MBE CONTRACTS INVENTORY

IN-DEPTH VIDEO TRAINING

Maryland
GOVERNOR'S OFFICE
OF SMALL, MINORITY & WOMEN
BUSINESS AFFAIRS

MBE Contracts Inventory: In-Depth Video Training

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Agenda

- General Overview & Legislation
- Entering data into the PRIMES spreadsheet
- Entering data into the SUBS spreadsheet
- Review and submission

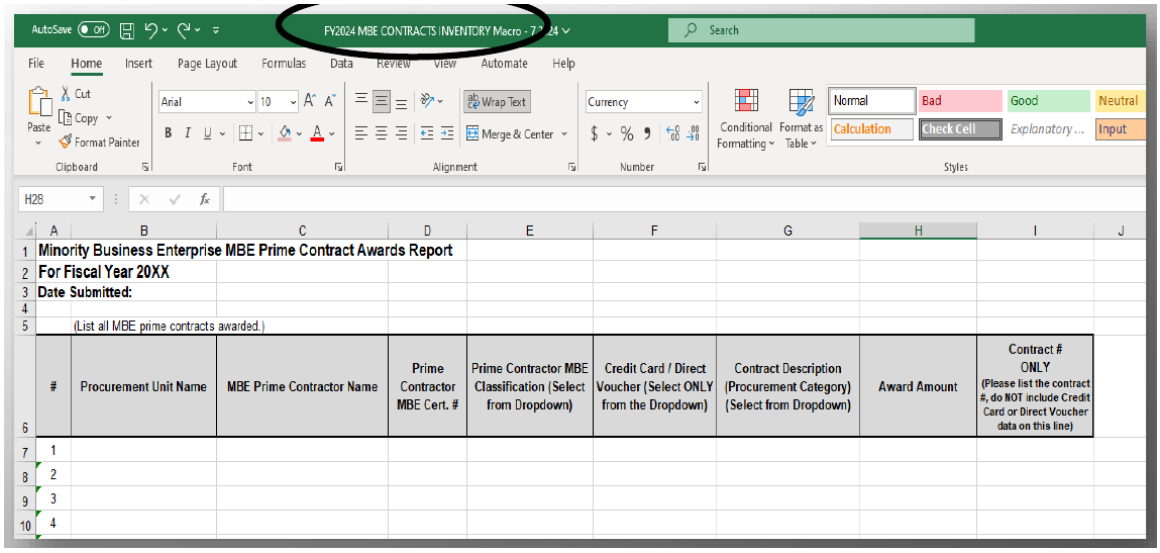
General Overview & Legislation

What Is the MBE Contracts Inventory?

The MBE Contracts Inventory excel template captures the detailed data for all:

- MBE Prime Awards
- MBE Sub Awards

Most up to date template is available in the MBE Reporting Toolkit!



Note: GOSBA reporting templates should not be modified or changed to avoid disrupting the functionality of the template

Where to Locate the Data?

- Detailed backup data is required to complete the annual report
- Visit the MBE Reporting Toolkit, for guidance on how to locate, compile and prepare the necessary backup data



MBE Reporting Toolkit link: https://gomdsmallbiz.maryland.gov/Pages/Reporting-Tool-MBE.aspx

Reporting Legislation: COMAR 21.11.03.17 A(1)(2) and (3)

A. Each procurement agency shall make a report annually within 90 days following the close of the fiscal year to the Governor's Office of Small, Minority & Women Business Affairs, the Department of Transportation, and, subject to State Government Article, §2-1257 , Annotated Code of Maryland, to the Joint Committee on Fair Practices and State Personnel Oversight that includes for the preceding fiscal year :

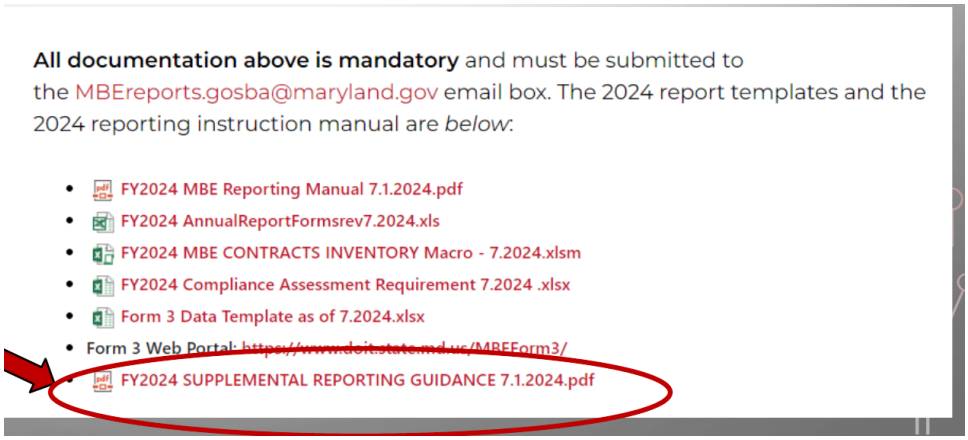
(1) The total number and value of procurement contracts between the procurement agency and certified MBEs, by specific MBE category and by industry type, including whether the MBE participated as a prime contractor or as a subcontractor;

(2) The percentage that those procurement contracts represent, by specific MBE category and by industry type, of the total number and value of procurement contracts;

(3) The total number and the names of certified MBEs that participated as prime contractors or as subcontractors on procurement contracts awarded by a unit;

Supplemental Reporting Guidance

- Download the supplemental reporting guidance from the MBE Reporting Toolkit for:
  - Direct excel cell references for each reporting template
  - Data cheat sheet
  - Common errors and omissions
  - Annual MBE Report Submission Checklist

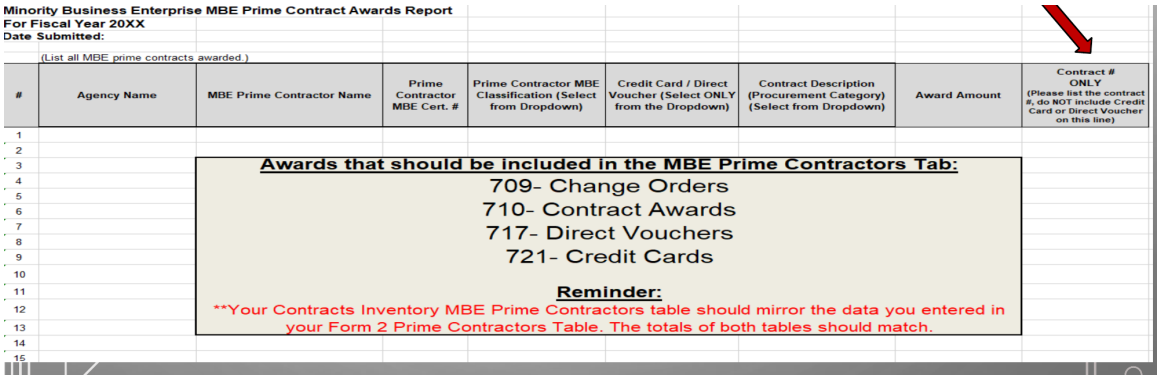


Entering Data into the PRIMES Tab

PRIMES Tab

- Enter the SCRUBBED MBE Prime award detailed data from the PCHL709, 710, 717 and 721 reports
- Columns E, F and G require selections from dropdowns ONLY
- For Direct Vouchers (717) and Credit Card (721) data it does not require a contract # within

column I



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

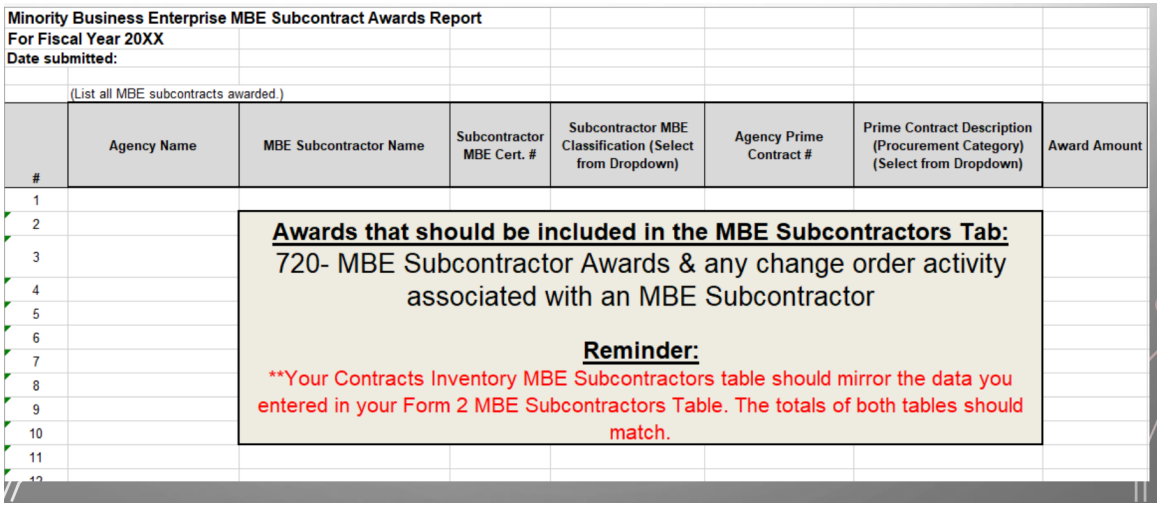
- 709- Change Orders
- 710- Contract Awards
- 717- Direct Vouchers
- 721- Credit Cards

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.

Entering Data into the SUBS Spreadsheet

SUBS Tab

- Enter the **SCRUBBED** MBE sub award detailed data from the PCHL720 report
- Columns E and G require selections from dropdowns ONLY



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.

Review and Submission

Review and Submission of Data

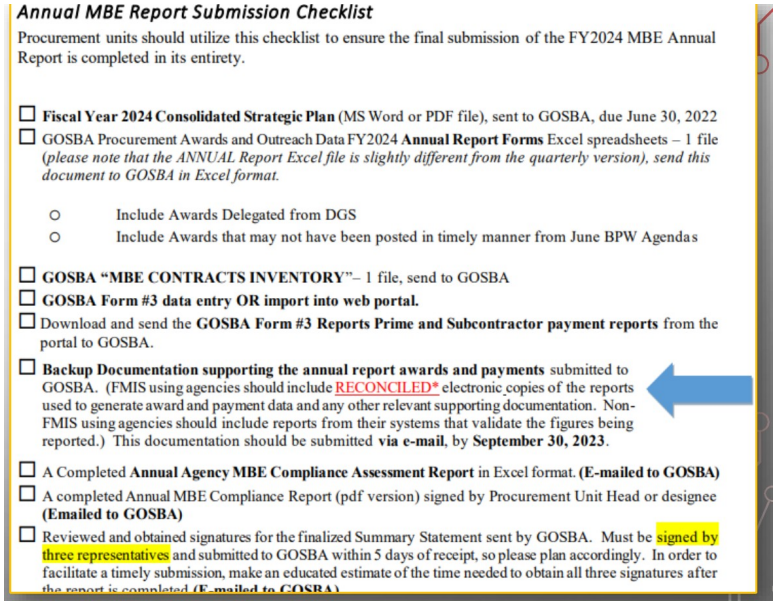
- Be sure to review the completed Contract Inventory template prior to submitting to GOSBA
  - Check for any error messages within the excel template
  - Cross reference totals entered in the template to backup data totals as well as the Form 2

to ensure accuracy

- Final submission of the Annual Report Forms template should be submitted to the: mbereports.gosba@maryland.gov in excel format

Annual MBE Report Submission Checklist

Utilize the Annual MBE Report Submission Checklist found within the MBE Reporting Manual to ensure all necessary documentations have been submitted for a COMPLETE MBE Annual Report



The checklist shown on the slide reads:

Annual MBE Report Submission Checklist

Procurement units should utilize this checklist to ensure the final submission of the FY2024 MBE Annual Report is completed in its entirety.

- **Fiscal Year 2024 Consolidated Strategic Plan** (MS Word or PDF file), sent to GOSBA, due June 30, 2022
- GOSBA Procurement Awards and Outreach Data FY2024 **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 GOSBA in Excel format.*
    - Include Awards Delegated from DGS
    - Include Awards that may not have been posted in timely manner from June BPW Agendas
- **GOSBA "MBE CONTRACTS INVENTORY"**– 1 file, send to GOSBA
- **GOSBA Form #3 data entry OR import into web portal.**
- Download and send the **GOSBA Form #3 Reports Prime and Subcontractor payment reports** from the portal to GOSBA.
- **Backup Documentation supporting the annual report awards and payments** submitted to GOSBA. (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 **September 30, 2023**. (A blue arrow on the slide points to this item.)
- A Completed **Annual Agency MBE Compliance Assessment Report** in Excel format. **(E-mailed to GOSBA)**
- A completed Annual MBE Compliance Report (pdf version) signed by Procurement Unit Head or designee **(Emailed to GOSBA)**
- Reviewed and obtained signatures for the finalized Summary Statement sent by GOSBA. Must be signed by three representatives and submitted to GOSBA within 5 days of receipt, so please

plan accordingly. In order 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 GOSBA)**

Questions

AS ALWAYS, IF YOU HAVE QUESTIONS AFTER TODAY'S TRAINING, PLEASE CONTACT:

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KAREN.REYES@MARYLAND.GOV

Document information

For Internal Training Purposes Only

Governor’s Office of Small, Minority & Women Business Affairs