$0	0	$0	0.00%	
Engineering					0	$0	0	$0	0	$0	0.00%	
Construction					0	$0	0	$0	0	$0	0.00%	
Construction Related Services					0	$0	0	$0	0	$0	0.00%	
Maintenance					0	$0	0	$0	0	$0	0.00%	
Services					0	$0	0	$0	0	$0	0.00%	
Supplies & Equipment					0	$0	0	$0	0	$0	0.00%	
IT Services					0	$0	0	$0	0	$0	0.00%	
IT Supplies & Equipment					0	$0	0	$0	0	$0	0.00%	
Human, Cultural, Social & Educational Services					0	$0	0	$0	0	$0	0.00%	
Corporate Credit Card					0	$0			0	$0	0.00%	
Direct Voucher					0	$0			0	$0	0.00%	
Totals	0	$0	0	$0	0	$0	0	$0	0	$0	0.00%	
Note(s):												
Total Contract Payments												
	MBE Prime Contracts $ Paid	MBE Subcontracts $ Paid	Total $ Paid - MBE Prime & MBE Subcontracts									
	$0	$0	$0									

The yellow cells of this spreadsheet are the areas designed for data input. (Please note: If data is pasted into the yellow cells, you must paste as plain text to avoid disrupting the formatting) The blue cells contain formulas and are write-protected.

Note: You must enter data in the appropriate yellow data cells of this spreadsheet for the MBE participation percentages to calculate. Data entry, by Procurement Category, must be entered in the yellow cell columns identified below.

- Total # All Prime Contracts (Including MBE) – Enter the total number of all prime contracts awarded by your procurement unit for the fiscal year. This would include the total number of prime contracts awarded to non-MBE and MBE contractors.
- Total All Prime Contracts Dollar Value Awarded (Including MBE) – Enter the total dollar value of all prime contracts awarded by your procurement unit for the fiscal year. This would include the total dollar value of prime contract awards to non-MBE and MBE contractors.
- Total # of Prime Contract Waivers – Enter the total number of all prime contracts, including MBE prime contracts, which received MBE Participation Goal Waivers by your procurement unit for the

fiscal year.

- Total Dollar Value of Prime Contract Waivers – Enter the total dollar value of all prime contracts including MBE prime contracts that received MBE Participation Goal Waivers by your procurement unit for the fiscal year.
- MBE Participation Calculation Quality Control – For each procurement category Architectural through HCSE, the MBE participation should never be greater than 100%. If calculation is greater than 100%, double check your denominator to make sure it includes all reportable awards including the Awards to MBE Primes and MBE Subs.

MBE PARTICIPATION CALCULATION:

NUMERATOR (MBE AWARDS detailed on FORM #2)

_____

DENOMINATOR

(Total Reportable Awards FORM #1 which includes MBE Prime and Sub Awards)

New Awards and Option Renewals

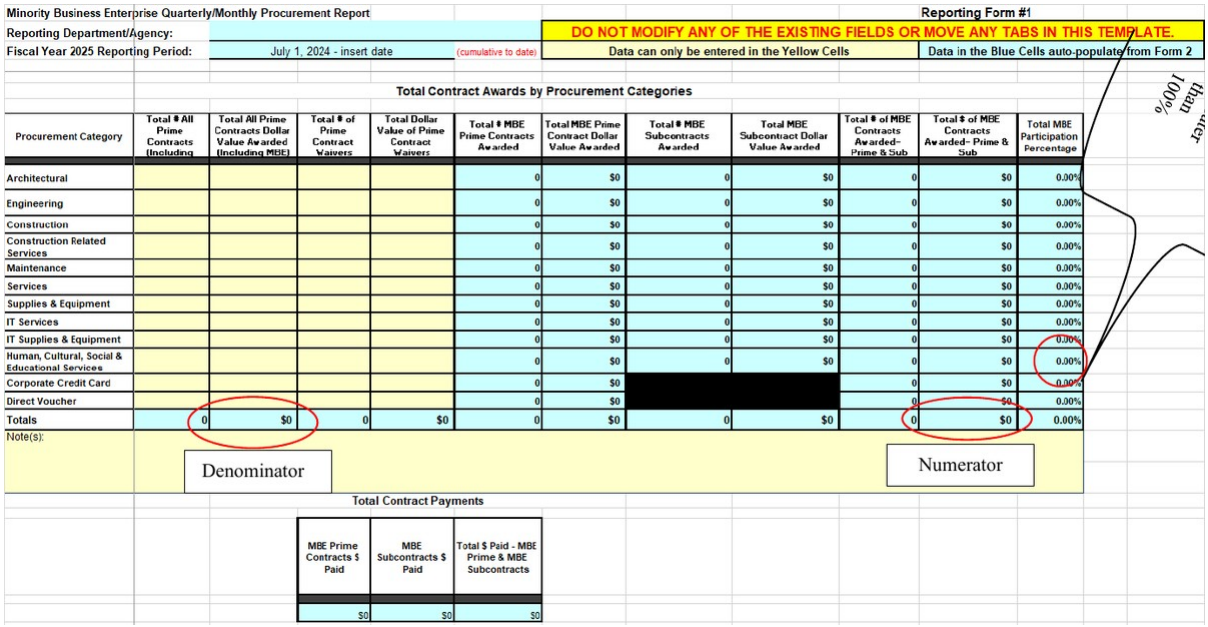
Change Orders

Direct Vouchers and

Credit Card Purchases

Numerator

Denominator



Minority Business Enterprise Quarterly/Monthly Procurement Report — Reporting Form #1

Reporting Department/Agency:

DO NOT MODIFY ANY OF THE EXISTING FIELDS OR MOVE ANY TABS IN THIS TEMPLATE.

Fiscal Year 2025 Reporting Period: July 1, 2024 - insert date (cumulative to date) — Data can only be entered in the Yellow Cells — Data in the Blue Cells auto-populate from Form 2

Total Contract Awards by Procurement Categories

Procurement Category	Total # All Prime Contracts (Including	Total All Prime Contracts Dollar Value Awarded (Including MBE)	Total # of Prime Contract Waivers	Total Dollar Value of Prime Contract Waivers	Total # MBE Prime Contracts Awarded	Total MBE Prime Contract Dollar Value Awarded	Total # MBE Subcontracts Awarded	Total MBE Subcontract Dollar Value Awarded	Total # of MBE Contracts Awarded- Prime & Sub	Total $ of MBE Contracts Awarded- Prime & Sub	Total MBE Participation Percentage
Architectural					0	$0	0	$0	0	$0	0.00%
Engineering					0	$0	0	$0	0	$0	0.00%
Construction					0	$0	0	$0	0	$0	0.00%
Construction Related Services					0	$0	0	$0	0	$0	0.00%
Maintenance					0	$0	0	$0	0	$0	0.00%
Services					0	$0	0	$0	0	$0	0.00%
Supplies & Equipment					0	$0	0	$0	0	$0	0.00%
IT Services					0	$0	0	$0	0	$0	0.00%
IT Supplies & Equipment					0	$0	0	$0	0	$0	0.00%
Human, Cultural, Social & Educational Services					0	$0	0	$0	0	$0	0.00%
Corporate Credit Card					0	$0			0	$0	0.00%
Direct Voucher					0	$0			0	$0	0.00%
Totals	0	$0	0	$0	0	$0	0	$0	0	$0	0.00%

Note(s):

Denominator

Numerator

Total Contract Payments

MBE Prime Contracts $ Paid	MBE Subcontracts $ Paid	Total $ Paid - MBE Prime & MBE Subcontracts
$0	$0	$0

Figure 30 shows a picture of the yellow input cells where the data discussed above is entered. Please remember that the MBE participation percentages will not be calculated if the appropriate information is not entered into the yellow cells as illustrated below.

Figure 30

Procurement Category	Total # All Prime Contracts (Including MBE)	Total All Prime Contracts Dollar Value Awarded (Including MBE)	Total # of Prime Contract Waivers	Total Dollar Value of Prime Contract Waivers
Architectural				
Engineering				
Construction				
Construction Related Services				
Maintenance				
Services				
Supplies & Equipment				
IT Services				
IT Supplies & Equipment				
Human, Cultural, Social & Educational Services				
Corporate Credit Card				
Direct Voucher				
Totals				

After you have entered all your MBE data in the appropriate yellow cells, make sure that you enter any notes your procurement unit will need to include to ensure OSBA is made aware of any data issues, discrepancies, or general notes about your procurement units MBE participation for the FY. The yellow Note(s) cell (See Figure 31) is located below the data cells.

Figure 31

Note(s):	

Please make sure to save the file after you have entered the data on Reporting Form #1.

Additionally, please remember to save a copy of the spreadsheet file for your records. If corrections are required, you can simply make those corrections and resubmit your corrected input to OSBA. Please indicate that you are re-submitting a corrected spreadsheet when you transmit your file.

Instructions for Outreach Data Spreadsheet

The yellow cells of this spreadsheet are the areas designed for data input. (Please note: If data is pasted into the yellow cells, you must paste as plain text to avoid disrupting the formatting) The blue cells contain formulas and are write-protected. In addition, the worksheet is also write-protected to avoid unauthorized alterations.

The top input area is entitled “Outreach Data.” This is where the Total # of MBE outreach events conducted and/or participated will be entered by type of event and whether the event was live or virtual. Enter the total # of events in the yellow cells as appropriate. For example, if your unit conducted 3 virtual webinars and participated in 2 live exhibitor events you would enter the total # in the appropriate data input fields. (see Figure 32).

Figure 32

Outreach Data							
# and type of organized outreach events your unit **conducted** (live or virtual)				# and type of organized outreach events your unit **participated** (live or virtual)			
Type of Event	Live	Virtual	Total	Type of Event	Live	Virtual	Total
Networking	5		5	Networking			0
Workshop			0	Workshop	1		1
Webinar		2	2	Webinar			0
Exhibitor	8		8	Exhibitor	10	15	25
Conference			0	Conference			0
Panelist	1	3	4	Panelist	2		2
Other			0	Other			0
Total	14	5	19	**Total**	13	15	28

The next input area is entitled “Procurement Unit Resources Available to MBE Vendors.” This is where the list of resources your agency has available to help businesses know how to do business with your agency will be entered. For example, if your unit has a brochure that is used during outreach events, or a

section of your unit's website highlights how to do business with your agency you would enter those in the data input field (see Figure 33).

Figure 33



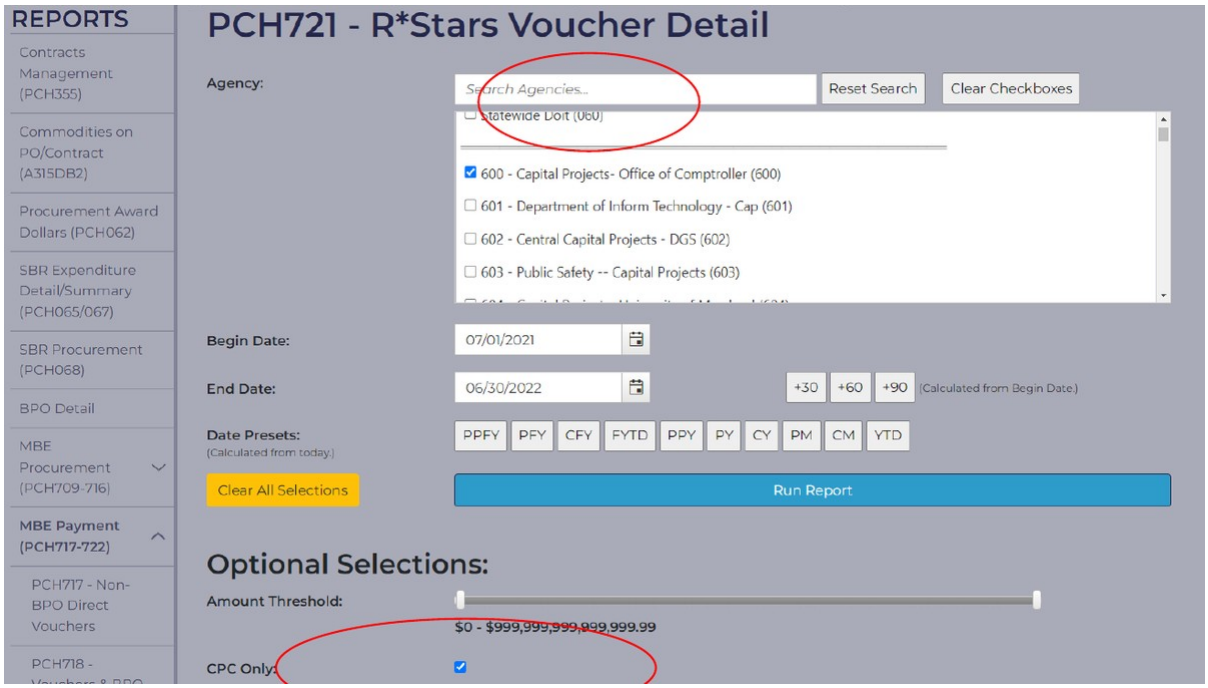
How to pull the Credit Card report (PCH721) from ANSWERS Cumulatively

For the Corporate Credit Card, awards categories agencies should run credit card reports PCH721 in ANSWERS cumulatively. To do so

For non-FMIS users, submit a ticket to service.desk@maryland.gov who will retrieve the report (ANSWERS PCH721, CPC only).

Select the MBE Payment dropdown under REPORTS and select the PCH721 report

Select your agency, insert begin and end date, under Optional Selections you MUST select 'CPC Only', to pull the CPC report cumulatively and accurately and then hit Run Report



Example of adding quarterly data cumulatively:

In QTR1 and QTR2, Procurement Unit A reported the following in credit card and direct voucher total awards:

QTR1 and QTR 2 credit card and direct voucher awards, Procurement Unit A

Category	QTR1 number	QTR1 amount	QTR 2 number	QTR 2 amount	TOTAL YTD number	TOTAL YTD amount
Corporate Credit Card	716	$12,578	1,718	$37,271	1,718	$37,271
Direct Voucher	92	$8,067	373	$29,014	373	$29,014

When Procurement Unit A prepares its QTR3 report, it would add QTR 3's "scrubbed" data to the total year-to-date and enter the total of the three quarters on Forms 1 and 2 in the appropriate cells.

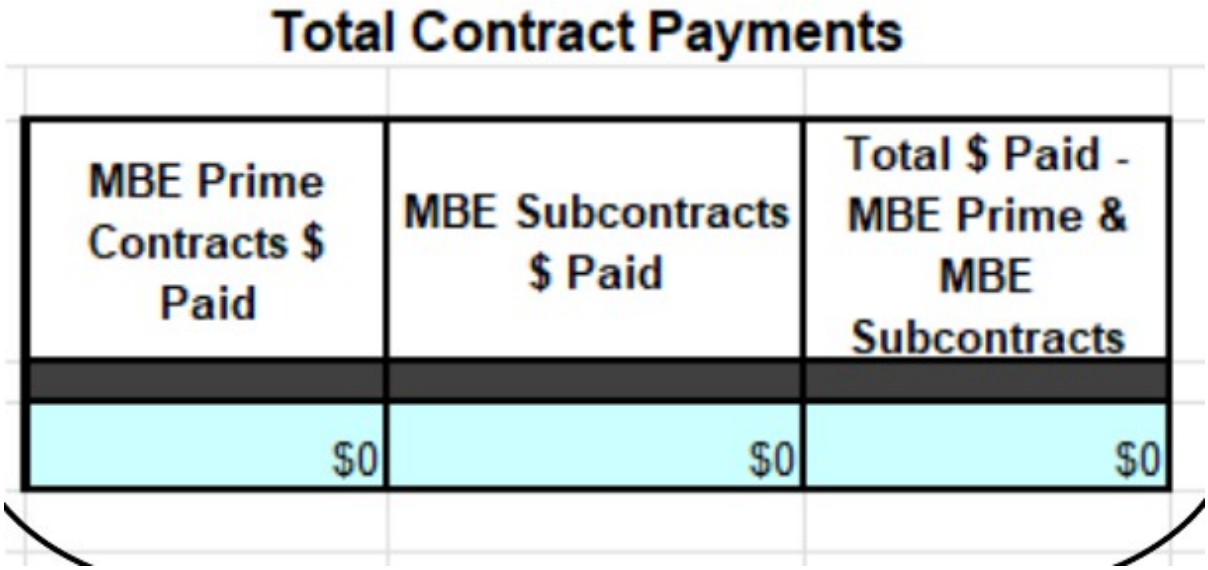
Procurement Units should record this information in the appropriate categories on Form #1. Form #2 should be completed in a similar manner.

QTR 3 data and QTR 3 cumulative totals, Procurement Unit A

Category	QTR 3 data number	QTR 3 data amount	QTR 3 Cumulative number	QTR 3 Cumulative amount
Corporate Credit Card	568	$9,412	2,286	$46,683
Direct Voucher	137	$10,653	510	$39,667

Payments

FMIS agencies would use ADPICS standard reports 717, 718, and 719, in addition to the ViewDirect A30USB11 report to capture all procurement payments. Non-FMIS agencies should use their financial systems to capture all procurement payments. On Form #2, the total of all procurement payments should be entered into the yellow cell. The blue cells on Form #1 are auto populated when the yellow cells on Form #2 have been completed.



These cells auto-populate from Form #2. In addition to the standard FMIS payments reports generated via ANSWERS (717, 718, and A30USB11/PCH 721) FMIS agencies will also use the 719 reports. All other agencies will use payments reports received from MBE subcontractors.

Tips

The purpose of reporting is to evidence the State of Maryland's commitment to procuring goods and services from minorities and women. To make reporting as accurate as possible, non-procurement items should not be included in agencies' reports.

- For a more complete list of exclusions visit the MBE Reporting Toolkit and download the Socioeconomic Data Reporting Guidance.
- For agencies that fall under Division II of the State Finance & Procurement Article, remember that use of non-delegated Statewide contracts is not reportable as awards; however, payments made on these contracts are reportable in the payments table on Forms 1 & 2. (Rule of thumb: Awards – do not include awards made from Statewide Contracts; Payments – report all procurement payments, including payments on Statewide contracts.)
- Credit cards. The credit card reports do not differentiate procurement purchases from non-procurement payments. It is required for agencies to review the credit card reports (either from FMIS or from the banking institution) to exclude non-procurement payments from the total credit card expenditure. This enables agencies to better determine the actual MBE participation in credit card purchases. Similarly, it would be beneficial for affected agencies to review their direct voucher reports to exclude any non-procurement items. IMPORTANT NOTE: AJ Stationers (for PAYMENTS ONLY) and Applied Technology are MBEs but may not be captured as such on the credit card reports, so be mindful to include them in your MBE count.
- Avoid overstating MBE participation. For any contracts with MBE participation where the prime contractor is a MBE, be careful not to record both the MBE prime amount as well as the MBE

subcontract amount. To do so would overstate the MBE participation on that contract. (Example, Agency/Department A awarded a $2.5 million contract to an MBE prime. There was a 20% MBE commitment of 500K. Agency/Department A would report this on Form #2 in one of two ways: 1) Enter the entire $2.5 million in the Prime Contracts table, or 2) Enter $500,000 in the Subcontracts table and $2 million in the Prime Contracts table.)

FMIS ADPICS Standard Reports

For your reference, a listing of FMIS ADPICS standard reports and a brief description of each are below:

- 709: MBE Blanket Purchase Order/Purchase Order Change Orders report – provides a list of change order increases to BPOs/POs awarded in a previous reporting period.
- 710: Purchase Order/Blanket Purchase Order detail report – provides a detail of all reportable POs/BPOs. (The ANSWERS version also lists any rejected POs/BPOs.)
- 711: MBE Procurement Report summary – provides a summary of all reportable procurements by procurement category. This report is very similar to Form #1, and lists all prime contracts, MBE prime contracts, and MBE subcontracts. Do not use the figures from this report. You should be scrubbing and sorting the data on the 710 Report.
- 713: MBE Prime Contracts report – provides a summary of MBE prime contracting by procurement category and minority classification. Do not use the figures from this report. You should be scrubbing and sorting the data on the 710 Report.
- 717: Non-BPO Direct Voucher report – contains all MBE payments made by direct voucher that are not associated with a purchase order or blanket purchase order. Since many legitimate non-procurement payments are made via direct voucher, there is a column that displays the reportable voucher amounts.
- 718: PO Voucher & BPO Direct Voucher report – contains all MBE voucher payments made against a purchase order or blanket purchase order. Generally, all these payments are reportable procurement payments.
- 719: MBE Subcontractor Payments report – provides a summary of all payments made to MBE subcontractors by MBE type.
- 720: MBE Subcontractor Awards detail report – provides a listing of all subcontractors on any prime contract by MBE type.
    - Click the row number to the far left (this will highlight the entire row)
    - Click on the Home tab at the top of the page. Navigate to the cells group in the ribbon, then click the insert icon to add as many rows as you like

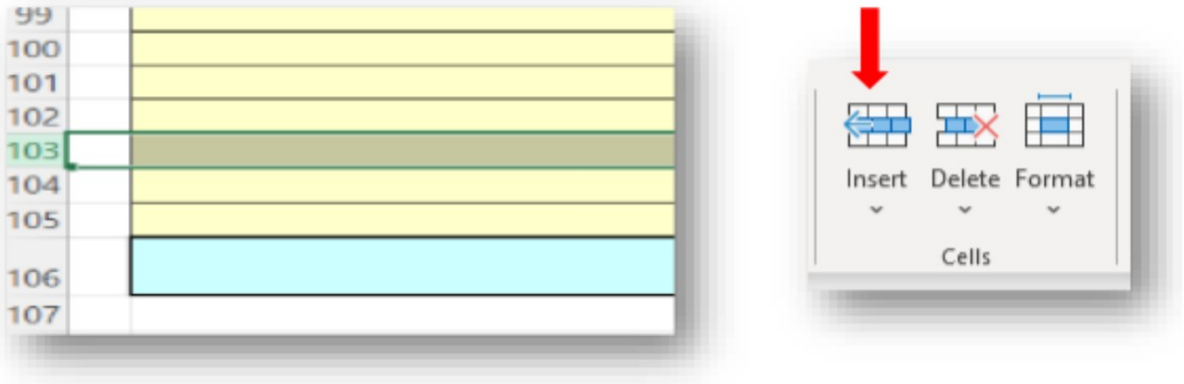
721: R*STARS Detail Voucher report – provides a listing of all Credit Card payments and identifies MBEs.

Completing the FY2027 MBE Procurement Activity Report

This section provides detailed instructions on how to complete the required procurement activity report inclusive of; contract awards, contract modifications, and contract renewals that were issued for FY2027 Quarterly reporting.

Please be aware: The procurement activity report should only include reportable data consistent with how procurement data is reported for the quarterly and annual MBE reports.

IMPORTANT You may add rows if needed to supply all relevant data



Instructions on completing the Contract Awards, Contract Modifications, and Contract Renewals spreadsheets are as follows:

Instructions for Contract Awards Spreadsheet

Complete all fields in the Contract Awards spreadsheet. (see figure 34)

Enter your agency name in the Contract Awards tab in Column C3.

Do not modify any of the existing fields. If your unit does not have data for an entire tab, type “NONE” in the Identification Number field on the first row (Row 6).

Figure 34

MBE Program Procurement Activity Report

Cumulative Data Collection: *Procurement Activity Detail for July 1, 2024 through June 30, 2025*

Agency Name:

Contract Awards Issued	Identification Number	Value ($)	MBE Goal (%)	MBE Prime Contractor (Select from Dropdown)

Contract Awards Issued: Enter the title of the contract award that was issued.

Identification Number: Enter the identification number (i.e. Contract #) used for the contract award issued.

Value ($): Enter the total dollar value of the contract award issued

MBE Goal %: Enter the MBE goal % of the contract award issued. If no MBE goal was applied leave the field blank.

MBE Prime Contractor: If the prime contractor who was awarded is a certified MBE, select ONLY from the drop-down ‘MBE Prime’. If the prime contractor is not an MBE, leave the field blank.

Instructions for Contract Modifications Spreadsheet

Complete all fields in the Contract Modifications spreadsheet. (see figure 35)

Do not modify any of the existing fields. If your unit does not have data for an entire tab, type “NONE” in the Identification Number field on the first row (Row 6).

Figure 35

MBE Program Procurement Activity Report

Cumulative Data Collection: *Procurement Activity Detail for July 1, 2024 through June 30, 2025*

Agency Name:

Contract Modifications Issued	Identification Number	Value ($)	MBE Goal (%)	MBE Goal Met at Time of Modification	MBE Goal Not Met at Time of Modification	MBE Prime Contractor (Select from Dropdown)

Contract Modifications Issued: Enter the title of the contract modification that was issued.

Identification Number: Enter the identification number (i.e. Contract #) used for the contract modification

issued.

Value ($): Enter the total dollar value of the contract modification issued

MBE Goal %: Enter the MBE goal % of the contract modification issued. If no MBE goal was applied leave the field blank.

MBE Goal Met at Time of Modification: If MBE goal was met at time of modification, select ONLY from the drop-down ‘Yes’.

MBE Goal Not Met at Time of Modification: If MBE goal was not met at time of modification, select ONLY from the drop-down ‘GOAL NOT MET’.

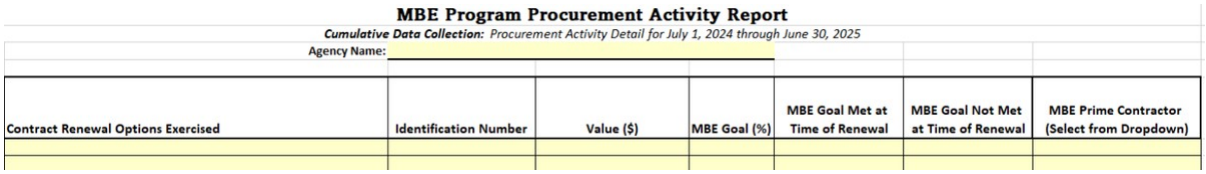
MBE Prime Contractor: If prime contractor who was awarded is a certified MBE, select ONLY from the drop-down ‘MBE Prime’. If the prime contractor is not an MBE leave the field blank.

Instructions for Contract Renewals Spreadsheet

Complete all fields in the Contract Renewals spreadsheet. (see figure 36)

Do not modify any of the existing fields. If your unit does not have data for an entire tab, type “NONE” in the Identification Number field on the first row (Row 6).

Figure 36



MBE Program Procurement Activity Report

Cumulative Data Collection: *Procurement Activity Detail for July 1, 2024 through June 30, 2025*

Agency Name: _____

Contract Renewal Options Exercised	Identification Number	Value ($)	MBE Goal (%)	MBE Goal Met at Time of Renewal	MBE Goal Not Met at Time of Renewal	MBE Prime Contractor (Select from Dropdown)

Contract Renewal Options Exercised: Enter the title of the contract renewal option that was exercised.

Identification Number: Enter the identification number (i.e. Contract #) used for the contract renewal option exercised.

Value ($): Enter the total dollar value of the contract renewal option that was exercised

MBE Goal %: Enter the MBE goal % of the contract renewal option that was exercised. If no MBE goal was applied leave the field blank.

MBE Goal Met at Time of Modification: If MBE goal was met at time of contract renewal, select ONLY from the drop-down ‘Yes’.

MBE Goal Not Met at Time of Modification: If MBE goal was not met at time of contract, select ONLY from the drop-down ‘GOAL NOT MET’.

MBE Prime Contractor: If prime contractor who was awarded is a certified MBE, select ONLY from the drop-down ‘MBE Prime’. If the prime contractor is not an MBE leave the field blank.

Summary Spreadsheet Overview

The Summary tab auto-populates the data that was entered. This tab does not require any data input from the agency. (See figure 37)

Figure 37

MBE Program Procurement Activity Report

The Wes Moore Administration has requested MBE Procurement Activity Reports on a quarterly basis.
Pursuant to COMAR 21.11.03.17 (F.) F. Each procurement agency shall furnish any other information or periodic reports requested by the Governor's Office of Small, Minority & Women Business Affairs or the Department of Transportation in connection with MBE certification and procurement, or any other matters related to the administration, effectiveness, or continuation of the Minority Business Enterprise Program.

As outlined in the Instructions tab, the data requested is collected cumulatively and the final submission for FY25 must be reported by MBE Participating Agencies **on or before October 15, 2025.**

Completed Reports should be submitted electronically by email to **mbereports.*gosba@maryland.gov***

Agency Name:

*Data from the detail tab automatically populates the table below. **ONLY** complete the certification section below the table with your units Quarter 4 submission on October 15, 2024.*

Procurement Activity July 1, 2024 - June 30, 2025	Total Quantity (#)	Total Cumulative Value ($)	Total Quantity (#) MBE Goal Met at Time of Action	Total Quantity (#) MBE Goal Not Met at Time of Action	Total Quantity (#) of MBE Prime Contractors Awarded
All contract awards issued	0	$0			0
All contract awards with MBE goals	0				
All contract modifications	0	$0			0
All contracts modified that had MBE goals	0		0	0	
All contract renewal options exercised	0	$0			0
All contracts whose renewal options were exercised that had MBE goals	0		0	0	

MBE Supplemental Reporting Guidance

FMIS/ANSWERS Data Collection Checklist

The following checklist will assist you in your efforts to collect and compile all the data necessary to complete and submit an accurate summary of your procurement unit's procurement activity, including Minority Business Enterprise (MBE) prime contract and subcontract awards and payments:

☐ Generate the following FMIS/ANSWERS MBE Reports:

a. PCHL709 (BPO/PO Change Orders from contracts awarded in prior fiscal years)
b. PCHL710 (Contract Awards Detail) run by award date
c. PCHL711 (Contract Awards Summary) Use Waiver Data Only
d. PCHL713 (MBE Prime Contract Awards by Ethnicity) Reference Document Only
e. PCHL717 (MBE Prime Payments by Direct Voucher; no BPO/PO)
f. PCHL718 (MBE Prime Voucher Payments made from BPO/PO)
g. PCHL719 (MBE Subcontractor Payments)
h. PCHL 720 (MBE Subcontract Awards & any change order activity associated with an MBE Subcontractor) run by award date
i. PCHL 721 or VIEWDIRECT A30USB11 (P-Card Total/MBE Purchases)

FMIS Cheat Sheet

Cut along dotted line and post in visible spot

AWARDS = ANSWER reports 709, 710, 717, 720 & 721 OR VIEW DIRECT A30USB11

PAYMENTS = ANSWER reports 717, 718, 719 & 721 OR VIEW DIRECT A30USB11

Reminder: Direct Vouchers and P-card purchases are reported as both AWARDS and PAYMENTS.*

**With the exception of the control agency statewide contracts*

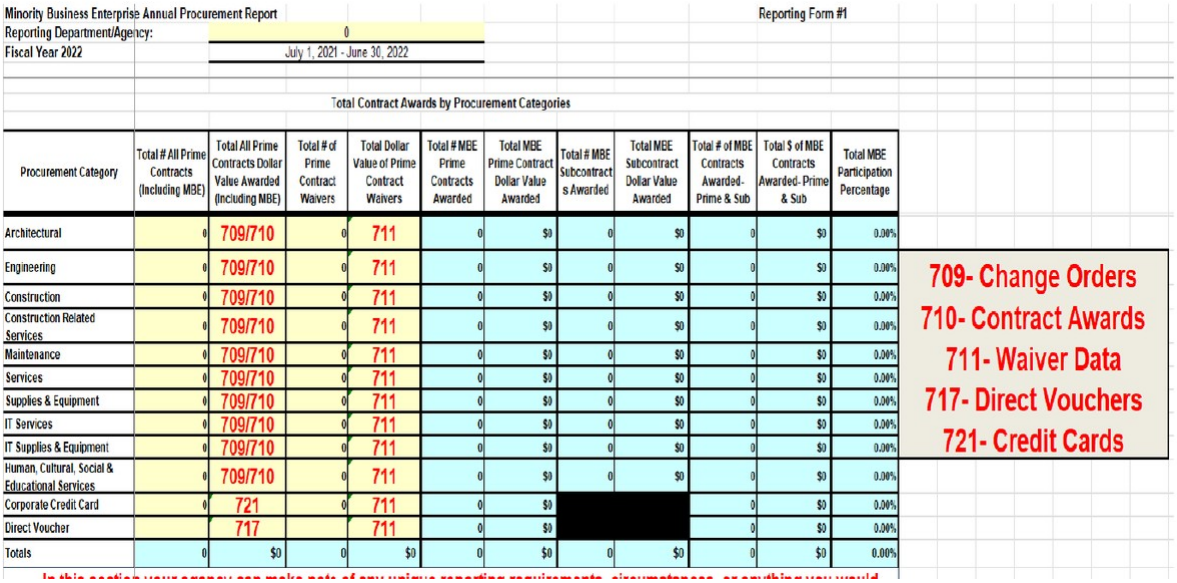
Forms	Data that is required in each form
Form #1- Contract Awards	The anticipated amount of the base period of the contract when it was first awarded or renewed.
Form #2-MBE Prime & Subcontract Awards	The MBE Prime Contractor's Portion of the Contract & the Subcontractor's MBE commitments when the contract was first awarded or renewed.
Form #3-Actual Payments	The confirmed MBE payment amounts actually paid for services rendered or

Forms	Data that is required in each form
	products purchased.

Reporting Template Guides

Form 1 (Quarterly & Annual Template) Total All Awards Table

Where each report goes on Form 1: for every procurement category row (Architectural through Human, Cultural, Social & Educational Services), the total number and dollar value of all prime contracts come from the 709 and 710 reports, and the prime contract waivers come from the 711 report. The Corporate Credit Card row comes from the 721 report and the Direct Voucher row comes from the 717 report. The MBE columns and the participation percentage are calculated.



Minority Business Enterprise Annual Procurement Report — Reporting Form #1
Reporting Department/Agency: 0
Fiscal Year 2022: July 1, 2021 - June 30, 2022

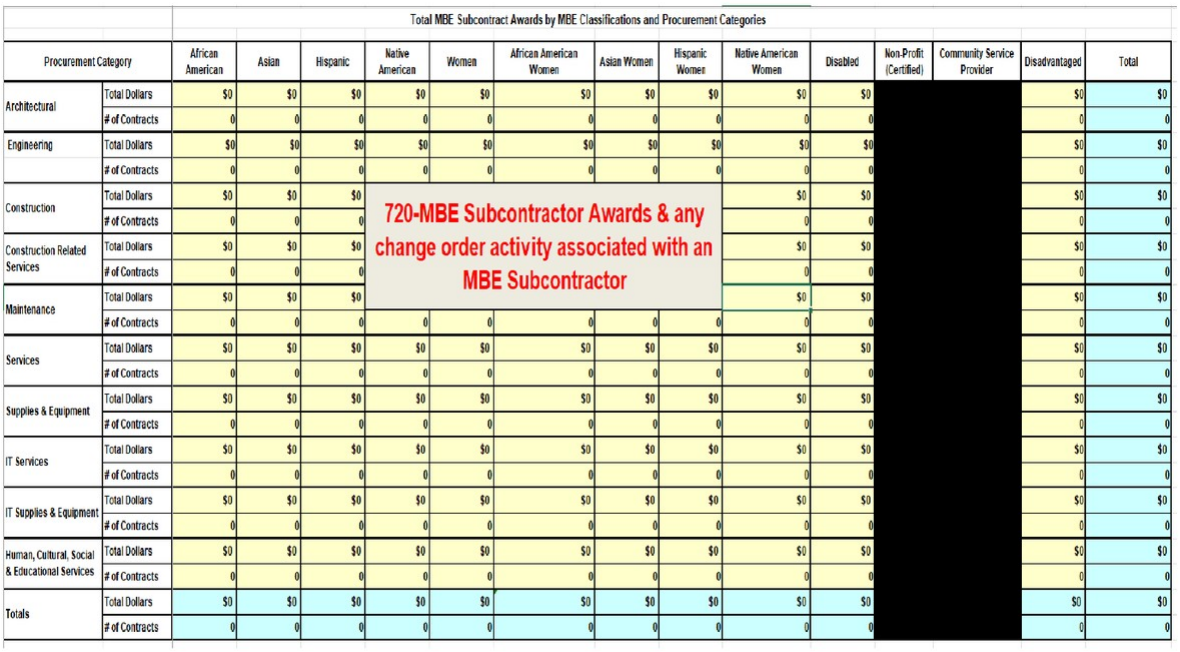
Total Contract Awards by Procurement Categories

Procurement Category	Total # All Prime Contracts (Including MBE)	Total All Prime Contracts Dollar Value Awarded (Including MBE)	Total # of Prime Contract Waivers	Total Dollar Value of Prime Contract Waivers	Total # MBE Prime Contracts Awarded	Total MBE Prime Contract Dollar Value Awarded	Total # MBE Subcontracts Awarded	Total MBE Subcontract Dollar Value Awarded	Total # of MBE Contracts Awarded- Prime & Sub	Total $ of MBE Contracts Awarded- Prime & Sub	Total MBE Participation Percentage
Architectural	0	709/710	0	711	0	$0	0	$0	0	$0	0.00%
Engineering	0	709/710	0	711	0	$0	0	$0	0	$0	0.00%
Construction	0	709/710	0	711	0	$0	0	$0	0	$0	0.00%
Construction Related Services	0	709/710	0	711	0	$0	0	$0	0	$0	0.00%
Maintenance	0	709/710	0	711	0	$0	0	$0	0	$0	0.00%
Services	0	709/710	0	711	0	$0	0	$0	0	$0	0.00%
Supplies & Equipment	0	709/710	0	711	0	$0	0	$0	0	$0	0.00%
IT Services	0	709/710	0	711	0	$0	0	$0	0	$0	0.00%
IT Supplies & Equipment	0	709/710	0	711	0	$0	0	$0	0	$0	0.00%
Human, Cultural, Social & Educational Services	0	709/710	0	711	0	$0	0	$0	0	$0	0.00%
Corporate Credit Card	0	721	0	711	0	$0			0	$0	0.00%
Direct Voucher		717		711	0	$0			0	$0	0.00%
Totals	0	$0	0	$0	0	$0	0	$0	0	$0	0.00%

709- Change Orders
710- Contract Awards
711- Waiver Data
717- Direct Vouchers
721- Credit Cards

Form 2 (Quarterly & Annual Template) Total MBE Subcontract Awards Table

The Total MBE Subcontract Awards table, by MBE classification and procurement category, comes from the 720 report: MBE subcontractor awards and any change order activity associated with an MBE subcontractor.



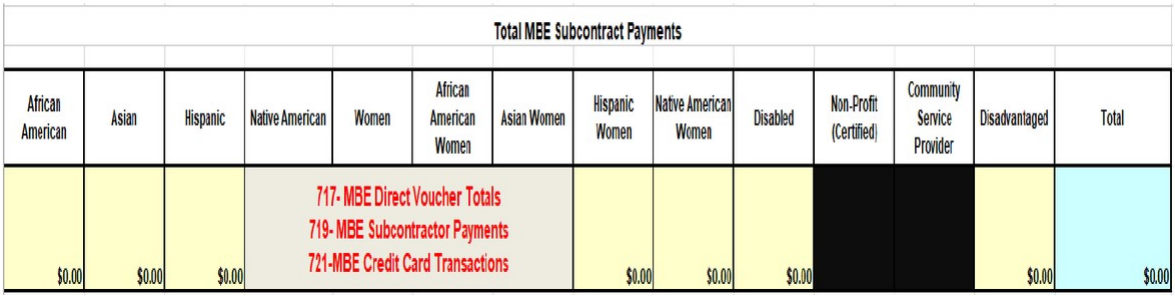
Total MBE Subcontract Awards by MBE Classifications and Procurement Categories

Procurement Category		African American	Asian	Hispanic	Native American	Women	African American Women	Asian Women	Hispanic Women	Native American Women	Disabled	Non-Profit (Certified)	Community Service Provider	Disadvantaged	Total
Architectural	Total Dollars	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0			$0	$0
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0
Engineering	Total Dollars	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0			$0	$0
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0
Construction	Total Dollars	$0	$0	$0						$0	$0			$0	$0
	# of Contracts	0	0	0						0	0			0	0
Construction Related Services	Total Dollars	$0	$0	$0						$0	$0			$0	$0
	# of Contracts	0	0	0						0	0			0	0
Maintenance	Total Dollars	$0	$0	$0						$0	$0			$0	$0
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0
Services	Total Dollars	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0			$0	$0
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0
Supplies & Equipment	Total Dollars	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0			$0	$0
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0
IT Services	Total Dollars	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0			$0	$0
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0
IT Supplies & Equipment	Total Dollars	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0			$0	$0
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0
Human, Cultural, Social & Educational Services	Total Dollars	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0			$0	$0
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0
Totals	Total Dollars	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0			$0	$0
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0

720-MBE Subcontractor Awards & any change order activity associated with an MBE Subcontractor

Form 2 (Quarterly Template ONLY) Total MBE Subcontract Payments Table

The callout on the Total MBE Subcontract Payments table lists 717 MBE Direct Voucher Totals, 719 MBE Subcontract Payments and 721 MBE Credit Card Transactions.

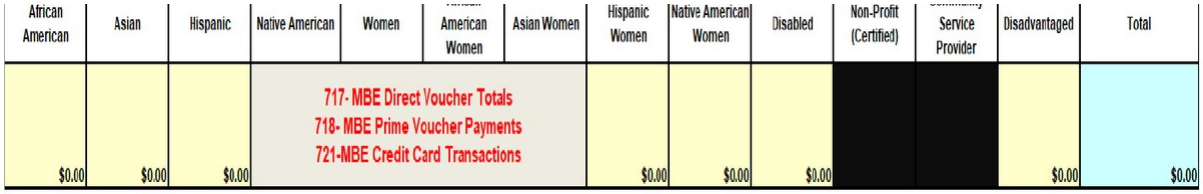


Total MBE Subcontract Payments

African American	Asian	Hispanic	Native American	Women	African American Women	Asian Women	Hispanic Women	Native American Women	Disabled	Non-Profit (Certified)	Community Service Provider	Disadvantaged	Total
$0.00	$0.00	$0.00	717- MBE Direct Voucher Totals 719- MBE Subcontractor Payments 721-MBE Credit Card Transactions				$0.00	$0.00	$0.00			$0.00	$0.00

Form 2 (Quarterly Template ONLY) Total MBE Prime Contract Payments

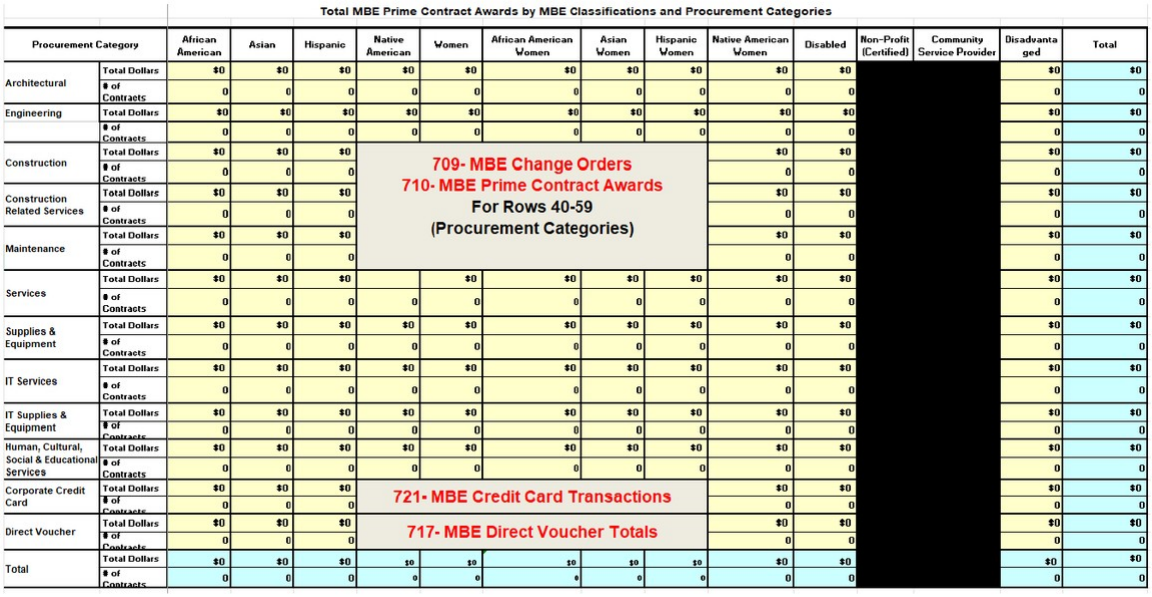
The Total MBE Prime Contract Payments table comes from 717 MBE Direct Voucher Totals, 718 MBE Prime Voucher Payments and 721 MBE Credit Card Transactions.



African American	Asian	Hispanic	Native American	Women	American Women	Asian Women	Hispanic Women	Native American Women	Disabled	Non-Profit (Certified)	Service Provider	Disadvantaged	Total
$0.00	$0.00	$0.00	717- MBE Direct Voucher Totals 718- MBE Prime Voucher Payments 721-MBE Credit Card Transactions				$0.00	$0.00	$0.00			$0.00	$0.00

Form 2 (Quarterly & Annual Template) Total MBE Prime Contractor Awards Table

In the Total MBE Prime Contract Awards table, rows 40 to 59 (the procurement categories) come from 709 MBE Change Orders and 710 MBE Prime Contract Awards. The Corporate Credit Card row comes from 721 MBE Credit Card Transactions and the Direct Voucher row comes from 717 MBE Direct Voucher Totals.



Total MBE Prime Contract Awards by MBE Classifications and Procurement Categories

Procurement Category		African American	Asian	Hispanic	Native American	Women	African American Women	Asian Women	Hispanic Women	Native American Women	Disabled	Non-Profit (Certified)	Community Service Provider	Disadvantaged	Total
Architectural	Total Dollars	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0			$0	$0
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0
Engineering	Total Dollars	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0			$0	$0
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0
Construction	Total Dollars	$0	$0	$0	709- MBE Change Orders 710- MBE Prime Contract Awards For Rows 40-59 (Procurement Categories)					$0	$0			$0	$0
	# of Contracts	0	0	0						0	0			0	0
Construction Related Services	Total Dollars	$0	$0	$0						$0	$0			$0	$0
	# of Contracts	0	0	0						0	0			0	0
Maintenance	Total Dollars	$0	$0	$0						$0	$0			$0	$0
	# of Contracts	0	0	0						0	0			0	0
Services	Total Dollars	$0	$0	$0		$0	$0	$0	$0	$0	$0			$0	$0
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0
Supplies & Equipment	Total Dollars	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0			$0	$0
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0
IT Services	Total Dollars	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0			$0	$0
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0
IT Supplies & Equipment	Total Dollars	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0			$0	$0
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0
Human, Cultural, Social & Educational Services	Total Dollars	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0			$0	$0
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0
Corporate Credit Card	Total Dollars	$0	$0	$0	721- MBE Credit Card Transactions					$0	$0			$0	$0
	# of Contracts	0	0	0						0	0			0	0
Direct Voucher	Total Dollars	$0	$0	$0	717- MBE Direct Voucher Totals					$0	$0			$0	$0
	# of Contracts	0	0	0						0	0			0	0
Total	Total Dollars	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0			$0	$0
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0

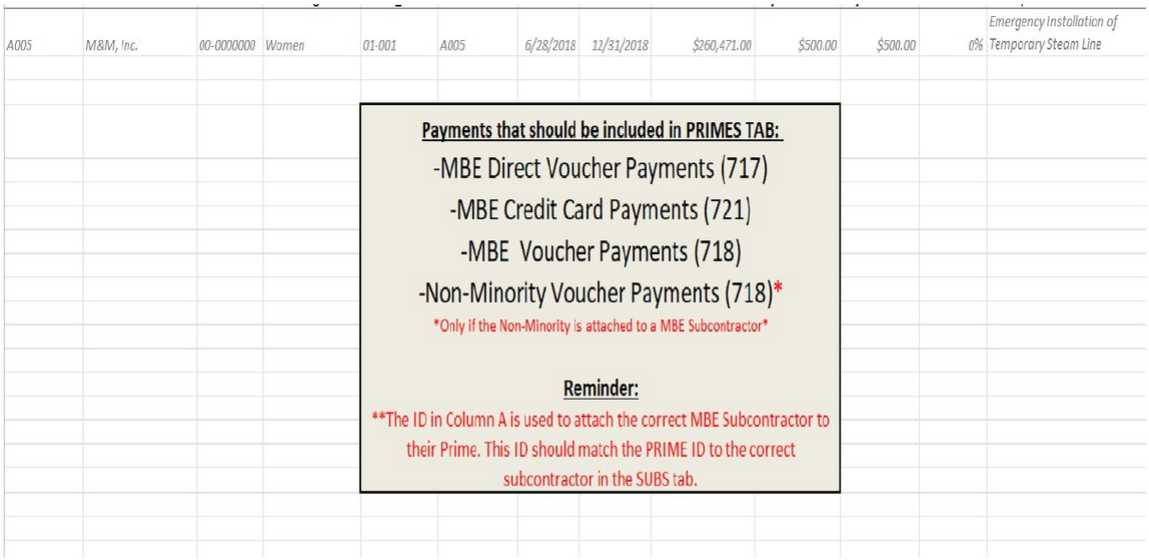
Form 3 (Annual Template ONLY) Prime Contractor Tab

Payments that should be included in the PRIMES tab:

- MBE Direct Voucher Payments (717)

- MBE Credit Card Payments (721)
- MBE Voucher Payments (718)
- Non-Minority Voucher Payments (718)* **Only if the Non-Minority is attached to a MBE Subcontractor*

Reminder: **The ID in Column A is used to attach the correct MBE Subcontractor to their Prime. This ID should match the PRIME ID in the SUBS tab.

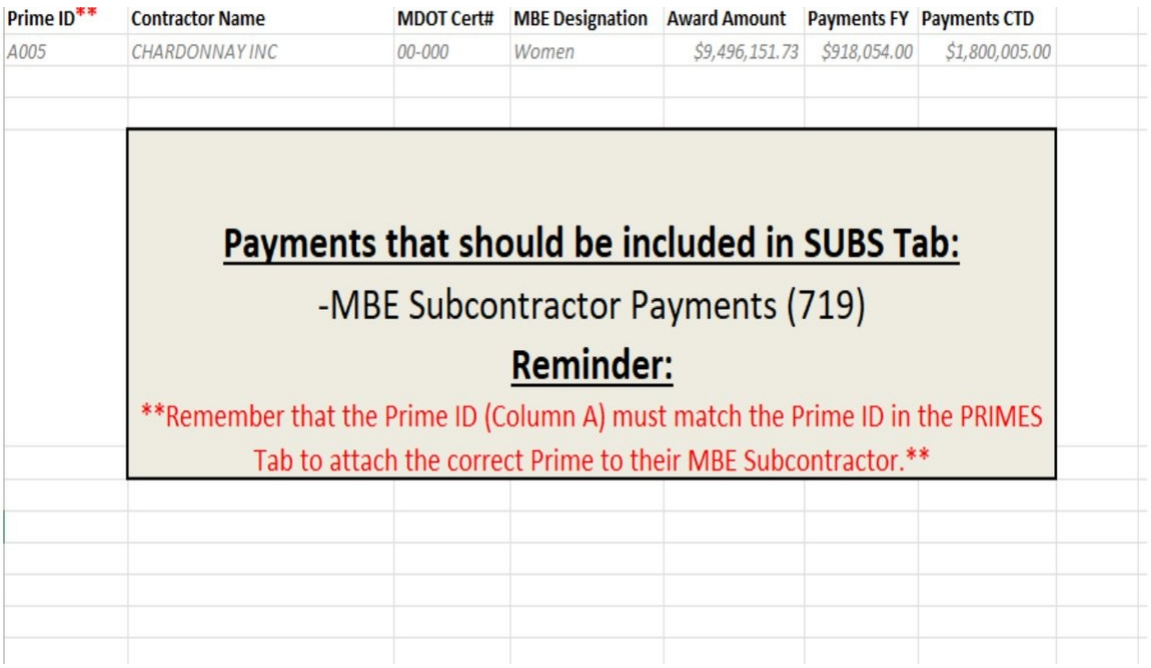


Form 3 (Annual Template ONLY) Subcontractor Tab

Payments that should be included in SUBS tab:

- MBE Subcontractor Payments (719)

Reminder: **Remember that the Prime ID (Column A) must match the Prime ID in the PRIMES Tab to attach the correct Prime to their MBE Subcontractor.**



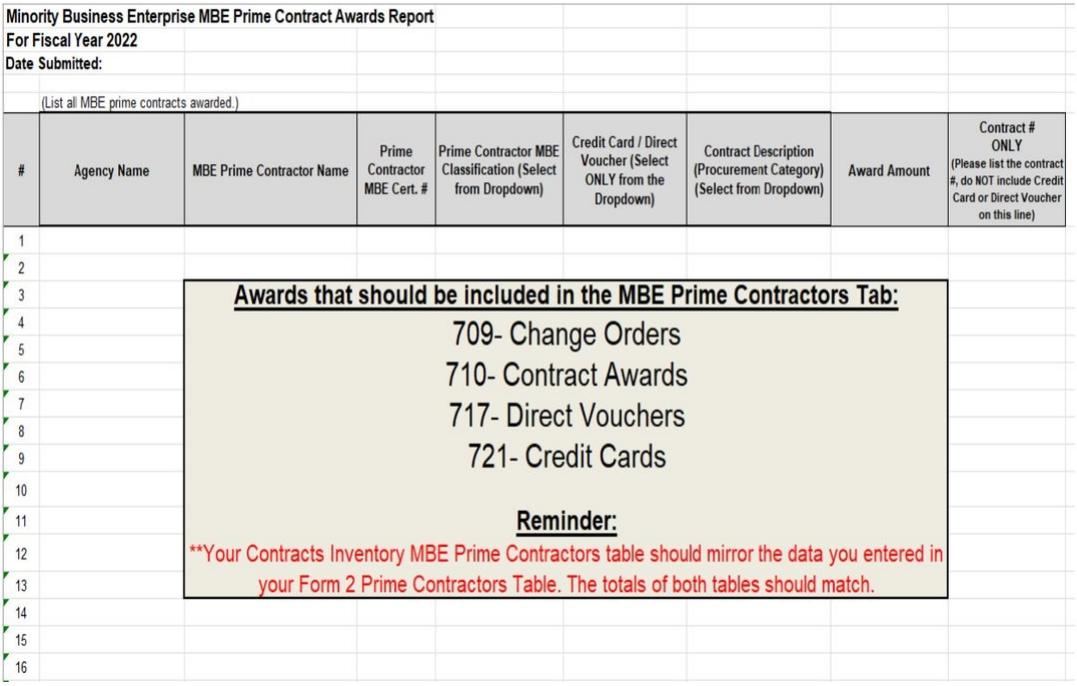
Contracts Inventory (Annual Template ONLY) Prime Contractors Tab

Awards that should be included in the MBE Prime Contractors Tab:

- 709- Change Orders

- 710- Contract Awards
- 717- Direct Vouchers
- 721- Credit Cards

Reminder: **Your Contracts Inventory MBE Prime Contractors table should mirror the data you entered in your Form 2 Prime Contractors Table. The totals of both tables should match.

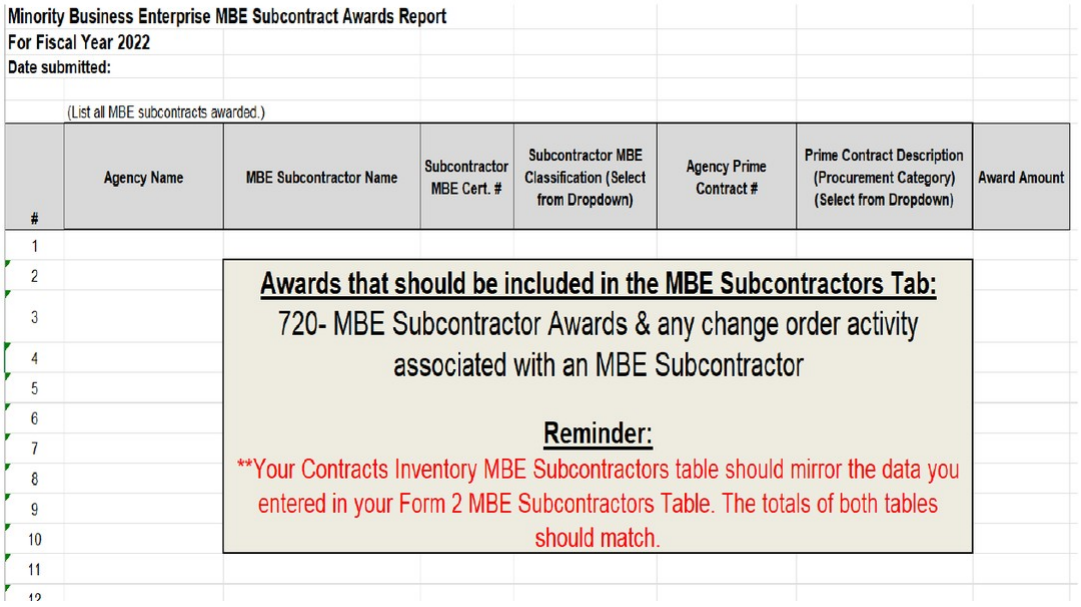


Contracts Inventory (Annual Template ONLY) Subcontractor Tab

Awards that should be included in the MBE Subcontractors Tab:

- 720- MBE Subcontractor Awards & any change order activity associated with an MBE Subcontractor

Reminder: **Your Contracts Inventory MBE Subcontractors table should mirror the data you entered in your Form 2 MBE Subcontractors Table. The totals of both tables should match.



Outreach Data (Quarterly & Annual Template)

The outreach data reported by the procurement unit is collected through internal data collection. This data is detailed within the report submission and does not require submission of additional backup data.

Compliance Assessment Data (Annual Template ONLY)

The compliance assessment data reported by the procurement unit requires collection of several MBE compliance metrics (awards, payment, and compliance data) which are collected through the procurement and accounting system of record (i.e. ANSWERS, iFMIS, PeopleSoft) in addition to internal data collection. This data is detailed within the report submission and does not require submission of additional backup data.

Quarterly Procurement Activity Report (Quarterly Template ONLY)

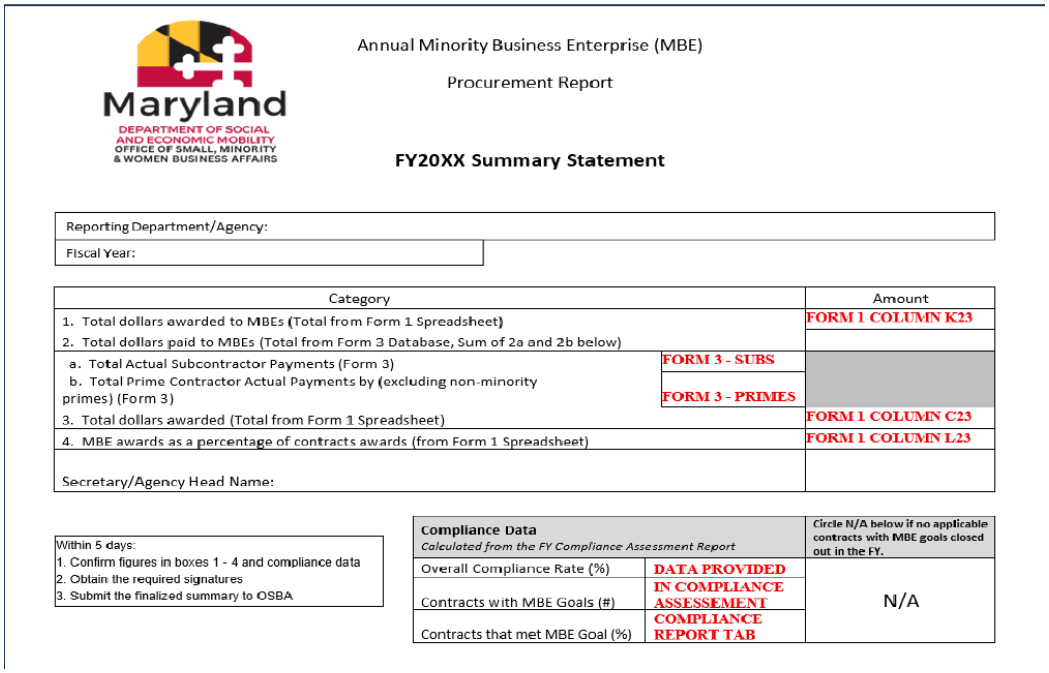
The procurement activity data reported by the procurement unit requires collection of several post-contract award activities (contract awards, modifications and renewals) which are collected through internal data collection. The data is detailed within the report submission and does not require submission of additional backup data.

Summary Statement Guide (Required for Annual ONLY)

- You will NOT provide a summary statement with your MBE annual report submission
- After OSBA has reviewed the submitted annual report data and determines the totals for your Summary statement, you will review to confirm the figures entered match the data in the report and column indicated below and obtain signatures as required.
- Below is a reference to the forms where the final totals are pulled from.

Summary Statement category	Where the amount comes from
1. Total dollars awarded to MBEs (Total from Form 1 Spreadsheet)	Form 1 Column K23
2. Total dollars paid to MBEs (Total from Form 3 Database, Sum of 2a and 2b below)	Sum of 2a and 2b
2a. Total Actual Subcontractor Payments (Form 3)	Form 3 - Subs
2b. Total Prime Contractor Actual Payments by (excluding non-minority primes) (Form 3)	Form 3 - Primes
3. Total dollars awarded (Total from Form 1 Spreadsheet)	Form 1 Column C23
4. MBE awards as a percentage of contracts awards (from Form 1 Spreadsheet)	Form 1 Column L23
Compliance Data: Overall Compliance Rate (%), Contracts with MBE Goals (#) and Contracts that met MBE Goal (%), calculated from the FY Compliance Assessment Report	Data provided in the Compliance Assessment, Compliance Report tab. Circle N/A if no applicable contracts with MBE goals closed out in the FY.

Within 5 days: 1. Confirm figures in boxes 1 - 4 and compliance data; 2. Obtain the required signatures; 3. Submit the finalized summary to OSBA.



Maryland
DEPARTMENT OF SOCIAL AND ECONOMIC MOBILITY
OFFICE OF SMALL, MINORITY & WOMEN BUSINESS AFFAIRS

Annual Minority Business Enterprise (MBE)

Procurement Report

FY20XX Summary Statement

Reporting Department/Agency:	
Fiscal Year:	

Category		Amount
1. Total dollars awarded to MBEs (Total from Form 1 Spreadsheet)		FORM 1 COLUMN K23
2. Total dollars paid to MBEs (Total from Form 3 Database, Sum of 2a and 2b below)		
a. Total Actual Subcontractor Payments (Form 3)	FORM 3 - SUBS	
b. Total Prime Contractor Actual Payments by (excluding non-minority primes) (Form 3)	FORM 3 - PRIMES	
3. Total dollars awarded (Total from Form 1 Spreadsheet)		FORM 1 COLUMN C23
4. MBE awards as a percentage of contracts awards (from Form 1 Spreadsheet)		FORM 1 COLUMN L23
Secretary/Agency Head Name:		

Within 5 days:
1. Confirm figures in boxes 1 - 4 and compliance data
2. Obtain the required signatures
3. Submit the finalized summary to OSBA

Compliance Data *Calculated from the FY Compliance Assessment Report*		Circle N/A below if no applicable contracts with MBE goals closed out in the FY.
Overall Compliance Rate (%)	DATA PROVIDED IN COMPLIANCE ASSESSEMENT COMPLIANCE REPORT TAB	N/A
Contracts with MBE Goals (#)		
Contracts that met MBE Goal (%)		

Reporting Checklist (Checks and Balances)

Caveats

- When using the checks and balances method, consider the following first:
  - If you have an MBE Prime with MBE Subcontractors, you will need to take into consideration the amount self-performed and whether you choose to split the contract award between the Prime and MBE Subs or report the full total under the Prime.
  - Contractors who were subject to the 60% percent rule.

Awards: ANSWERS and Non-ANSWERS Reports

All Prime Contracts Data

- Form #1 tab (YELLOW area) only should be consistent with the contracts on the scrubbed source reports MINUS Statewide contracts/transactions.
- While this may seem elementary to some, we often find reports with these totals mismatched because of clerical errors and changes so remember to check at the conclusion of your report preparation before submitting.

Report	Form 1 Data totals	Source Reports
Form 1	Form 1 fields B (#) and C ($) 11-20	709 Change Orders / 710 Contract Awards – minus statewide contracts
Form 1	Fields B (#) and C ($) 21	721 Credit Cards – minus statewide payments
Form 1	Fields B (#) and C ($) 22	717 Direct Vouchers – minus statewide payments

MBE Prime Contractor Data

- The Form #2 Primes table should be consistent with the Contract Inventory Primes tab and should match the scrubbed source data for MBE firms only MINUS Statewide contracts/transactions.
- If the totals on Form 1 columns F & G are not correct, changes must be made on the Form 2 Primes table.

Report	Form 2 Data totals	Contract Inventory	Source Reports
Form 1	Fields F (#) and G ($) 11-20	Contract Inventory Primes tab, contracts only	709 Change Orders / 710 Contract Awards – minus statewide contracts (MBE contracts only)
Form 1	Fields F (#) and	Contract Inventory Primes tab,	721 Credit Cards – minus statewide payments (MBE

Report	Form 2 Data totals	Contract Inventory	Source Reports
	G ($) 21	credit card data	transactions only)
Form 1	Fields F (#) and G ($) 22	Contract Inventory Primes tab, direct voucher data	717 Direct Vouchers – minus statewide payments (MBE vouchers only)

MBE Subcontractor Data

- The Form #2 – Subs table should be consistent with the Contract Inventory – Subs tab AND the reportable contracts on your scrubbed 720 Subcontractor Awards report.
- Specifically, Form #2 summary data for MBE Subcontractors on Form #1, fields H (#) and I ($) 11-20 = 720 Subcontractor Awards report.

Payments: ANSWERS Reporters

MBE Payment Data

- Form #3 Prime contractor data should be consistent with MBE reportable payment amounts on the scrubbed 718 (contract voucher payments), 717 (direct one-time voucher payments), and 721 (Credit Card) reports.
    - Keep in mind that non-minority prime contractor data should only be added if MBE subcontractors under the same contract are listed on the subs tab.
- Form 3 Subcontractor data should be consistent with the MBE payments on your scrubbed 719 Subcontractor Payments report.

Common Errors and Omissions

- Remember, use your MBE Reporting Manual as your “Reference Document” for reporting.

ANSWERS reports

- Do not use the 718 Report for reporting Awards on Form 1 [This is a payments report]
- The 711 and 713 Reports are for your reference only
- Submitting PDF formatted backup hinders the verification process
- Remember to submit all relevant 700 series or internal reports for backup
- Use the reportable column, if applicable, and highlight or show what is being used for awards/payments within your backup data

Form #1 & #2, Form #3 and Contracts Inventory

- Use the correct & current Template as things change from year to year
- Please do not change/add to templates
- Know what Awards vs. Payments are
- Statewide Contracts should not appear in your awards data (Note: DGS Statewide Contracts and other contracts can be searched via links from our MBE Toolkit)
- Negative Numbers and totals should not be included
- MBE goals are only on contracts with subs, everything else should be 0% (PRIMES). For Form 3 100% is not a valid entry.
- MBE Designations for Form #3 must match those listed in the Manual, p. 45, including using non-minority for primes with no MBE designation.
- Contracts Inventory totals should match Form #2

Report Corrections

- Keep in mind that corrections to reports, whether MBE, SBR, or VSBE, will be sent back to the parties who submitted the report.
- To ensure all parties are aware of correction requests, you should cc all parties on the original submission.

NEED ASSISTANCE??????

For Any and all questions regarding MBE Quarterly and Annual Reporting Submission, please contact your MBE Compliance Manager:

Tiara Randolph
tiara.randolph@maryland.gov
410-697-9596
443-597-5638