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

Combined Liaison Training

May 9, 2024

Combined Liaison Training

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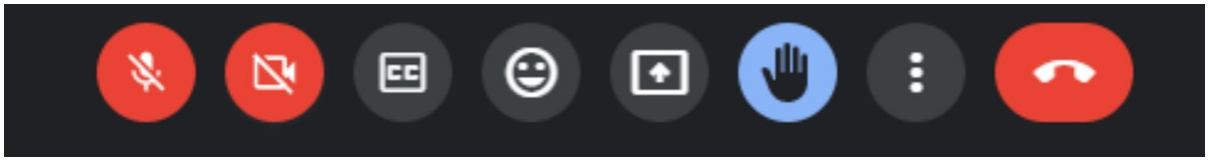
Virtual Training Housekeeping

Please mute your microphone and turn off video camera during training

Use the chat bar on the right side of your screen or click the raise hand button on the bottom of your screen to make the speaker aware that you would like to ask a question

If follow up questions are requested by the speaker you may unmute and clarify your question at that time

During breaktime, please avoid hanging up, if you can, as this could cause a disruption when we resume





Special Secretary Maria Martinez



Today’s Agenda

Opening Remarks
Legislative Updates
General Liaison Training
MBE Ombudsman Unit
Stretching Break (10 mins)
MBE Program
Lunch Break (45 mins)
SBR Program
Stretching Break (10 mins)
VSBE Program

Legislative Updates

Presented by Davon K. Gardner

Director of Policy & Legislative Affairs

HB 850 State Procurement - Small Business Preference Procurement

Expands the Small Business Preference (SBP) Program to include all units or agencies in the executive branch of state government (Previously, DGS, MDOT, USM, Morgan State, DPSCS; construction only)

Designates the Board of Public Works (BPW) as the regulatory authority for the SBP Program

Establishes a price preference not to exceed 8%

- 5% for certified Small businesses
- 2% for veteran-Owned small businesses
- 3% for Disabled veteran-owned small businesses

Unit may designate SBP Program procurements of supplies, services and construction related services with the approval of the head of the unit

HB 861 Procurement - Preferences - Veteran-Owned Small Business Enterprise Program

Increases the Veteran-owned Small Business Enterprise (VSBE) participation goal from 1% to 3% in the Maryland Annotated Code (State Statute)

Removes GOSBA's authority to promulgate regulation that establish the overall percentage goal in the Code of Maryland Regulations (COMAR)

GOSBA met with the bill sponsor, Delegate Nick Allen, to withdraw the legislation

HB 962/SB 673 Small Business Reserve Program - Goals and Outreach Program

Adds the definition of "Certification Agency" and "Economically Disadvantaged Individual" to § 14-501 State Finance & Procurement Article (Consistent with MBE § 14-301)

Increases the Small Business Reserve (SBR) Program designation from 15% to 20%

Includes "Designated" and "Nondesignated" SBR achievements

Amends "Payments" to "Awards" (Consistent with MBE and VSBE Program)

MDOT & GOSBA shall develop an outreach program to increase the participation of economically disadvantaged individuals participating the SBR Program

SB 587 Procurement - Minority Business Participation - Real Property Title Insurance Services Reporting

Expands the current list of procurement categories to include real property title insurance services and commercial real property title insurance services in SFP § 14-301

Exempts the Special Secretary of GOSBA from waiving the requirement for a unit to report MBE participation by industry type if the spending threshold for the industry type is too low for the unit to provide sufficient data

SB 1014 State Procurement - Procurement Forecast and Outreach

Creates entirely new sections (§§ 9-304.1 & 9-308) within the Maryland Annotated Code's State Government Article

§ 9-304.1 State Government Article

- Requires GOSBA to consult with each primary procurement unit to identify potential contracting opportunities and outreach
- Identify and increase awareness of procurement opportunities for small businesses including services and supplies
- Assist small business with procedures for bidding and responding to a request for proposal

SB 1014 State Procurement - Procurement Forecast and Outreach (Cont'd)

§ 9-308 State Government Article

On or before June 30 of each year, each unit shall submit to GOSBA a procurement forecast for all procurement contracts over $100,000 for the upcoming fiscal year (Codified from COMAR)

On or before August 15 of each year, each unit shall submit annually the unit's reconciliation of the prior year's procurement forecast

Each unit should notify GOSBA within 15 days of any updates to the existing forecast

GOSBA Shall publish the information provided by each unit on its website

General Liaison Training

Presented by:

Karen Reyes & Lisa Mitchell Sennaar

General Training Agenda

General Reminders
GAD List Workgroup Findings/Next Steps
Strategic Plan
Procurement Forecast
Questions

LIAISON ROLE PER REGULATION

COMAR

SBR- 21.11.01.06

MBE- 21.11.03.05

VSBE- 21.11.14.05

LIAISON RESPONSIBILITIES

Coordinating agency outreach efforts
Reviewing agency contracting procedures to ensure compliance
Assisting in resolution of contracting issues
Submitting required program reports or information

National Small Business Month



Liaison Onboarding Training

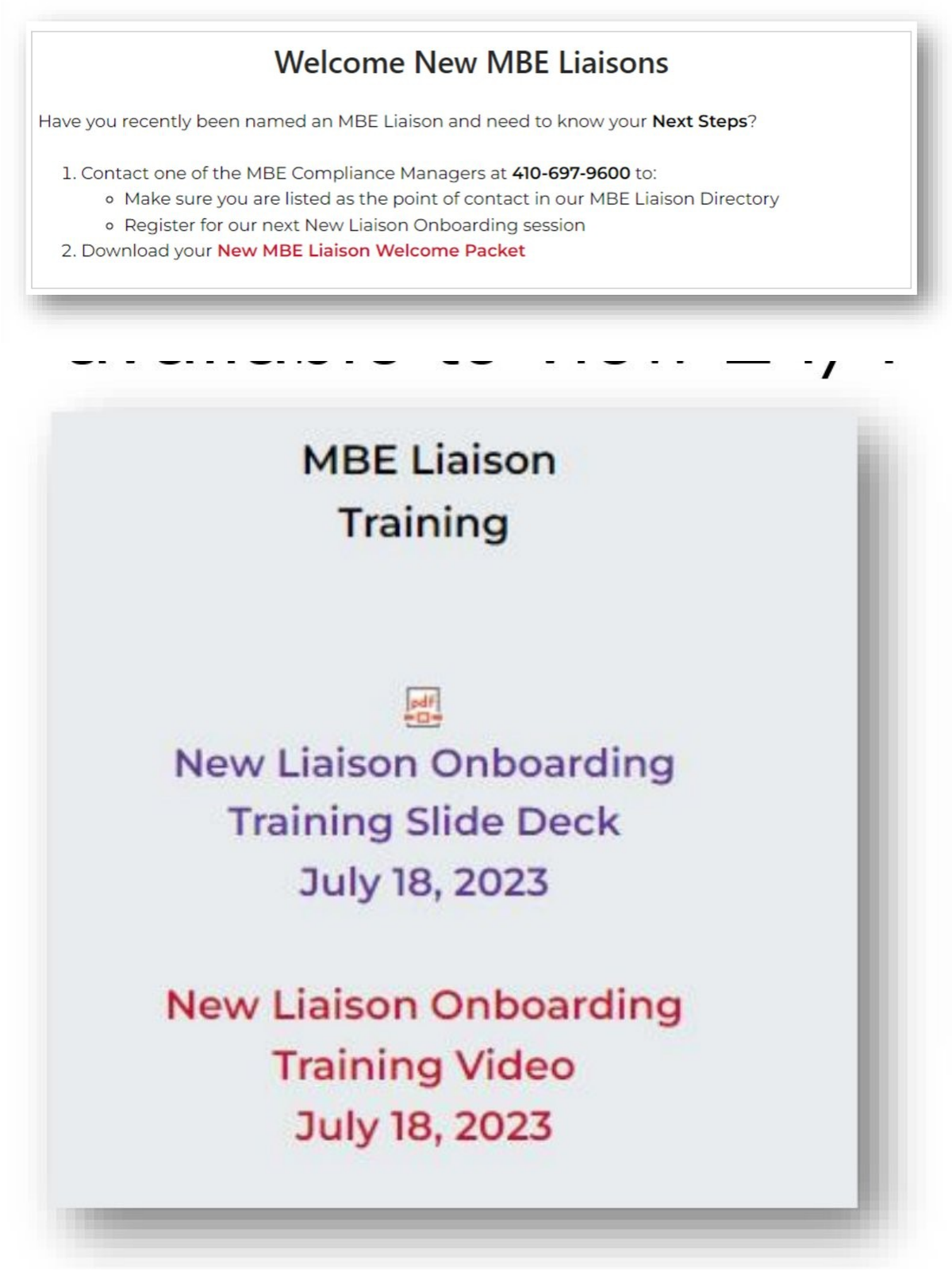


Whether you are a new liaison or are looking for a refresher on all that encompasses the liaison role always remember liaison onboarding training & welcome packets are available on the SBR, MBE, & VSBE Toolkits!



Visit GOSBA homepage to access all 3 toolkits on the left-hand side!

Liaison Onboarding Training



Next virtual liaison onboarding training date will be forthcoming
Training, slide decks, and welcome packets will always be available to view 24/7 on the toolkits

Reporting Deadlines

Due Date	Report
June 30, 2024	Strategic Plan
June 30, 2024	Procurement Forecast
September 30, 2024	SBR & MBE Annual Report

Due Date	Report
October 1, 2024	VSBE Annual & Outreach Report
October 30, 2024	SBR, MBE, & VSBE QTR1 Reports

Updated Reporting Templates & Documents

Updated reporting documents and templates will be made available for all programs on July 1, 2024

- FY24 Annual Report Templates
- FY25 Quarterly Report Templates
- Program Specific Reporting Manuals & Resources

Can be found on the MBE, SBR, and VSBE Toolkits

Upcoming Meeting Dates

Date	Meetings
June 6, 2024	Quarterly Compliance Call
FY25 Training Dates are forthcoming.	FY25 Trainings & Meetings

GAD LIST WORKGROUP

General Updates

Next Steps

Re-naming Resource

- Socioeconomic Programs Reporting Guidance

New Rationale

- Resource will address reporting exclusions and inclusions by:
  - COMAR 21.01.03.01: Purchases exempt from the procurement regulations
  - ADPICS Additional Elements: Contract Type Field, Procurement Method Fields, and Category of Work Fields
  - Comptroller Object Codes

FY25 Socioeconomic Program Strategic Plan

Consolidated Strategic Plan

Strategic planning is an organizational management activity that is used to:

- Set priorities to focus energy and resources
- Strengthen operations
- Ensure that employees and other stakeholders are working toward common goals
- Establish agreement around intended outcomes/results
- Assess and adjust the organization's direction in response to a changing environment

Submission Requirements

Submitted via google form with distinct MBE, SBR, and VSBE sections

Agencies that participate in all three programs:

- a PDF version is provided on all reporting toolkits to coordinate answers across multiple contributors

Mandatory report due by June 30, 2024

MBE Ombudsman Compliance Considerations

Presented by Nichelle Johnson

May 9, 2024

Appointment of the MBE Ombudsman

Established through State Government Articles §9–303.3, the MBE Ombudsman unit officially started during the Moore-Miller administration, in January 2024.

The Ombudsman has been directed by legislation to:

- Conduct trainings for state agency personnel on enforcement of the requirements of current MBE laws and regulations, specifically Title 14, Subtitle 3 of the State Finance and Procurement Article, including the assessment of liquidated damages under § 14–303(b)(6) of the State Finance and Procurement Article.
- Serve as a resource to minority business enterprise liaisons, procurement officers in units of State government, and others.
- Work with prime contractors, MBEs, and state agencies to resolve issues that arise during contract performance

Appointment of the MBE Ombudsman

The Ombudsman will:

- Develop policies and guidance to assist agencies in implementing the MBE Program
- Conduct training for prime contractors as well as MBEs performing in the prime and/or subcontracting role
- Oversee data collection of documented nonperformance by prime contractors and track agency contract compliance performance
- Additionally, it was the desire of Governor Moore that our unit help small and minority business owners navigate state procurement

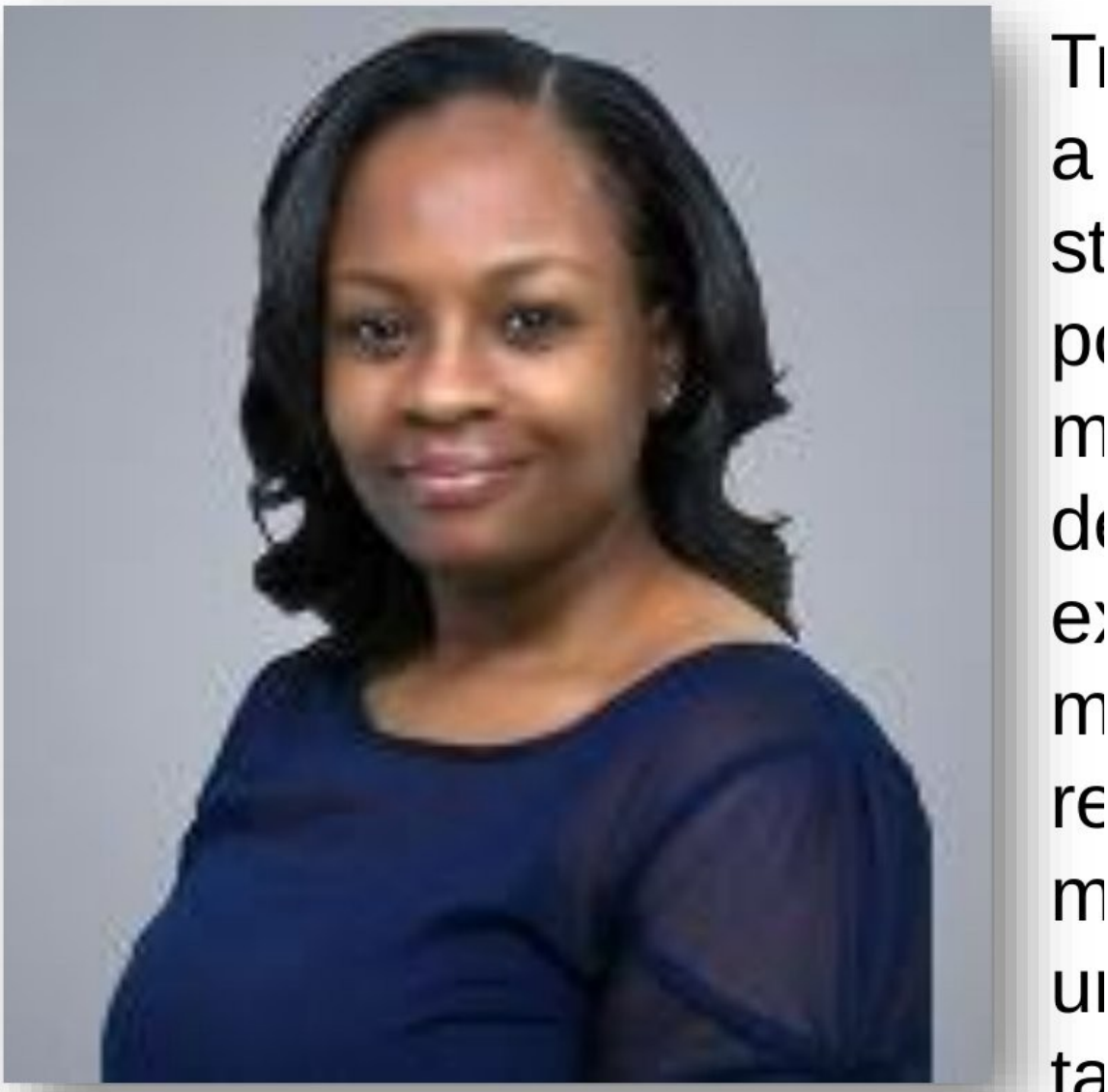
The MBE O
Growing



The MBE Ombudsman Unit is Already Growing

Welcome Tracie Bolden!

Tracie joined the MBE Ombudsman unit in mid-April and will serve a pivotal role in helping to promote a culture change among stakeholders of the MBE Program through education and outreach, policy changes, advocacy, and support of both state personnel and minority and women-owned businesses. Tracie has a bachelor's degree in finance from the University of Maryland and has extensive proficiency in contract negotiations, vendor management, process improvement, change management, and regulatory compliance. She is an inventive and experienced management professional who loves to think outside the box. Her unique perspective and skillset will be invaluable as we focus on target areas for process and performance improvement.



MBE Program Compliance

As a part of the compliance process for the MBE program, you are to monitor, facilitate, promote and ensure compliance to MBE Program Laws, Regulations, Guidelines, Policies, and Objectives at both the state and agency levels.

You should be both effective and just in advocating for the proper treatment of Small, Minority & Women business owners. Specifically, to State certified MBE businesses.

This includes a commitment to identifying and acting on both compliance lapses and fraud.

MBE Program Compliance

Who is put in place to carry out compliance?

- Contract Monitors
- Contract Managers
- Compliance Officers
- Project Managers
- Procurement Officers
- Fair Practice Office
- MBE Liaison Officers
- DEI Offices

Frequent Partners in Compliance include:

- Finance/Budget Office
- Agency Head
- Procurement Director
- Agency Assistant Attorney General (AAG)
- MBE Ombudsman

MBE Liaison

As mentioned earlier, the Liaison Role works hand in hand with contract monitors, contract managers, procurement officers, and compliance staff. Why is this important?

The MBE Liaison is one of the main compliance measures put in place is to help ensure the successful implementation of the MBE Program at the agency level.

Real life examples – The results when the system breaks down.

- A solicitation with MBE goals that had no MBE clauses or paperwork in the solicitation documents
- Incorrectly calculated liquidated damages figures
- Persistent bad behavior by a prime throughout the contract (ex. The prime asking the MBE firm to perform work they are not certified for and trying to count those dollars towards the MBE goal or persistent lateness in processing payments to subcontractors)

MBE Liaison COMAR 21.11.03.05

COMAR 21.11.03.05

Resources

Your main resources will be:

- Office of State Procurement Website
  - Latest Forms (PRG, Attachment D- NEW forms coming)
  - Procurement Manual including Policies, Procedures and Best Practices
  - GOSBA MBE Toolkit
  - Guidance (Liquidated Damages, Subgoals, Reporting, Sample Forms, Training Materials)
- MBE Ombudsman Page – State Agency Resources
- MDOT Directory
  - State Certified MBE Vendors
- BPW Website
  - Advisories - 2001-1 (PRG Guidance), 2003-2 (Waivers Report)

MBE Program Compliance Components



Vendor Relations:

Networking

Advocacy

Education

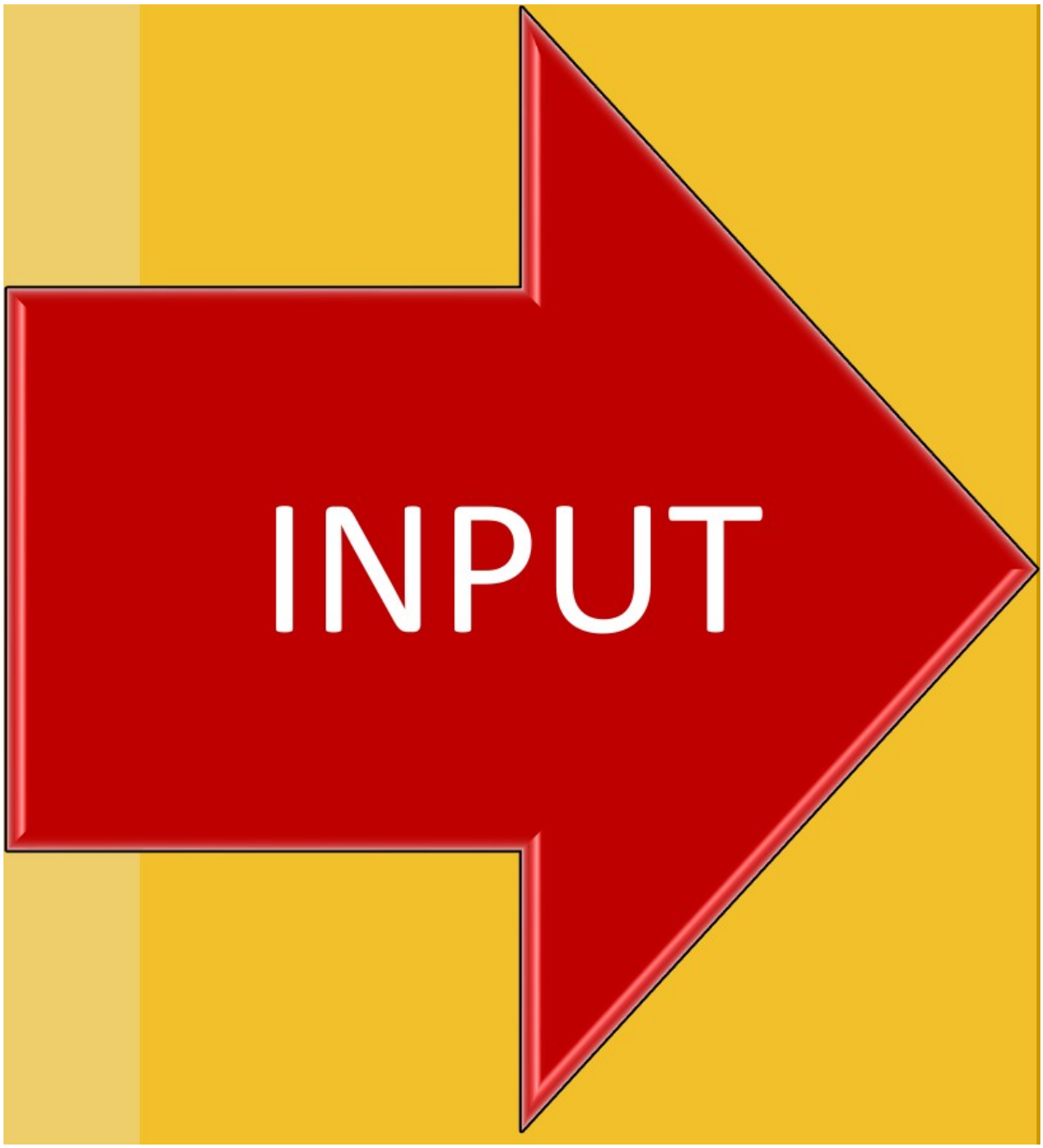
Program Implementation & Compliance

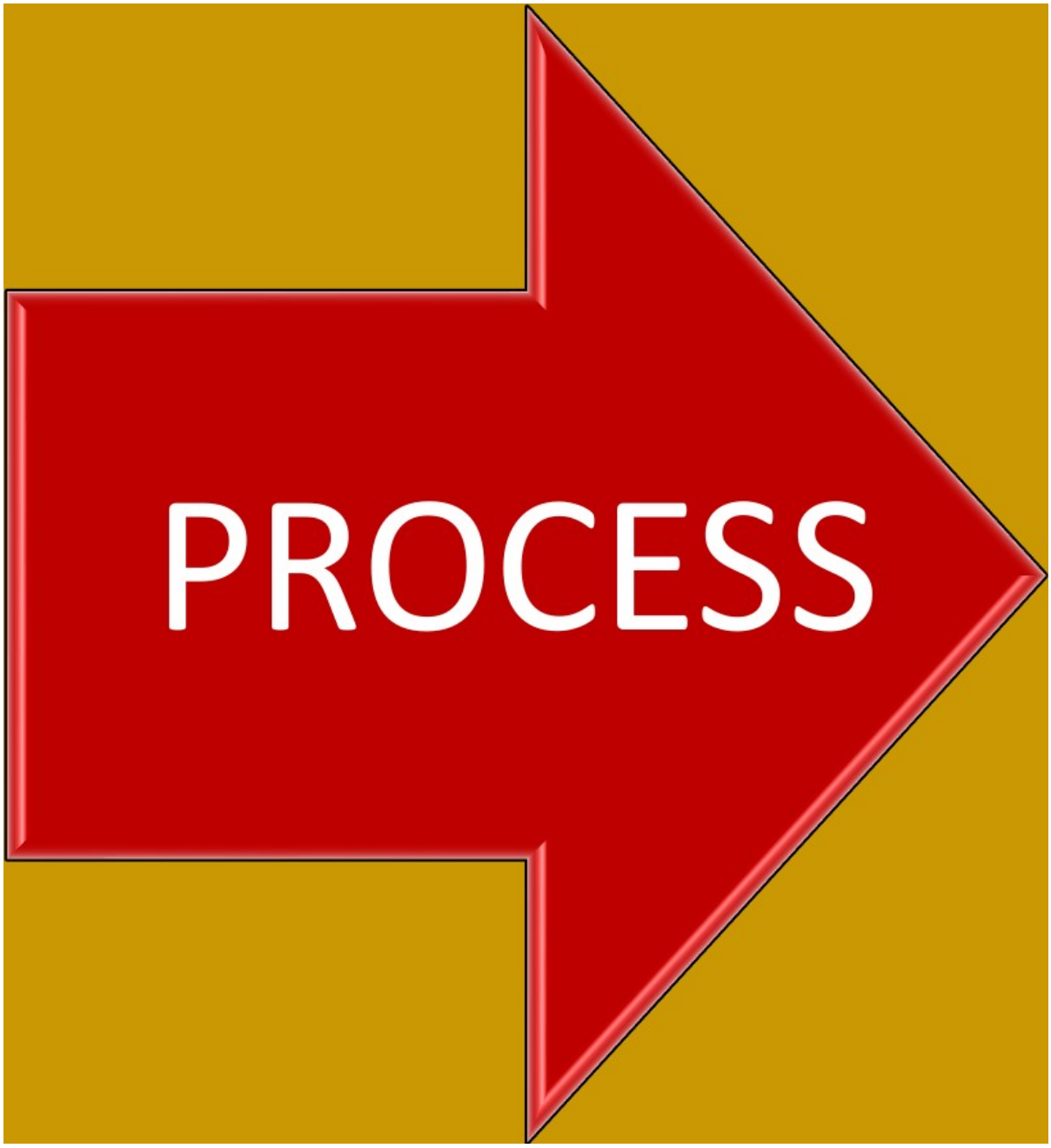
Reporting

Contract

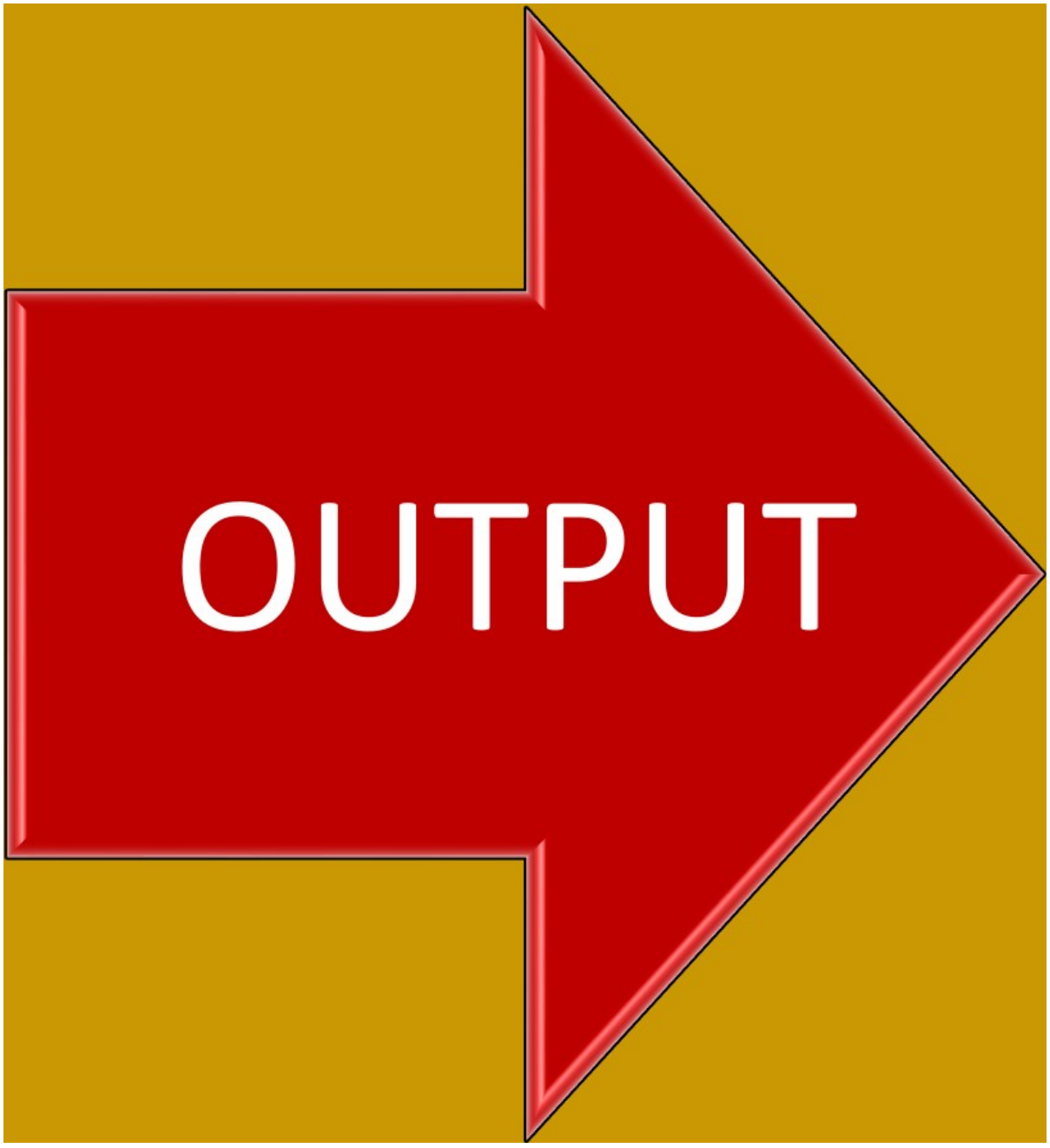
Monitoring

The Successful Implementation of the MBE Program occurs as a result of optimal performance at the input, process, and output stages.





PROCESS



OUTPUT

Program Implementation & Compliance

Compliance Regulations

COMAR 21.11.03.13

COMAR 21.11.03.10

Compliance Regulations



COMAR 21.11.03.13 – General Compliance Requirements



COMAR 21.11.03.10 – Contract Award Compliance Requirements including Good Faith Efforts considerations for Waiver Requests and Contract provisions, such as Liquidated Damages.



COMAR 21.07.01.14 – Mandatory Liquidated Damages provisions for all contracts with certified MBE participation goals and any other contracts deemed appropriate by PO in consultation with that AAG.

COMAR 21.07.01.14 – Mandatory Liquidated Damages provisions for all contracts with certified MBE participation goals and any other contracts deemed appropriate by PO in consultation with that AAG.

Program Implementation and Compliance

Review agency contracting procedures to ensure compliance

- Participating in your agency's Procurement Review Group (PRG)
- Ensuring that solicitation documentation includes the necessary forms, clauses, and language for each program
- Answering internal agency questions to ensure current contracts are upholding socioeconomic policies

Know the rules; Make sure your Agency follows the rules

Issues that arise with solicitations containing MBE goals should be documented and discussed among the PO, MBE Liaison, and you may need to include your legal counsel.

- Reviewing legislation and resulting policy changes
- Attending training
- Contract Award reviews
- Reviewing MBE forms & waiver requests (Good Faith Efforts Documentation)
- Attend Corrective Action Meetings

At the input phase:

- When setting MBE goals, ensure your agency is evaluating solicitations on a case-by-case basis; use past similar contract compliance as a model and be sure to include written justification in PRG documents

- MBE goals/subgoals and MBE forms should be on the agenda at all Pre-bid Conferences
- Directly solicit certified MBE firms at every opportunity – build up your pool of vendors

Successful Implementation of the MBE Program

Procurement Review Group (PRG)

- There should be at least one or more standing procurement review group(s) within your unit.

- The PRG shall be comprised of:
  - Agency’s chief procurement official or senior-level procurement official designated to act

in his/her place
SBR, MBE & even VSBE Liaison Officers or senior level alternates
Your unit's legal counsel to provide support and advice, as necessary

PRG (cont.)

Need to ensure the agency is doing an:

Thorough evaluation of procurements expected to exceed $100,000 in value for MBE and VSBE participation, including evaluation for MBE Subgoals as directed in the MBE Program Subgoal Guidance
Resource: BPW Advisory 2001-1

PRG Guidance and Worksheets are on OSP's website:
https://procurement.maryland.gov/procurement-review-group-prg/

Did your Agency Consider:

If the procurement be broken down into subcontracting opportunities
Does the contract structure support subcontracting?
Did the unit list all possible subcontracting NAICS Codes on the PRG Form
Are small, minority, women, and veteran-owned businesses available in the categories identified (After a search for State certified MBE firms)?
Does it make sense geographically?
Consider the 60% Rule's impact on goalsetting and goal achievement
Treat the MBE & VSBE Programs as mutually exclusive
Dually-certified firms can count toward both program goals)
Provide as much detail and context as possible on your PRG Determination (for historical purposes and protest)

PRG (cont.) Did your Agency Consider:

PRG (cont.)

Are Subgoals applied correctly?

TABLE 2 – RECOMMENDED SUBGOALS

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

***The *Subgoal Total Plus 2% Margin* is the sum of the Recommended Subgoals plus 2%.**

☑ **Refer to Table 2 above. If there are 3 or more certified firms in a Subgroup for the work of the procurement (indicated by a "Y" in Column 10), the Recommended Subgoal for the Combined Industry Category in Table 2 should be set for that Subgroup unless an explanation is provided in Step 11.**

☑ **A subgoal may not be set if the number of certified firms in that Subgroup is less than 3 (indicated by an "N" in Column 10).**

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

Any relevant Subgroup with less than 3 certified firms available results in no subgoal being set for that

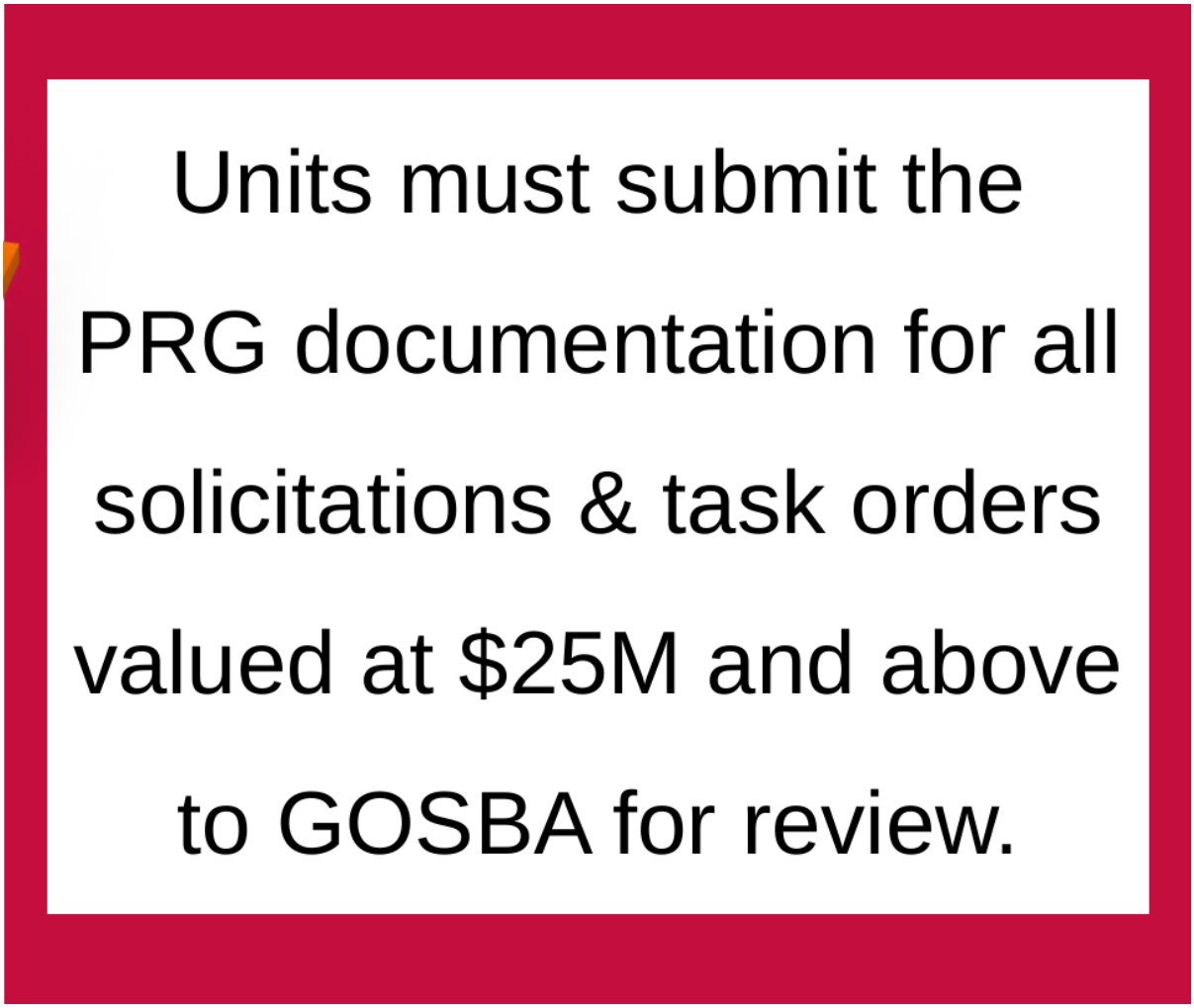
subgroup

For InternalTraining Purposes Only

Ex.: Construction Contract with an overallMBE goal of 25% would be evaluated for Subgoals. If your search reveals that 2 African American MBE firms and 10 Women owned MBE firms were available, this will result in only a Women Subgoalof 11%

- Your agency must fill out the subgoal worksheet and determine if Subgoals will be set on procurements

PRG (cont.)



Units must submit the PRG documentation for all solicitations & task orders valued at $25M and above to GOSBA for review.

Best practices:

- Documents should be completely filled out & signed
- Units should include a clear and adequate justification for goals including 0% goals.
- Provide all relevant documentation including PRG Forms, Research with MBE firms identified, Engineers Estimate, SOW

PRG (cont.) Best practices:

Compliance and MBE Forms

MBE Program Compliance

COMAR 21.11.03.09 - 10 and 21.11.03.11

MBE Participation Forms

Thoroughly review MBE forms to ensure they are correct and complete, including the application of the 60% rule (COMAR 21.11.03.12-1).

D-1A - MBE Utilization and Fair Solicitation Affidavit and MBE Participation Schedule

D-3A - MBE Subcontractor Project Participation Certification

D-3B - MBE Prime Contractor Participation Certification

Procurement staff are directed to contact the agency MBE Liaison if there are issues or if additional guidance is needed.
Sample Forms are provided on our website, as well as a Forms training in the MBE toolkit:

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

Review MBE forms for accuracy and completeness, especially Waiver paperwork.

Along with this document, you would also be requesting copies of MBE subcontract agreements per COMAR 21.11.03.10 D-3B - MBE Prime Contractor Participation Certification

MBE Program Vendor Verification – Ask Karen

In accordance with COMAR, procurement agencies may not permit a vendor to participate in a procurement as a certified MBE unless the state has certified the firm as an MBE.
Procurement officers must verify the certification status of MBEs during the bidding process.
•Procurement officers should use the MDOT Central Directory to verify the status of MBEs.
A status of Pending is not allowed.
Contact MDOT's Office of Minority Business Enterprise for information, if needed, about the status of certified vendors.

MBE Program Compliance – Ask Karen

Waiver Documentation

Carefully review any waiver documentation to make sure it fits the "good faith efforts" requirement.

D-1B - Exhibit A: MBE Subcontractor Unavailability Certificate

D-1C - Good Faith Efforts Documentation (as defined in COMAR 21.11.03.11)

D-2 - MBE Outreach Efforts Compliance Statements

Procurement Officers should follow the guidance and best practices found in the MBE & VSBE Goal Waiver Guidance: Good Faith Efforts Review & Documentation

COMAR 21.11.03.11

MBE Program Compliance

Contract Compliance should be reviewed by the contract monitor or other assigned staff using the MBE reports (Attachment D) regularly received from Primes/Subcontractors

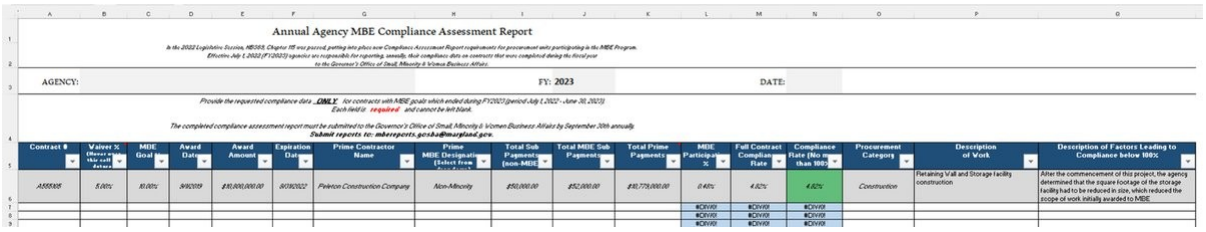
D-4A - Prime Contractor Paid/Unpaid Invoice Report

D-4B - MBE Prime Contractor Report

D-5 - MBE Subcontractor Paid/Unpaid Invoice Report

Agency contract compliance reports should be regularly generated by liaisons, contract monitors, or other assigned staff which utilized this data.
This data is essential when performing contract close out.

MBE COMPLIANCE ASSESSMENT Data Tracking



Annual Agency MBE Compliance Assessment Report

AGENCY: FY: 2023 DATE:

Contract #	Waiver X (Hover over this cell for dataset explanation)	MBE Goal	Award Date	Award Amount	Expiration Date	Prime Contractor Name	Prime MBE Designation (Select from dropdown)	Total Sub Payments (non-MBE)	Total MBE Sub Payments	Total Prime Payments	MBE Participation %	Full Contract Compliance Rate	Compliance Rate (No more than 100%)	Procurement Category	Description of Work	Description of Factors Leading to Compliance below 100%
A555105	5.00%	10.00%	9/9/2019	$10,000,000.00	8/30/2022	Peirson Construction Company	Non-Minority	$50,000.00	$52,000.00	$10,770,000.00	0.48%	4.82%	4.82%	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.
											#DIV/0!	#DIV/0!	#DIV/0!			
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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)
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), construction

• The Compliance Assessment Report data will be used by the Ombudsman unit to track and monitor contracts

•The Compliance Assessment Report data will be used by the Ombudsman unit to track and monitor contracts that did not meet the established MBE goal. Contracts that do not meet the MBE goal are required to list valid mitigating factors.

MBE Program Compliance

Procurement staff should collaborate with the Prime, the MBE liaison and legal counsel to quickly resolve issues with MBE subcontractors.

Only after these steps should procurement staff reach out to the MBE Ombudsman Unit for assistance.

Procurement staff, compliance staff, and the MBE liaison should ensure that issues are handled in accordance with COMAR, procurement guidelines, and best practices

MBE Form Reminders

Primes experiencing issues must work with procurement staff and the MBE liaison and cannot make unilateral decisions concerning named MBEs on contracts

Primes who wish to amend MBE participation schedules must work with procurement staff and the MBE liaison to act according to COMAR 21.11.03.12

Involves consideration of the 72-hour rule before contract execution and amendment of participation schedule after contract execution

Contract Monitoring

Compliance Regulations

COMAR 21.11.03.13

COMAR 21.11.03.13: A. To ensure compliance with certified MBE participation goals, the procurement agency shall:

Verify that the certified MBEs listed in the MBE participation schedule are performing work and receiving compensation as set forth in the participation schedule;

Compliance Staff may need to visit the worksite and even interview subcontractors or workers:

- The contractor shall:
- Permit the procurement agency to inspect any relevant matter, including records and the jobsite and to interview subcontractors and workers;

Compliance Regulations - Payment

COMAR 21.10.08 – Prompt Payment Requirements may intersect with MBE program compliance requirements when payment issues involve an MBE subcontractor.

COMAR 21.11.03.13 [Collection & Review of payment reports]

B (3) Submit monthly to the procurement agency a report listing payments made to each MBE subcontractor in the preceding 30 days and any unpaid invoices over 30 days old received from a certified MBE subcontractor, and the reason payment has not been made; and…

C. Upon determining that a contractor did not make good faith efforts to comply with contract MBE participation goals, the procurement agency shall notify the contractor in writing of its findings and shall specify what corrective actions are required. The contractor is required to initiate the corrective actions within 10 days and complete them within the time specified by the procurement agency.

Compliance vs Fraud

Compliance requirements:

- Use of the MBEs listed at time of bid/proposal
- MBE Subcontractors must perform their items of work, independent from the prime contractor, with their own supervisor and employees
- MBEs cannot subcontract out any portion of their work without prior approval from the agency
- MBE must perform commercially useful function "….For execution of the work of the contract and is carrying out its responsibilities by actually performing, managing, and supervising the work involved; and (ii) With respect to materials and supplies used on the contract, for negotiating price, determining quality and quantity, ordering the material, and installing (where applicable) and paying for the material itself."

Compliance vs Fraud

Fraud: "deceit, trickery, or breach of confidence for profit or to gain some unfair or dishonest advantage."

Alleged Fraud is handled by the Attorney General's Office and can also be reported to the Ombudsman Unit at

- Using the MBE in name only (pass through)
- Listing employees on certified payroll when actually paid by another company
- Reporting work is being performed by MBE when another firm is actually doing the work

mbe.ombudsman@maryland.gov

Compliance Regulations

COMAR 21.11.03.13 [Carry out remedies to non-compliance]

D. If a procurement agency determines that material noncompliance with MBE contract provisions exists and that the prime contractor refuses or fails to take the corrective action required by the procurement agency, then the following sanctions may be invoked:

(1) Termination of the contract;

(2) Referral to the Office of the Attorney General for appropriate action; or

(3) Initiation of any other specific remedy identified by contract.

Remedies to Non-Compliance

There are several tools at the agency level to handle these issues, such as

Remedies to Non-Compliance COMAR 21.07.01 & 21.10.08

Letter of non-performance

Withholding Payment

Contract Termination for Cause or Convenience

COMAR 21.07.01 & 21.10.08

Vendor Relations

Vendor Relations

Assisting vendors and educating them on MBE Program Requirements

- Assist Vendors with navigating procurements with your unit:
  - Helping vendors learn how to do business with YOUR agency.
  - Receiving vendor capability statements and adding them to your agency's internal database
  - Conducting Pre-bid meeting where you explain MBE forms and requirements and hosting Kick-off meetings for contracts.
- Educate Vendors on the Program
  - Providing resources or points of contact if vendors have questions
  - Making vendors aware of statewide resources and training, such as GOSBAs T.I.P.S. Webinar Series.
  - Refer vendors to the MBE Ombudsman for assistance with navigating state procurement.

Vendor Relations

Assisting in resolution/prevention of contracting issues

- Advocating for certified vendors
  - Helping a vendor mitigate payment issues
  - Assist vendors who are experiencing fraud/fraudulent behavior
  - Interviewing and answer questions from subcontractors to ensure current contracts are upholding socioeconomic policies

Coordinating agency outreach efforts

- Brainstorming outreach ideas with your units:
  - Contract monitors
  - Compliance manager
  - Buyers
  - Fair practice offices
  - Outreach coordinators
  - Communications & marketing team



MBE Ombudsman Unit Nichelle Johnson MBE Ombudsman Nichelle.johnson1@maryland.gov 410-697-9605 667-232-1369 Tracie Bolden MBE Ombudsman Compliance Manager tracie.bolden@maryland.gov 410-697-9726 667-644-8476

FY2025 Procurement Forecast

Procurement Forecast

Submission of the Procurement Forecast satisfies GOSBA's request pursuant to COMAR:

Procurement Forecast

All agencies are required to submit one report with all projected purchases over $50,000 including SBR designated procurements and those with MBE and VSBE goals no later than

June 30, 2024

Do not use previous templates and instructions

Retrieve the updated instructions and the template for FY2025

From either the SBR, MBE, or VSBE Toolkits

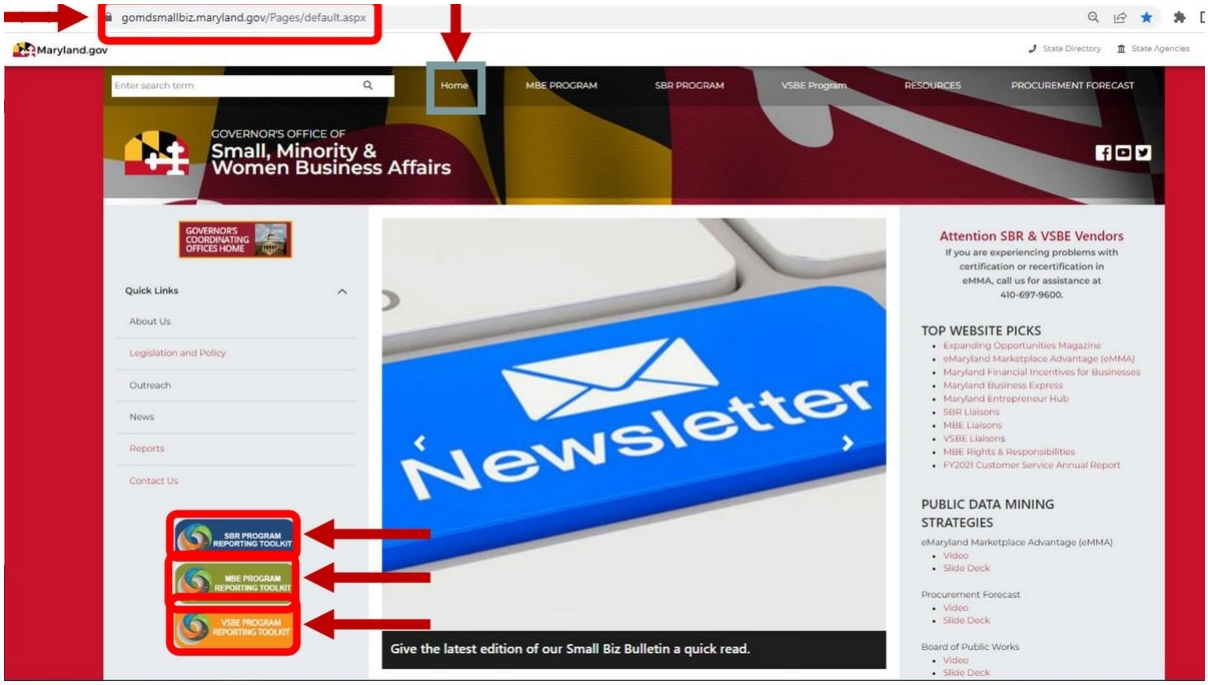
The submission should include:

Detailed FY2025 Procurement Forecast excel spreadsheet

Signed attestation in PDF format

Submissions should be sent via email to: compliance.gosba@maryland.gov

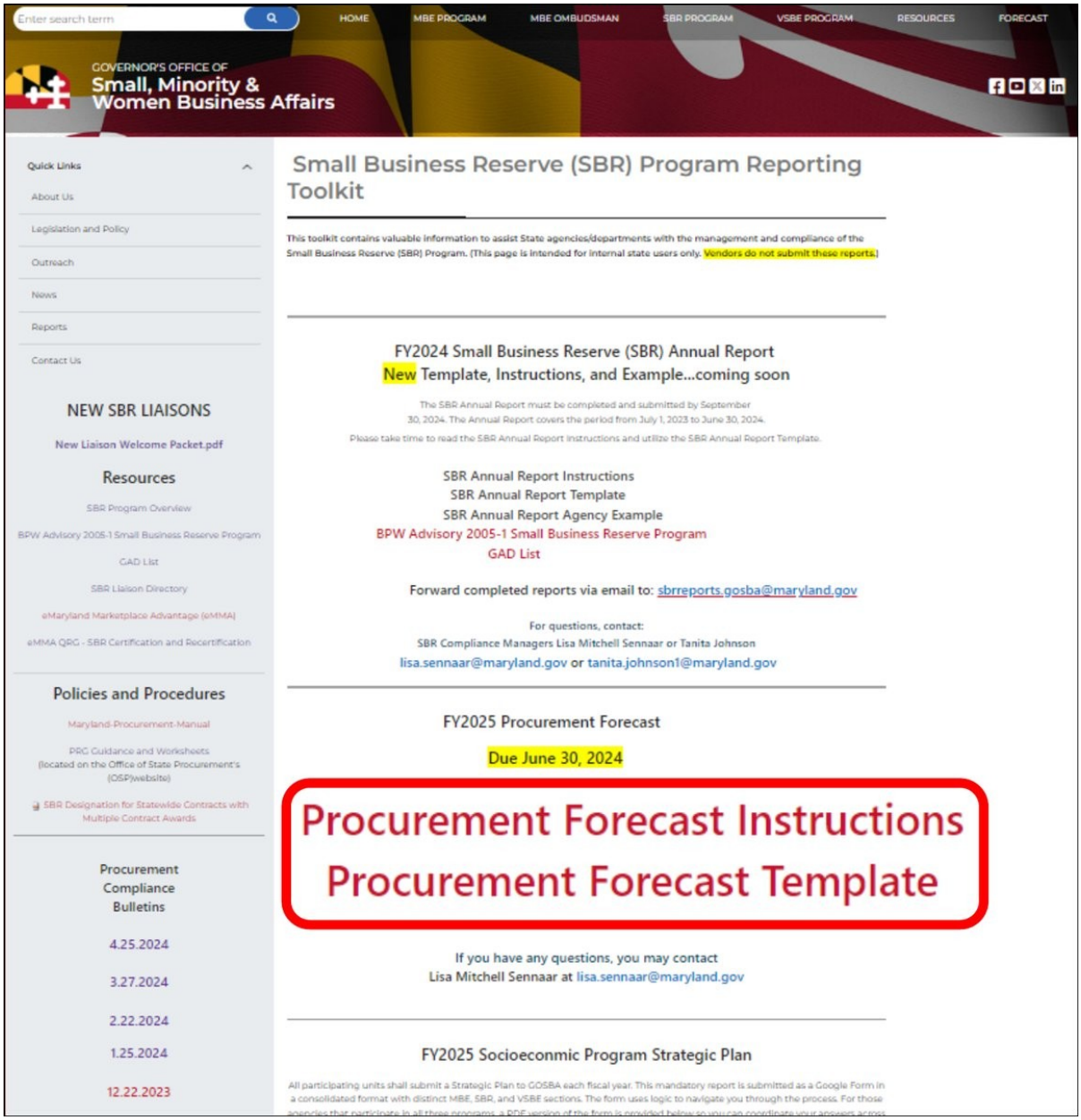
SBR, MBE and VSBE Toolkits





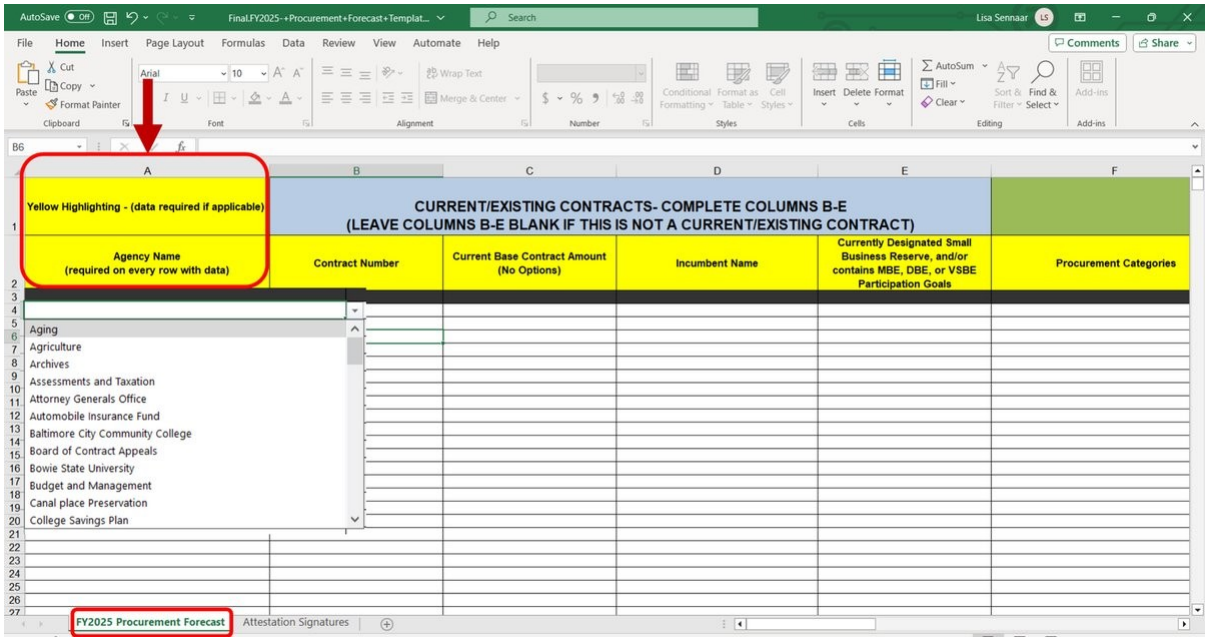




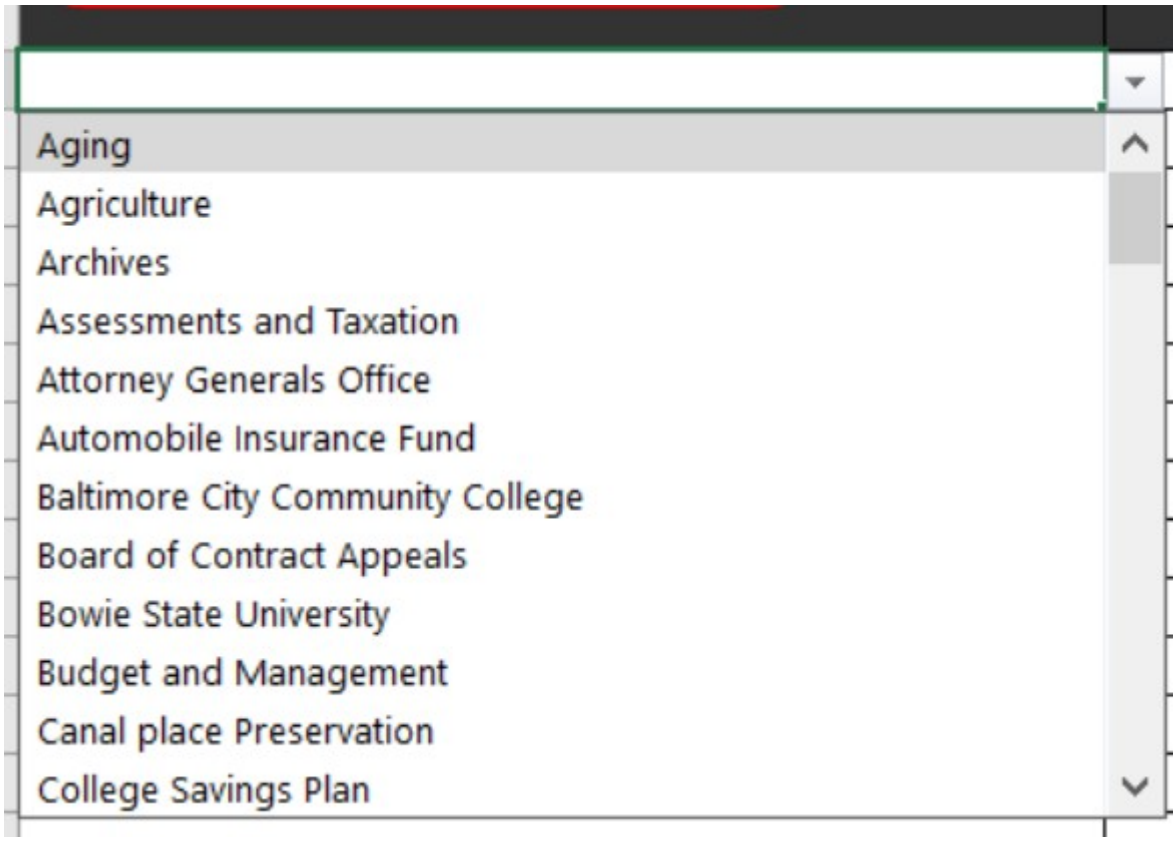


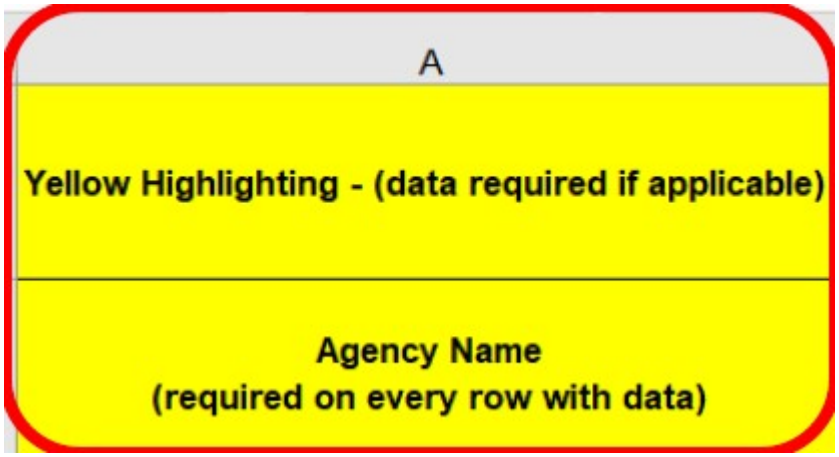
Procurement Forecast Instructions
Procurement Forecast Template

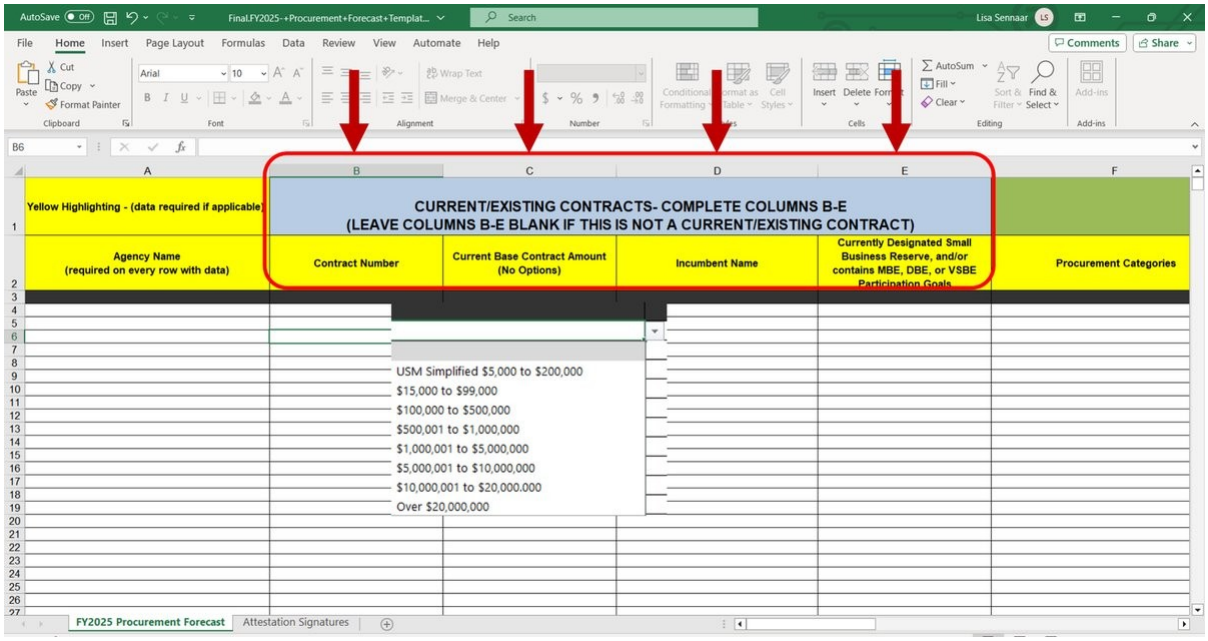
Procurement Forecast Instructions
Procurement Forecast Template



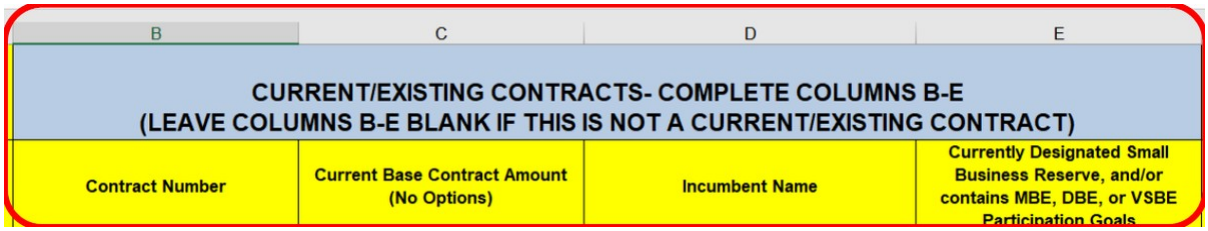
Procurement Forecast Template

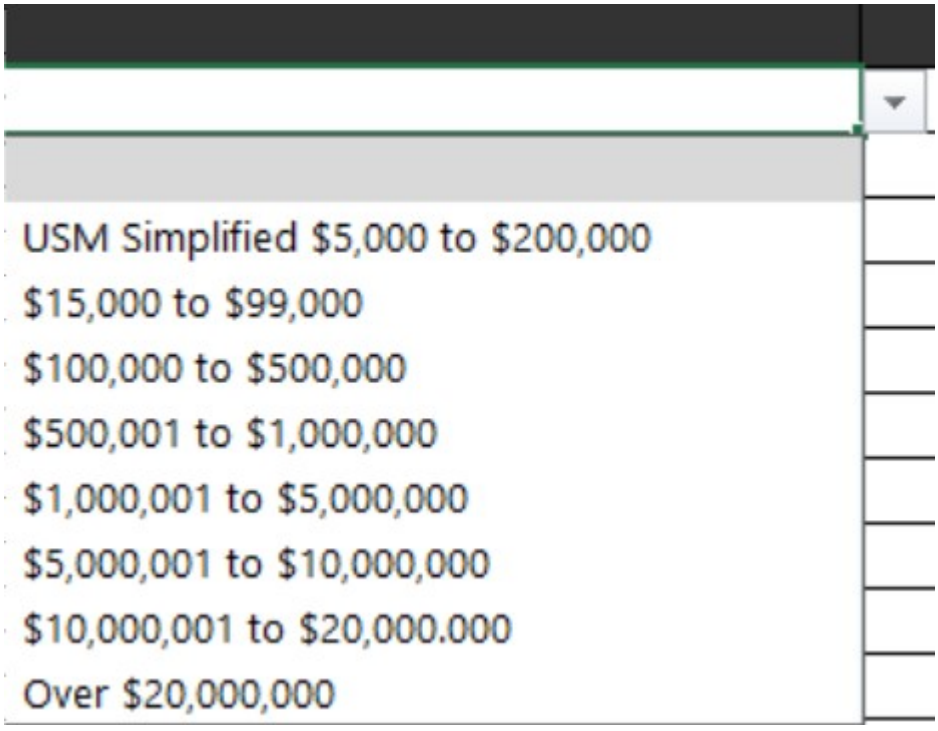


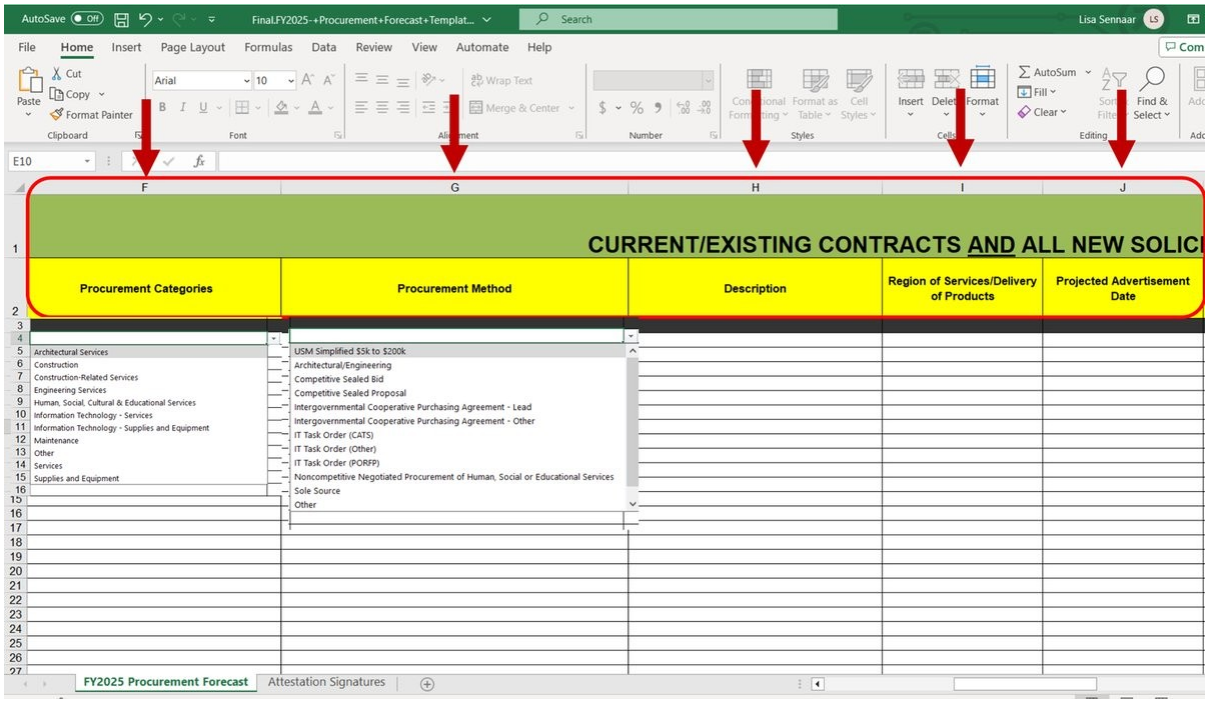




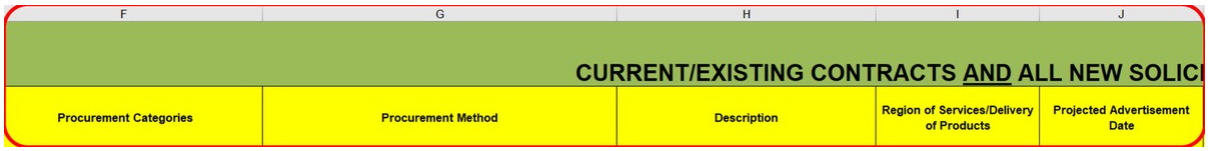
Procurement Forecast Template

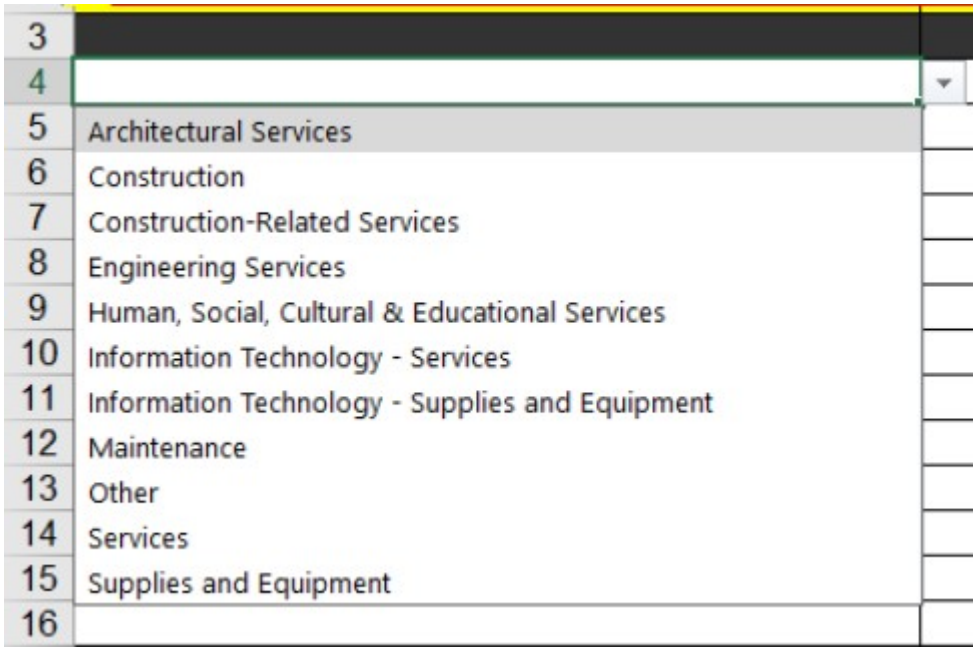


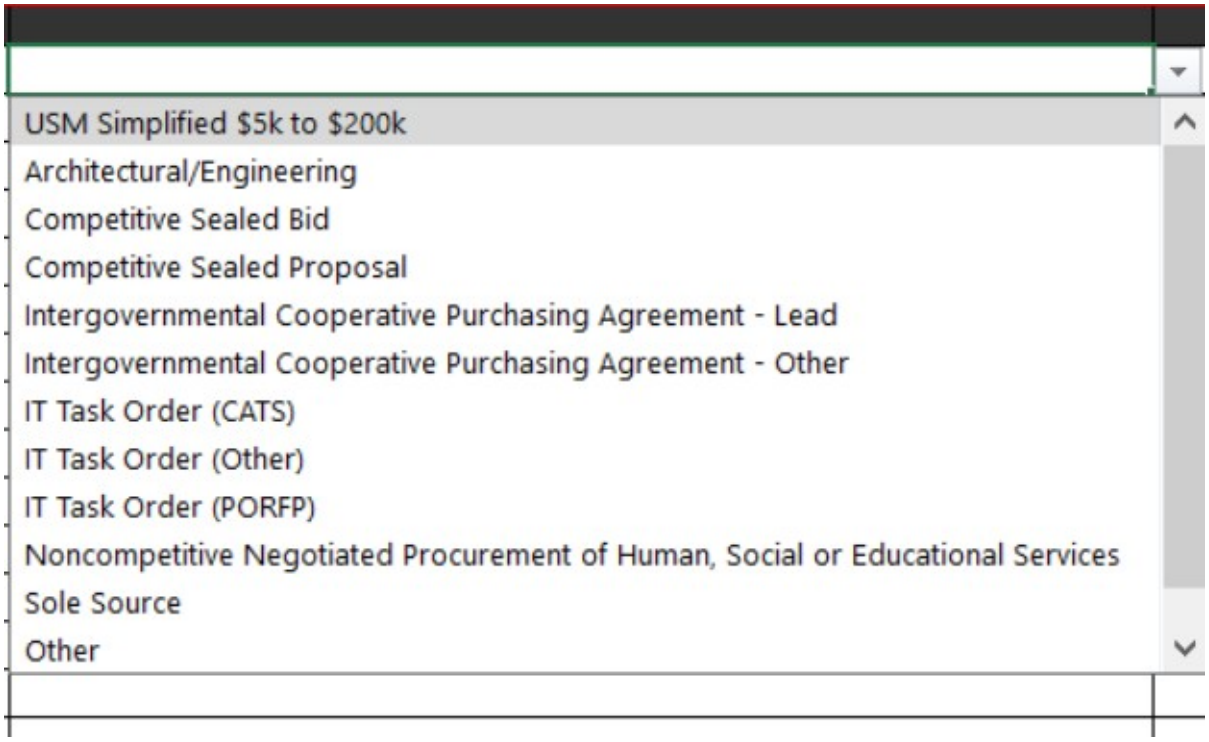


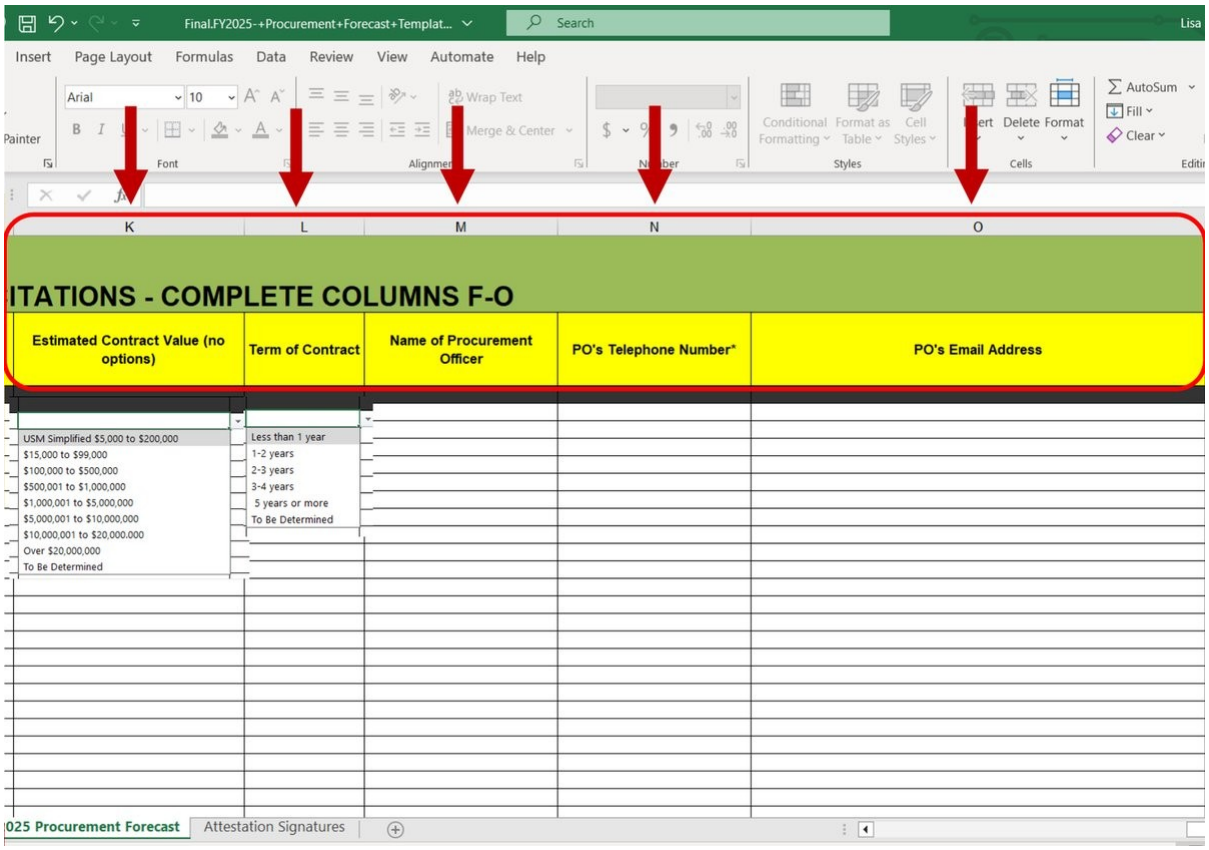


Procurement Forecast Template

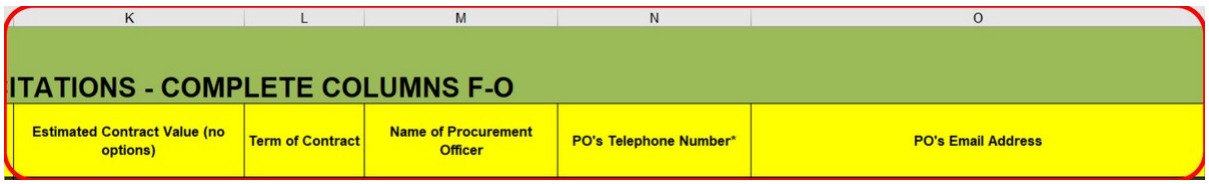




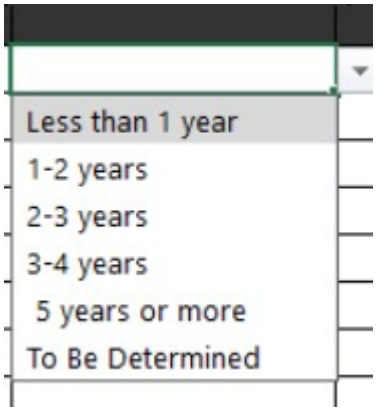


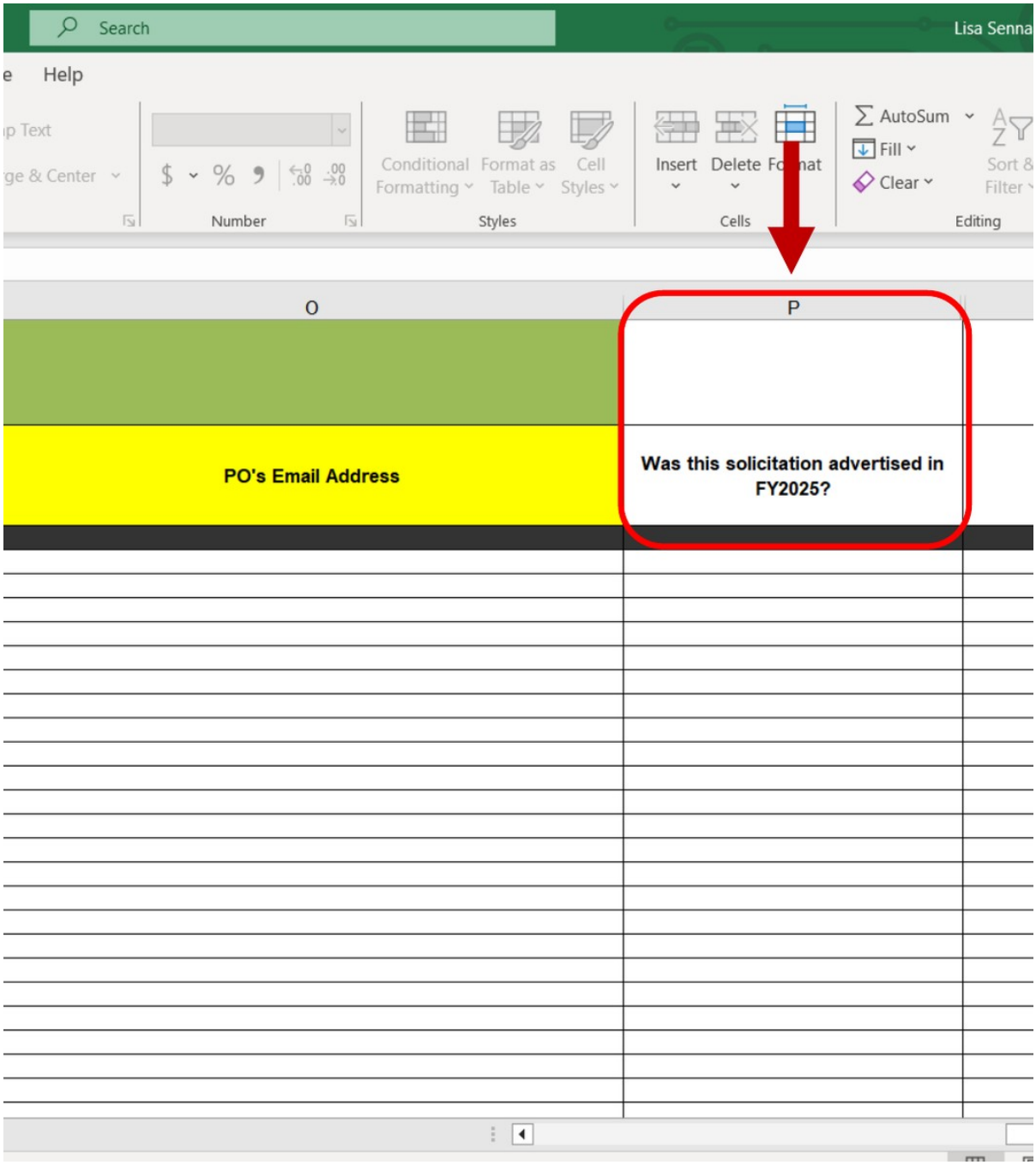


Procurement Forecast Template

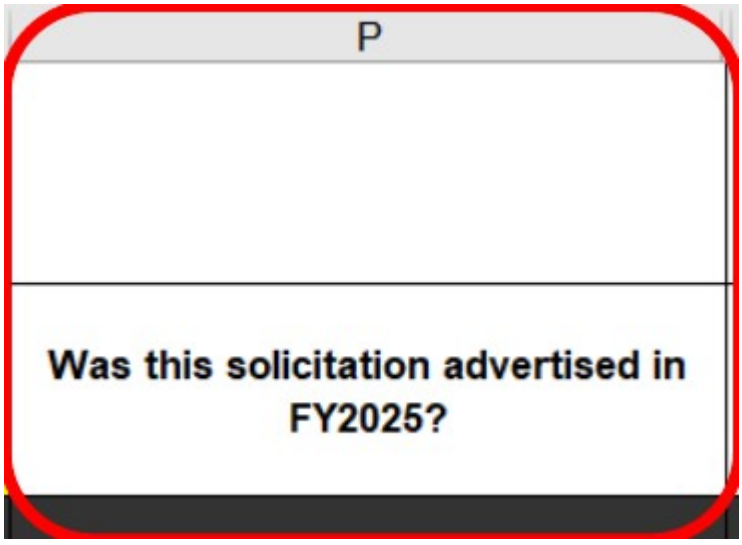


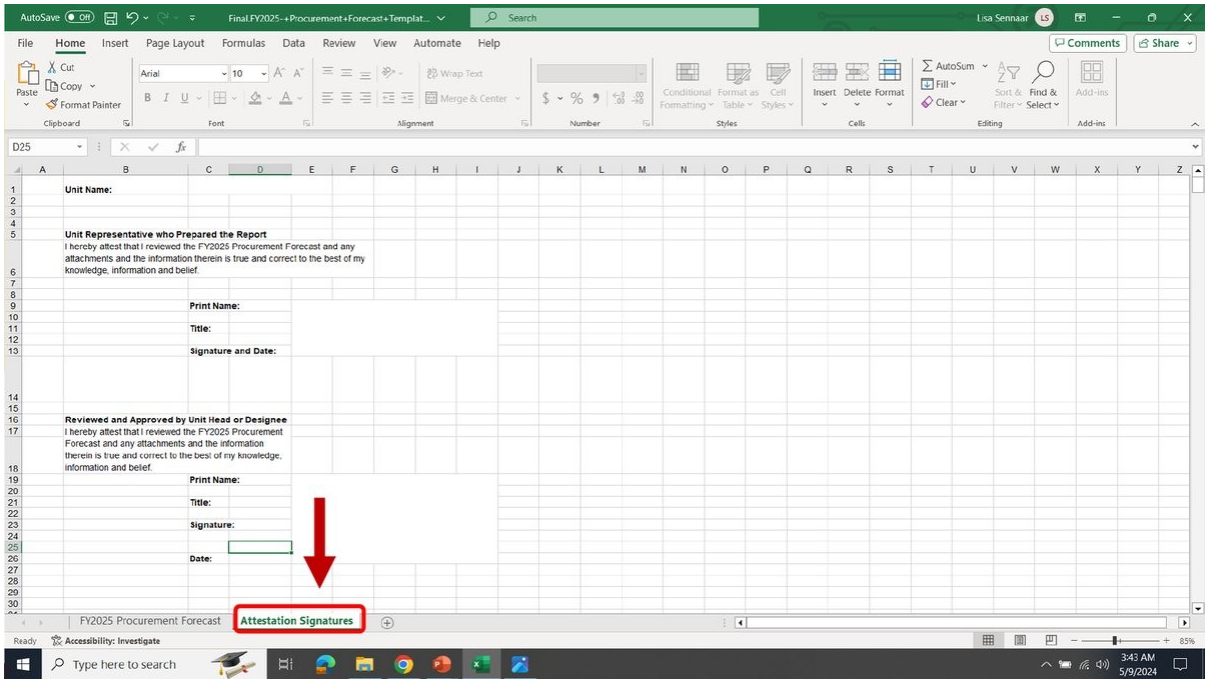

USM Simplified $5,000 to $200,000
$15,000 to $99,000
$100,000 to $500,000
$500,001 to $1,000,000
$1,000,001 to $5,000,000
$5,000,001 to $10,000,000
$10,000,001 to $20,000.000
Over $20,000,000
To Be Determined


Less than 1 year
1-2 years
2-3 years
3-4 years
5 years or more
To Be Determined

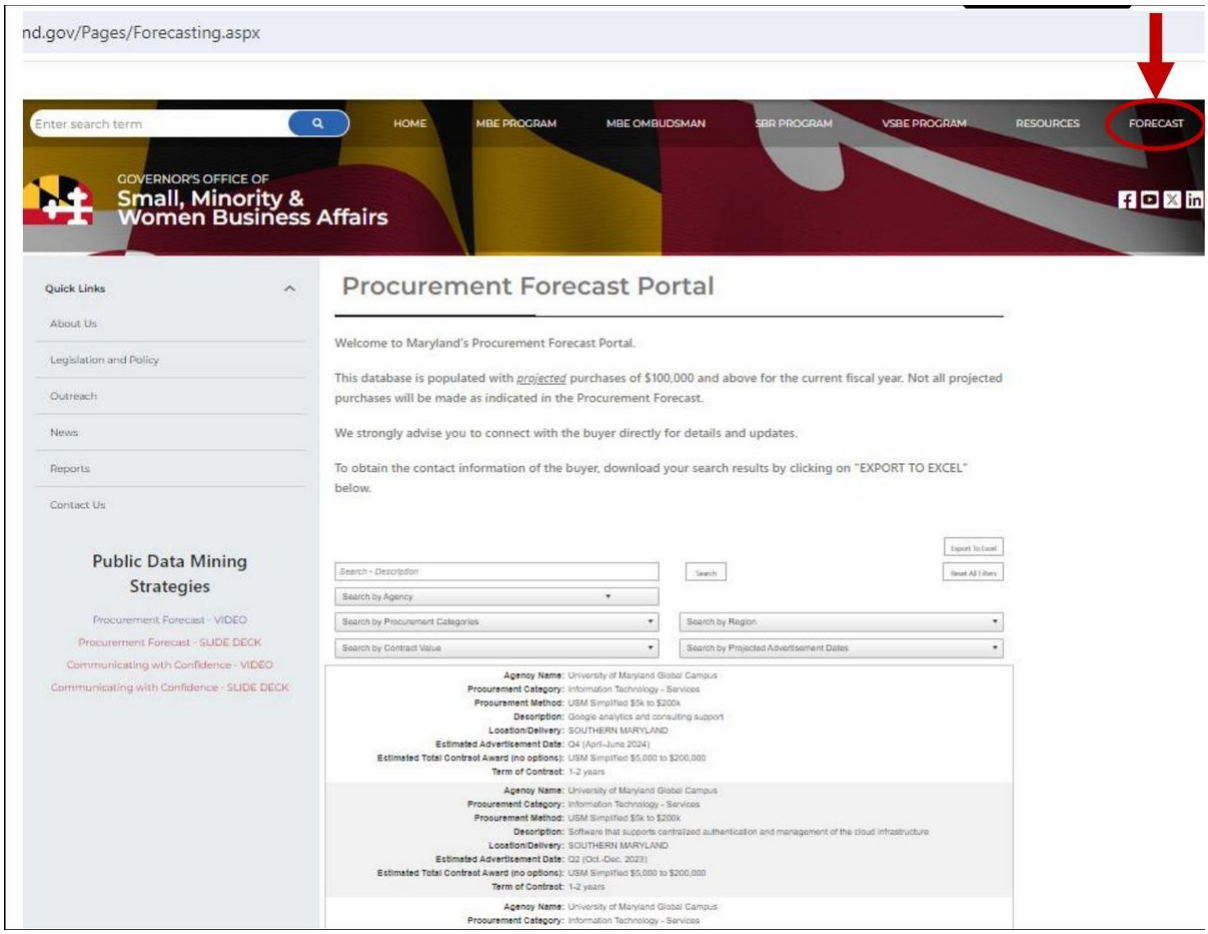


Procurement Forecast Template





Procurement Forecast Template



Procurement Forecast Portal

Only 80% of units submitted Forecasts in 2024

Any Questions?

Any Questions?

MBE Program

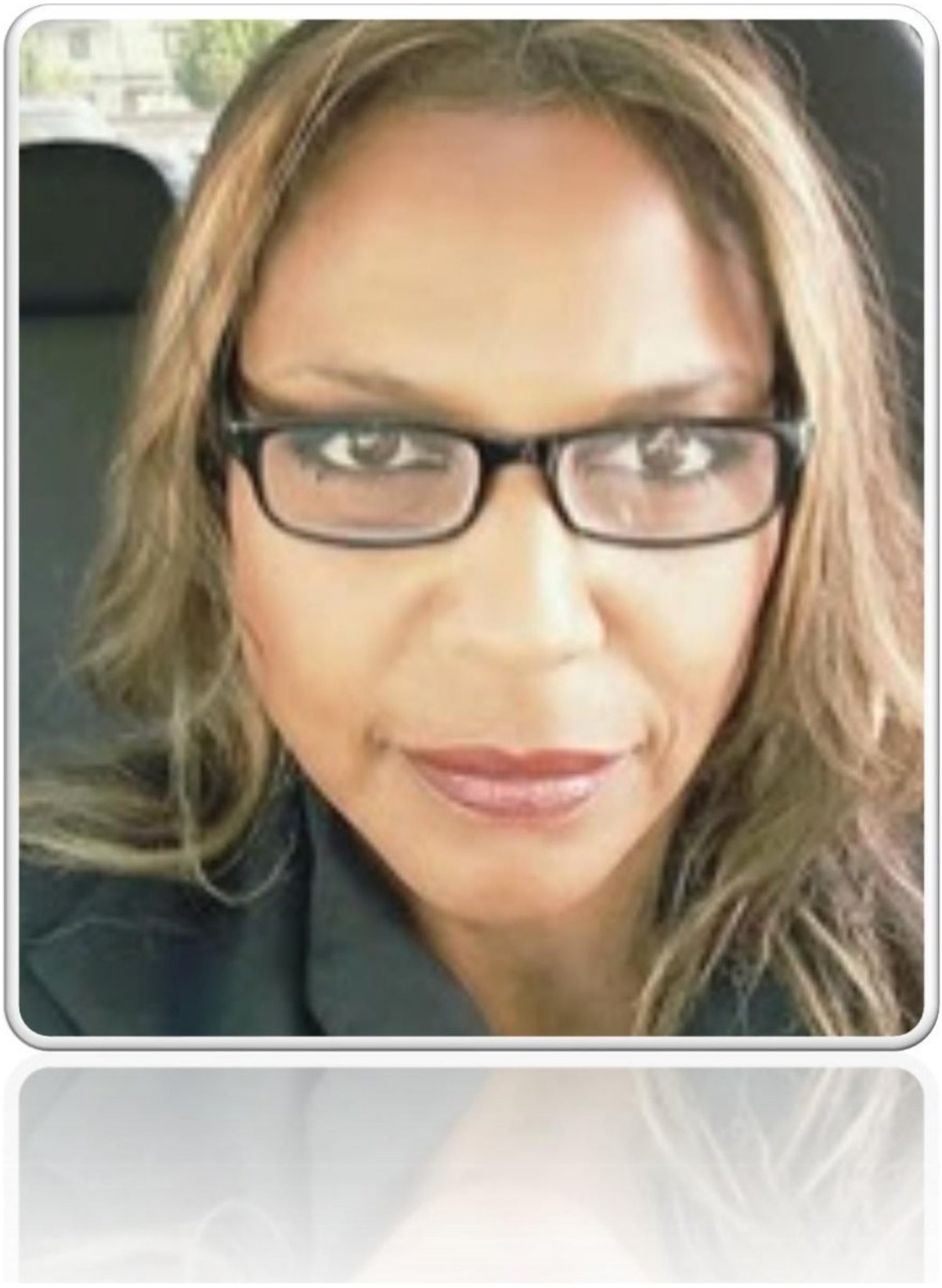
Presented by Karen Reyes

MBE Compliance Manager

MBE Program Agenda

- MBE Reporting Requirements
- Backup Data
- FY24 Annual Report Preparation
- Checks and Balances
- FY25 Quarterly Report Preparation
    - **New Data Requirements
- Data Accuracy
- Supplemental Reporting Guidance

New Addition to the GOSBA Team!



Caryn Brandon joined our office at the beginning of April as an MBE Compliance Manager. Caryn has jumped right in and some of you may have already noticed her in training sessions and meetings. Caryn brings a wealth of experience in business, accounting, and contracts & grants management to the position. She will be working hand in hand with Karen Reyes on MBE Program compliance and ensuring accurate and timely reporting. We look forward to all that she has to contribute!

MBE Reporting Requirements

MBE Reporting Requirements

Let's review the reporting requirements for our office:

Found in COMAR 21.11.03.17. Reporting

Our office must receive both Quarterly and Annual MBE Procurement Reports (backup data should be included).

Always send to the mbereports.gosba@maryland.gov email box.

MBE Reporting Requirements

Other Reporting Requirements:

Submit to the compliance.gosba@maryland.gov email box

Waiver Determinations as granted

Copy our office on the Annual Waiver report to BPW

MBE Form Amendment Consent/Approval

We should receive PRG paperwork for solicitations 25 Million and over.

Note:

COMAR 21.11.03.17 C.

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.

Note:

COMAR 21.11.03.17 C.

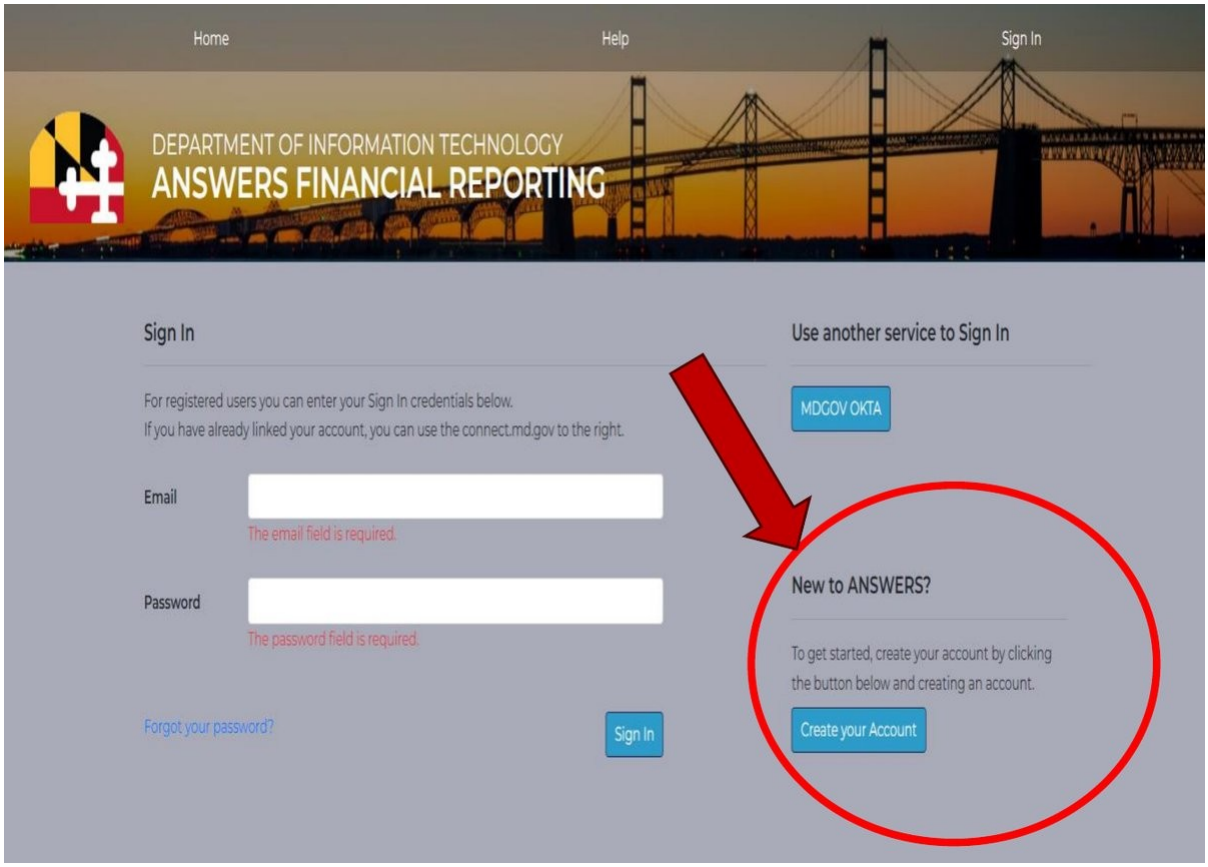
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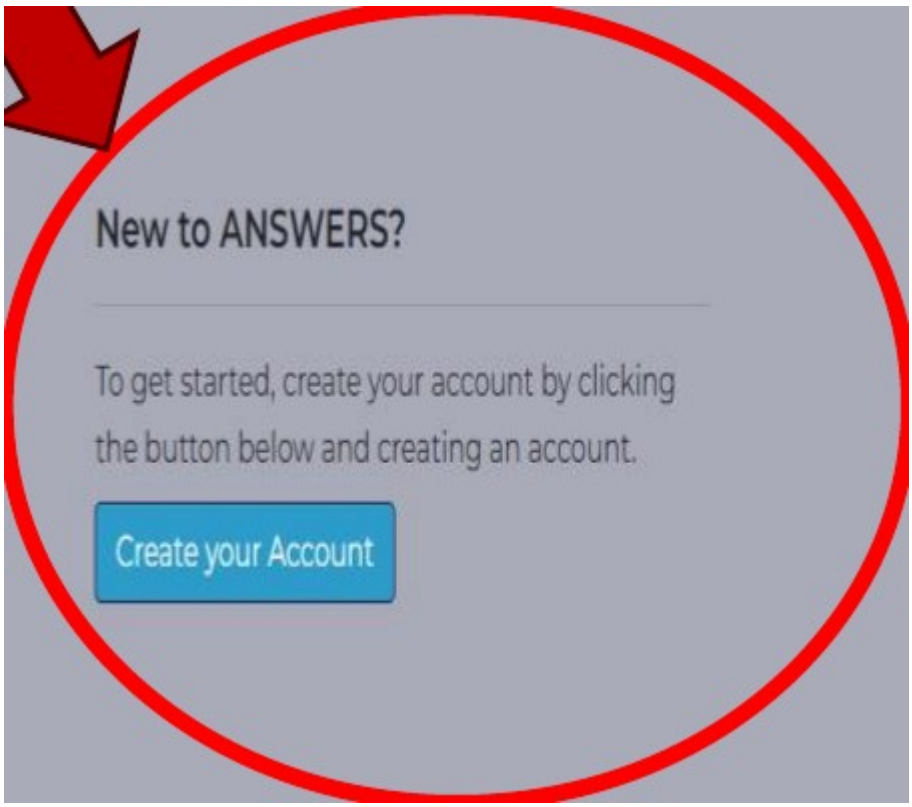
Backup Data

Creating an ANSWERS Account

To access the ANSWERS website (https://net.md.gov/apps/answers/) VPN connection is required

On the homepage follow the prompt to create your account





Reporting – source documents for data reports

Generate the following FMIS/ANSWERS Reports:

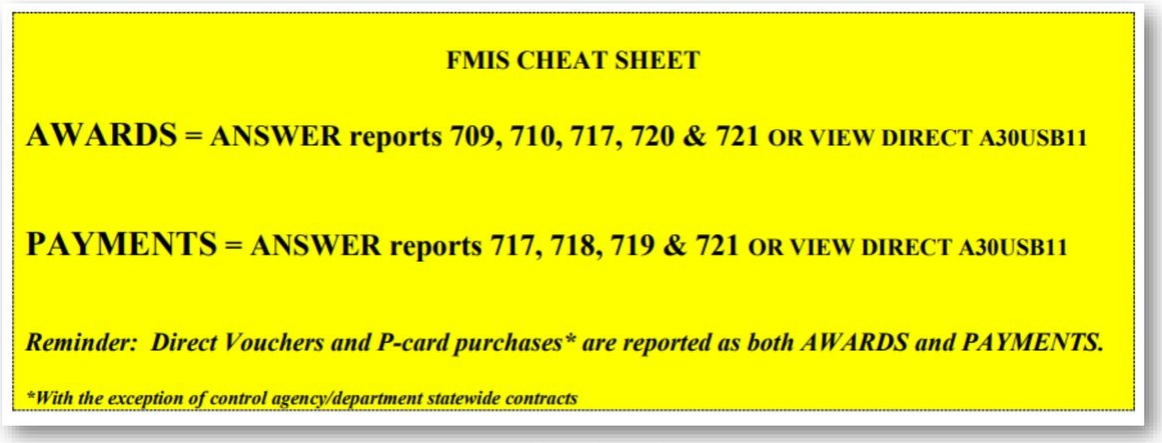
PCHL709 (BPO/PO Change Orders from contracts awarded in prior fiscal years)
PCHL710 (Contract Awards Detail) run by award date
PCHL711 (Contract Awards Summary) Use Waiver Data Only
PCHL717 (Prime Payments by Direct Voucher; no BPO/PO)
PCHL718 (Prime Voucher Payments made from BPO/PO)

PCHL719 (Subcontractor Payments)
PCHL 720 (Subcontract Awards) run by award date
PCHL 721 or VIEWDIRECT A30USB11(P-Card Total/Detail)

IFMIS and other reporting systems

•EXPECTED REPORTS
- ❑CHANGE ORDERS (SIMILAR TO ANSWERS 709 REPORT)
- ❑AWARDS (PO/BPO) (SIMILAR TO ANSWERS 710 REPORT)
- ❑SUBCONTRACTOR AWARDS (SIMILAR TO ANSWERS 720 REPORT)
- ❑SUBCONTRACTOR PAYMENTS (SIMLAR TO ANSWERS 719 REPORT)
- ❑VOUCHER PAYMENTS (PO/BPO) (SIMILAR TO ANSWERS 718 REPORT)
- ❑DIRECT VOUCHERS (SIMILAR TO ANSWERS 717 REPORT)
- ❑CREDIT CARD OR CPC REPORT (SIMILAR TO ANSWERS 721 REPORT)

MBE AWARDS/PAYMENTS REPORTING

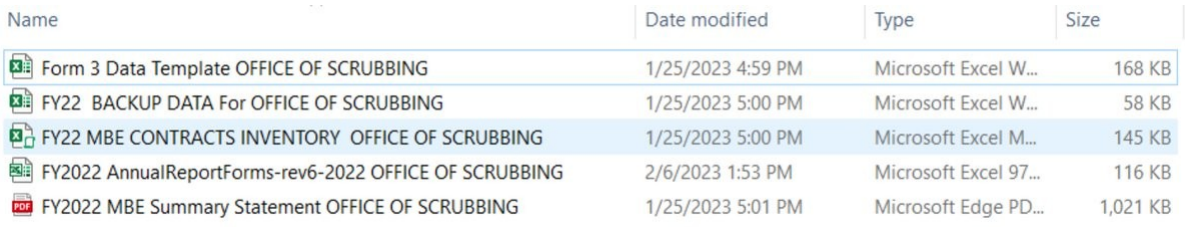


Compiling your data

Once you have completed the scrubbing of your data, you will consolidate and save your data reports with a name that describes the dataset, your agency/department, and the FY, as discussed earlier.

You will enter data into the correct cells of the fields in the Form 1 / 2, Form 3, and Contracts Inventory

Perform Checks and Balances to ensure your data is accurate



Name	Date modified	Type	Size
Form 3 Data Template OFFICE OF SCRUBBING	1/25/2023 4:59 PM	Microsoft Excel W...	168 KB
FY22 BACKUP DATA For OFFICE OF SCRUBBING	1/25/2023 5:00 PM	Microsoft Excel W...	58 KB
FY22 MBE CONTRACTS INVENTORY OFFICE OF SCRUBBING	1/25/2023 5:00 PM	Microsoft Excel M...	145 KB
FY2022 AnnualReportForms-rev6-2022 OFFICE OF SCRUBBING	2/6/2023 1:53 PM	Microsoft Excel 97...	116 KB
FY2022 MBE Summary Statement OFFICE OF SCRUBBING	1/25/2023 5:01 PM	Microsoft Edge PD...	1,021 KB

What to look out for when data sorting/scrubbing

Ensure Data is complete for the timeframe it is being pulled

Ex. If you are pulling QTR 1 report be sure that you are pulling the correct months (July 1-September 31)

Ensure data is clean and all data errors are solved

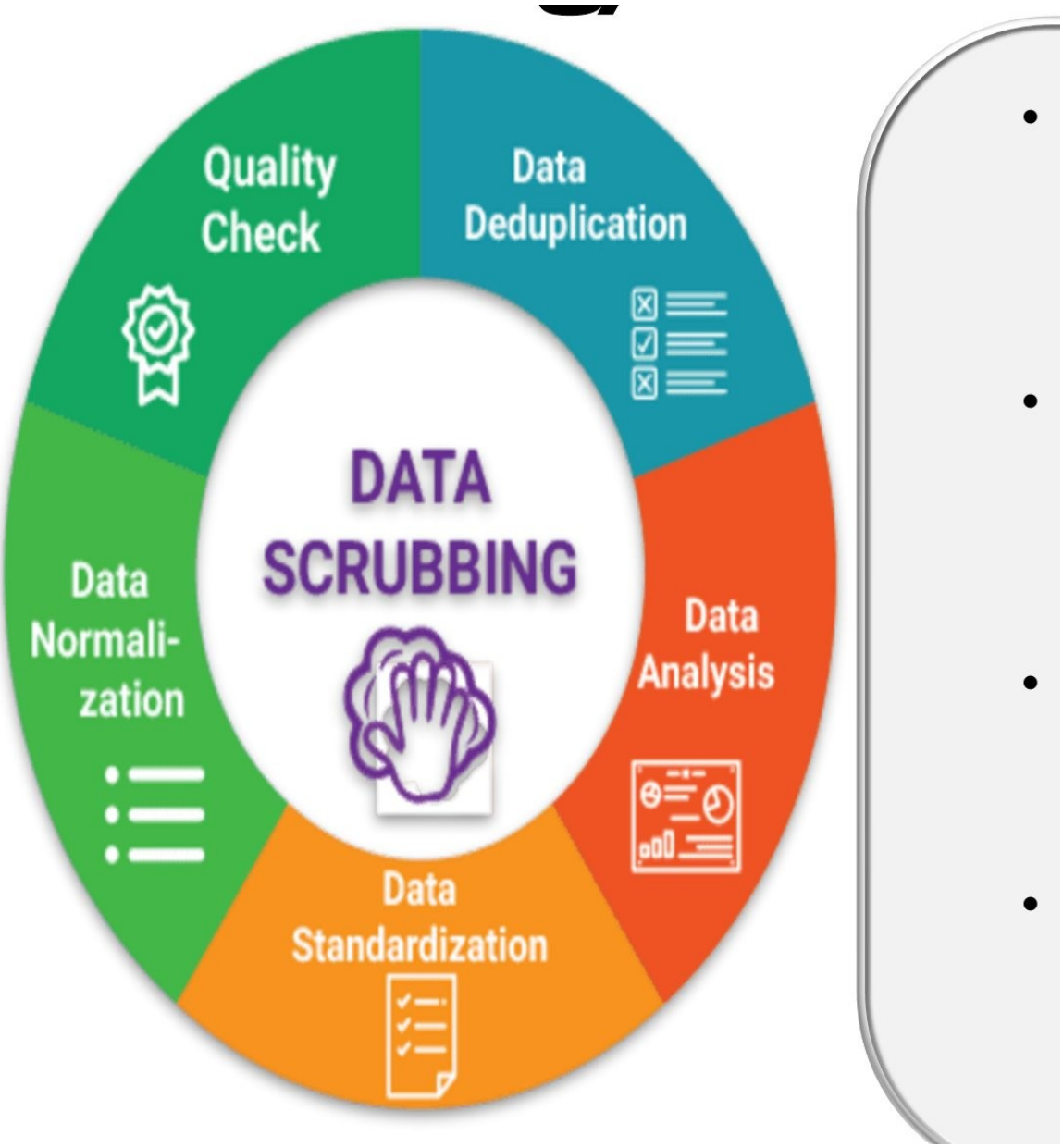
Ex. If your agency is reporting negative numbers on their credit card report be sure to reconcile any returns that were made and only report the final total that was spent

Ensure data is consistent with socioeconomic reporting requirements

Ex. Scrubbing out preferred providers

Ensure data is in the proper format

Ex. Making sure the backup data that was collected provides all the necessary data fields



Data Scrubbing Example

When submitting backup data it is crucial for the data to be easily understood

Utilizing color coding or pivot tables aids in clear understanding of the data being provided

Sample Data Templates are available per request, contact your designated MBE Compliance Manager to obtain the sample data for reference



Dep	MBE Co	MBE Descripti	Vendor N	Vendor Name	SBR Ver	MBE Cer	Due Date	Voucher No	Voucher Amou	Reportable Amou	Line No / Commodity Id / Commodity Name
S33			****842146	SIGN LANGUAGE LLC			12/3/2021	S33PB3300089	$153.60	$153.60	"001","96167","SIGN LANGUAGE SERVICES FOR THE HEARING IMPAIRED."
S33			****189892	PRODUCTION TEAM			12/18/2021	S33PB3300090	$275.00	$275.00	"001","91581","TELEVISION COMMERCIAL PRODUCTION"
S33			****508591	321 SUPPORT			8/28/2021	S33PB3300091	$1,225.00	$1,225.00	"001","95285","SUPPORT SERVICES"
S33			****586710	LANGUAGE PROS			5/25/2022	S33PB3300092	$147.32	$147.32	"001","96175","TRANSLATION SERVICES"
S33			****982511	QUICK REPAIRS LLC			3/29/2022	S33PB3300093	$31,085.52	$31,085.52	"001","93625000000","REPAIR ON EQUIPMENT OR REPLACE"
S33			****143563	MOBILE SOFTWARE INC			1/16/2022	S33PB3300095	$2,040.83	$2,040.83	"001","20556GIS012","MOBILE SOFTWARE, GIS SOFTWARE MASTER CONTRACT"
S33			****968872	ELECTRONICS CORP			5/25/2022	S33PB3300096	$273.47	$273.47	"001","01621DCNW06","NETWORK DIGITAL COPIER AND MULTIFUNCTION DEVICES, CLASS VI"
									Total DV	$35,200.74	
									Total DV Count	7	
EXCLUDE FROM AWARDS INCLUSION FOR PAYMENTS											
S33		STATEWIDE	****027237	RUDOLPHS OFFICE SUPPLY		94-126	8/20/2021	S33PB3300094	$167.08	$167.08	"001","98528","COOLERS, DRINKING WATER"
Exclusions											
S33			****942913	ELITE CONSULTING INC			7/30/2021	S33PB3300077	$5,500.00	$0.00	"001","94821","FEES, CONSULTING"
S33			****924710	CELLPHONE CORP			7/13/2021	S33PB3300078	$0.29	$0.00	"001","91579","TELEPHONE SERVICES, LONG DISTANCE/LOCAL, 800 SERVICE, CALLING CARD, WATS SVCS"
S33			****699120	BOOKS & COMPANY INC			2/26/2022	S33PB3300079	$249.25	$0.00	"001","71510","BOOKS, MAGAZINES, PAMPHLETS, REPRINTS, ETC.(PUBLICATIONS)"
S33			****881509	SERVICE PROS			5/20/2022	S33PB3300080	$35,886.12	$0.00	"001","96141","SERVICE AGREEMENT"
S33			****333555	MARKETING ASSOCIATION			3/18/2022	S33PB3300081	$500.00	$0.00	"001","95440000003","DUES"
S33			****095459	NATIONAL ACCOUNTING ASSOCIATION			8/18/2021	S33PB3300082	$18,486.00	$0.00	"001","99560","MEMBERSHIP FEES"
S33			****888725	QUICK STORE			7/28/2021	S33PB3300083	$142.27	$0.00	"001","99580","REIMBURSEMENT"
S33			****457454	ELEMENTARY SCHOOL FOUNDATION			7/30/2021	S33PB3300084	$16,440.67	$0.00	"001","94631","GRANT PAYMENTS"
S33			****592177	COMMUNITY HOSPITAL			4/19/2022	S33PB3300085	$3,987.06	$0.00	"001","96194","MEDICAL AND HOSPITAL SERVICES (INCLUDING BLOOD TESTING & REPORTS) ETC."
S33			****221660	MECHANICS ON THE GO			9/9/2021	S33PB3300086	$115.85	$115.85	"001","92847","VEHICLE MAINTENANCE SERVICE"
S33			****091383	GOOD FUEL COMPANY			12/3/2021	S33PB3300087	$50.74	$50.74	"001","40515","GASOLINE, AUTOMOTIVE"

Summary of MBE report | PCHL709 | PCHL710 RAW | PCHL710 SCRUBBED | PCHL711 | PCHL713 | PCHL717 RAW | PCHL717 SCRUBBED | PCHL 71 ..

Data Processing for MBE Reporting

Your agency is responsible for downloading the most up to date MBE Reporting templates provided in the MBE programs reporting toolkit

These templates are already equip with the necessary formulas to calculate your agencies participation percentages for every FY

Many of these templates are being uploaded into a database which makes it crucial for the processing step to be done accurately to produce the annual report you see at the end of the year



The Governor's Office of Small, Minority & Women Business Affairs Reports

Type	Doc Title	File Size
Category : Annual Report (9)		
	Fiscal Year 2023	27075 KB
	Fiscal Year 2022	1363 KB
	Fiscal Year 2021	1071 KB
	Fiscal Year 2020	1897 KB
	Fiscal Year 2019	1581 KB
	Fiscal Year 2018	2057 KB
	Fiscal Year 2017	1653 KB
	Fiscal Year 2016	5563 KB
	Fiscal Year 2015	1846 KB

Data Analysis

Data analysis is the process of inspecting, cleansing, transforming, and modeling data with the goal of discovering useful information, informing conclusions, and supporting decision-making.

Annual reporting templates provided by GOSBA have a designated ‘NOTES’ section

This is where your agency can list out what conclusions were made or important data related notes that are necessary to have a full understanding of the data being provided

FY24 MBE Annual Report Preparation

Award reports

This part of the process will include the preparation of the :

Form 1 / 2 Annual Report

Contracts Inventory Sheet

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

Payment reports

This part of the process will include the preparation of the :

Form 3 Payment Portal

Manual entry and deletion method OR

Import Method (Form 3 Data Template)

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

Compliance report

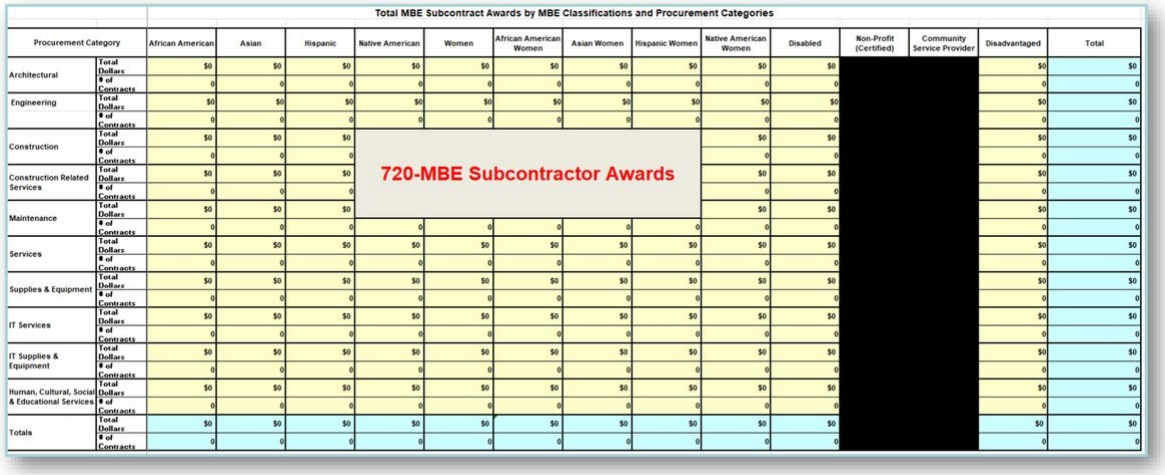
This part of the process will include the preparation of the :

Compliance Assessment

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

REPORTING MBE AWARDS Form 1 Form 2 Contracts Inventory

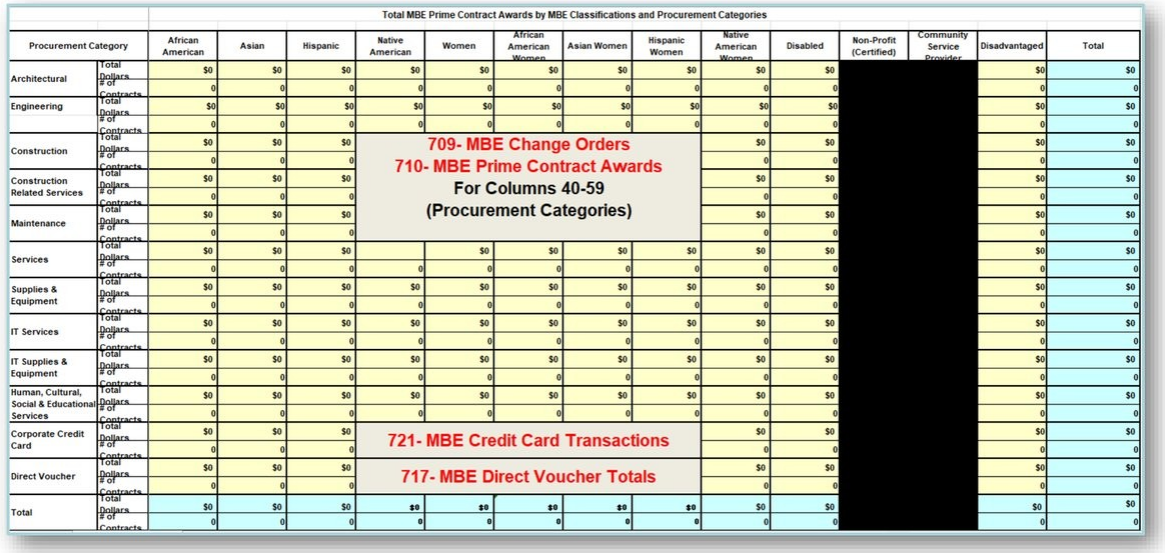
Form 2- Subcontract awards Table



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	720-MBE Subcontractor Awards					$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

Form 2- Prime contract awards Table



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 Columns 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 1- total contract awards table

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	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	709/710	0	711	0	$0	0	$0	0	$0	
Engineering	0	709/710	0	711	0	$0	0	$0	0	$0	
Construction	0	709/710	0	711	0	$0	0	$0	0	$0	
Construction Related Services	0	709/710	0	711	0	$0	0	$0	0	$0	
Maintenance	0	709/710	0	711	0	$0	0	$0	0	$0	
Services	0	709/710	0	711	0	$0	0	$0	0	$0	
Supplies & Equipment	0	709/710	0	711	0	$0	0	$0	0	$0	
IT Services	0	709/710	0	711	0	$0	0	$0	0	$0	
IT Supplies & Equipment	0	709/710	0	711	0	$0	0	$0	0	$0	
Human, Cultural, Social & Educational Services	0	709/710	0	711	0	$0	0	$0	0	$0	
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

Outreach Data & Evaluation Tab **NEW Found in Form 1 & 2 Excel Template

Outreach Data

*# and type of organized outreach events your unit **conducted** (live or virtual)*

Type of Event	Live	Virtual	Total
Networking			0
Workshop			0
Webinar			0
Exhibitor			0
Conference			0
Panelist			0
Other			0
Total	0	0	0

*# and type of organized outreach events your unit **participated** (live or virtual)*

Type of Event	Live	Virtual	Total
Networking			0
Workshop			0
Webinar			0
Exhibitor			0
Conference			0
Panelist			0
Other			0
Total	0	0	0

Agency Resources Available to MBE Vendors

List of resources your agency has available to help businesses know how to do business with your agency:

Evaluation By Procurement Agency of the Success of its MBE Program

COMAR 21.11.03.17

(7) An evaluation by the procurement agency of the success of its MBE program, which evaluation shall include a brief description of the procurement agency's outreach efforts to MBE prime contractors and MBE subcontractors.

Contracts Inventory-MBE Prime contractors

Minority Business Enterprise MBE Prime Contract Awards Report
For Fiscal Year 2022
Date Submitted:

(List all MBE prime contracts awarded.)

#	Agency 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 on this line)
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								

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

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

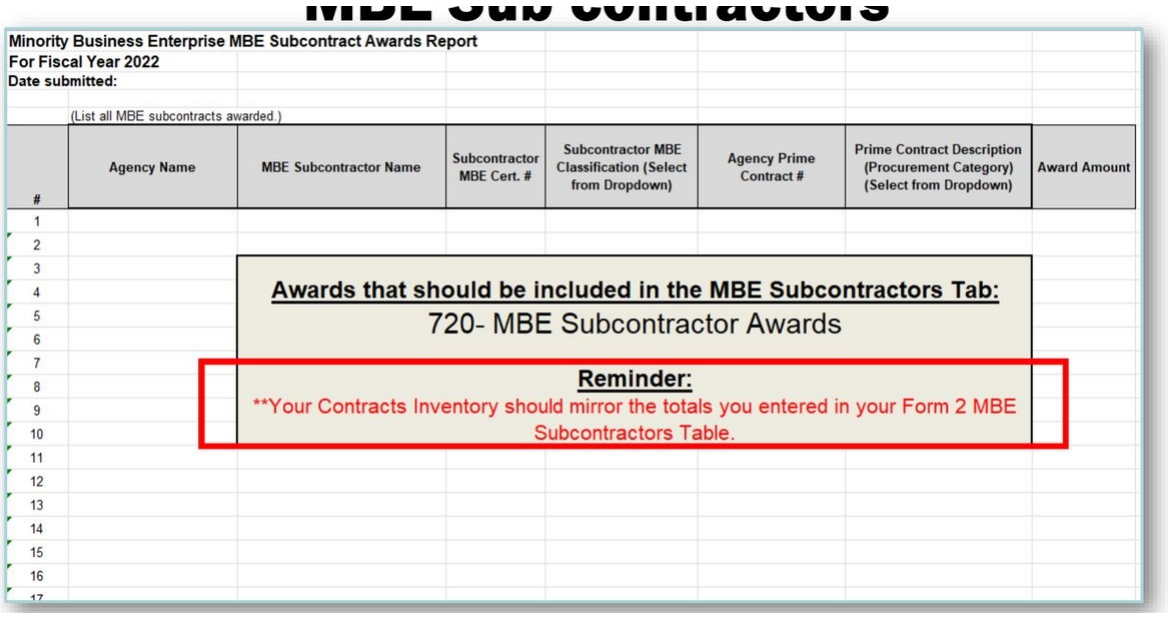
Reminder:

**Your Contracts Inventory should mirror the totals you entered in your Form 2 Prime Contractors Table.

Reminder:

**Your Contracts Inventory should mirror the totals you entered in your Form 2 Prime Contractors Table.

Contracts Inventory-MBE Sub contractors



Minority Business Enterprise MBE Subcontract Awards Report
For Fiscal Year 2022
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
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							

Awards that should be included in the MBE Subcontractors Tab:
720- MBE Subcontractor Awards

Reminder:
**Your Contracts Inventory should mirror the totals you entered in your Form 2 MBE Subcontractors Table.

Reminder:
**Your Contracts Inventory should mirror the totals you entered in your Form 2 MBE Subcontractors Table.

REPORTING MBE PAYMENTS FORM 3 Template & Portal

https://doit.state.md.us/MBEFORM #3/

Retrieve login info from Governor's Office of Small, Minority & Women Business Affairs, if needed.

Choose your method, DO NOT DO BOTH

Manual Entry OR

Import Template Method

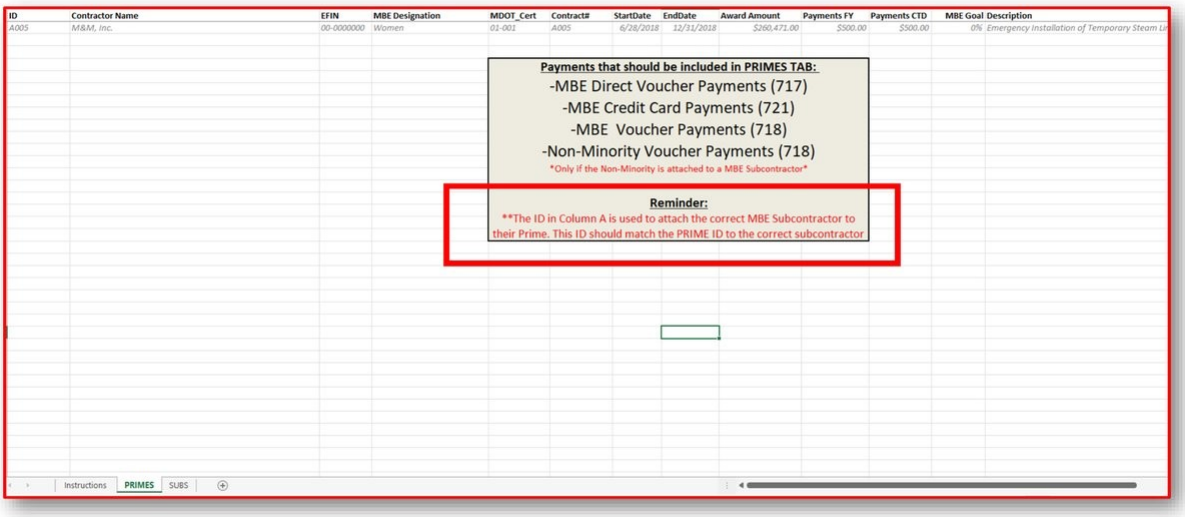
Be mindful, if you are using the import method, it will overwrite everything currently in working data.

No matter what method you choose, you must still submit for the reporting year.

Problems with submitting, contact Governor's Office of Small, Minority & Women Business Affairs:

Form 3 Web Portal - Data Entry

Form 3 - import method MBE Prime Contractor Payments

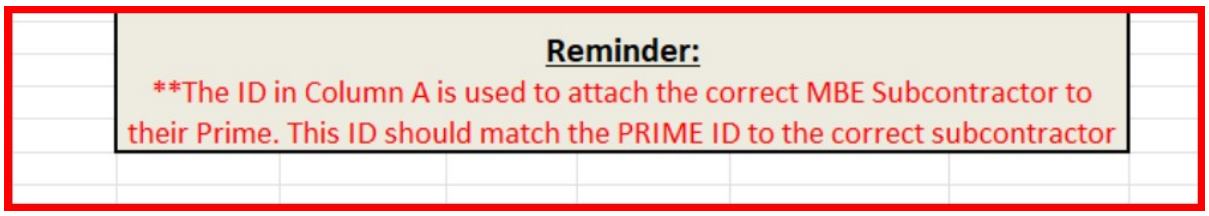


ID	Contractor Name	EFIN	MBE Designation	MDOT_Cert	Contract#	StartDate	EndDate	Award Amount	Payments FY	Payments CTD	MBE Goal	Description
A005	M&M, Inc.	00-0000000	Women	01-001	A005	6/28/2018	12/31/2018	$260,471.00	$500.00	$500.00	0%	Emergency Installation of Temporary Steam Li

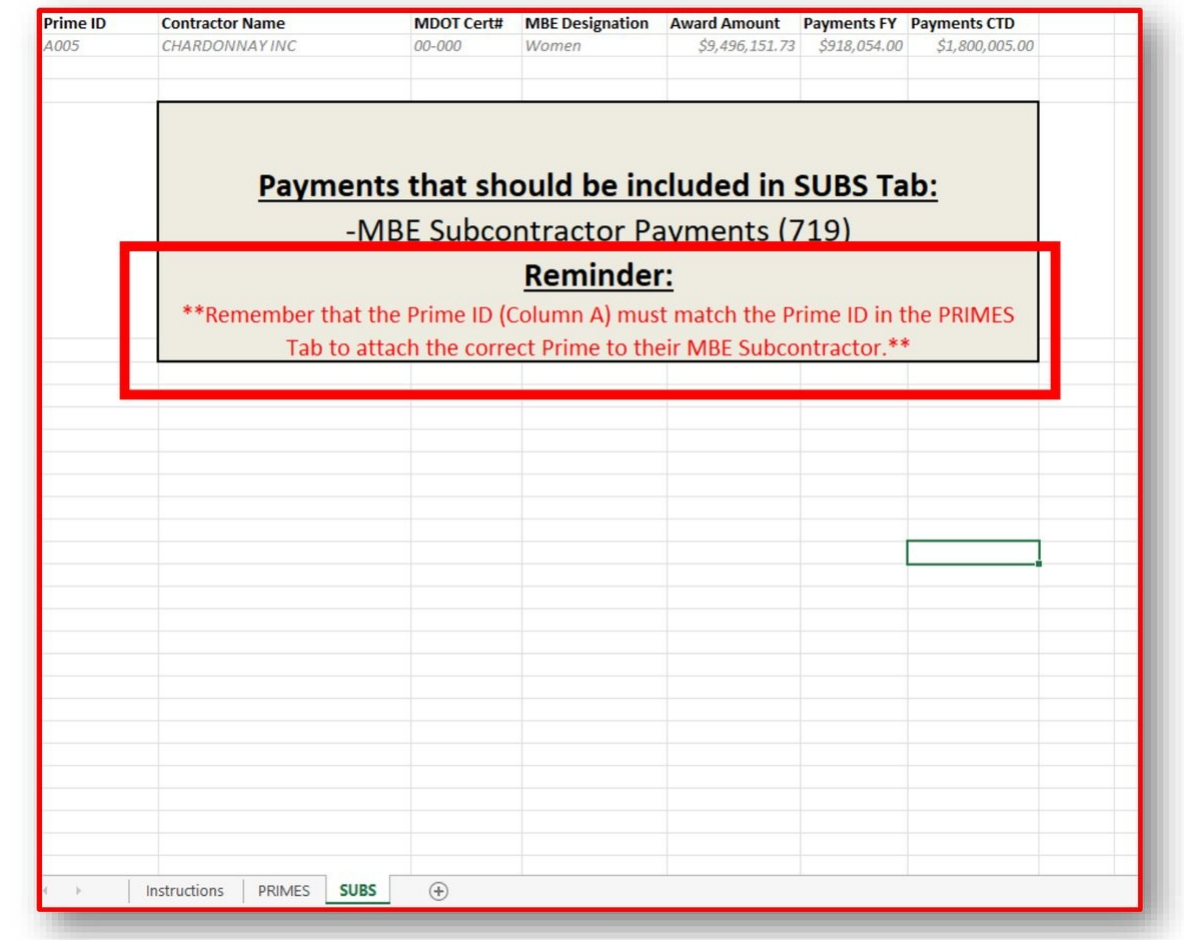
Payments that should be included in PRIMES TAB:
-MBE Direct Voucher Payments (717)
-MBE Credit Card Payments (721)
-MBE Voucher Payments (718)
-Non-Minority Voucher Payments (718)
Only if the Non-Minority is attached to a MBE Subcontractor

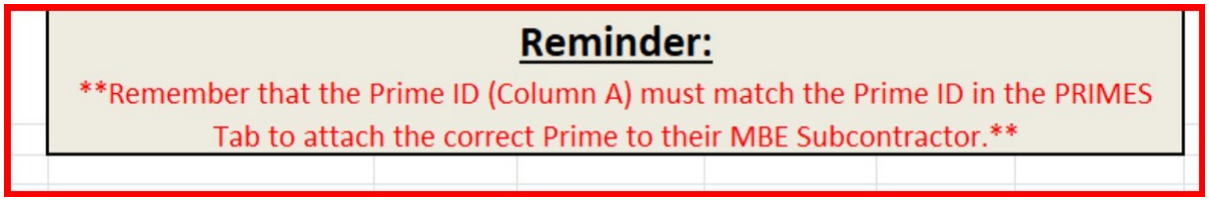
Reminder:
**The ID in Column A is used to attach the correct MBE Subcontractor to their Prime. This ID should match the PRIME ID to the correct subcontractor.

Instructions | PRIMES | SUBS



Form 3 - import method MBE Subcontractor Payments





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 as shown.
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 instead you receive errors, resolve them, then try importing the Excel file again.
Should you need to edit your import data, you can edit the Excel file and reimport it.





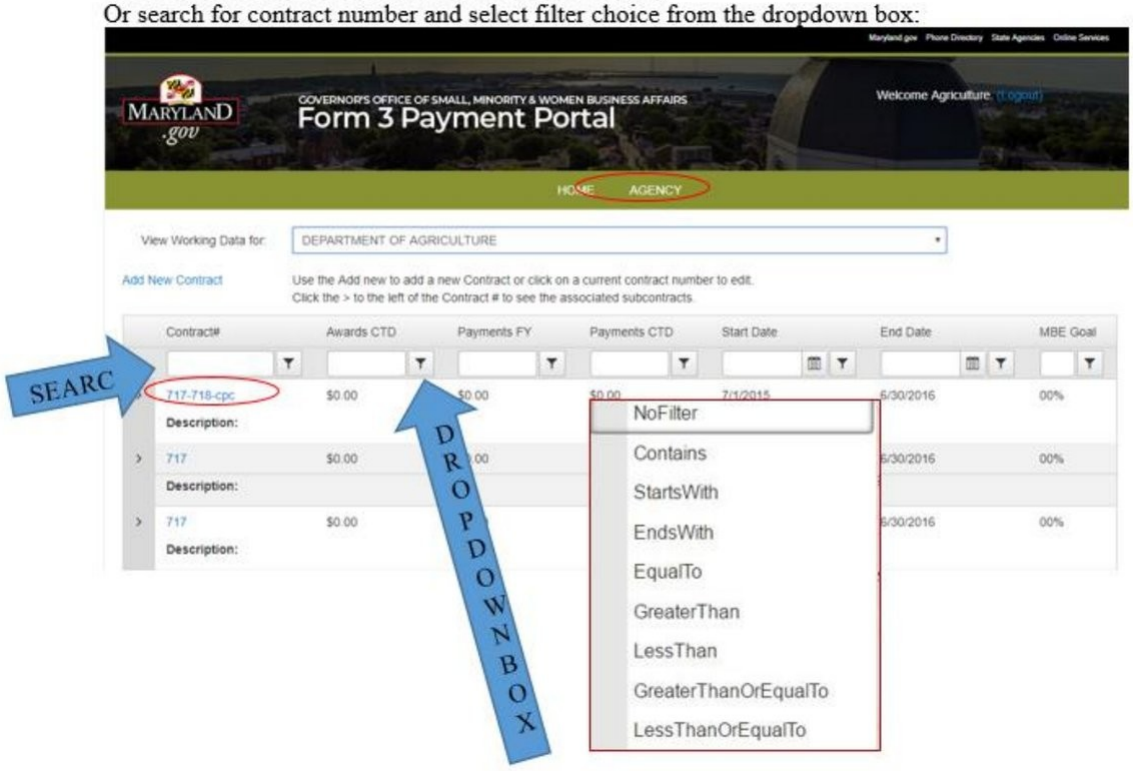
Form 3 Portal – Import Method

Form 3 Portal - Manual Entry

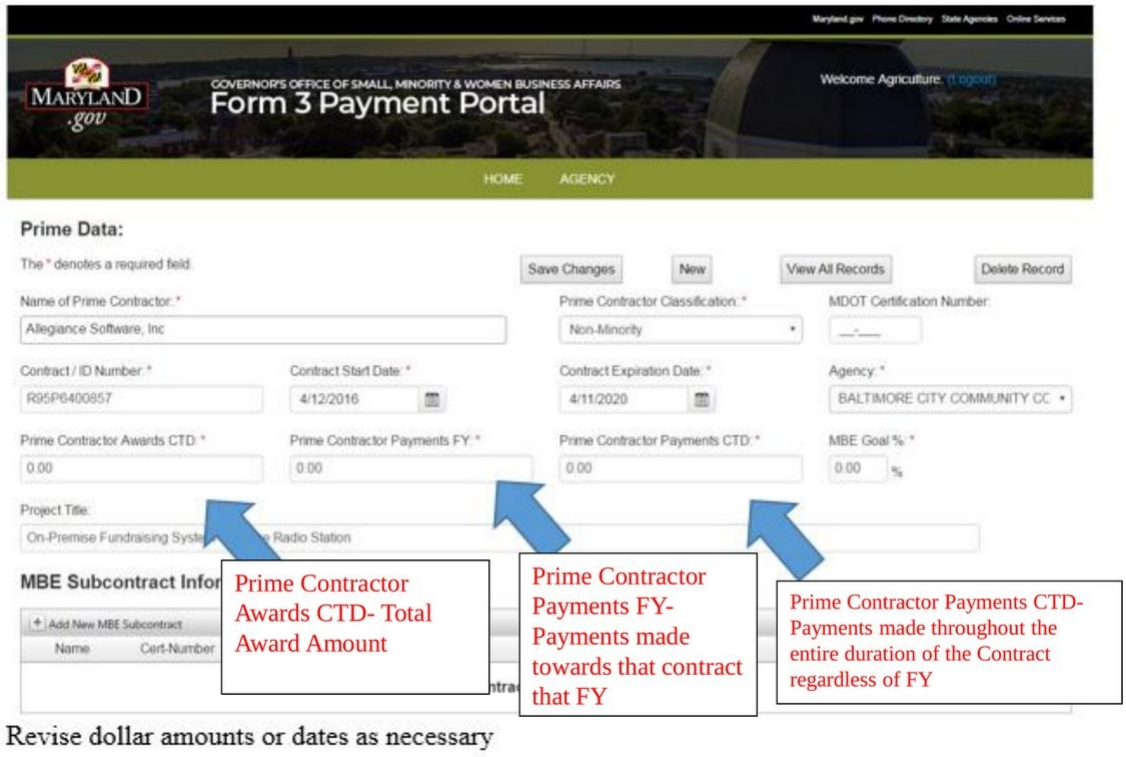
After Sign in On the left-hand side, Click:

Working Data
View All Data
Proceed to Edit Data

Click on contract number and revise data as necessary
Or search for contract number and select filter choice from the dropdown box:



Form 3 Portal - Manual Entry



Revise dollar amounts or dates as necessary

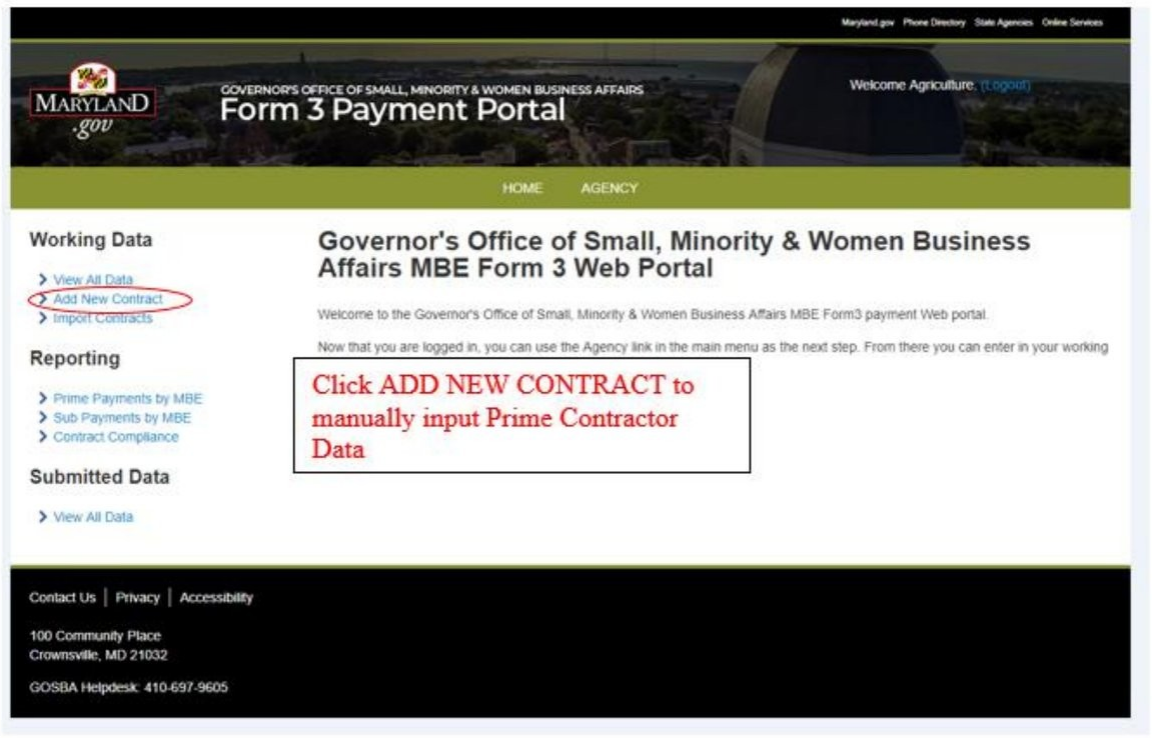
Prime Contractor Awards CTD- Total Award Amount

Prime Contractor Payments FY- Payments made towards that contract that FY

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

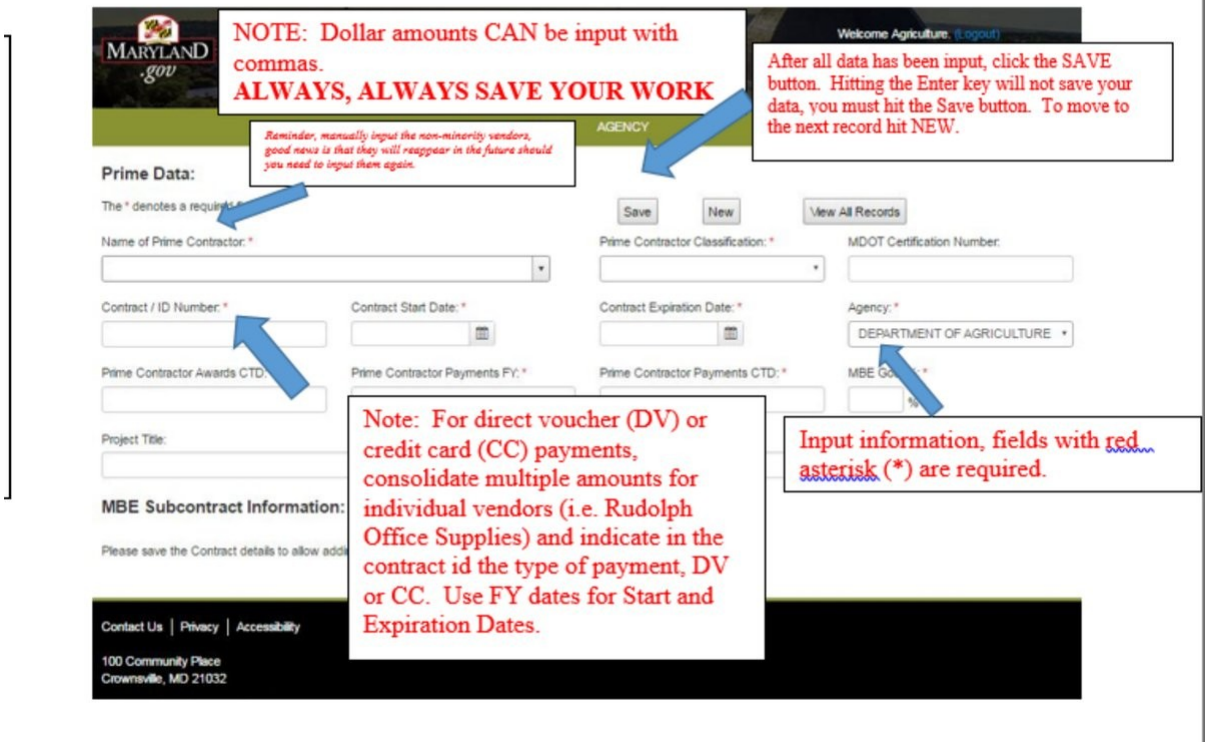
Form 3 Portal - Manual Entry

Input a brand new contract:



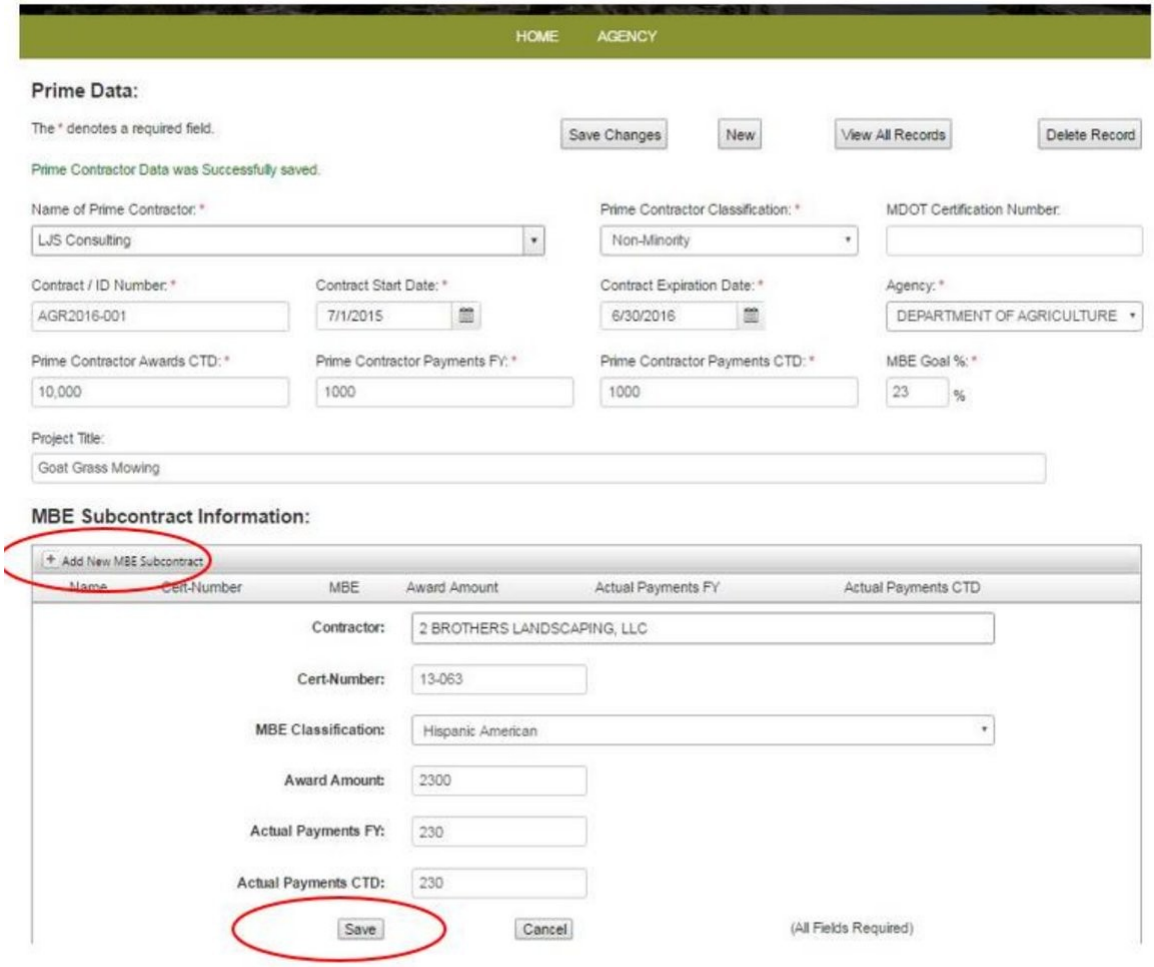
Form 3 Portal - Manual Entry

Input prime contractor data:



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

Form 3 Portal - Manual Entry



Add subcontractor data:
Click “Add MBE Subcontractor”
Input Subcontractor Data
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/

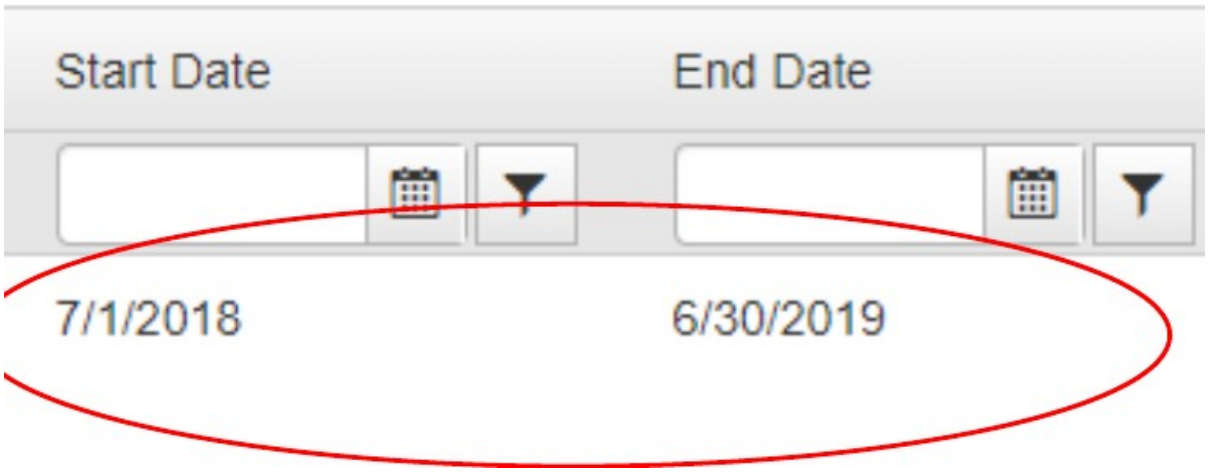
by certification number and confirm Vendor’s legal name.

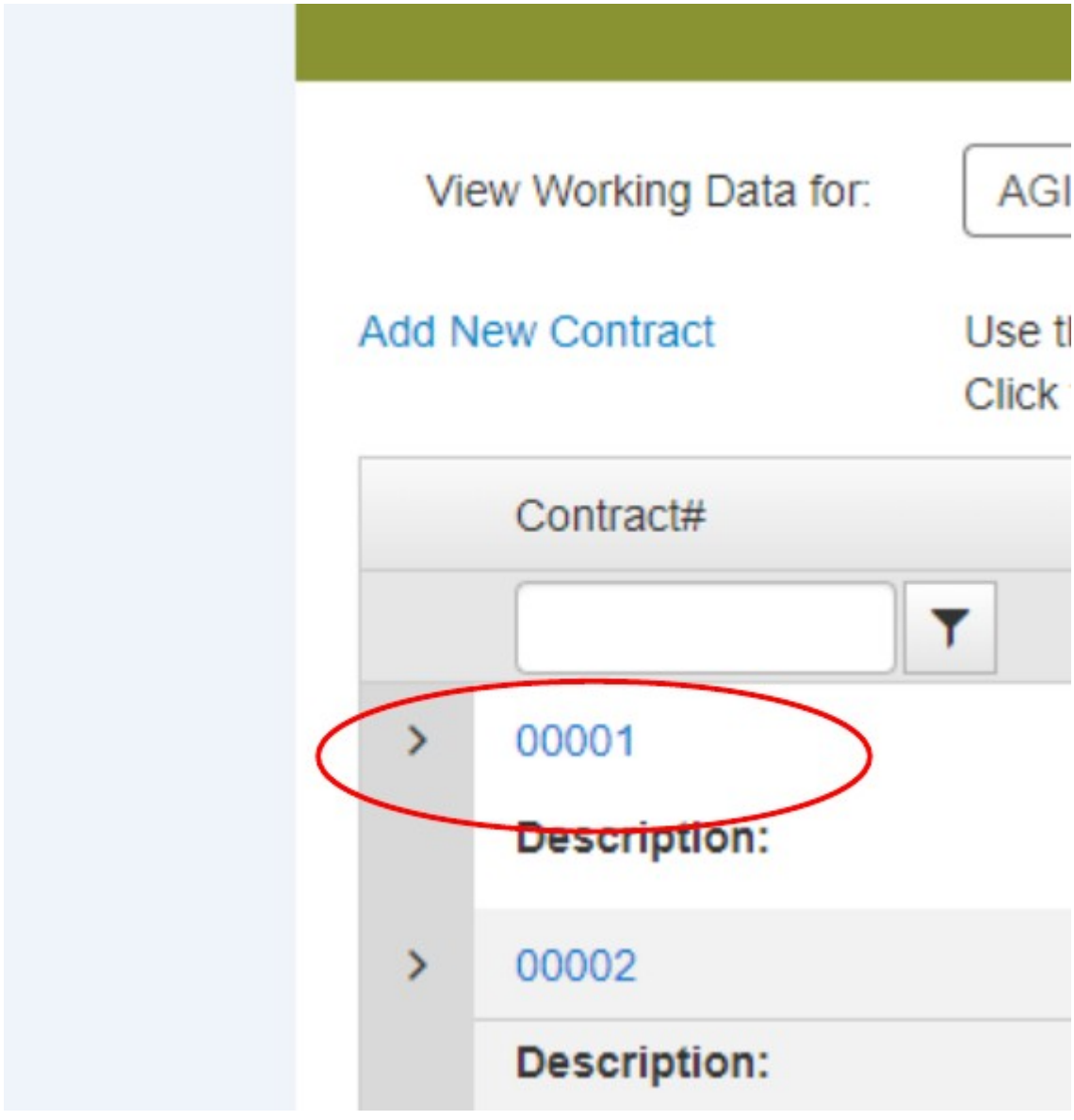
Form 3 Portal – Manual Removal of Prior Year/Expired Data

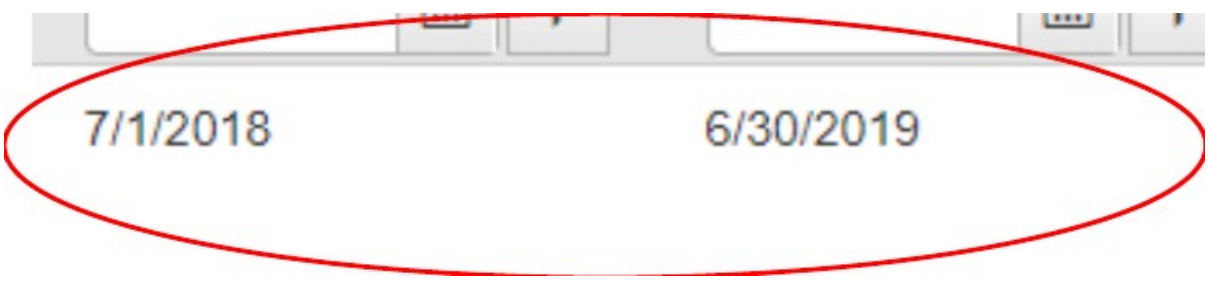


Click View All Data under Working Data

Form 3 Portal – Manual Removal of Prior Year/Expired Data









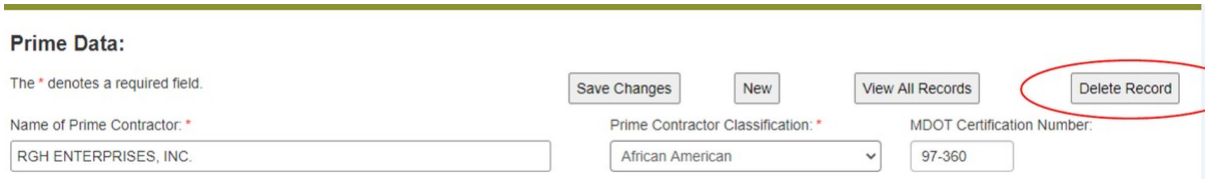
Click the number under Contract# If End date is not within the fiscal year you are reporting for

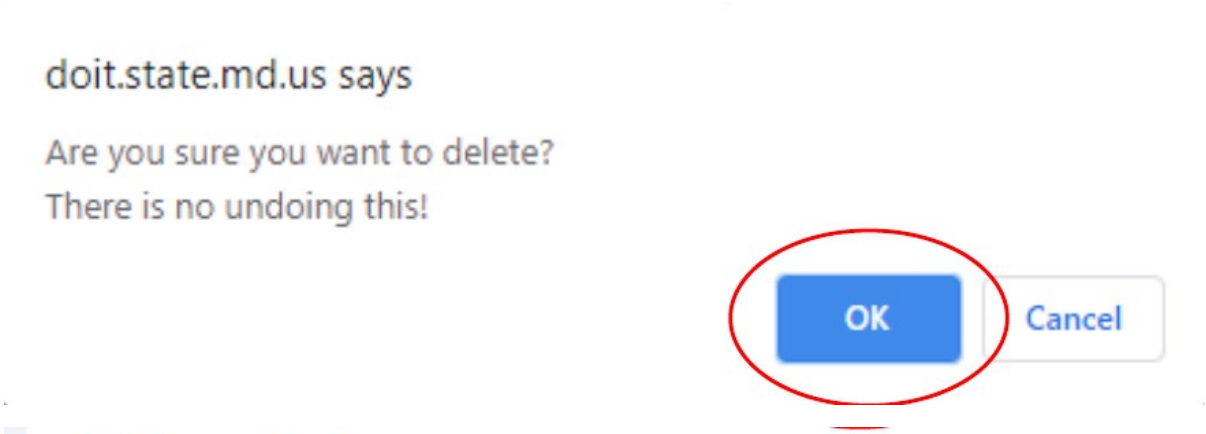
Example FY 24 would be 7/1/2023 6/30/2024; so, if a contract or transactions end date is 6/30/2019 this would be a contract or transaction you need to delete.

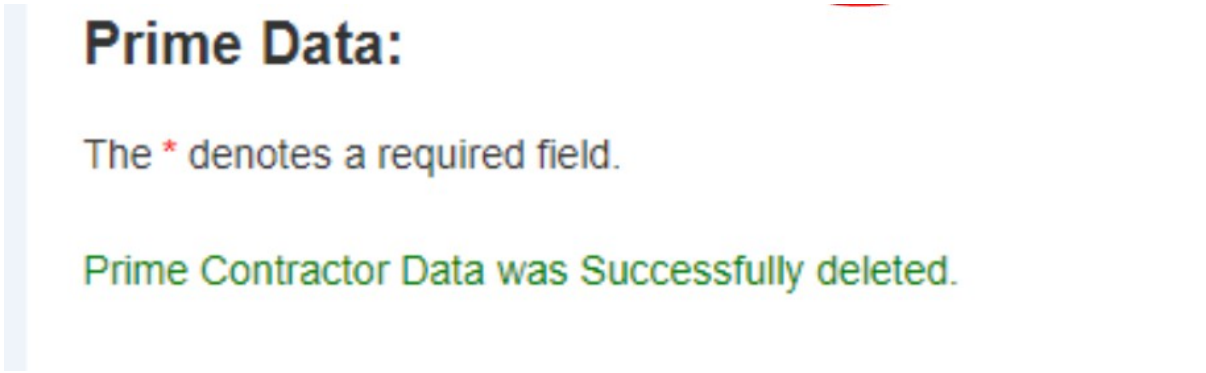
Form 3 Portal – Manual Removal of Prior Year/Expired Data

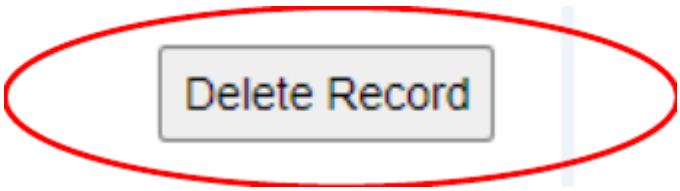
Click OK to confirm deletion, you will get a success message. Then go on to the next record to delete.

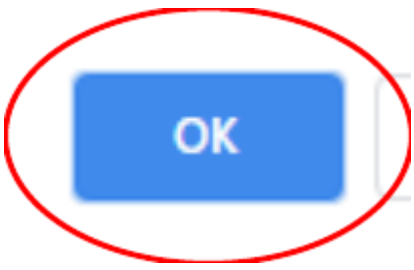
Click to delete the record,











Remember this

The Form 3 Errors and Resolutions section of the reporting manual will help you work through any errors.

Call us for assistance if you unable to resolve an error.

Once the manual entry or data import has been completed, you can review and export the summary data.

The PRIME and Subcontractor summaries should be submitted with your final report.



Remember our Training Video

The Form 3 Portal in-depth training video is available on our website in the MBE Reporting Toolkit.

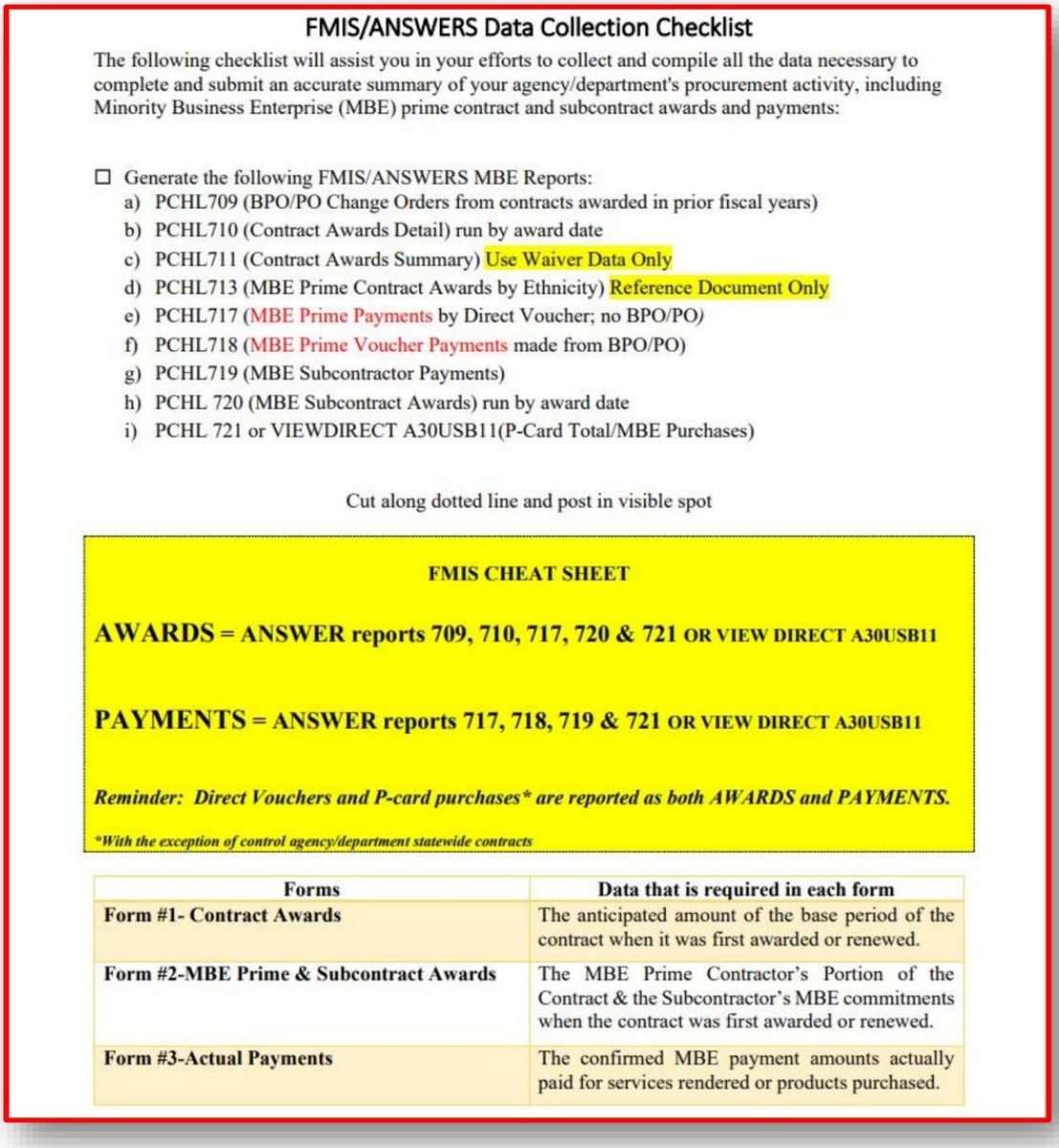
A slide deck is also provided for your review.

Call us if you still have questions after watching the video.

Checks and Balances

Governor’s Office of Small, Minority & Women Business Affairs For Internal Training Purposes Only

REPORTING CHECKS AND BALANCES



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 agency/department'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) run by award date
i) PCHL 721 or VIEWDIRECT A30USB11(P-Card Total/MBE Purchases)

Cut along dotted line and post in visible spot

FMIS CHEAT SHEET

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 control agency/department 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 products purchased.

Supplemental Reporting Guidance Includes:

Each report requirement will have a guide, which will list which backup reports will be required to fill in the specific report as well as general reminders for each report.

- Annual Reporting Templates
  - Form 1 & 2
  - Form 3
  - Contracts Inventory
- Checks and Balances include:
  - Reporting Checklist
  - Submission Checklist



Checks and balances

Based on FINAL scrubbed backup data reports which include or identify data that was used to produce the values entered in the Annual Form 1 / 2, Form 3, and Contract Inventory Sheet.
AWARDS - ANSWERS REPORTS – ALL PRIME CONTRACTS DATA

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

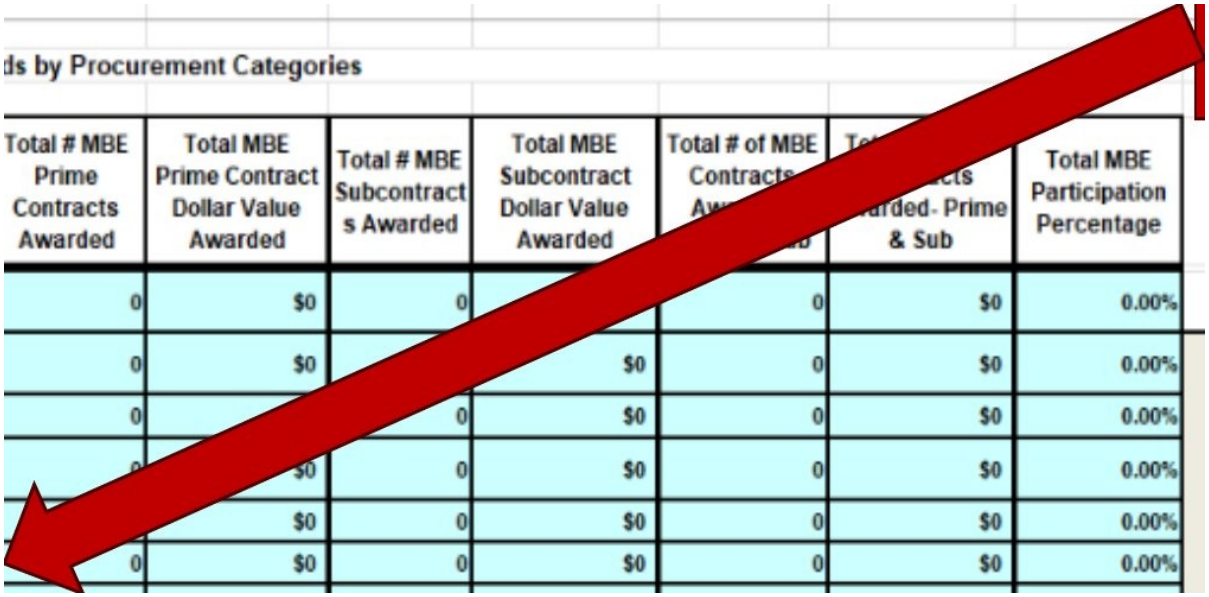
Procurement Category	Total # All Prime Contracts (Including MBE)	Total All Prime Contracts Dollar Value Awarded (Including MBE)	Total # of Prime Contract Waivers	Total Dollar Value of Prime Contract Waivers	Total # MBE Prime Contracts Awarded	Total MBE Prime Contract Dollar Value Awarded	Total # MBE Subcontracts Awarded	Total MBE Subcontract Dollar Value Awarded	Total # of MBE Contracts [illegible]	[illegible] - Prime & Sub	Total MBE Participation Percentage
Architectural	0	709/710	0	711	0	$0	0		0	$0	0.00%
Engineering	0	709/710	0	711	0	$0		$0	0	$0	0.00%
Construction	0	709/710	0	711	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%

Note(s): In this section your agency can make note of any unique reporting requirements, circumstances, or anything you would like to make our office aware of in regards to the Annual Report Submission.

Supplemental Reporting Guidance Example

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

Supplemental Reporting Guidance Example



Checks and balances

Based on FINAL scrubbed backup data reports which include or identify data that was used to produce the values entered in the Annual Form 1 / 2, Form 3, and Contract Inventory Sheet.

AWARDS - ANSWERS REPORTS – MBE PRIME CONTRACTOR DATA

Form 2 tab - Primes table, should be consistent with the Contract Inventory – Primes tab AND the reportable MBE totals on your 709 / 710, 717, and 721 reports MINUS Statewide Contracts

Cross-reference the Supplemental Reporting Guidance to view Form 2 Prime Contractor data table checks and balances per cell

Checks and balances

Based on FINAL scrubbed backup data reports which include or identify data that was used to produce the values entered in the Annual Form 1 / 2, Form 3, and Contract Inventory Sheet.

AWARDS - ANSWERS REPORTS – MBE SUBCONTRACTOR DATA

Form 2 – Subs table, should be consistent with the Contract Inventory – Subs tab AND the reportable contracts on your scrubbed 720 report.

Cross-reference the Supplemental Reporting Guidance to view Form 2 Subcontractor data table checks and balances per cell

If you have an MBE Prime with MBE Subcontractors, you will need to take in consideration the amount selfperformed and whether you choose to split the contract award between the Prime and MBE Subs or report the full total under the Prime.

Consider contractors who were subject to the 60% percent rule.

Checks and balances- Form 2

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

Checks and balances- Form 3

PAYMENTS - ANSWERS REPORTERS

Form 3 Prime contractor data should be consistent with MBE reportable payment amounts on the scrubbed 718, 717, and 721 reports.

Keep in mind that non-minority contractor data should only be added if it matches MBE subcontractors listed on the subs tab.

Form 3 Subcontractor data should be consistent with the MBE payments on your 719 report.

Cross-reference the Supplemental Reporting Guidance to view Form 3 Prime &

Subcontractor data table checks and balances per cell

Common Errors and Omissions in Reporting

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 referenceonly
- Submitting PDF formatted backup hinders the verification process and is not accepted
- 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

Common Errors and Omissions in Reporting

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

- Use the correct & current Template as things change from year to year
- 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
- Contracts Inventory totals should match Form 2
- Know what is an Awards vs. Payments
- Please do not change/add to templates
- MBE goals are only on contracts with subs, everything else should be 0% (PRIMES) in Form 3.
- MBE Designations for Form 3 must match those listed in the Manual, p. 35, including using Non-minority for primes with no MBE designation.

REPORT CORRECTIONS ✓Keep in mind that corrections to MBE Reports will be sent back to the parties who submitted the report. ✓To ensure all parties are aware of correction requests, you can cc all parties on the original submission.

REPORT CORRECTIONS

COMPLIANCE ASSESSMENT REPORT

Governor’s Office of Small, Minority & Women Business Affairs For Internal Training Purposes Only

Procurement Activity Data Requirements

- In 2022 Legislative Session, HB389, Chapter 115 was passed putting into place the Compliance Assessment Report Requirements
- Agencies are required to provide the requested Compliance data ONLY for contracts with MBE goals, which were completed during the FY being reported
  - A contract is considered ‘completed’ when all contract close out activities were finalized. Which includes ALL payments made.
- Your agency is responsible to submit:
  - FY Award Data
  - FY Payment Data
  - MBE Contract Compliance

Requirements for submission:

The worksheet must be submitted in Excel format, along with the submission of the signed compliance report in PDF format. (If your agency utilizes electronic signatures be sure to save the compliance report as a PDF and upload to your agencys E-signature program. Once signed submit as PDF with your submission.)

The worksheet must have all fields filled in.

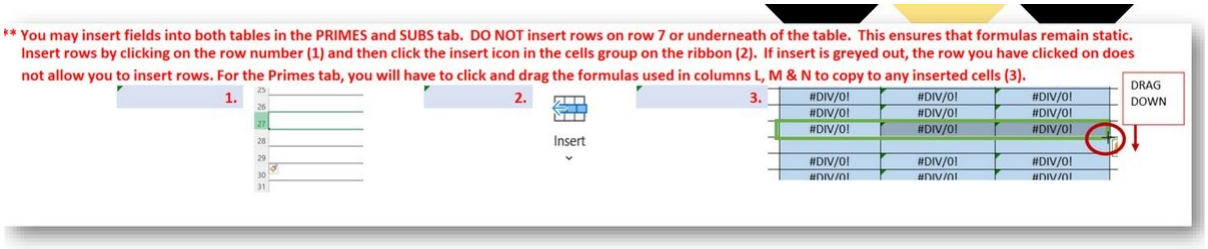
The PRIMES tab must be filled in before the SUBS tab is filled in.

The worksheet must include all 3 sheets: Primes, Subs, Compliance Report

The completed report will be submitted to **mbereports.gosba@maryland.gov** by September 30th of each year.

***All fields are required to be filled in**

How to add extra data rows



PRIMES TAB



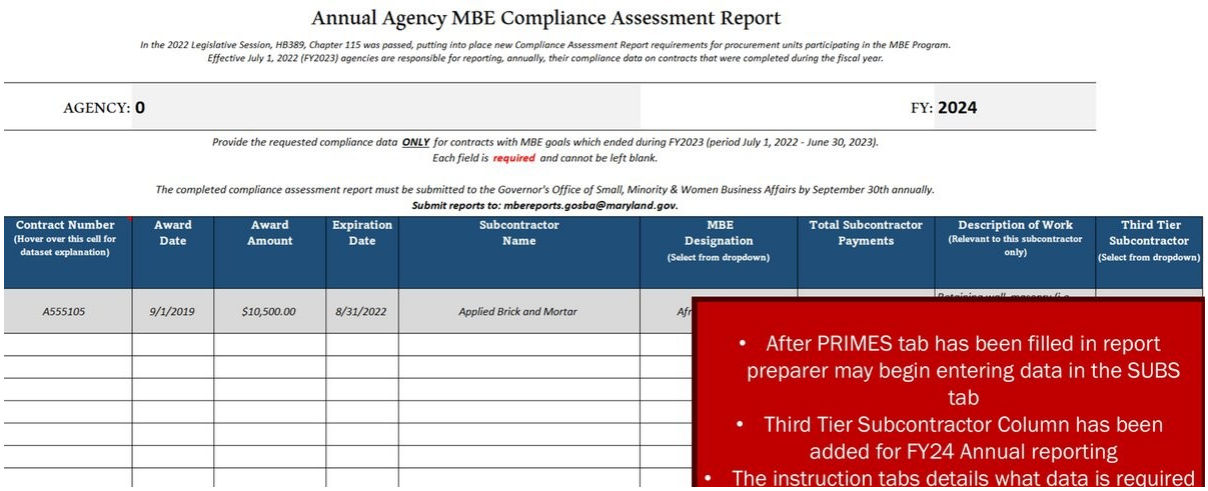
Primes tab must be filled in before the SUBS tab is filled in

The instruction tabs details what data is required in each column

Notes section is provided at the bottom for general notes only

All notes or comments for a specific contract with MBE compliance below 100% must be identified in Column R

SUBS TAB



Annual Agency MBE Compliance Assessment Report

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. Effective July 1, 2022 (FY2023) agencies are responsible for reporting, annually, their compliance data on contracts that were completed during the fiscal year.

AGENCY: **0** FY: **2024**

*Provide the requested compliance data **ONLY** for contracts with MBE goals which ended during FY2023 (period July 1, 2022 - June 30, 2023). Each field is **required** and cannot be left blank.*

The completed compliance assessment report must be submitted to the Governor's Office of Small, Minority & Women Business Affairs by September 30th annually.
Submit reports to: mbereports.gosba@maryland.gov.

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	Af			

- After PRIMES tab has been filled in report preparer may begin entering data in the SUBS tab
- Third Tier Subcontractor Column has been added for FY24 Annual reporting
- The instruction tabs details what data is required

After PRIMES tab has been filled in report preparer may begin entering data in the SUBS tab
Third Tier Subcontractor Column has been added for FY24 Annual reporting
The instruction tabs details what data is required in each column

COMPLIANCE REPORT TAB



Annual MBE Compliance Report

This completed and signed report must be submitted in PDF format along with the completed Excel version of the compliance assessment document to the Governor's Office of Small, Minority & Women Business Affairs by September 30th of the reporting fiscal year.

All content on this form has been auto-populated from the data contained in the PRIMES and SUBS tab of the MBE compliance assessment report.

Date: January 0, 1900

FY: 2024 Agency: 0

Overall Agency Compliance Rate: _____ Number of Completed Contracts: 0 Contracts (%) that Met MBE _____

Average Award to Subcontractors: _____ Total Number of MBE Subcontractors: 0 that Met MBE Goal: 0

Signature of Approver: _____ Date: _____

Printed Name of Approver: _____ Printed Name of Preparer: _____

Notes:

None

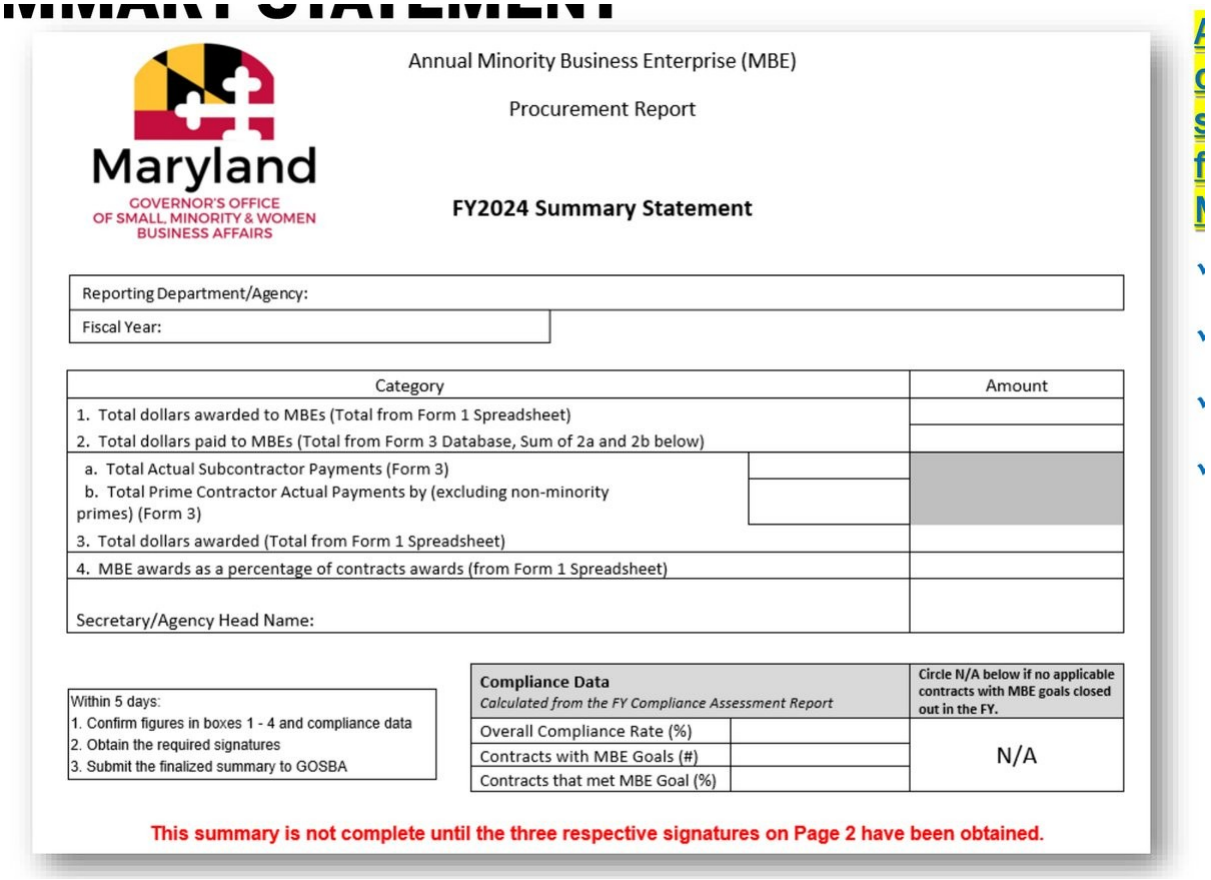
This tab will auto-populate data based on what you have entered in the PRIMES and SUBS tab.
You will need to add the printed name of the preparer, approver, and the date on the bottom of the report on this tab.
You will need to save the compliance report tab as a PDF document and/or print this tab to collect the signature of the approver of this document.
The Compliance Report should be approved (signed) by the Agency Head or Designee.
The completed and signed Compliance Report should be submitted in PDF format along with the completed excel version of the compliance assessment document.

SUMMARY STATEMENT

Governor’s Office of Small, Minority & Women Business Affairs For Internal Training Purposes Only

Agency Responsibility once summary statement is received from MBE Compliance Manager:

- Review
- Confirm
- Secure signatures
- Submit back to GOSBA mbereports.gosba@ maryland.govmailbox



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

Annual Minority Business Enterprise (MBE)

Procurement Report

FY2024 Summary Statement

Reporting Department/Agency:	
Fiscal Year:	

Category		Amount
1. Total dollars awarded to MBEs (Total from Form 1 Spreadsheet)		
2. Total dollars paid to MBEs (Total from Form 3 Database, Sum of 2a and 2b below)		
a. Total Actual Subcontractor Payments (Form 3)		
b. Total Prime Contractor Actual Payments by (excluding non-minority primes) (Form 3)		
3. Total dollars awarded (Total from Form 1 Spreadsheet)		
4. MBE awards as a percentage of contracts awards (from Form 1 Spreadsheet)		
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 GOSBA

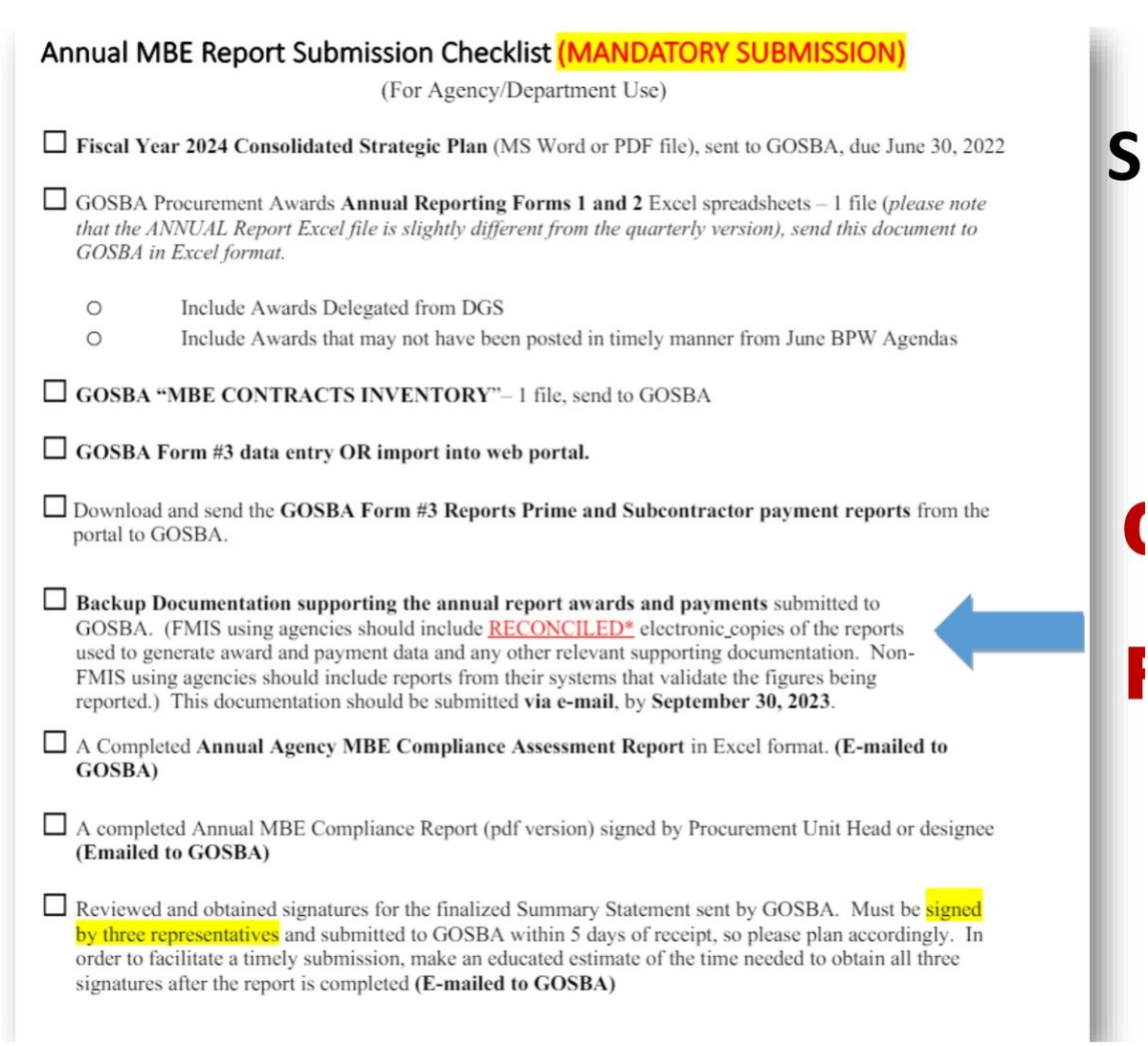
Compliance Data *Calculated from the FY Compliance Assessment Report*		Circle N/A below if no applicable contracts with MBE goals closed out in the FY.
Overall Compliance Rate (%)		N/A
Contracts with MBE Goals (#)		
Contracts that met MBE Goal (%)		

This summary is not complete until the three respective signatures on Page 2 have been obtained.

Use Your Checklist Located in the MBE Reporting Manual

SUBMISSION CHECKS AND BALANCES

Governor’s Office of Small, Minority & Women Business Affairs For Internal Training Purposes Only



Annual MBE Report Submission Checklist (MANDATORY SUBMISSION)

(For Agency/Department Use)

- ☐ **Fiscal Year 2024 Consolidated Strategic Plan** (MS Word or PDF file), sent to GOSBA, due June 30, 2022
- ☐ GOSBA Procurement Awards **Annual Reporting Forms 1 and 2** 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 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)**

FY25 Quarterly Data Preparation

Quarterly Report Requirements

Quarterly/Monthly MBE Procurement Reporting

MBE Quarterly/Monthly Procurement Report

Use the link above to complete quarterly or monthly MBE procurement data reports. Reports are due no later than 30 days following the quarter/month being reported, and should contain data from the start of the fiscal year.

Reports should be submitted via email in EXCEL FORMAT to: MBEreports.gosba@maryland.gov

Quarterly reports are cumulative. No 4th quarter report is due. Instead, the full fiscal year is reported in the Annual Report. Data for the Annual Report is submitted 90 days after the close of the fiscal year being reported.

Next Quarterly Report will be due in FY25 October 30, 2024

MBE Quarterly Reports now require 2 submissions:

MBE Procurement Report

MBE Program Procurement Activity Report

Template and instructions will be made available on the MBE Reporting Toolkit by July 1, 2024

Submission requirement and deadlines:	
Reports are required to be submitted via email to: mbereports.gosba@maryland.gov	
QTR Reporting For:	**Due Date:**
Quarter 1 (July 1, 2024-September 31, 2024)	Wednesday, October 30, 2024
Quarter 2 (July 1, 2024- December 31, 2024)	Thursday, January 30, 2025
Quarter 3 (July 1, 2024- March 31, 2025)	Wednesday, April 30, 2025
Quarter 4 (July 1 2024-June 30, 2025)	QTR 4 Submission is not required agencies will begin working on Annual Report data.

Quarter 4 (July 1 2024-June 30, 2025)	QTR 4 Submission is not required agencies will begin working on Annual Report data.

Quarterly MBE Procurement Report (Form 1 and 2 Template) Deadlines:

Quarterly Reporting Data Requirements

The MBE Quarter Report request similar data to the annual report. Your agency is responsible to submit:

Award Data

Payment Data

Waiver Data

Outreach Data

Procurement Contract Activity **NEW

MBE Quarterly Procurement Report (Form 1 and 2 Template)

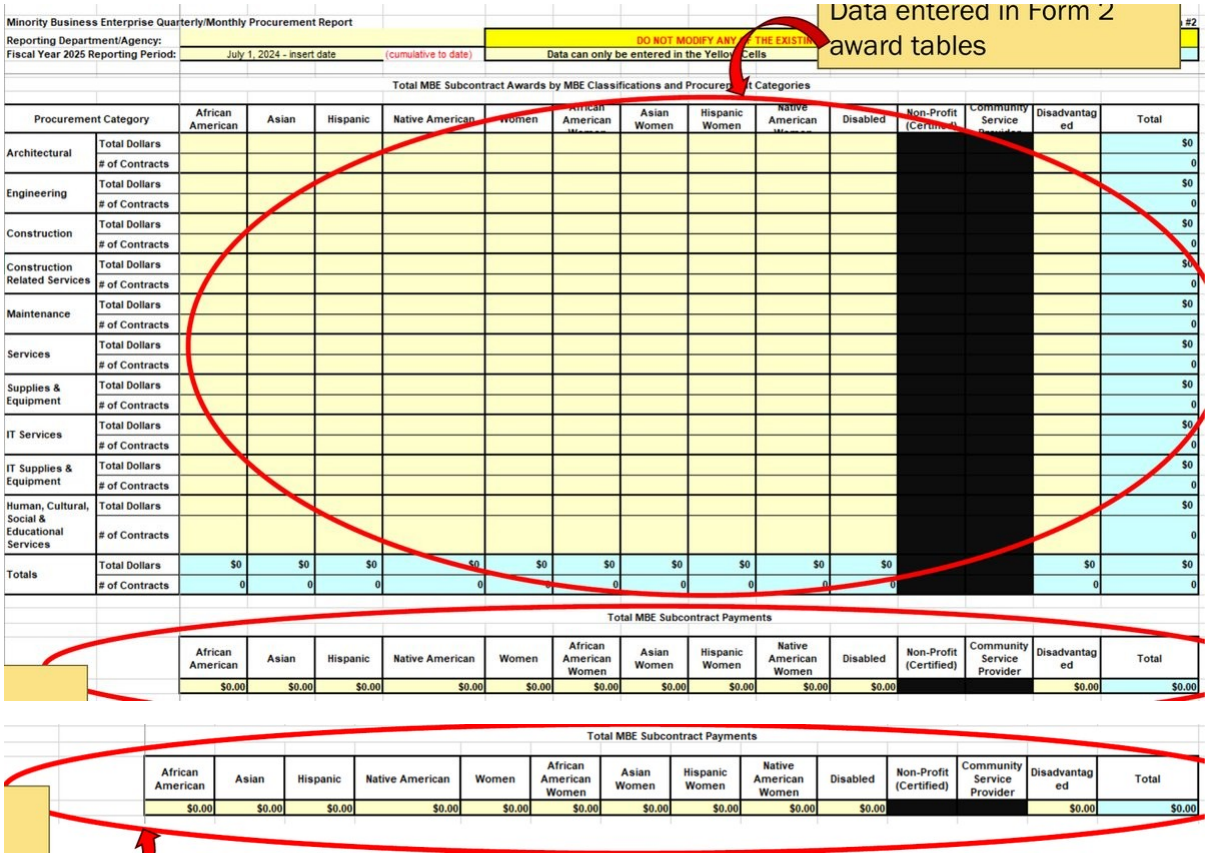
Use the Quarterly Form 1 / 2 only. Found in the MBE Reporting toolkit, scroll down to see it.

Pull quarterly report data from ANSWERS or your agency's internal records (iFMIS, Workday, PeopleSoft, etc.)

No Form 3 Payment Portal entries are required for quarterly reports.

Same general rules as Annual Report, except you include payment data broken down by MBE Classification on Form 2 and total agency payments including those to MBEs on Form 1.

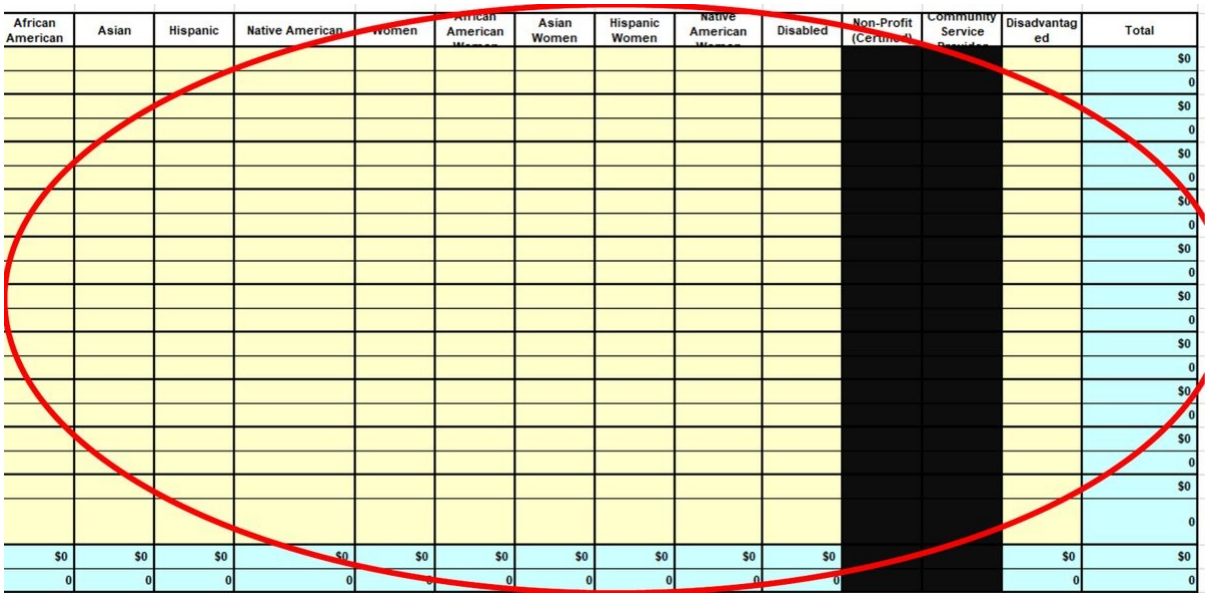
Form 2 Tab

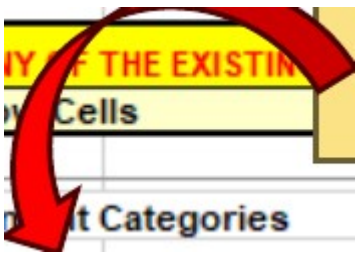


MBE Prime and MBE Subcontractor
Awards & Payment Data Entry Only

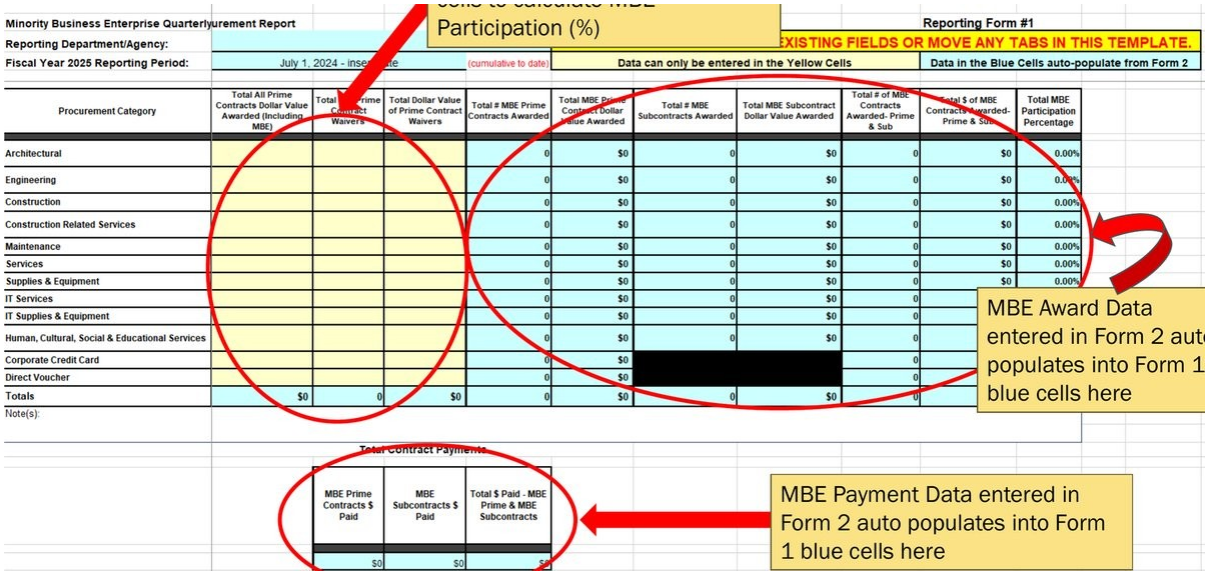
MBE Prime and Sub Payment Data entered in Form 2 payment tables

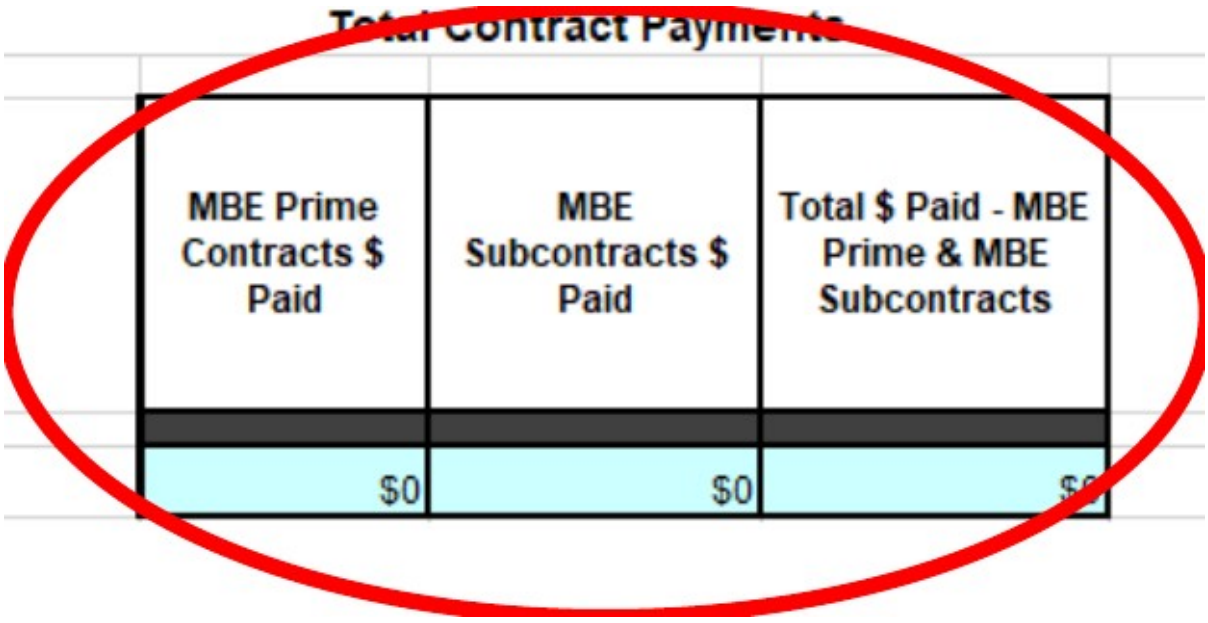
MBE Prime and Sub Award Data entered in Form 2 award tables



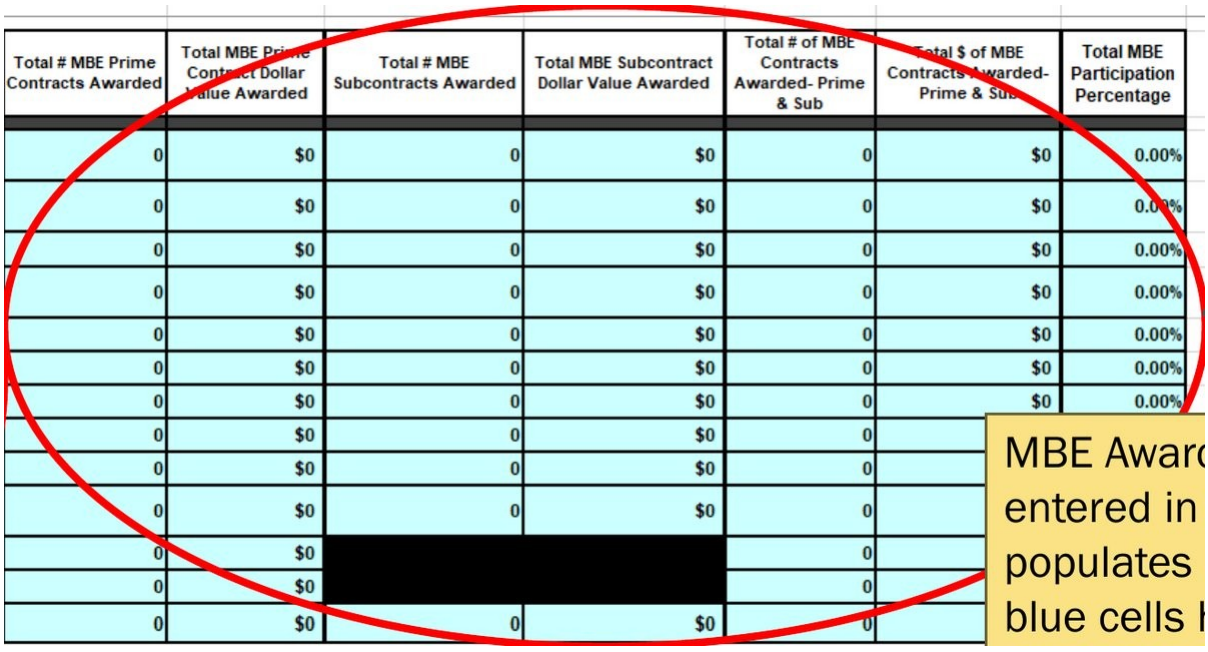


Form 1 Tab

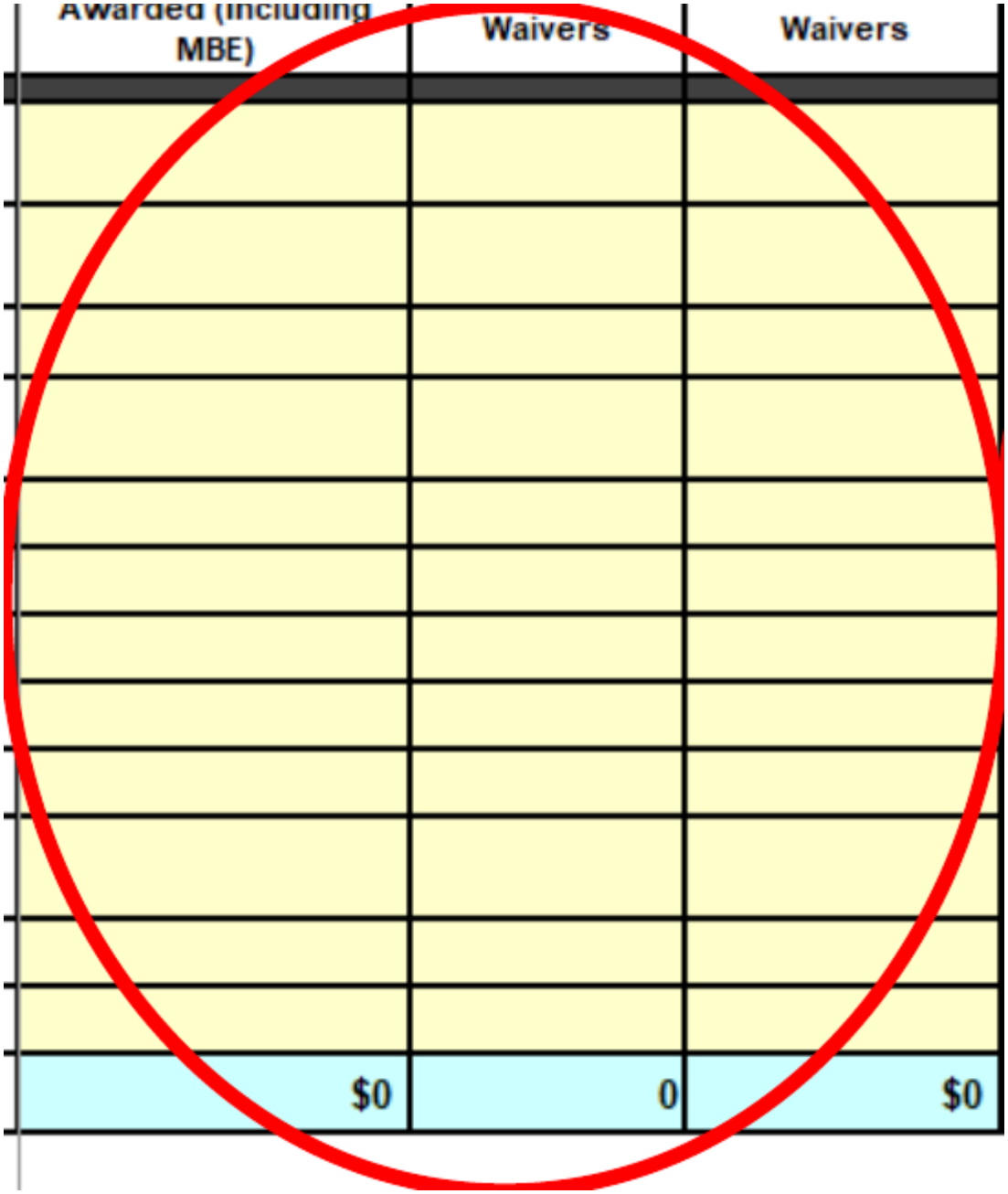




MBE Payment Data entered in Form 2 auto populates into Form 1 blue cells here



MBE Award Data entered in Form 2 auto populates into Form 1 blue cells here



Awarded (Including MBE)	Waivers	Waivers
$0	0	$0

Total All Awards Data(Including MBE award totals) and Waiver data entered in Form 1 yellow cells to calculate MBE Participation (%)

Outreach Data Tab

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

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			0	Networking			0
Workshop			0	Workshop			0
Webinar			0	Webinar			0
Exhibitor			0	Exhibitor			0
Conference			0	Conference			0
Panelist			0	Panelist			0
Other			0	Other			0
Total	0	0	0	**Total**	0	0	0

Agency Resources Available to MBE Vendors

List of resources your agency has available to help businesses know how to do business with your agency:

NEW FY25 Quarterly MBE Program Procurement Activity Report

Procurement Activity Data Requirements

The Moore-Miller Administration has required for procurement activity data be reported on a Quarterly basis

MBE Agencies collected this type of data for Executive Order 01.01.2023.03

Your agency is responsible to submit:

- Procurement Solicitation Data
- Contract Award Data
- Contract Modification Data
- Contract Renewal Data

Submission deadlines:	
Reports are required to be submitted via email to: **mbereports.gosba@maryland.gov**	
QTR Reporting For:	**Due Date:**
Quarter 1 (July 1, 2024-September 31, 2024)	Wednesday, October 30, 2024
Quarter 2 (July 1, 2024- December 31, 2024)	Thursday, January 30, 2025
Quarter 3 (July 1, 2024- March 31, 2025)	Wednesday, April 30, 2025
Quarter 4 (July 1 2024-June 30, 2025)	Wednesday, October 15, 2025

Quarter 4 (July 1 2024-June 30, 2025)	Wednesday, October 15, 2025

Submission Requirements

The Procurement Activity Report is collected quarterly and is cumulative

Only include reportable data consistent with how procurement data is reported for the quarterly and annual MBE reports

Donot include credit card or direct voucher transactions (i.e. purchases that did not require a formal solicitation)

Report all solicitations and resulting awards subject to the PRG process, regardless of the dollar value

- Even if no MBE goal was placed on the solicitation

Submission Requirements (continued)

Canceled solicitations should not be reported

Preferred providers are not reported with MBE data and should not be reported in response to this data request

Your unit will retain and utilize the same template that is submitted for QTR 1 for the remaining submissions for FY25.

- This is to ensure that the data is being collected cumulatively

Data Field Requirements

Identification #

- Is synonymous with the Contract #

Enter the number that your agency utilizes to identify solicitations, awards, modifications, and renewals

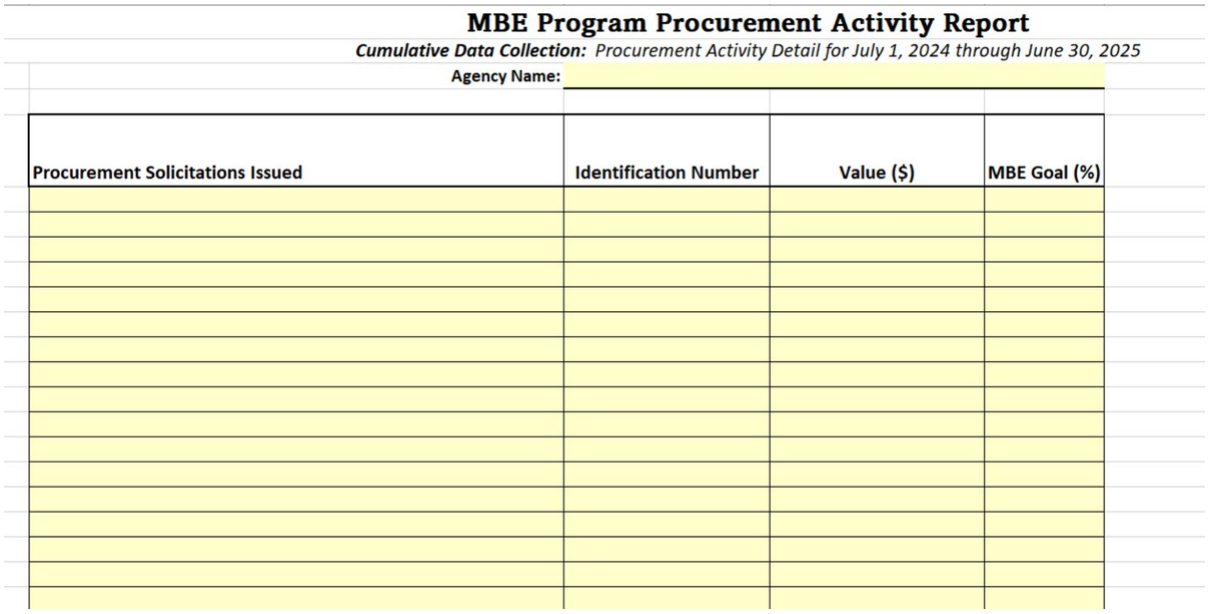
MBE Goal (%)

If the item had no MBE Goal (%) leave the field blank

MBE Prime Contractor

Select ‘yes or no’ to identify if the contract is being performed by an MBE Prime Contractor

Procurement Solicitation Tab



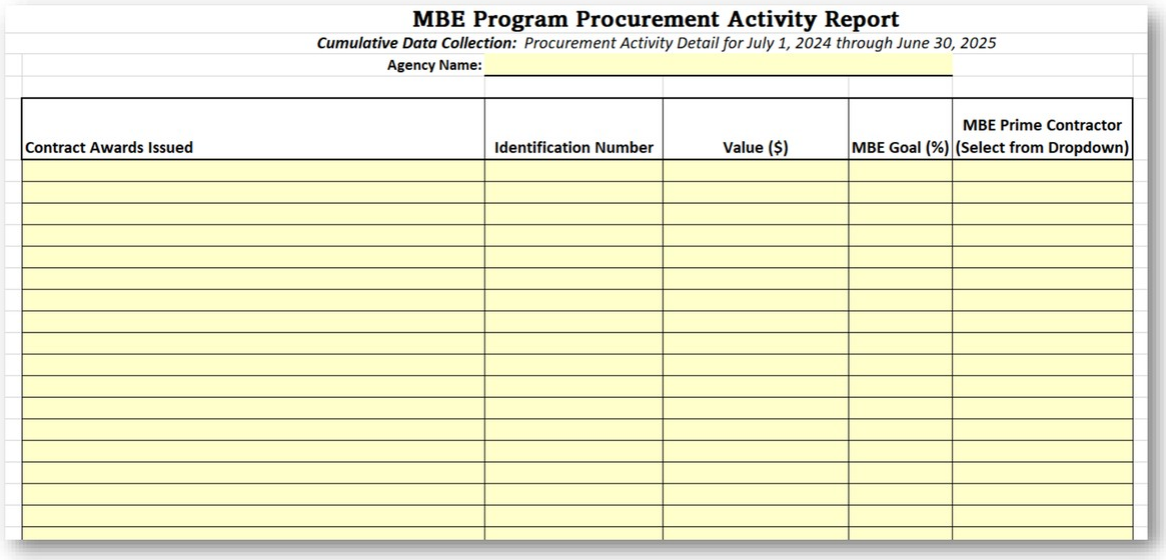
MBE Program Procurement Activity Report

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

Agency Name:

Procurement Solicitations Issued	Identification Number	Value ($)	MBE Goal (%)

Contract Awards



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 Modifications Tab

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 Renewals Tab

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)

Summary Tab *Data Entry Is Not Required*

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, 2025.*

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

2024 MBE & LIAISON SURVEYS

As in previous years, the House Appropriations Committee has mandated an additional series of surveys in order to address concerns about low MBE goal attainment and liaison vacancies.

Our office will launch the first survey in this new series, the 2024 Agency MBE Participation Attainment Survey, on June 30, 2024.
Please keep in mind that this survey does require the entry of FY2024 procurement data from your agency's FY2024 MBE Annual Report.
Submission of this survey is required and agencies who fail to submit the requested data by the due date will be reported as non-responsive to the Committee.
The survey will be due October 31, 2024. No extension can be granted.

KAREN REYES KAREN.REYES@MARYLAND.GOV 410-697-9608 443-346-0630

CARYN BRANDON CARYN.BRANDON2 @MARYLAND.GOV 410-697-9596 667-644-8478

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

Thank YOU!

Governor's Office of Small, Minority & Women Business Affairs For Internal Training Purposes Only

SBR Program

Presented by Lisa Mitchell Sennaar & Tanita Johnson

FY24 SBR Annual Reporting & FY25 SBR Quarterly Reporting

► SBR Reporting Requirements

► Resources available in SBR Toolkit

► Submission of FY24 SBR Annual Report

► Importance of referring to the BPW Advisory 2005-1 and New Socio-Economic Programs Reporting Guidance Document when reporting (scrubbing)

► Certified small business vendor verification of certification as it pertains to reporting

SBR Program Requirements

COMAR 21.13.01.03 Reporting

Units must submit both Quarterly and Annual SBR Reports (backup data should be included).

Email completed reports in EXCEL FORMAT to:sbrreports.gosba@maryland.gov

SBR Reporting

Be certain to follow the steps provided in the SBR Reporting ToolKit as it pertains to the SBR FY2024 Annual Report Instructions/Templates.
Instead of submitting a 4th Quarter Report, you will provide an Annual Report, consisting of all 4 quarters. The SBR Quarterly Reports are cumulative, so those who submitted the 1st-3rd Quarter Reports have a head start on this Annual Report.



Remember:

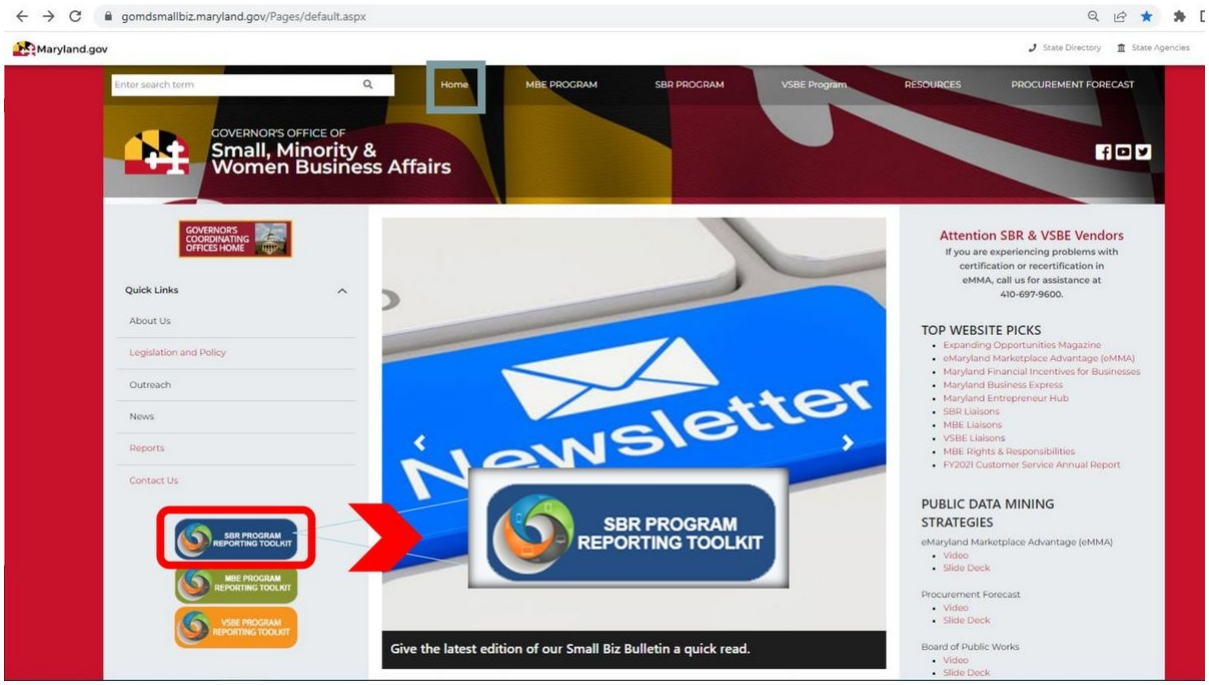
SBR Annual Report is due before or on September 30, 2024

SBR Toolkit

Resources

- SBR Program Overview
- Updated Report Instructions and Templates
- Policies and Procedures
- Monthly Procurement Compliance Bulletins
- Previous Liaison Training Slide Decks and Recordings
- Compliance Call Library

SBR Toolkit







SBR Toolkit



SBR Annual Report Instructions

The SBR Annual Report Instructions are provided as a guideline to completing this report. If you follow the step-by-step instructions, you should be able to effectively prepare the report.

Be certain to read through the instructions in its entirety.

Remember that you can contact us (SBR Compliance Managers) with any questions that you may have in regards to the SBR Annual Report.

SBR Annual Report Instructions

The SBR Annual Report is due no later than 90 days after the end of each fiscal year, in a format determined by the Governor's Office of Small, Minority & Women Business Affairs

GENERAL GUIDELINES:

The objective of the Small Business Reserve (SBR) Program. B. Scope. To the extent practicable, each procurement unit shall structure its procurement procedures to achieve the result that a minimum of 15 percent of the unit's total dollar value of procurements for goods, supplies, services, maintenance, construction, construction-related services, architectural services, and engineering services are expended directly with certified small businesses at the prime contract level on SBR designated procurements per **COMAR 21.11.01.06 (B)**. Firms must be certified in the SBR Program at the time of the award and payments for agencies to count that payment toward the 15 % SBR mandated achievement.

A. **FMIS Using Agencies**

If you are a FMIS using agency, you will need to access the following reports to obtain the data needed from ANSWERS to complete the template:

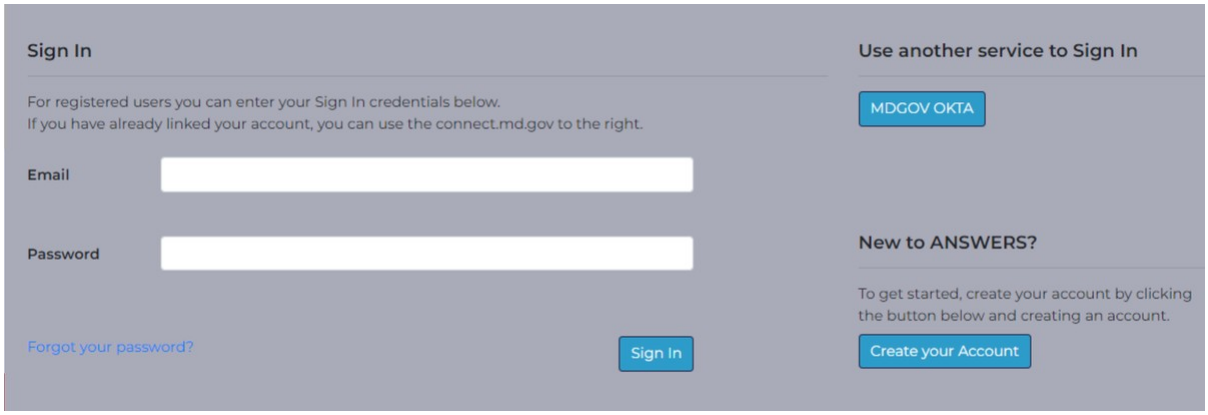
1) PCH065/067 SBR Payments Report
2) PCH068 SBR Designated Awards Report
3) A30USB12 SBR P-card Report – optional
4) A30USB11 P-card MBE Summary Report - optional
5) A30USB11 MBE Non-Match Report – optional
6) PCH721 R*STARS and Credit Card Payments (includes MBE and SBR flags)

State FMIS agencies must use the ANSWERS application to generate the 065/067 and 068 report. The link for the ANSWERS application is https://net.md.gov/apps/answers/. The MDOT modals must submit similar documentation in spreadsheet format from the MDOT iFMIS system.

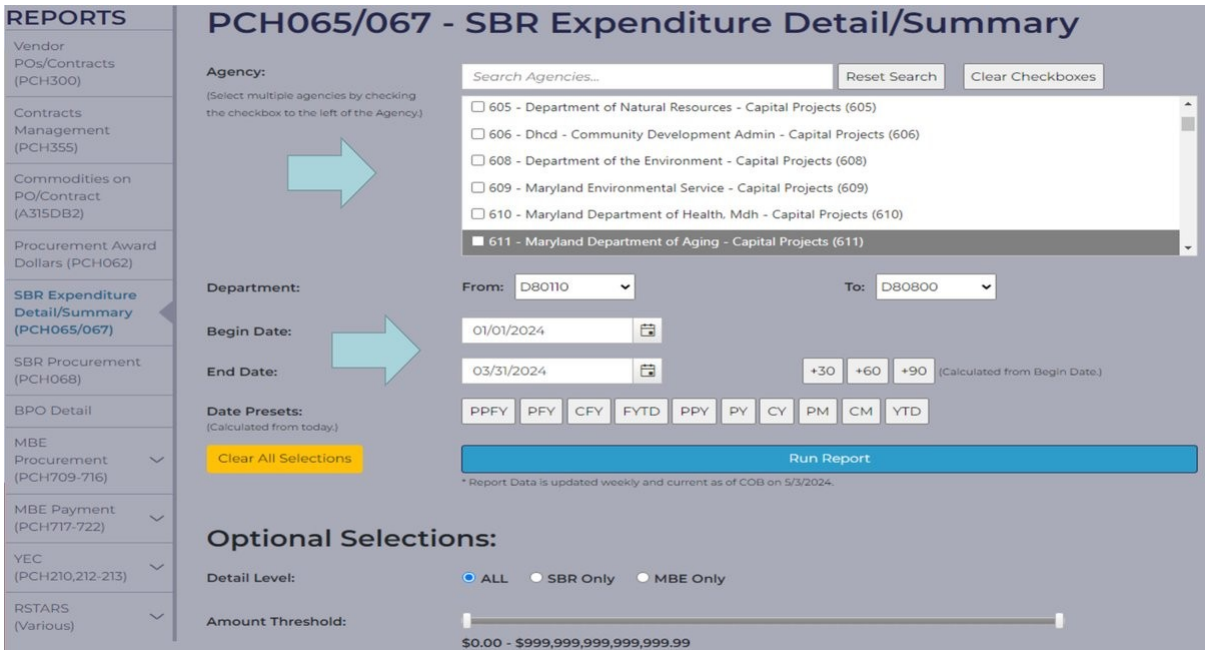
template:

1) PCH065/067 SBR Payments Report
2) PCH068 SBR Designated Awards Report
3) A30USB12 SBR P-card Report – optional
4) A30USB11 P-card MBE Summary Report - optional
5) A30USB11 MBE Non-Match Report – optional
6) PCH721 R*STARS and Credit Card Payments (includes MBE and SBR flags)

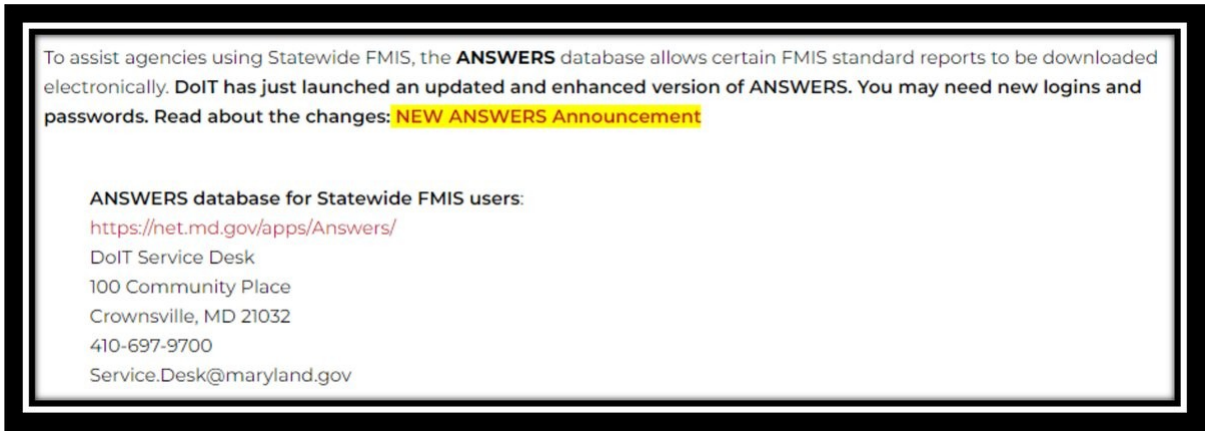
ANSWERS Database



ANSWERS Database



ANSWERS Database



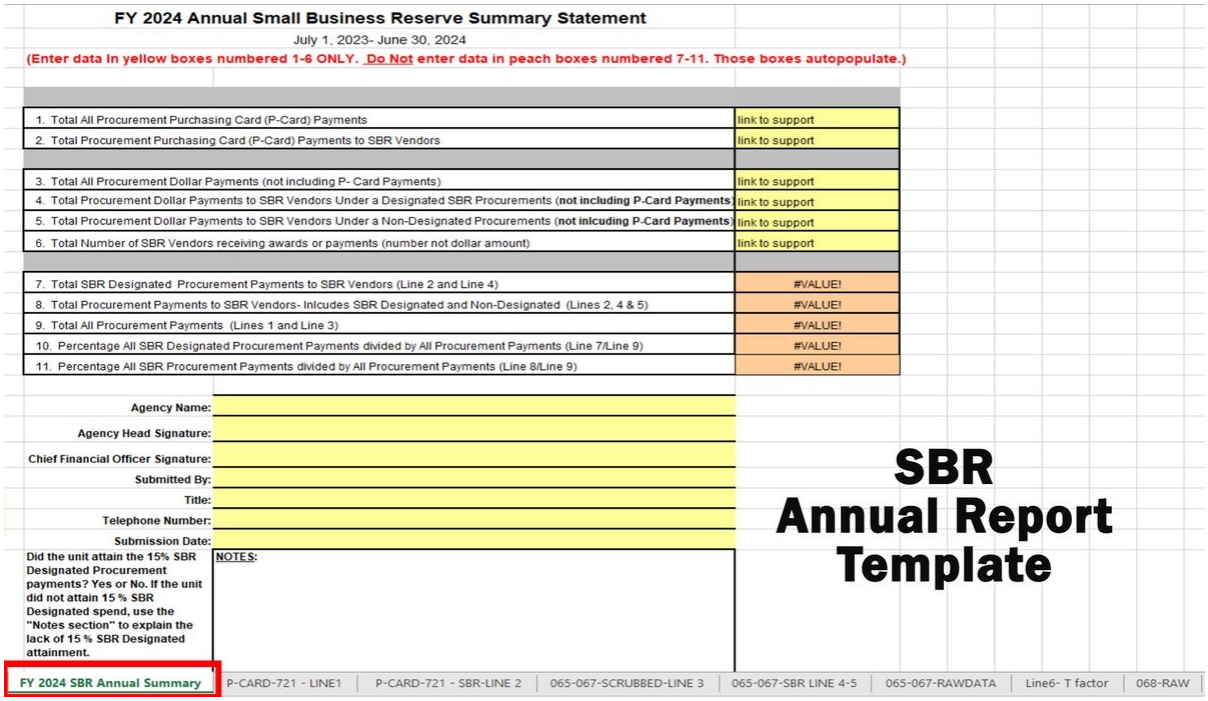
SBR Annual Report Template

The SBR Annual Report Template is to be submitted, which requires signatures from the Agency Head and Chief Financial Officer. (Quarterly Reports do not require signatures currently.)

The template should only be altered if adding tabs to provide extra back-up data.

Please make sure that you are using the SBR Annual Report Template and Instructions for the most recent fiscal year that are located in the SBR Toolkit.

Report Template Summary Statement Tab



FY 2024 Annual Small Business Reserve Summary Statement

July 1, 2023- June 30, 2024

(Enter data in yellow boxes numbered 1-6 ONLY. Do Not enter data in peach boxes numbered 7-11. Those boxes autopopulate.)

1. Total All Procurement Purchasing Card (P-Card) Payments	link to support
2. Total Procurement Purchasing Card (P-Card) Payments to SBR Vendors	link to support
3. Total All Procurement Dollar Payments (not including P- Card Payments)	link to support
4. Total Procurement Dollar Payments to SBR Vendors Under a Designated SBR Procurements (**not including P-Card Payments**)	link to support
5. Total Procurement Dollar Payments to SBR Vendors Under a Non-Designated Procurements (**not inlcuding P-Card Payments**)	link to support
6. Total Number of SBR Vendors receiving awards or payments (number not dollar amount)	link to support
7. Total SBR Designated Procurement Payments to SBR Vendors (Line 2 and Line 4)	#VALUE!
8. Total Procurement Payments to SBR Vendors- Inlcudes SBR Designated and Non-Designated (Lines 2, 4 & 5)	#VALUE!
9. Total All Procurement Payments (Lines 1 and Line 3)	#VALUE!
10. Percentage All SBR Designated Procurement Payments divided by All Procurement Payments (Line 7/Line 9)	#VALUE!
11. Percentage All SBR Procurement Payments divided by All Procurement Payments (Line 8/Line 9)	#VALUE!

Agency Name:

Agency Head Signature:

Chief Financial Officer Signature:

Submitted By:

Title:

Telephone Number:

Submission Date:

Did the unit attain the 15% SBR Designated Procurement payments? Yes or No. If the unit did not attain 15 % SBR Designated spend, use the "Notes section" to explain the lack of 15 % SBR Designated attainment.

NOTES:

SBR Annual Report Template

FY 2024 SBR Annual Summary | P-CARD-721 - LINE1 | P-CARD-721 - SBR-LINE 2 | 065-067-SCRUBBED-LINE 3 | 065-067-SBR LINE 4-5 | 065-067-RAWDATA | Line6- T factor | 068-RAW



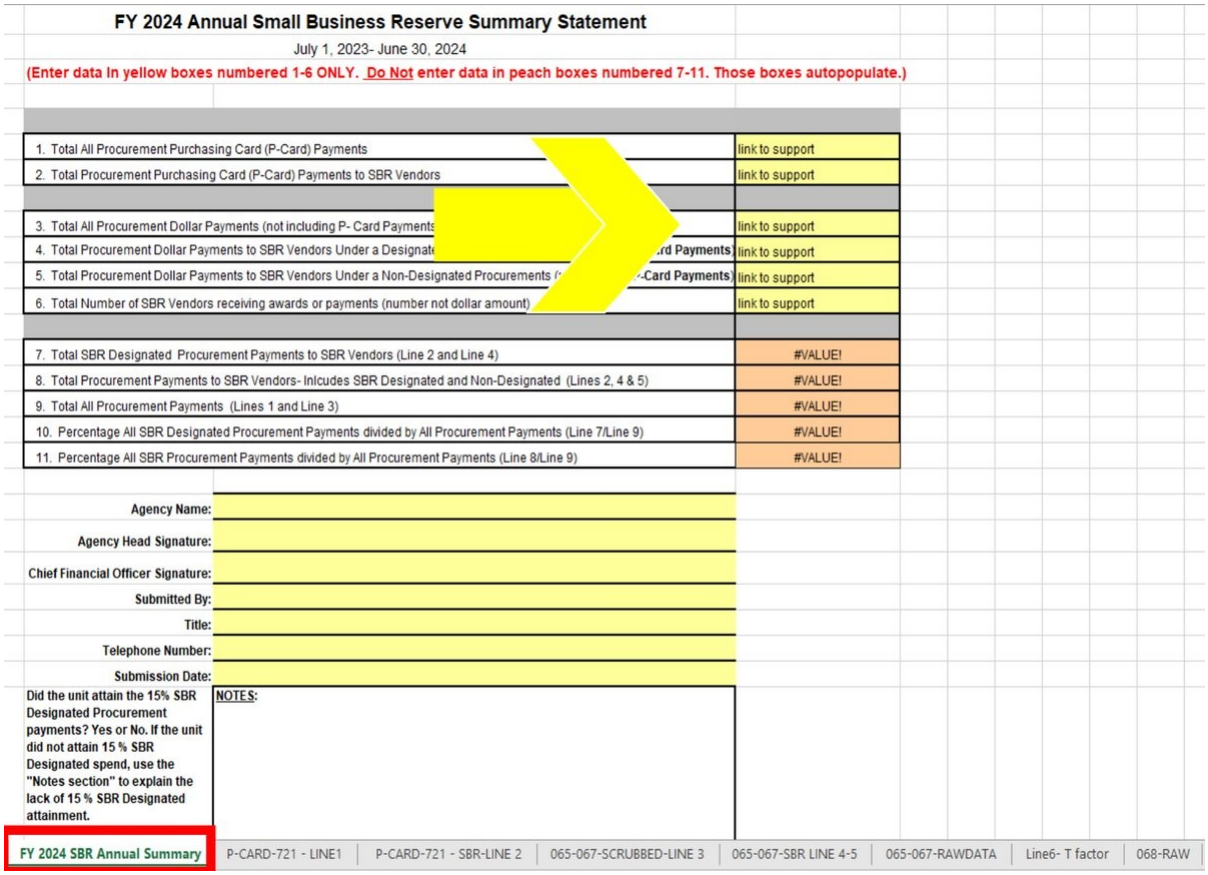
SBR

Annual Report

Template

Note that in the first tab, “SBR Annual Summary” (i.e. Summary Statement), amounts for Lines 1-6 are to be manually entered by the report preparer.

SBR Annual Report Template



FY 2024 Annual Small Business Reserve Summary Statement

July 1, 2023- June 30, 2024

(Enter data in yellow boxes numbered 1-6 ONLY. Do Not enter data in peach boxes numbered 7-11. Those boxes autopopulate.)

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3. Total All Procurement Dollar Payments (not including P- Card Payments	link to support
4. Total Procurement Dollar Payments to SBR Vendors Under a Designat ...rd Payments)	link to support
5. Total Procurement Dollar Payments to SBR Vendors Under a Non-Designated Procurements (...-Card Payments)	link to support
6. Total Number of SBR Vendors receiving awards or payments (number not dollar amount)	link to support
7. Total SBR Designated Procurement Payments to SBR Vendors (Line 2 and Line 4)	#VALUE!
8. Total Procurement Payments to SBR Vendors- Inlcudes SBR Designated and Non-Designated (Lines 2, 4 & 5)	#VALUE!
9. Total All Procurement Payments (Lines 1 and Line 3)	#VALUE!
10. Percentage All SBR Designated Procurement Payments divided by All Procurement Payments (Line 7/Line 9)	#VALUE!
11. Percentage All SBR Procurement Payments divided by All Procurement Payments (Line 8/Line 9)	#VALUE!

Agency Name:	
Agency Head Signature:	
Chief Financial Officer Signature:	
Submitted By:	
Title:	
Telephone Number:	
Submission Date:	
Did the unit attain the 15% SBR Designated Procurement payments? Yes or No. If the unit did not attain 15 % SBR Designated spend, use the "Notes section" to explain the lack of 15 % SBR Designated attainment.	NOTES:

FY 2024 SBR Annual Summary | P-CARD-721 - LINE1 | P-CARD-721 - SBR-LINE 2 | 065-067-SCRUBBED-LINE 3 | 065-067-SBR LINE 4-5 | 065-067-RAWDATA | Line6- T factor | 068-RAW

Annual Report Template

For Lines 7-11, these values are automatically calculated based upon totals entered in prior line items.

FY 2024 Annual Small Business Reserve Summary Statement

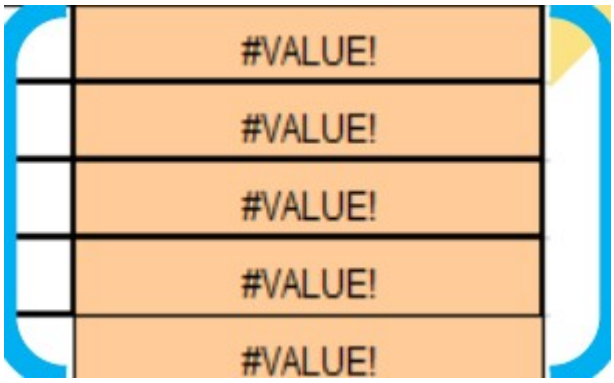
July 1, 2023- June 30, 2024

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7. Total SBR Designated Procurement Payments to SBR Vendors (Line 2 and Line 4)	#VALUE!
8. Total Procurement Payments to SBR Vendors- Inlcudes SBR Designated and Non-Designated (Lines 2, 4 & 5)	#VALUE!
9. Total All Procurement Payments (Lines 1 and Line 3)	#VALUE!
10. Percentage All SBR Designated Procurement Payments divided by All Procurement Payments (Line 7/Line 9)	#VALUE!
11. Percentage All SBR Procurement Payments divided by All Procurement Payments (Line 8/Line 9)	#VALUE!

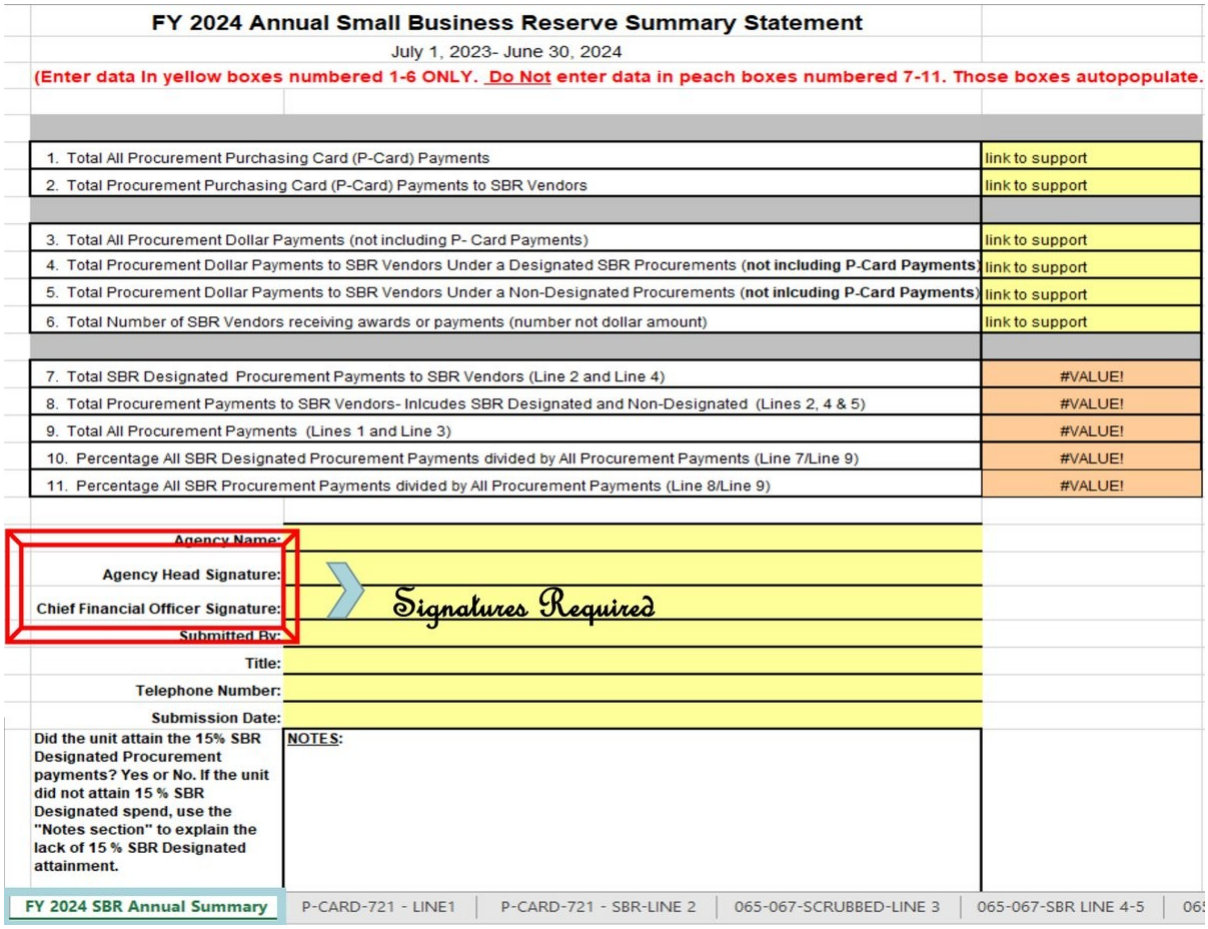
Agency Name:	
Agency Head Signature:	
Chief Financial Officer Signature:	
Submitted By:	
Title:	
Telephone Number:	
Submission Date:	
Did the unit attain the 15% SBR Designated Procurement payments? Yes or No. If the unit did not attain 15 % SBR Designated spend, use the "Notes section" to explain the lack of 15 % SBR Designated attainment.	**NOTES:**

FY 2024 SBR Annual Summary | P-CARD-721 - LINE1 | P-CARD-721 - SBR-LINE 2 | 065-067-SCRUBBED-LINE 3 | 065-067-SBR LINE 4-5 | 06



Annual Report Template

REMEMBER: Signatures are required by the Agency Head and Chief Financial Officer!



FY 2024 Annual Small Business Reserve Summary Statement

July 1, 2023- June 30, 2024

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9. Total All Procurement Payments (Lines 1 and Line 3)	#VALUE!
10. Percentage All SBR Designated Procurement Payments divided by All Procurement Payments (Line 7/Line 9)	#VALUE!
11. Percentage All SBR Procurement Payments divided by All Procurement Payments (Line 8/Line 9)	#VALUE!

Agency Name:	
Agency Head Signature:	
Chief Financial Officer Signature:	
Submitted By:	
Title:	
Telephone Number:	
Submission Date:	
Did the unit attain the 15% SBR Designated Procurement payments? Yes or No. If the unit did not attain 15 % SBR Designated spend, use the "Notes section" to explain the lack of 15 % SBR Designated attainment.	NOTES:

Signatures Required

FY 2024 SBR Annual Summary | P-CARD-721 - LINE1 | P-CARD-721 - SBR-LINE 2 | 065-067-SCRUBBED-LINE 3 | 065-067-SBR LINE 4-5 | 065

Signatures Required



Annual Report Template

goMDsmallbiz.maryland.gov

The “All SBR Designated Procurement Payments” Percentage (not the “All SBR Procurement Payments” Percentage) counts toward the 15% SBR set-aside

Annual Report Template The “All SBR Designated Procurement Payments” Percentage (not the “All SBR Procurement Payments” Percentage) counts toward the 15% SBR set-aside

FY 2024 Annual Small Business Reserve Summary Statement

July 1, 2023- June 30, 2024

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9. Total All Procurement Payments (Lines 1 and Line 3)	#VALUE!
10. Percentage All SBR Designated Procurement Payments divided by All Procurement Payments (Line 7/Line 9)	#VALUE!
11. Percentage All SBR Procurement Payments divided by All Procurement Payments (Line 8/Line 9)	#VALUE!

Be certain to use the “Notes” section to provide any explanation of the data, specifically if your agency did not obtain 15% of the SBR designated spend.

Annual Report

Template

FY 2024 Annual Small Business Reserve Summary Statement

July 1, 2023- June 30, 2024

(Enter data In yellow boxes numbered 1-6 ONLY. Do Not enter data in peach boxes numbered 7-11. Those boxes autopopulate.

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8. Total Procurement Payments to SBR Vendors- Inlcudes SBR Designated and Non-Designated (Lines 2, 4 & 5)	#VALUE!
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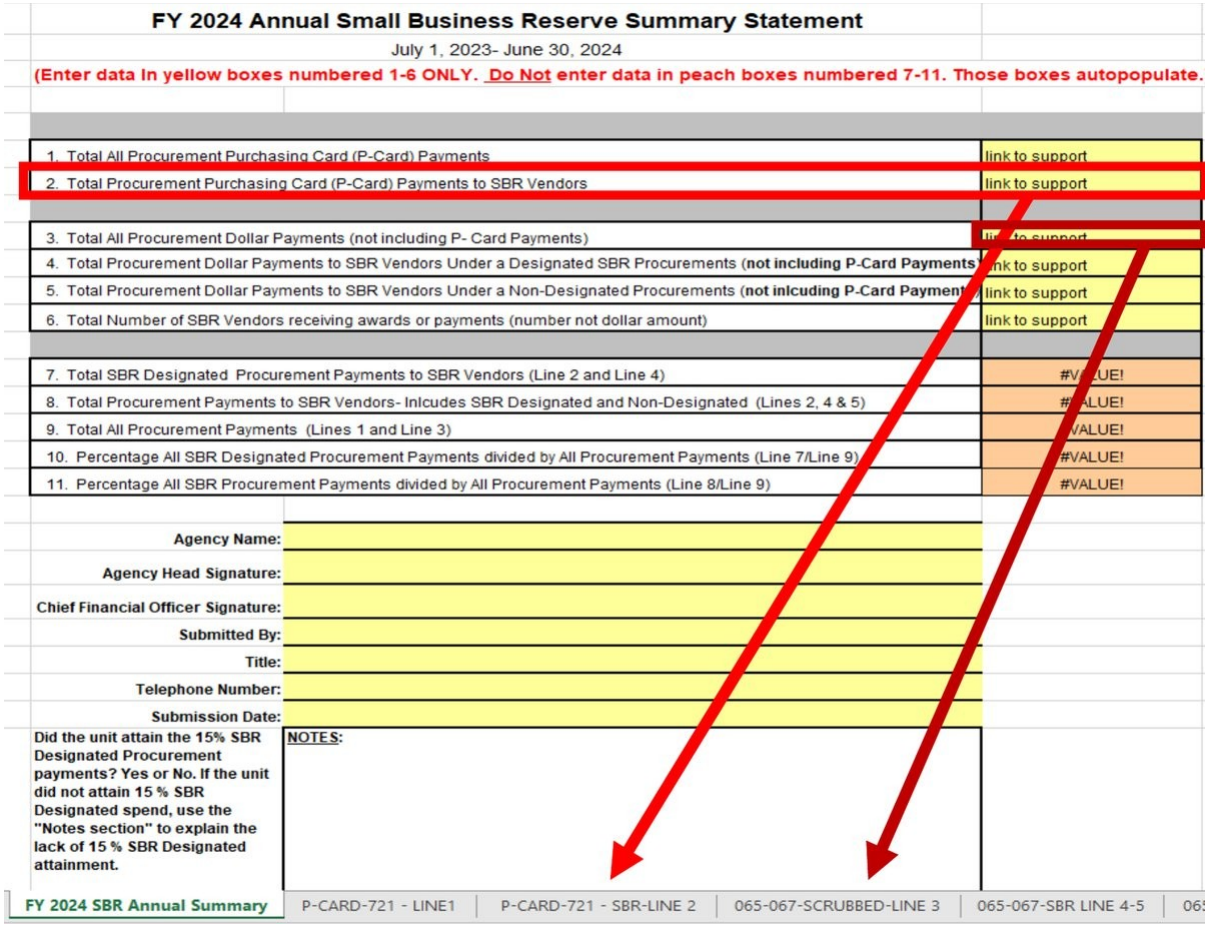
Agency Name:	
Agency Head Signature:	
Chief Financial Officer Signature:	
Submitted By:	
Title:	
Telephone Number:	
Submission Date:	
Did the unit attain the 15% SBR Designated Procurement payments? Yes or No. If the unit did not attain 15 % SBR Designated spend, use the "Notes section" to explain the lack of 15 % SBR Designated attainment.	**NOTES:** USE THIS AREA

FY 2024 SBR Annual Summary | P-CARD-721 - LINE1 | P-CARD-721 - SBR-LINE 2 | 065-067-SCRUBBED-LINE 3 | 065-067-SBR LINE 4-5 | 065

USE THIS AREA

USE THIS AREA

Annual Report Template



FY 2024 Annual Small Business Reserve Summary Statement

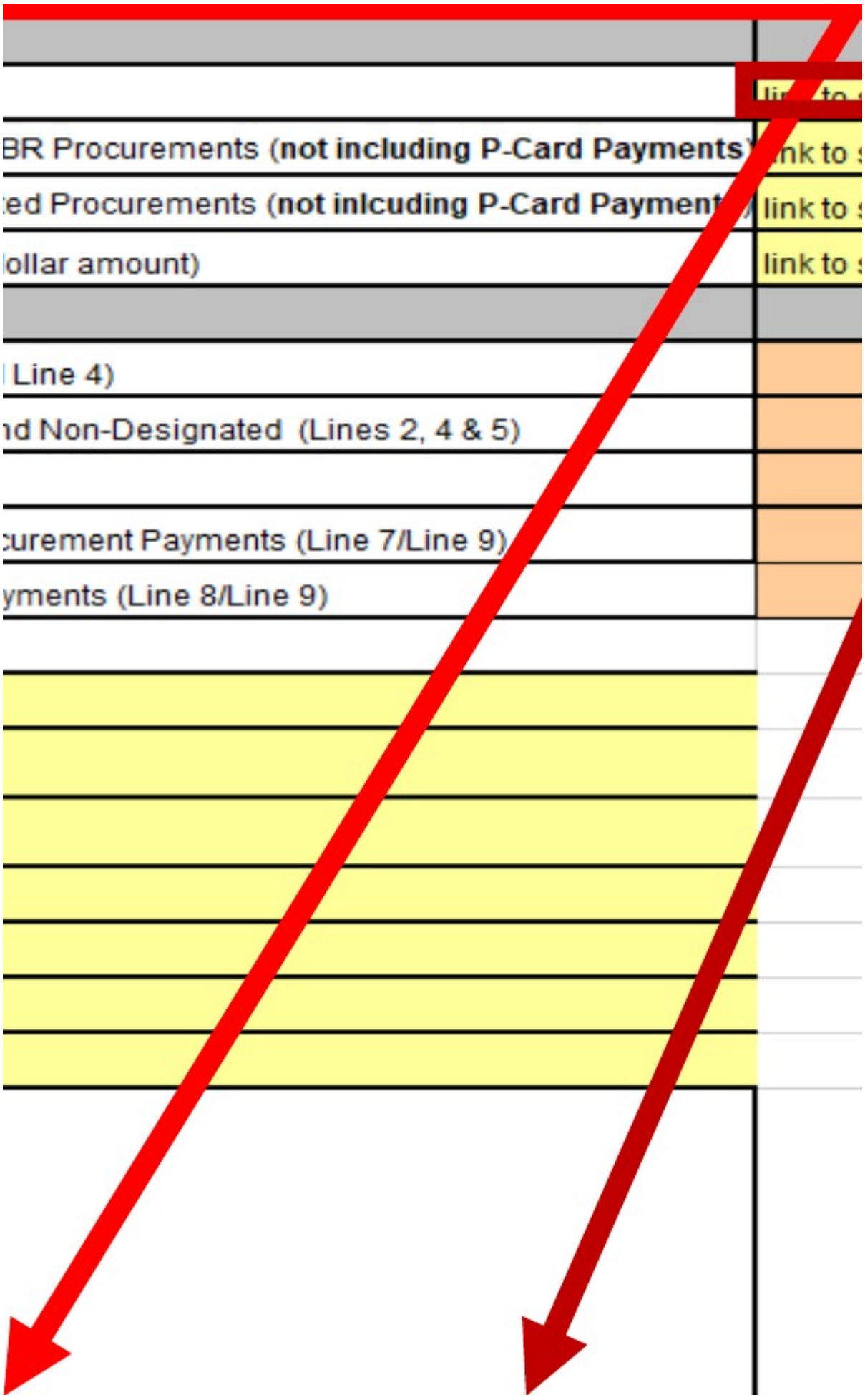
July 1, 2023- June 30, 2024

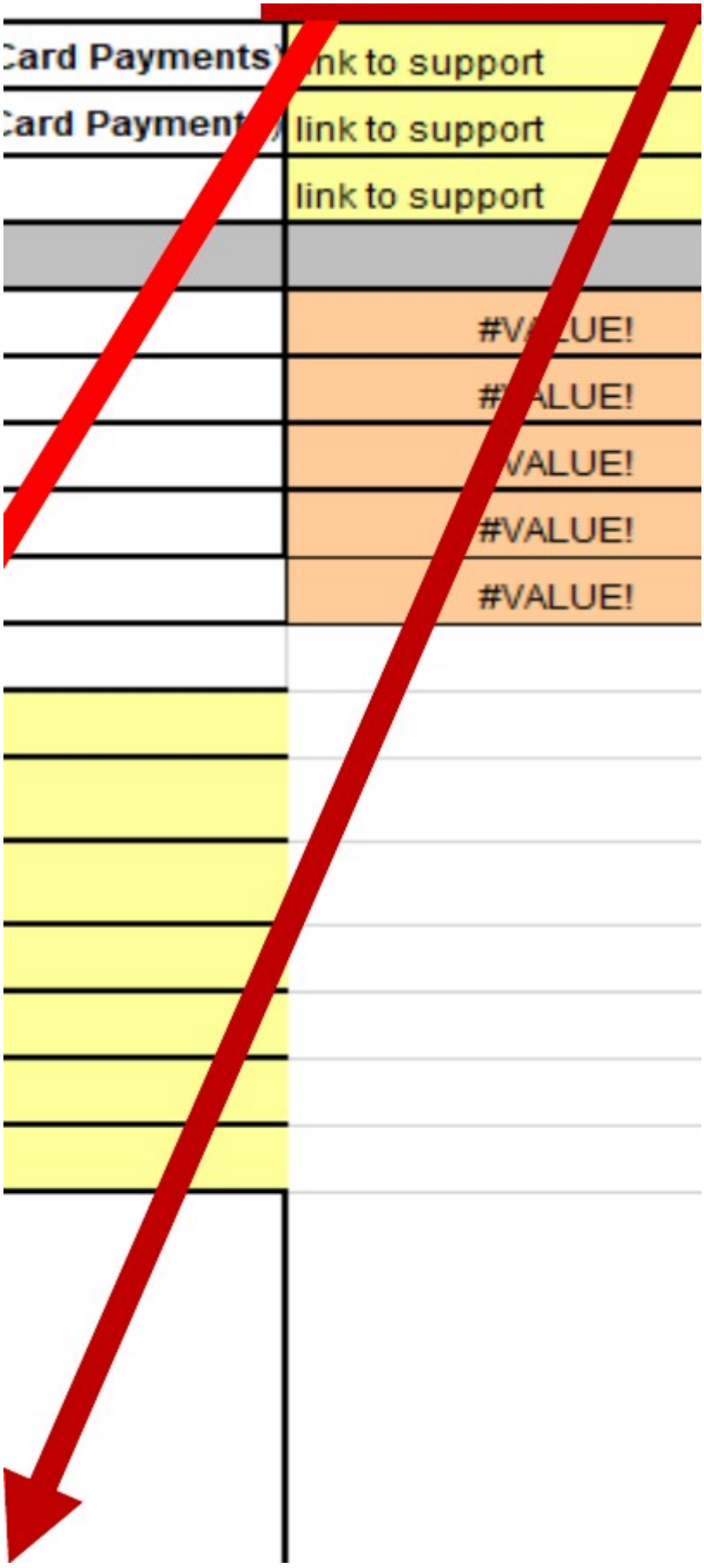
(Enter data In yellow boxes numbered 1-6 ONLY. Do Not enter data in peach boxes numbered 7-11. Those boxes autopopulate.

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4. Total Procurement Dollar Payments to SBR Vendors Under a Designated SBR Procurements (**not including P-Card Payments**)	link to support
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8. Total Procurement Payments to SBR Vendors- Inlcudes SBR Designated and Non-Designated (Lines 2, 4 & 5)	#VALUE!
9. Total All Procurement Payments (Lines 1 and Line 3)	#VALUE!
10. Percentage All SBR Designated Procurement Payments divided by All Procurement Payments (Line 7/Line 9)	#VALUE!
11. Percentage All SBR Procurement Payments divided by All Procurement Payments (Line 8/Line 9)	#VALUE!

Agency Name:	
Agency Head Signature:	
Chief Financial Officer Signature:	
Submitted By:	
Title:	
Telephone Number:	
Submission Date:	
Did the unit attain the 15% SBR Designated Procurement payments? Yes or No. If the unit did not attain 15 % SBR Designated spend, use the "Notes section" to explain the lack of 15 % SBR Designated attainment.	**NOTES:**

FY 2024 SBR Annual Summary | P-CARD-721 - LINE1 | P-CARD-721 - SBR-LINE 2 | 065-067-SCRUBBED-LINE 3 | 065-067-SBR LINE 4-5 | 065


BR Procurements (not including P-Card Payments
ed Procurements (not inlcuding P-Card Payment
ollar amount)
Line 4)
nd Non-Designated (Lines 2, 4 & 5)
urement Payments (Line 7/Line 9)
yments (Line 8/Line 9)
link to
link to
link to



Information on the Summary Statement should be clearly defined in the listed tabs.
We should be able to quickly find the amounts/related data in the corresponding tab.

Annual Report Template

Example #1

If Summary Statement, Line 1 (Total Credit Card Payments) is “$6,000” and Line 2 (Total Credit Card

Payments to SBR Vendors) is “$3,400”…

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

FY 2024 Annual Small Business Reserve Summary Statement

July 1, 2023- June 30, 2024

(Enter data in yellow boxes numbered 1-6 ONLY. Do Not enter data in peach boxes numbered 7-11. Those boxes autopopulate.)

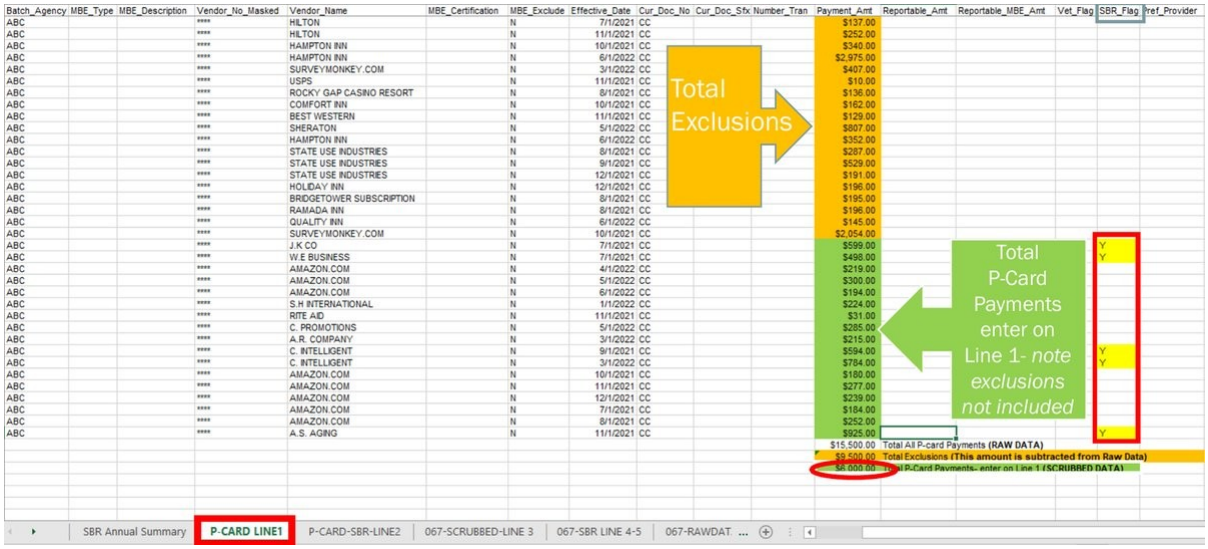
1. Total All Procurement Purchasing Card (P-Card) Payments	$6,000
2. Total Procurement Purchasing Card (P-Card) Payments to SBR Vendors	$3,400

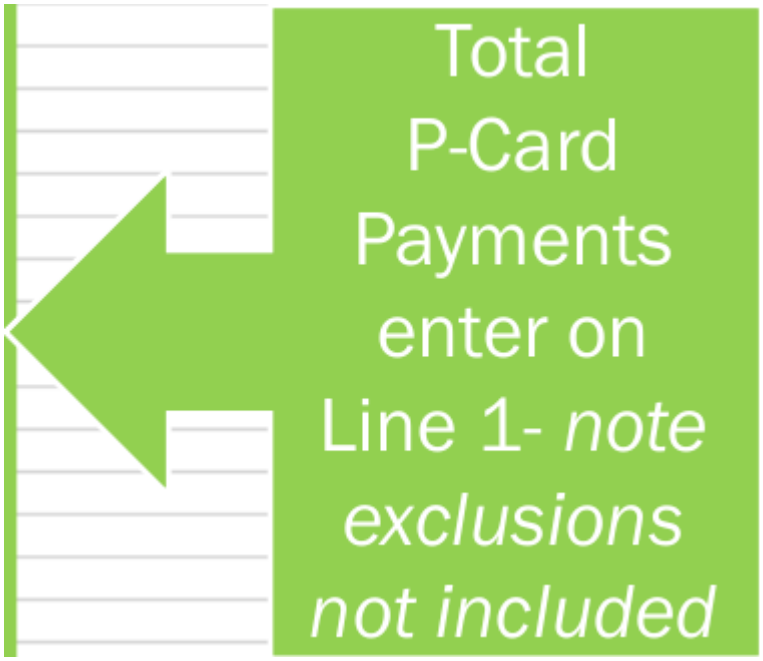


Annual Report Template

Example #1 (cont’d)

…The corresponding tab, “P-CARD LINE1”, should clearly show how amounts were calculated.

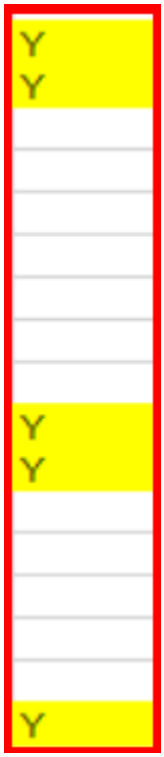




Total

P-Card

Payments enter on Line 1- note exclusions not included





Total Exclusions

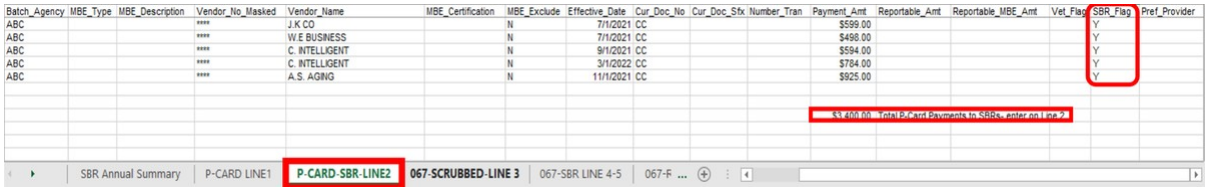
(Note: Highlighting data to clearly define specific grouping of information

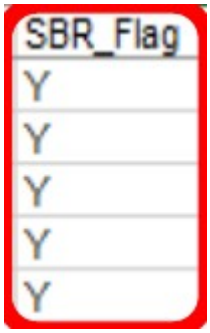
is highly encouraged.)

Annual Report Template

Example #1 (cont'd)

…The corresponding tab, "P-CARD-SBR-LINE2", should clearly show how amounts were calculated.





-This “P-CARD-SBR-LINE2” tab includes the total of all SBR P-Card/Credit Card spend

(you know that these are the SBR Vendor credit card payments because “Y” is listed in the “SBR Flag” column).

-Data provided here (“P-Card-SBR-Line 2” tab) is a subset of the information listed in the Line 1 tab.

Example #2

If Summary Statement, as it pertains to other payments (i.e. DV, BPO/PO),

Line 3 (Total Procurement Payments), has $754,163

Line 4 (Dollars Paid to SBR Vendors on Designated SBR Procurements), has $629,070

Line 5 (Dollars Paid to SBR Vendors on Non-Designated Procurements) has $12,300…

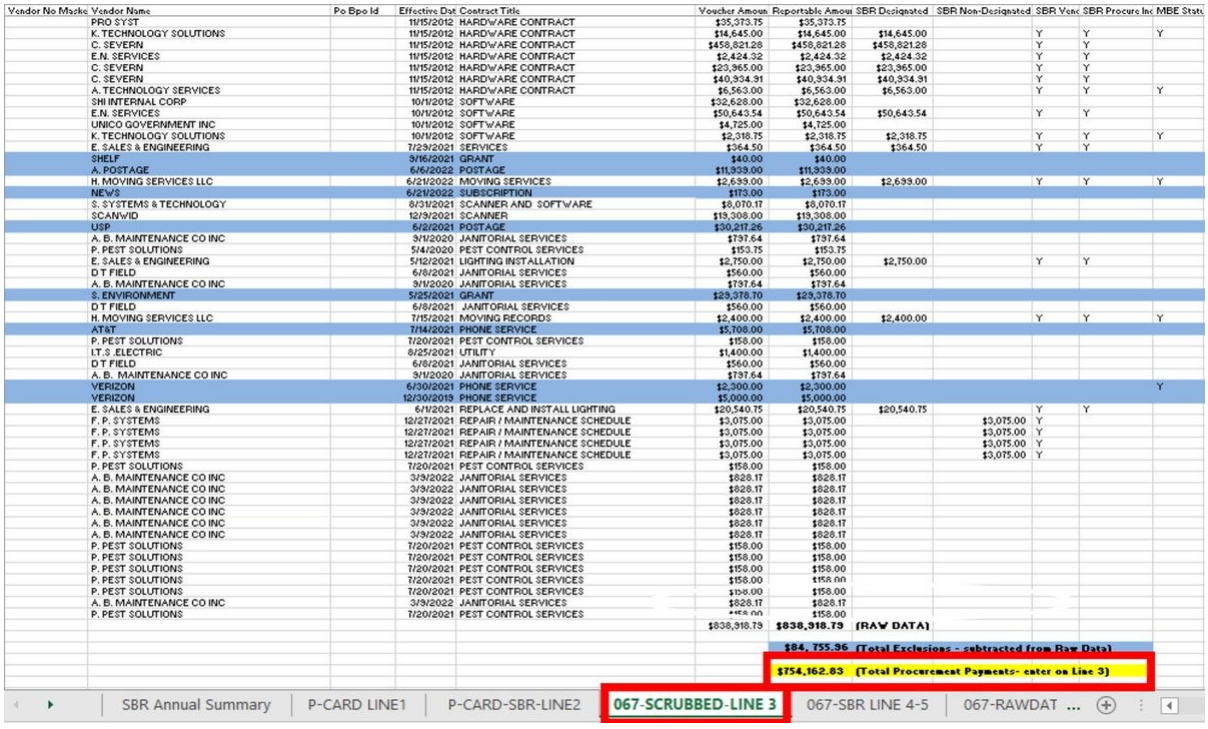
3. Total All Procurement Dollar Payments (not including P- Card Payments)	$754,163
4. Total Procurement Dollar Payments to SBR Vendors Under a Designated SBR Procurements (**not including P-Card Payments**)	$629,070
5. Total Procurement Dollar Payments to SBR Vendors Under a Non-Designated Procurements (**not inlcuding P-Card Payments**)	$12,300

Annual Report Template

Annual Report Template

Example #2 (cont’d)

…Corresponding tab, “065-067-SCRUBBED-LINE 3”, should provide how that amount was determined.



Vendor No Maske	Vendor Name	Po Bpo Id	Effective Dat	Contract Title	Voucher Amoun	Reportable Amou	SBR Designated	SBR Non-Designated	SBR Vend	SBR Procure Inc	MBE Stat
	PRO SYST		11/15/2012	HARDWARE CONTRACT	$35,373.75	$35,373.75					
	K. TECHNOLOGY SOLUTIONS		11/15/2012	HARDWARE CONTRACT	$14,645.00	$14,645.00	$14,645.00		Y	Y	Y
	C. SEVERN		11/15/2012	HARDWARE CONTRACT	$458,821.28	$458,821.28	$458,821.28		Y	Y	
	E.N. SERVICES		11/15/2012	HARDWARE CONTRACT	$2,424.32	$2,424.32	$2,424.32		Y	Y	
	C. SEVERN		11/15/2012	HARDWARE CONTRACT	$23,965.00	$23,965.00	$23,965.00		Y	Y	
	C. SEVERN		11/15/2012	HARDWARE CONTRACT	$40,934.91	$40,934.91	$40,934.91		Y	Y	
	A. TECHNOLOGY SERVICES		11/15/2012	HARDWARE CONTRACT	$6,563.00	$6,563.00	$6,563.00		Y	Y	Y
	SHI INTERNAL CORP		10/1/2012	SOFTWARE	$32,628.00	$32,628.00					
	E.N. SERVICES		10/1/2012	SOFTWARE	$50,643.54	$50,643.54	$50,643.54		Y	Y	
	UNICO GOVERNMENT INC		10/1/2012	SOFTWARE	$4,725.00	$4,725.00					
	K. TECHNOLOGY SOLUTIONS		10/1/2012	SOFTWARE	$2,318.75	$2,318.75	$2,318.75		Y	Y	Y
	E. SALES & ENGINEERING		7/23/2021	SERVICES	$364.50	$364.50	$364.50		Y	Y	
	SHELF		5/16/2021	GRANT	$40.00	$40.00					
	A. POSTAGE		5/6/2022	POSTAGE	$11,939.00	$11,939.00					
	H. MOVING SERVICES LLC		6/21/2022	MOVING SERVICES	$2,699.00	$2,699.00	$2,699.00		Y	Y	Y
	NEWS		6/21/2022	SUBSCRIPTION	$173.00	$173.00					
	S. SYSTEMS & TECHNOLOGY		8/31/2021	SCANNER AND SOFTWARE	$8,070.17	$8,070.17					
	SCANWID		12/3/2021	SCANNER	$19,308.00	$19,308.00					
	USP		6/2/2021	POSTAGE	$30,217.26	$30,217.26					
	A. B. MAINTENANCE CO INC		3/1/2020	JANITORIAL SERVICES	$797.64	$797.64					
	P. PEST SOLUTIONS		5/4/2020	PEST CONTROL SERVICES	$153.75	$153.75					
	E. SALES & ENGINEERING		5/12/2021	LIGHTING INSTALLATION	$2,750.00	$2,750.00	$2,750.00		Y	Y	
	D T FIELD		6/8/2021	JANITORIAL SERVICES	$560.00	$560.00					
	A. B. MAINTENANCE CO INC		3/1/2020	JANITORIAL SERVICES	$797.64	$797.64					
	S. ENVIRONMENT		5/25/2021	GRANT	$23,318.70	$23,318.70					
	D T FIELD		6/8/2021	JANITORIAL SERVICES	$560.00	$560.00					
	H. MOVING SERVICES LLC		7/15/2021	MOVING RECORDS	$2,400.00	$2,400.00	$2,400.00		Y	Y	Y
	AT&T		7/14/2021	PHONE SERVICE	$5,708.00	$5,708.00					
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	$158.00	$158.00					
	I.T.S. ELECTRIC		8/25/2021	UTILITY	$1,400.00	$1,400.00					
	D T FIELD		6/8/2021	JANITORIAL SERVICES	$560.00	$560.00					
	A. B. MAINTENANCE CO INC		3/1/2020	JANITORIAL SERVICES	$797.64	$797.64					
	VERIZON		6/30/2021	PHONE SERVICE	$2,300.00	$2,300.00					Y
	VERIZON		12/30/2019	PHONE SERVICE	$5,000.00	$5,000.00					
	E. SALES & ENGINEERING		6/1/2021	REPLACE AND INSTALL LIGHTING	$20,540.75	$20,540.75	$20,540.75		Y	Y	
	F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	$3,075.00	$3,075.00		$3,075.00	Y		
	F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	$3,075.00	$3,075.00		$3,075.00	Y		
	F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	$3,075.00	$3,075.00		$3,075.00	Y		
	F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	$3,075.00	$3,075.00		$3,075.00	Y		
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	$158.00	$158.00					
	A. B. MAINTENANCE CO INC		3/3/2022	JANITORIAL SERVICES	$828.17	$828.17					
	A. B. MAINTENANCE CO INC		3/3/2022	JANITORIAL SERVICES	$828.17	$828.17					
	A. B. MAINTENANCE CO INC		3/3/2022	JANITORIAL SERVICES	$828.17	$828.17					
	A. B. MAINTENANCE CO INC		3/3/2022	JANITORIAL SERVICES	$828.17	$828.17					
	A. B. MAINTENANCE CO INC		3/3/2022	JANITORIAL SERVICES	$828.17	$828.17					
	A. B. MAINTENANCE CO INC		3/3/2022	JANITORIAL SERVICES	$828.17	$828.17					
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	$158.00	$158.00					
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	$158.00	$158.00					
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	$158.00	$158.00					
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	$158.00	$158.00					
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	$158.00	$158.00					
	A. B. MAINTENANCE CO INC		3/3/2022	JANITORIAL SERVICES	$828.17	$828.17					
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	$158.00	$158.00					
					$838,318.79	$838,318.79	(RAW DATA)				
						$84,755.96	(Total Exclusions - subtracted from Raw Data)				
						$754,162.83	(Total Procurement Payments- enter on Line 3)				

SBR Annual Summary | P-CARD LINE1 | P-CARD-SBR-LINE2 | 067-SCRUBBED-LINE 3 | 067-SBR LINE 4-5 | 067-RAWDAT ...

Annual Report Template Example #2 (cont’d)

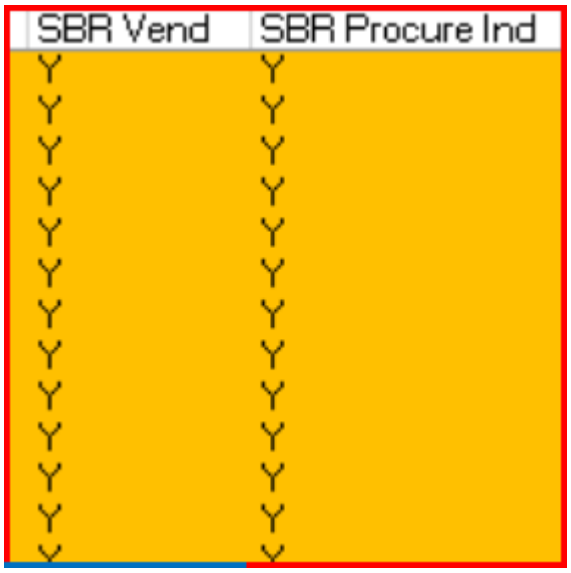
The “065-067-SBR LINE 4-5” tab should clearly provide how those amounts were determined.

Vendor No Masked	Vendor Name	Po Bpo Id	Effective Date	Contract Title	Voucher Amount	Reportable Amount	SBR Designated	SBR Non-Designated	SBR Vend	SBR Procure Ind	MBE Status
	K. TECHNOLOGY SOLUTIONS		11/15/2012	HARDWARE CONTRACT	$14,645.00	$14,645.00	$14,645.00		Y	Y	Y
	C. SEVERN		11/15/2012	HARDWARE CONTRACT	$458,821.28	$458,821.28	$458,821.28		Y	Y	
	E.N. SERVICES		11/15/2012	HARDWARE CONTRACT	$2,424.32	$2,424.32	$2,424.32		Y	Y	
	C. SEVERN		11/15/2012	HARDWARE CONTRACT	$23,965.00	$23,965.00	$23,965.00		Y	Y	
	C. SEVERN		11/15/2012	HARDWARE CONTRACT	$40,934.91	$40,934.91	$40,934.91		Y	Y	
	A. TECHNOLOGY SERVICES		11/15/2012	HARDWARE CONTRACT	$6,563.00	$6,563.00	$6,563.00		Y	Y	Y
	E.N. SERVICES		10/1/2012	SOFTWARE	$50,643.54	$50,643.54	$50,643.54		Y	Y	
	K. TECHNOLOGY SOLUTIONS		10/1/2012	SOFTWARE	$2,318.75	$2,318.75	$2,318.75		Y	Y	Y
	E. SALES & ENGINEERING		7/29/2021	ENGINEERING SERVICES	$364.50	$364.50	$364.50		Y	Y	
	H. MOVING SERVICES LLC		6/21/2022	MOVING SERVICES	$2,699.00	$2,699.00	$2,699.00		Y	Y	Y
	E. SALES & ENGINEERING		5/12/2021	LIGHTING INSTALLATION	$2,750.00	$2,750.00	$2,750.00		Y	Y	
	H. MOVING SERVICES LLC		7/15/2021	MOVING RECORDS	$2,400.00	$2,400.00	$2,400.00		Y	Y	Y
	E. SALES & ENGINEERING		6/1/2021	REPLACE AND INSTALL LIGHTING	$20,540.75	$20,540.75	$20,540.75		Y	Y	
	F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	$3,075.00	$3,075.00		$3,075.00	Y		
	F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	$3,075.00	$3,075.00		$3,075.00	Y		
	F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	$3,075.00	$3,075.00		$3,075.00	Y		
	F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	$3,075.00	$3,075.00		$3,075.00	Y		

$629,070.05 Total Payments to SBR Contractors on Designated SBR Procurements

$12,300.00 Total Payments to SBR Contractors on Non-Designated SBR Procurer

SBR Annual Summary | P-CARD LINE1 | P-CARD-SBR-LINE2 | 067-SCRUBBED-LINE 3 | 067-SBR LINE 4-5 | 067-RAWD ...



The “067-RAWDATA” tab provides data from the 067 Report prior to scrubbing.

Vendor No Masked	Vendor Name	Po Bpo Id	Effective Date	Contract Title	Voucher Amount	Reportable Amount	SBR Designated	SBR Non-Designated	SBR Vend	SBR Procure Ind	MBE Status
	PRO SYST		11/15/2012	HARDWARE CONTRACT	$35,373.75	$35,373.75					
	K. TECHNOLOGY SOLUTIONS		11/15/2012	HARDWARE CONTRACT	$14,645.00	$14,645.00	$14,645.00		Y	Y	Y
	C. SEVERN		11/15/2012	HARDWARE CONTRACT	$458,821.28	$458,821.28	$458,821.28		Y	Y	
	E.N. SERVICES		11/15/2012	HARDWARE CONTRACT	$2,424.32	$2,424.32	$2,424.32		Y	Y	
	C. SEVERN		11/15/2012	HARDWARE CONTRACT	$23,965.00	$23,965.00	$23,965.00		Y	Y	
	C. SEVERN		11/15/2012	HARDWARE CONTRACT	$40,934.91	$40,934.91	$40,934.91		Y	Y	
	A. TECHNOLOGY SERVICES		11/15/2012	HARDWARE CONTRACT	$6,563.00	$6,563.00	$6,563.00		Y	Y	Y
	SHI INTERNAL CORP		10/1/2012	SOFTWARE	$32,628.00	$32,628.00					
	E.N. SERVICES		10/1/2012	SOFTWARE	$50,643.54	$50,643.54	$50,643.54		Y	Y	
	UNICO GOVERNMENT INC		10/1/2012	SOFTWARE	$4,725.00	$4,725.00					
	K. TECHNOLOGY SOLUTIONS		10/1/2012	SOFTWARE	$2,318.75	$2,318.75	$2,318.75		Y	Y	Y
	E. SALES & ENGINEERING		7/29/2021	SERVICES	$364.50	$364.50	$364.50		Y	Y	
	SHELF		9/16/2021	GRANT	$40.00	$40.00					
	A. POSTAGE		6/6/2022	POSTAGE	$11,939.00	$11,939.00					
	H. MOVING SERVICES LLC		6/21/2022	MOVING SERVICES	$2,699.00	$2,699.00	$2,699.00		Y	Y	Y
	NEWS		6/21/2022	SUBSCRIPTION	$173.00	$173.00					
	S. SYSTEMS & TECHNOLOGY		8/31/2021	SCANNER AND SOFTWARE	$8,070.17	$8,070.17					
	SCANWID		12/3/2021	SCANNER	$19,308.00	$19,308.00					
	USP		6/2/2021	POSTAGE	$30,217.26	$30,217.26					
	A. B. MAINTENANCE CO INC		3/1/2020	JANITORIAL SERVICES	$797.64	$797.64					
	P. PEST SOLUTIONS		5/4/2020	PEST CONTROL SERVICES	$153.75	$153.75					
	E. SALES & ENGINEERING		5/12/2021	LIGHTING INSTALLATION	$2,750.00	$2,750.00	$2,750.00		Y	Y	
	D T FIELD		6/8/2021	JANITORIAL SERVICES	$560.00	$560.00					
	A. B. MAINTENANCE CO INC		3/1/2020	JANITORIAL SERVICES	$797.64	$797.64					
	S. ENVIRONMENT		5/25/2021	GRANT	$29,378.70	$29,378.70					
	D T FIELD		6/8/2021	JANITORIAL SERVICES	$560.00	$560.00					
	H. MOVING SERVICES LLC		7/15/2021	MOVING RECORDS	$2,400.00	$2,400.00	$2,400.00		Y	Y	Y
	AT&T		7/14/2021	PHONE SERVICE	$5,708.00	$5,708.00					
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	$158.00	$158.00					
	I.T.S. ELECTRIC		8/25/2021	UTILITY	$1,400.00	$1,400.00					
	D T FIELD		6/8/2021	JANITORIAL SERVICES	$560.00	$560.00					
	A. B. MAINTENANCE CO INC		9/1/2020	JANITORIAL SERVICES	$797.64	$797.64					
	VERIZON		6/30/2021	PHONE SERVICE	$2,300.00	$2,300.00					Y
	VERIZON		12/30/2019	PHONE SERVICE	$5,000.00	$5,000.00					
	E. SALES & ENGINEERING		6/1/2021	REPLACE AND INSTALL LIGHTING	$20,540.75	$20,540.75	$20,540.75		Y	Y	
	F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	$3,075.00	$3,075.00		$3,075.00	Y		
	F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	$3,075.00	$3,075.00		$3,075.00	Y		
	F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	$3,075.00	$3,075.00		$3,075.00	Y		
	F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	$3,075.00	$3,075.00		$3,075.00	Y		
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	$158.00	$158.00					
	A. B. MAINTENANCE CO INC		3/9/2022	JANITORIAL SERVICES	$828.17	$828.17					
	A. B. MAINTENANCE CO INC		3/9/2022	JANITORIAL SERVICES	$828.17	$828.17					
	A. B. MAINTENANCE CO INC		3/9/2022	JANITORIAL SERVICES	$828.17	$828.17					
	A. B. MAINTENANCE CO INC		3/9/2022	JANITORIAL SERVICES	$828.17	$828.17					
	A. B. MAINTENANCE CO INC		3/9/2022	JANITORIAL SERVICES	$828.17	$828.17					
	A. B. MAINTENANCE CO INC		3/9/2022	JANITORIAL SERVICES	$828.17	$828.17					
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	$158.00	$158.00					
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	$158.00	$158.00					
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	$158.00	$158.00					
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	$158.00	$158.00					
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	$158.00	$158.00					
	A. B. MAINTENANCE CO INC		3/9/2022	JANITORIAL SERVICES	$828.17	$828.17					
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	$158.00	$158.00					
					$838,918.79	$838,918.79					

... | P-CARD-SBR-LINE2 | 067-SCRUBBED-LINE 3 | 067-SBR LINE 4-5 | 067-RAWDATA | Line6- T factor | 068-RAW

Summary Statement/Reporting

If Summary Statement, Line 6 (Total Number

of SBR Vendors receiving award and payments) states 57…

6. Total Number of SBR Contractors receiving award and payments	57

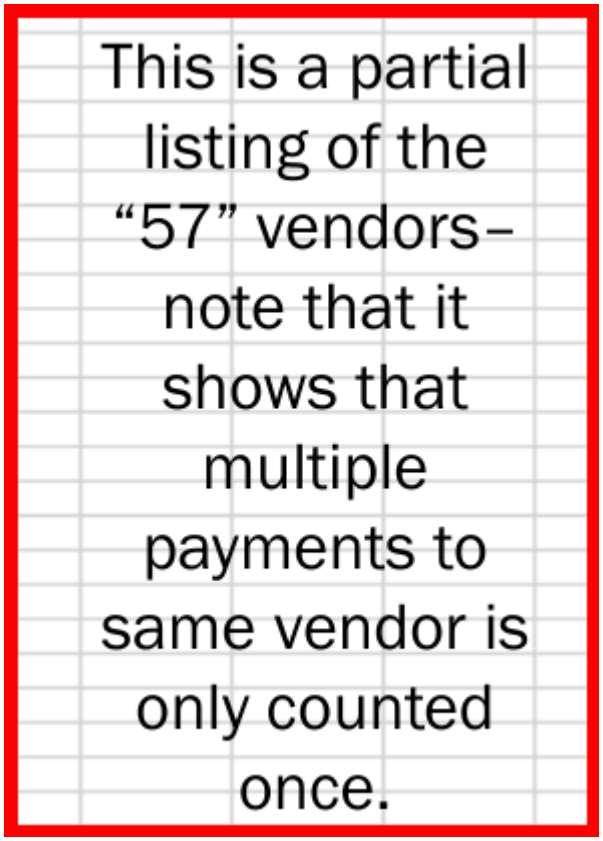
Summary Statement/Reporting

…Tab “Line6– T-factor” should show how that data was determined.

The corresponding tab, “Line6- T factor”, should clearly provide how that amount was determined



Vendor Name
A. B. LASER CARTRIDGE
A. B. LASER CARTRIDGE
A B. LASER CARTRIDGE Total
A. PERFECTIONN INC
A. PERFECTION INC Total
AC. UNIFORM SERVICES INC
AC UNIFORM SERVICES INC Total
AD SECURITY SAFE & LOCK
AD SECURITY SAFE & LOCK Total
ADV SECURITY SAFE AN
ADV SECURITY SAFE AN Total
A STATIONERS
A STATIONERS
A STATIONERS Total
AJ STATIONERS INC
AJ STATIONERS INC Total
ALAR ENGINEERING INC
ALAR ENGINEERING INC
ALAR ENGINEERING INC
ALAR ENGINEERING INC
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ALAR ENGINEERING INC
ALAR ENGINEERING INC
ALAR ENGINEERING INC
ALAR ENGINEERING INC Total
ALL PLACEMENT SERVICE INC
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ALL PLACEMENT SERVICE INC
ALL PLACEMENT SERVICE INC Total
A. PRO STAFFING
A. PRO STAFFING
A. PRO STAFFING
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A. PRO STAFFING
A. PRO STAFFING
A. PRO STAFFING
A. PRO STAFFING
A. PRO STAFFING Total
ALXT INC
ALXT INC Total
AMERIC LLC
AMERIC LLC
AMERIC LLC
AMERIC LLC Total
ANGEL SYS INC
ANGEL SYS INC
ANGEL SYS INC
ANGEL SYS INC
ANGEL SYS INC
ANGEL SYS INC
ANGEL SYS INC
ANGEL SYS INC Total
APP TECHNOLOGY SERVICES
APP TECHNOLOGY SERVICES
APP TECHNOLOGY SERVICES
APP TECHNOLOGY SERVICES
APP TECHNOLOGY SERVICES
APP TECHNOLOGY SERVICES
APP TECHNOLOGY SERVICES
APP TECHNOLOGY SERVICES
APP TECHNOLOGY SERVICES Total



This is a partial listing of the “57” vendors– note that it shows that multiple payments to same vendor is only counted once.

Summary Statement/Reporting

Proc Method	Work Category	Po Bpo Id	Amount	Effective D	Vendor No	Vendor Name	SBR Ind	SBR Vend	Description
			$72,500.00	3/20/2023		I E C CHESAPEAKE APPRNTC & TRAINING INC			
			$12,500.00	3/20/2023		SEASIDE PLUMBING INC.			
			$35,000.00	3/20/2023		BALTI ELEC			
			$5,050.00	3/20/2023		REY ELEC			
			$2,500.00	3/22/2023		GLAXO KLIN			
			$911,390.00	3/22/2023		BOARD OF TRUSTEES			
			$7,500.00	3/22/2023		VANG ENTERPRISES LLC			
			$30,000.00	3/22/2023		VANG ENTERPRISES LLC			
			$50,000.00	3/22/2023		EAST DRIVING			
			$2,500.00	3/22/2023		AUTO STRAT			
			$2,500.00	3/22/2023		RING CONT			
			$200,000.00	3/27/2023		WESTERN CONS			
			$3,292.50	3/30/2023		DOUG ELECTRIC			
			$573.12	8/30/2022		A. PERFECTION INC	Y	Y	
			$305.00	7/29/2022		AD SECURITY SAFE &	Y	Y	
			$16,000.00	9/1/2022		AMERIC LLC	Y	Y	
			$729.57	9/16/2022		CONTROL SYSY	Y	Y	
			$2,139.08	9/21/2022		DRINK DELIVERY INC	Y	Y	
			$2,425.00	9/8/2022		DRINK DELIVERY INC		Y	
			$3,491.00	8/25/2022		DS INC	Y	Y	
			$117.15	7/15/2022		EAST ELEVATOR		Y	
			$1,222,956.80	1/1/2023		ELEG ENT	Y	Y	
			$3,082.80	9/1/2022		E.N. SERVICES	Y	Y	
			$1,413.42	9/8/2022		E.N. SERVICES	Y	Y	
			$308.28	9/23/2022		E.N. SERVICES	Y	Y	
			$1,800.00	8/26/2022		G H N INC		Y	
			$3,120.00	9/27/2022		GLEN CONSTRUCTION INC	Y	Y	
			$3,140.00	8/16/2022		HC HART INC	Y	Y	
			$3,140.00	9/14/2022		HC HART INC	Y	Y	
			$1,249.00	8/26/2022		HC HART INC	Y	Y	
			$1,060.00	8/4/2022		IG INNOV		Y	
			$439.88	8/25/2022		KEL HVAC INC	Y	Y	
			$250.00	8/30/2022		KOORS SIGNS LLC	Y	Y	

... | P-CARD-SBR-LINE2 | 067-SCRUBBED-LINE 3 | 067-SBR LINE 4-5 | 067-RAWDATA | Line6- T factor | 068-RAW

Summary Statement/Reporting

Note

For those units who do not utilize the 065-067/068/721 Answers Reports, you would provide the data as listed from your internal reporting system.

Be certain that this information is clearly defined within the Annual Report Template.

BPW Advisory 2005-1 Small Business Reserve Program

Qualified Expenditures.

For purposes of calculating 15% of the dollar value of procurements, include only procurement expenditures that are subject to the Small Business Reserve Program (qualified expenditures).

BPW Advisory 2005-1 Small Business Reserve Program

Exclusions:

Where governing federal law or federal grant provisions conflict with this Small Business Reserve Program, the procurement is excluded from these requirements.

Procurements from Maryland Correctional Enterprises, Blind Industries and Services of Maryland, and the Employment Works Program (COMAR 21.11.05) and from Maryland Vending Facilities Program for the Blind (COMAR 21.11.09) are excluded from these requirements.
The value of excluded procurements is not included in the procurement dollar base from which the 15% reserve is calculated. (the denominator)

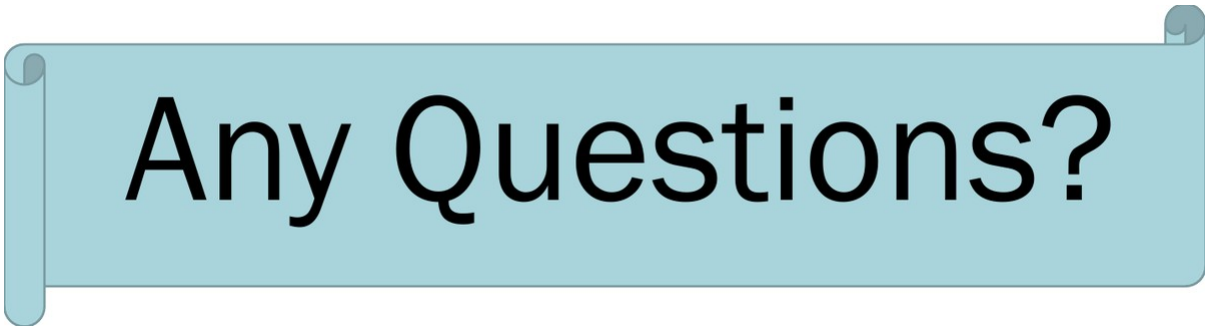
BPW Advisory 2005-1 Small Business Reserve Program (cont'd)

Grant expenditures as defined inCOMAR 21.01.02.01(B)(46).
Pass-through payments (e.g., employee health benefits, employee retirement contributions, employee travel payments), although the administrative and management fees expended to process such payments are included.
Expenditures excluded under §11-203 of the State Finance and Procurement Article (see COMAR 21.01.03.01).

Verification of SBR Vendors

SBR report preparers may request an "SBR All Active Report" from eMaryland Marketplace Advantage (eMMA) by emailing the

emma.helpdesk@maryland.gov. This report can help to verify whether a firm was certified in the SBR Program at the time of payment.



Any Questions?

FY25 SBR Quarterly Reporting

New Reporting Requirements

Increasing the SBR participation goal from a minimum of 15% to 20%of the unit's total dollar value of goods, supplies, services, maintenance, construction, construction–related services, and architectural and engineering service contracts to be made directly to small businesses certified in the SBR Program

Expands the SBR Program to count designated SBR procurements and non-designated procurements contracts awarded to small businesses that are certified in the SBR Program toward the unit's 20 % SBR attainment

State Procurement - Small Business Reserve (SBR) Program –

Goals and Outreach Program

SBR Program Changes Effective October 1, 2024

[HB0962/SB 673]

SBR Program Changes Effective October 1, 2024

SBR Program Changes Effective October 1, 2024

The total number and the dollar value of AWARDS the unit made to small businesses under designated small business reserve contracts;
The total number and the dollar value of AWARDS the unit made to small businesses under non-designated Small Business Reserve contracts, including purchase card procurements;

FY25 NEW SBR Quarterly Reporting Requirements

The total dollar value of AWARDS the unit made under procurement contracts; and
Contain other such information as required by the Governor's Office of Small, Minority, and Women Business Affairs

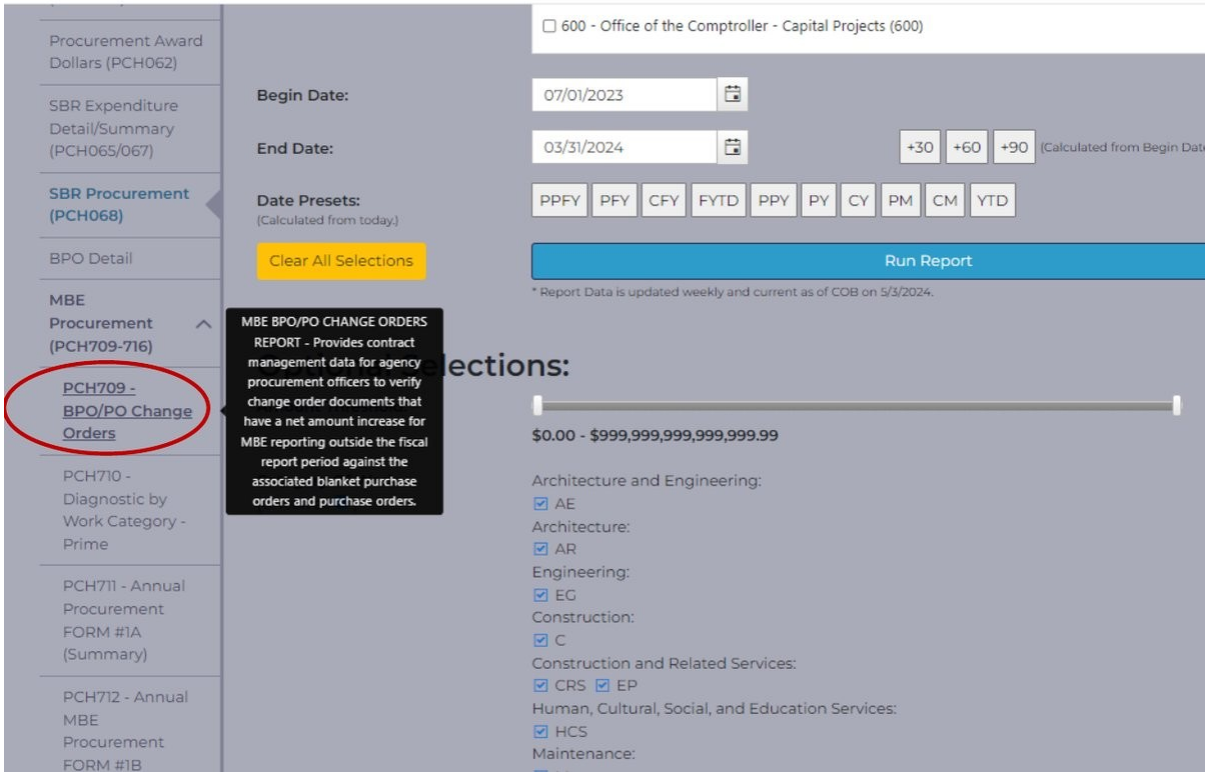
FY25 NEW SBR Quarterly Reporting Requirements

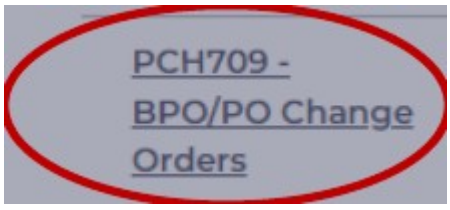
FY25 NEW SBR Quarterly Reporting Requirements

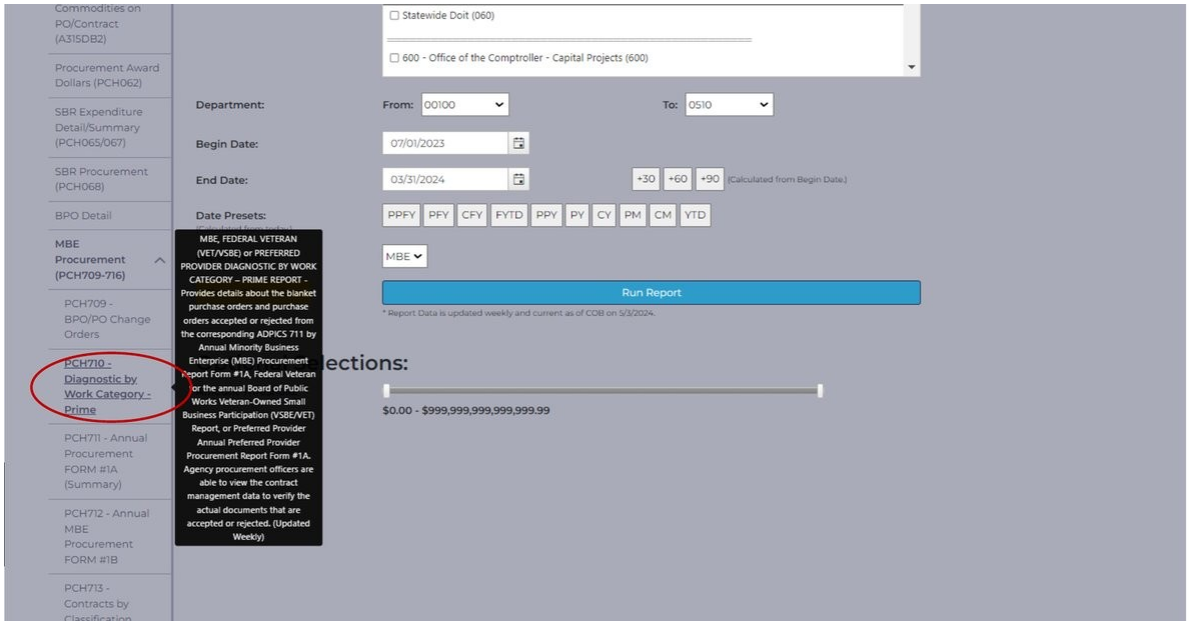
FMIS CHEAT SHEET

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

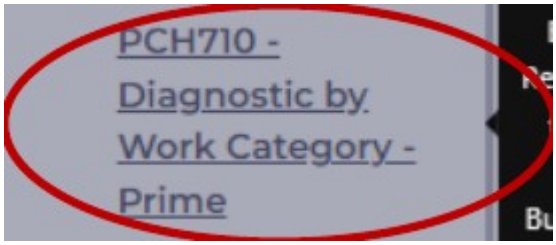
FY25 NEW SBR Quarterly Reporting Requirements

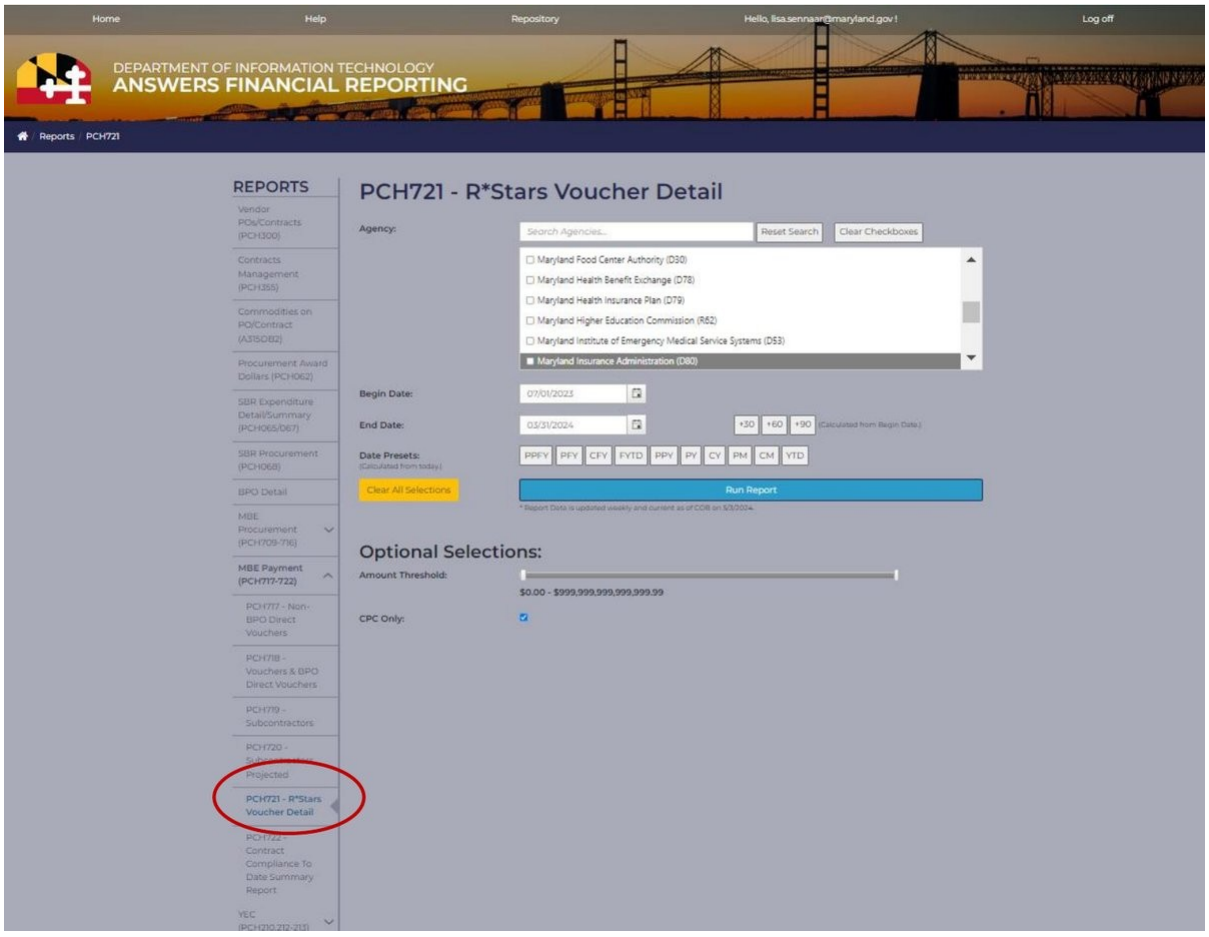






FY25 NEW SBR Quarterly Reporting Requirements





FY25 NEW SBR Quarterly Reporting Requirements



FY25 NEW SBR Quarterly Reporting Instructions and Templates

New Instructions and Template will be

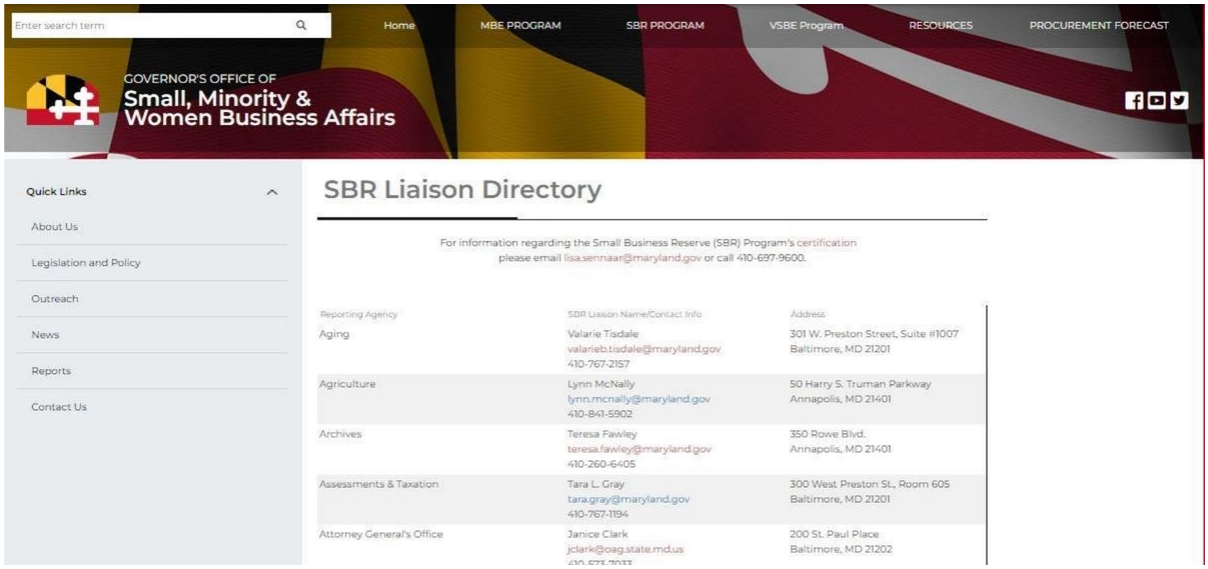
posted in the SBR Toolkit by July 1, 2024.

Reminder

SBR Liaison Directory

- Be certain to verify that the SBR Liaison information is correctly listed for your agency/department.
- Send us an email to provide any correct information at your earliest convenience, as we want to make certain that you are invited to our events, receive information and vendors can reach out to you.
- Keep us updated with any changes (i.e. new SBR Liaisons or if the SBR Liaison listed in the directory is no longer with your unit)

SBR Liaison Directory

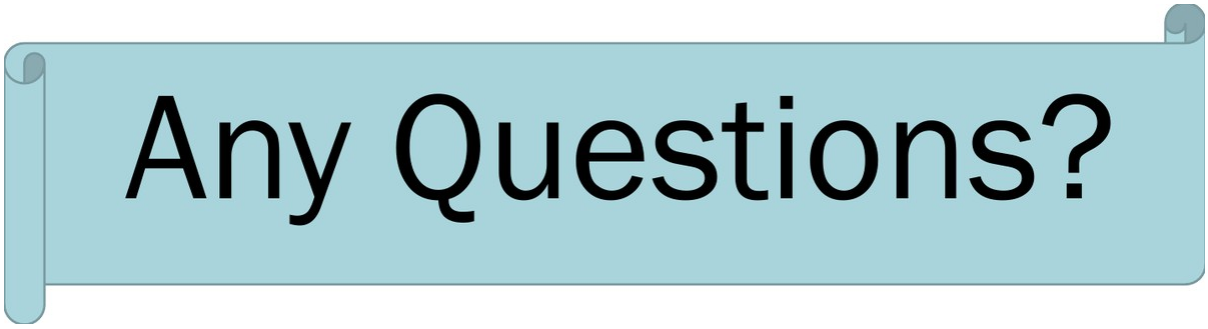


https://gomdsmallbiz.maryland.gov/Pages/SBR-Liaison-Directory.aspx

CONTACT INFO

Any questions after today's training, please contact us: Lisa Mitchell Sennaar lisa.sennaar@maryland.gov 410-697-9613 410-508-8089

Tanita Johnson tanita.johnson1@maryland.gov 410-697-9619 667-232-1368



Any Questions?

VSBE Program

Presented by Danielle N. Davis



VSBE Agenda

VSBE PROGRAM UPDATES
VSBE OUTREACH UPDATES
VSBE REGULATION UPDATES
VSBE REPORTING UPDATES
WHATS COMING VSBE FY25

VSBE Program Updates

Over 840 certified VSBEs in the database
Continue to work with internal and external veteran stakeholders that led to education about the program and resource opportunities
VSBE Advisory Committee now meets quarterly, chaired by our Special Secretary

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



VSBE PROGRAM GUIDE FOR LIAISON AND PROCUREMENT OFFICERS

VSBE Vendor Verification

eMaryland Marketplace Advantage (eMMA) is the only platform to verify certified Veteran-Owned Small Business Enterprise (VSBE) Program vendors.

Once certified, the vendor will be assigned a VSBE number (VBXX-XXXXXX) in eMMA. An agency or department must verify a VSBE's certification by the VSBE# and a current application date (not expired).

Counting VSBE Vendor Participation

Only the work of a certified VSBE vendor may be counted toward an established contract goal. This requires the procurement team to verify VSBE status in eMMA both at the time of award and as payments are made throughout the life of the contract.

Vendor Certification

Veteran-owned businesses that want to participate in the VSBE Program must complete the 3-step certification process.
First - Register as a vendor in eMMA
Second - Submit veteran verification
Third- Complete the VSBE Application within eMMA

Are you working with veteran small businesses? Refer them to our website for complete information.
https://gomdsmallbiz.maryland.gov/Pages/VSBE-Program.aspx

Welcome to eMaryland Marketplace Advantage (eMMA)
https://emma.maryland.gov/
eMaryland Marketplace Advantage

VSBE Goalsetting

Participating agencies/departments shall follow guidelines established in BPW Advisory 2001-1 - Procurement Review Groups: SBR Designations, MBE and VSBE Determinations.
https://bpw.maryland.gov/Pages/adv-2001-1.aspx

Identifying veteran-owned small businesses is a critical step in setting VSBE goals on a contract-by-contract basis. VSBE liaisons and procurement officers should use all available resources to identify veteran firms.

Primary resources include, but are not limited to:

- eMMA
- VeteranOwnedBusiness.com
- Veteran Small Business Certification (VetCert)
  https://veterans.certify.sba.gov/#home

Note: As of January 1, 2023, VetBiz is no longer in operation.

VSBE Outreach

The VSBE liaison officer is responsible for coordinating outreach efforts to the veteran business community. Please remember to track these efforts as they are now required to be documented and reported at the end of each fiscal year.

If you have any questions regarding the VSBE Program, feel free to contact our VSBE Compliance manager Danielle Davis at Danielle.Davis2@maryland.gov

VSBE Outreach Updates

January – Salute to Service Ravens Football Game
February – Frederick, MD In-person Certification Workshop
March – Federal and State Certification and Program Updates
April - Eastern Shore In-person Certification Workshop


State of Maryland's
Veteran-Owned Small Business
Enterprise (VSBE) Program





VSBE Outreach Upcoming

May - 2024 Small Business Military Appreciation Breakfast
June - Women Veteran Day Entrepreneurship Conference
July – Harford County In-person Certification Workshop
September – Baltimore In-person Certification Workshop
October – Maryland Department of Labor Veteran-Owned Small Business Conference
November – Maryland Judiciary MBE/VSBE Event
November – VSBE Appreciation Breakfast @ Live Casino

VSBE Certification

eMaryland Marketplace *Advantage*



VSBE Compliance

https://dsd.maryland.gov/regulations/Pages/21.11.14.11.aspx

To ensure compliance with VSBE subcontract participation goals, the procurement agency shall verify that the VSBEs listed in the participation schedule are actually performing work and receiving compensation as set forth in the schedule.



VSBE Waivers https://dsd.maryland.gov/regulations/Pages/21.11.14.09.aspx

D. When a waiver is granted , except waivers under §C of this regulation, one copy of the waiver determination and the reasons for the determination shall be kept by the VSBE liaison officer with another copy forwarded to the Governor's Office of Small, Minority & Women Business Affairs.

Granted VSBE Waivers need to be emailed to: VSBE.GOSBA@maryland.gov

VSBE Regulation Updates

21.11.14.02 Definitions
https://dsd.maryland.gov/regulations/Pages/21.11.14.02.aspx

.02 Definitions.

A. In this chapter, the following terms have the meanings indicated.

B. Terms Defined.

(1) "Certification" means a determination by the certification agency through the procedures outlined in this chapter that a legal entity is a veteran-owned small business enterprise (VSBE) for purposes of these regulations.

(2) "Certification agency" means the Governor's Office of Small, Minority & Women Business Affairs (GOSBA).

(3) "Certified VSBE" means a veteran-owned small business that holds a certification issued by the certification agency.

(4) "Control" means the exercise of the power to manage and operate a business enterprise .

(5) "Database" means the State's Internet-based electronic procurement system.

(6) "Procurement agency" has the meaning stated in COMAR 21.01.02.01B.

(7) "Vendor" has the meaning stated in COMAR 21.01.02.01B.

(8) "Verification" means a business owner that is verified by the Maryland Department of Veterans Affairs or the U.S. Small Business Administration as a veteran.

(9) "Veteran" means an individual who is verified as having served on active duty in the armed forces of the United States, other than for training, and was discharged or released under conditions other than dishonorable.

(10) "Veteran-owned small business enterprise (VSBE)" means a for-profit business, other than a joint venture, that:

(a) Meets the size standards adopted by the U.S. Small Business Administration in 13 CFR §121.201 and any subsequent revision of that regulation; and

(b) Is at least 51 percent owned by one or more individuals who:

(i) Are veterans; and

(ii) Control the management and daily operations of the business.

21.11.14.12 Certification Procedures
https://dsd.maryland.gov/regulations/Pages/21.11.14.12.aspx

.12 Certification Procedures.

A. General.

(1) The certification agency is designated to certify, recertify, and decertify VSBEs.

(2) A procurement agency may not permit a vendor to participate in a procurement as a veteran-owned vendor unless it is identified as a certified VSBE in the Database.

B. Vendor Registration.

(1) A veteran vendor seeking to be recognized as a certified VSBE shall register as a vendor in the State's Internet-based electronic procurement system.

(2) A registered vendor shall submit veteran verification and complete the VSBE Program application in the State's Internet-based electronic procurement system.

C. Information Which May Be Requested. The certification agency may request the following information to assist in any certification, recertification, decertification, or participation determination. Failure to furnish the requested information within a reasonable time as specified in writing may result in an administrative closing of an application, a denial of certification or recertification, or a determination to decertify. The information consists of:

(1) Copies of articles of incorporation, bylaws, minutes, shareholder agreements, stock certificates, stock transfer ledgers, any additional profit-sharing agreements or buyout rights, or in the case of a partnership, the partnership agreement;

(2) Current financial statements, business licenses, federal personal income tax returns for the most current 2 years, including all schedules, federal business tax returns for the past 3 years, including all schedules, cancelled checks, resumes of principal parties, and any relevant personal and third-party agreements, such as rental and management agreements; and

(3) Copies of supporting veteran-related documents issued by the federal government.

D. A certified VSBE shall have certified status in the Database at the time the contract is awarded in order for its participation to be counted toward the VSBE contract goal. All payments made shall be counted toward the VSBE goal under a contract entered into when the VSBE was certified.

E. Failure of a certified VSBE to maintain certification may not be the cause of the termination of the contractual relationship for the remainder of the term of the contract.

VSBE FY24 Reporting Updates

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



VSBE Toolkit Reporting Section

FY2024 VSBE Annual Report will be due October 1, 2024.

***Updated Templates for FY24 Coming Soon**

This report is mandatory and must be submitted to:
vsbereports.gosba@maryland.gov

VSBE Report Instructions and Template:

- FY2023 VSBE REPORTING MANUAL.docx
- FY23 Outreach Form-NEW!!

VSBE Additional Reporting Document Tools:

- GAD List
- Annual ANSWERS Cheat Sheet
- Annual Non-Answers Cheat Sheet
- VSBE Program Guide.png

Call 443-346-0717 if you have any questions or email danielle.davis2@maryland.gov.

VSBE Deadlines

Please make sure adhere to the deadlines and ALL ITEMS are submitted by the close of business on October 1st

This year October 1st falls on a Tuesday!



OCTOBER 1ST

FY2024 VSBE REPORTING REQUIREMENTS

1. Updated VSBE Annual Template

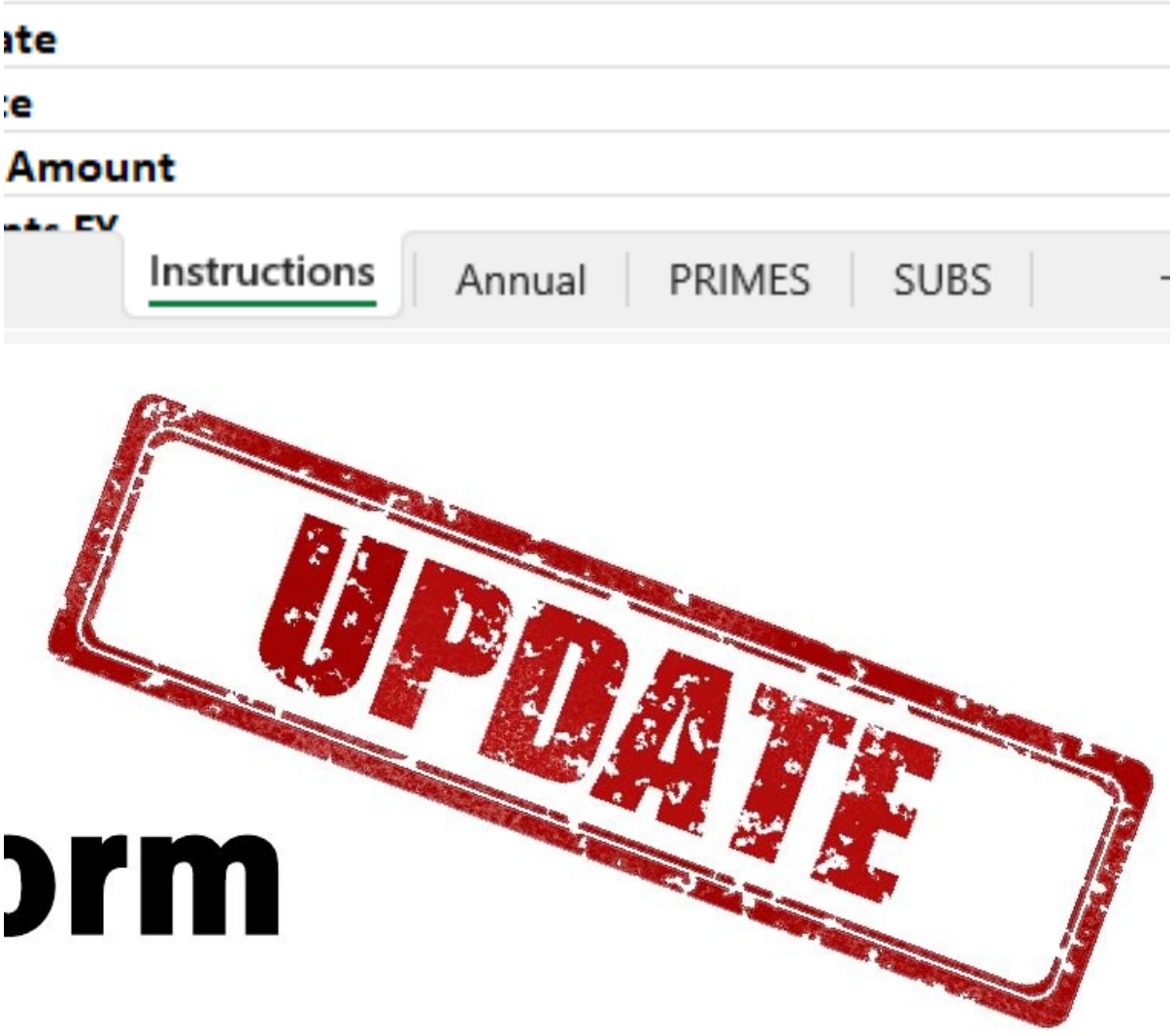
2. VSBE Outreach Google Form Submission

3. ALL REQUIRED Supporting Backup Data

The VSBE Annual Form to collect both award and payment data made to VSBE Prime and VSBE Subcontractors
The form is broken into 2 parts, section 1 is for all overall award data
While section 2 is for all payment data and then specific VSBE payment data with separate tabs to assist in this process

UPDATED FY2024 VSBE Annual Form ANNUAL TAB SECTION 1AWARDS DATA ONLY

UPDATED FY2024 VSBE Annual Form



UPDATED FY2024 VSBE Annual Form ANNUAL TAB

VSBE Program utilization data is being collected by the Governor's Office of Small, Minority & Women Business Affairs

Veteran-Owned Small Business Enterprise (VSBE) Annual Report

Fiscal Year 2024

Beginning in Fiscal Year 2019, the work of firms verified by the Center For Veterans Enterprise of the United States Department of Veterans Affairs or the Maryland Department of Veterans Affairs may be counted toward a defined VSBE contract goal (see COMAR 21.11.14).

INSTRUCTIONS: Complete all yellow cells. Automatic calculations will appear in blue cells. Do not edit this template.

Agency Reporting:

Individual Completing Report:

Awards to VSBEs

	Total # All Procurement Contracts Awarded	Total $ All Procurement Contracts Awarded	Total # Contracts Awarded to VSBEs as Prime Contractors	Total $ Contracts Awarded to VSBEs as Prime Contractors	Total # VSBE Subcontracts Awarded	Total $ VSBE Subcontracts Awarded	*Percentage of VSBE Participation*
Procurement Contracts							
Corporate Credit Card							
Direct Voucher							
Total		$0		$0		$0	

Payments to VSBEs

SECTION 2- PAYMENT DATA ONLY

Total $ Payments to All Prime Contractors (Total of ALL Payments)	Total $ Payments to VSBEs as Prime	Total $ Payments to VSBEs as Subcontractors	VSBE Payments as % of All Payments
	$ -	$ -	



orm

Total $ Payments to All Prime Contractors (Total of ALL Payments)	Total $ Payments to VSBEs as Prime	Total $ Payments to VSBEs as Subcontractors	VSBE Payments as % of All Payments
	$ -	$ -	

	Total # All Procurement Contracts Awarded	Total $ All Procurement Contracts Awarded	Total # Contracts Awarded to VSBEs as Prime Contractors	Total $ Contracts Awarded to VSBEs as Prime Contractors	Total # VSBE Subcontracts Awarded	Total $ VSBE Subcontracts Awarded	*Percentage of VSBE Participation*
Procurement Contracts							
Corporate Credit Card							
Direct Voucher							
Total		$0		$0		$0	



SECTION 1- AWARDS DATA ONLY

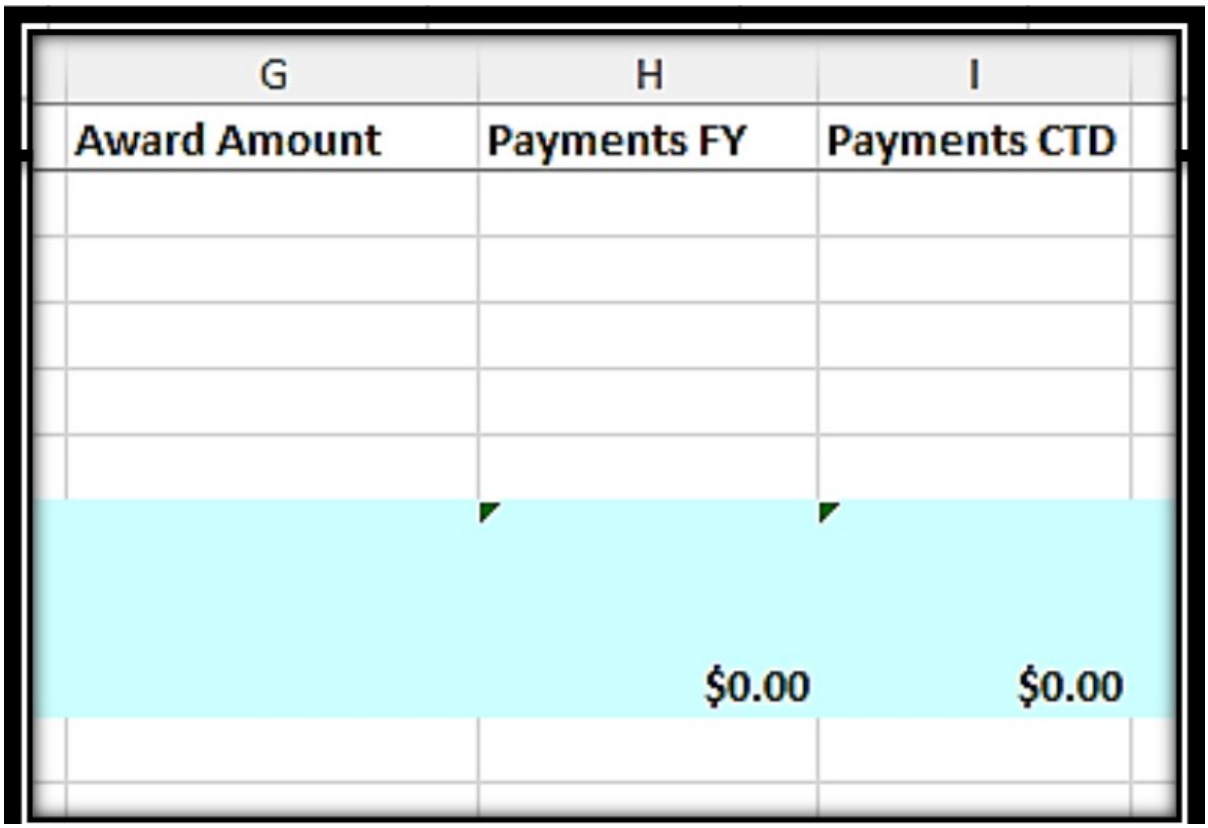
SECTION 2- PAYMENT DATA ONLY

	A	B	C	D	E	F	G	H	I	J	
1	Contractor Name	EFIN	VSBE Certification#	Contract#	StartDate	EndDate	Award Amount	Payments FY	Payments CTD	VSBE Goal	Description
2	M&M, Inc.	00-0000000	01-001	A005	6/28/2018	12/31/2018	$260,471.00	$500.00	$500.00	0%	Emergency Installation c
3											

G	H	I
Award Amount	Payments FY	Payments CTD

FY2024 VSBE Annual Form- PRIME TAB

The Prime Payment Tab has a built-in equation to pull the total number of payments into the Annual (Total is on Line Item 100). You may add rows above row 100, if needed. All of the following rows are required:



Such data would come from:

VSBE Direct Vouchers Payments (717)

VSBE Prime Voucher Payments (718)

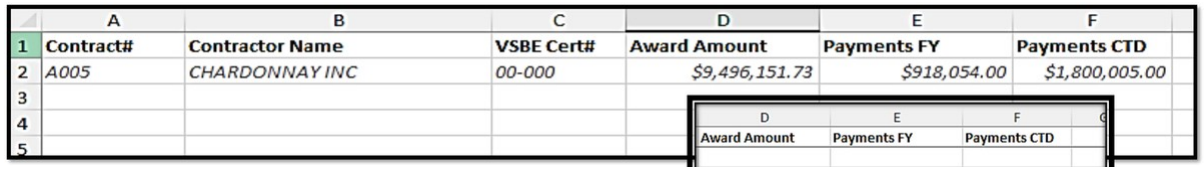
VSBE Credit Cards Payments (721)

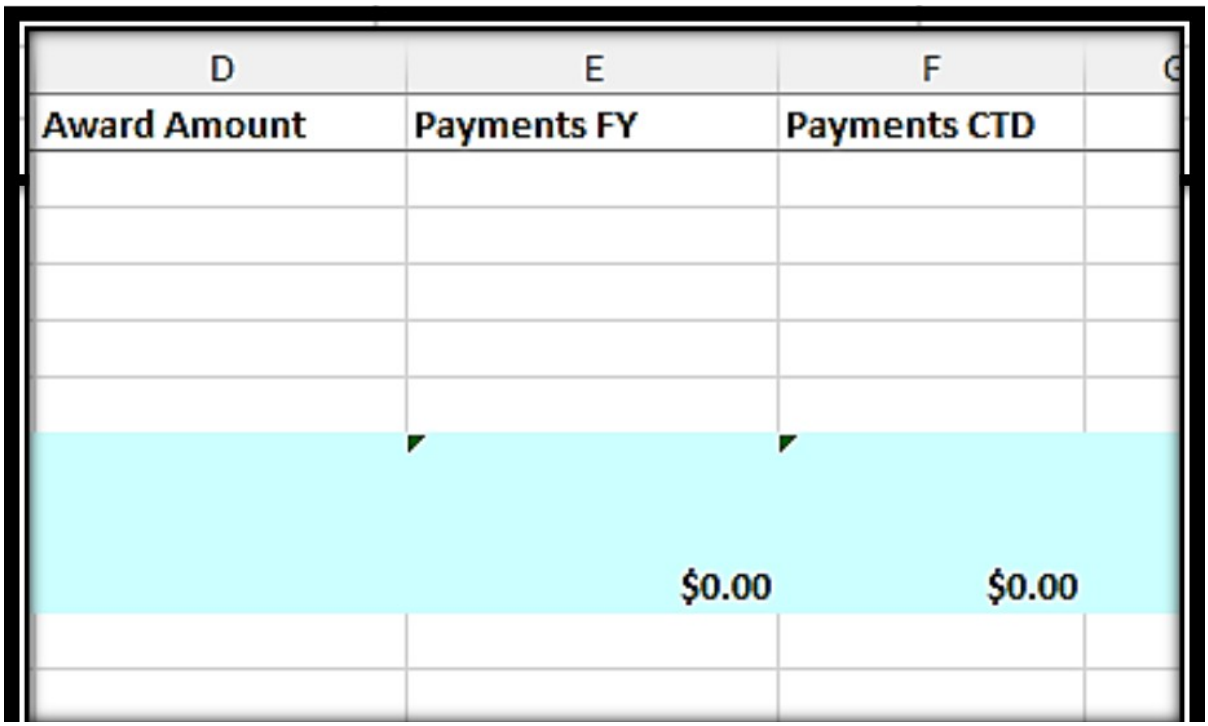
FY2024 VSBE Annual Form- SUB TAB

The Subcontract Payment Tab has a built-in equation to pull the total number of payments into the

Annual (Total is on Line Item 100). You may add rows above row 100, if needed. All of the following rows are required:

	A	B	C	D	E	F
1	**Contract#**	**Contractor Name**	**VSBE Cert#**	**Award Amount**	**Payments FY**	**Payments CTD**
2	*A005*	*CHARDONNAY INC*	*00-000*	*$9,496,151.73*	*$918,054.00*	*$1,800,005.00*
3						
4						
5						





Such data would come from:

VSBE Subcontractor Payments (719)

UPDATED FY2024 Outreach Form

2024 VSBE Annual Outreach Form

B I U

Every participating unit must report their VSBE Program outreach to veteran small businesses per COMAR 21.11.14.06A(3). Which states: An evaluation by the procurement agency of the success of its VSBE Program, which shall include a brief description of the procurement agency's outreach efforts to VSBE prime and VSBE subcontractors.

Each participating VSBE unit must complete and submit as part of their annual forms by October 1, 2024 for FY2024 (July 1, 2023 - June 30, 2024).

Reminder: There is no minimum required length for responses, however, please directly address each inquiry in a clear and concise manner.

Email *

Valid email



m

Now a Fillable Google Document

Required for all VSBE participating units
12 questions both qualitative and quantitate data points
Follow-Up Appointments may be requested after submission

3. Individual Completing Form/Title *

4. Does your unit have a defined outreach strategy for engaging veteran-owned small businesses? *

Mark only one oval.

- Yes
- No, not yet
- Working on it
- Need help to define one

5. How did your unit specifically target veteran-owned firms to perform as Prime contractors and/or subcontractors in FY2024? *

6. Did your unit directly solicit certified VSBEs

Mark only one oval.

- Yes
- No

6. Did your unit directly solicit certified VSBEs in FY2024? *

Mark only one oval.

- ◯ Yes
- ◯ No

7. Identify any factors or barriers that impacted your overall outreach efforts to veteran-owned small businesses. *

Please make sure to read each question thoroughly

8. What channels do your engage for your veteran-owned small business outreach? *

Check all that apply:

Mark only one oval.

- ◯ Live/In-Person
- ◯ Print
- ◯ Virtual
- ◯ Social Media Platforms
- ◯ One on One
- ◯ Other: _____

9. Number of outreach events (live or virtual) targeting VSBE's **hosted** by your unit? *

Enter a numerical value. If your unit did not have any enter N/A.

10. Number of outreach events (live or virtual) targeting VSBE's **participating in only (not hosted)** by your Agency/Department?

Enter a numerical value. If your unit did not have any enter N/A.

11. Does yo
goals?

Mark onl

◯ Ye

11. Does your unit's VSBE Liaison or designee attend pre-bid meetings on solicitations that include VSBE goals? *

Mark only one oval.

- ◯ Yes
- ◯ No
- ◯ No solicitations were issued with VSBE goals

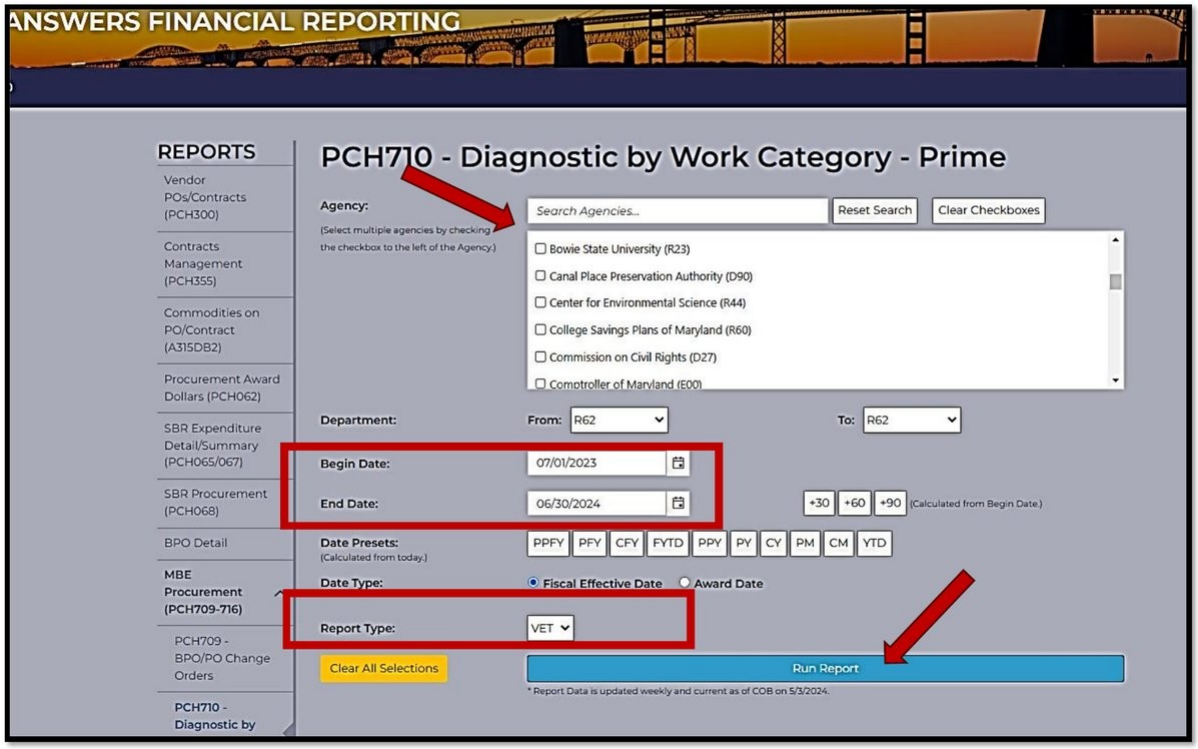
12. Please provide any additional information relevant to your unit's veteran-owned small business outreach efforts:

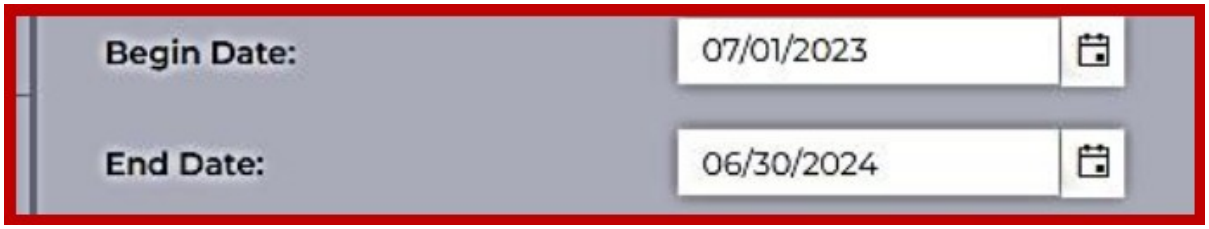
FY24 SUPPORTING BACKUP DATA- ANSWER USERS

1. PCHL 709 (PO/BPO Change Orders from contracts awarded in prior fiscal years) WITH NEW Vet flag
2. PCHL 710 (Contract Awards Detail) with Vet Flag
3. PCHL 717 (MBE/VSBE Prime Payments by Direct Voucher; no BPO/PO) with Vet Flag
4. PCHL 718 (MBE/VSBE Prime Voucher Payments made from BPO/PO) with Vet Flag
5. PCHL 719 (MBE/VSBE Subcontractor Payments) with Vet Flag
6. PCHL 720 (MBE/VSBE Subcontractor Awards) run by award dates with Vet Flag
7. PCHL 721 or Internal Agency/Department (MBE/VSBE Credit Card/P-Card Purchases) no Vet Flag, but has Vet column on report

6. PCHL 720 (MBE/VSBE Subcontractor Awards) run by award dates with Vet Flag 7. PCHL 721 or Internal Agency/Department (MBE/VSBE Credit Card/P-Card Purchases) no Vet Flag, but has Vet column on report

ANSWERS REPORTS https://net.md.gov/apps/Answers/







FY24 SUPPORTING BACKUP DATA- NON-ANSWERS USERS

1. PO/BPO Change Orders from contracts awarded in prior fiscal years with VSBE awards
2. All Contract Awards Detail with VSBE awards
3. All Prime Payments by Direct Voucher; no BPO/PO with VSBE payments
4. All Prime Voucher Payments made from BPO/PO with VSBE payments
5. All Subcontractor Payments with VSBE payments
6. All Subcontractor Awards with VSBE awards
7. All Internal Agency/Department Credit Card/P-Card Purchases with VSBE Payments

3. All Prime Payments by Direct Voucher; no BPO/PO with VSBE payments 4. All Prime Voucher Payments made from BPO/PO with VSBE payments 5. All Subcontractor Payments with VSBE payments 6. All Subcontractor Awards with VSBE awards 7. All Internal Agency/Department Credit Card/P-Card Purchases with VSBE Payments

VSBE SUPPORTING BACKUP DATA SUBMISSION

Scenario #1

(1) Excel Spreadsheet containing:

VSBE Annual Template
Raw and Separate Scrubbed Data with VSBE Totals

(1) Completed Google Form Outreach Submission

Scenario #2

(2) Separate Excel Spreadsheets containing:

VSBE Annual Template
Raw and Separate Scrubbed Data with VSBE Totals

(1) Completed Google Form Outreach Submission

TIP- BUILD YOUR VSBE TEAM

Make sure if the VSBE Liaison is not doing the reports, then the report preparer needs to be included on the submission emails

Many of the Total ALL data is similar to the MBE data, it is advised to have a working relationship with the MBE Liaison/MBE report preparer, as some of the totals should be concise with the information being reported

Outreach Data may also be handled with another individual/department, please make sure to be in communication with them as well!

WHAT'S COMING FOR FY2025

FY25 VSBE Changes

PROGRAM CHANGES
REPORTING CHANGES
DATA POINTS



VSBE Regulation Changes COMING FY25

COMAR 21.11.14.01-

A. Each procurement agency shall structure its procedures for making procurements to try to achieve an overall minimum of 1 percent of the unit's total dollar value of all procurement contracts made directly or indirectly with veteran-owned small business enterprises;

1% to 3%



VSBE Reporting Changes COMING

Now just like MBE & SBR, VSBE participating units will be REQUIRED to start reporting quarterly data.

This will help track VSBE award, payment and compliance data on a quarterly basis. This will be required Quarter 1, Quarter 2 and Quarter 3 then unit’s Annual.

All participating units will be notified when the quarterly form is available under the VSBE Toolkit. (It will look similar to the Annual)

VSBE QUARTERLY REPORTING

VSBE DATA POINTS COMING

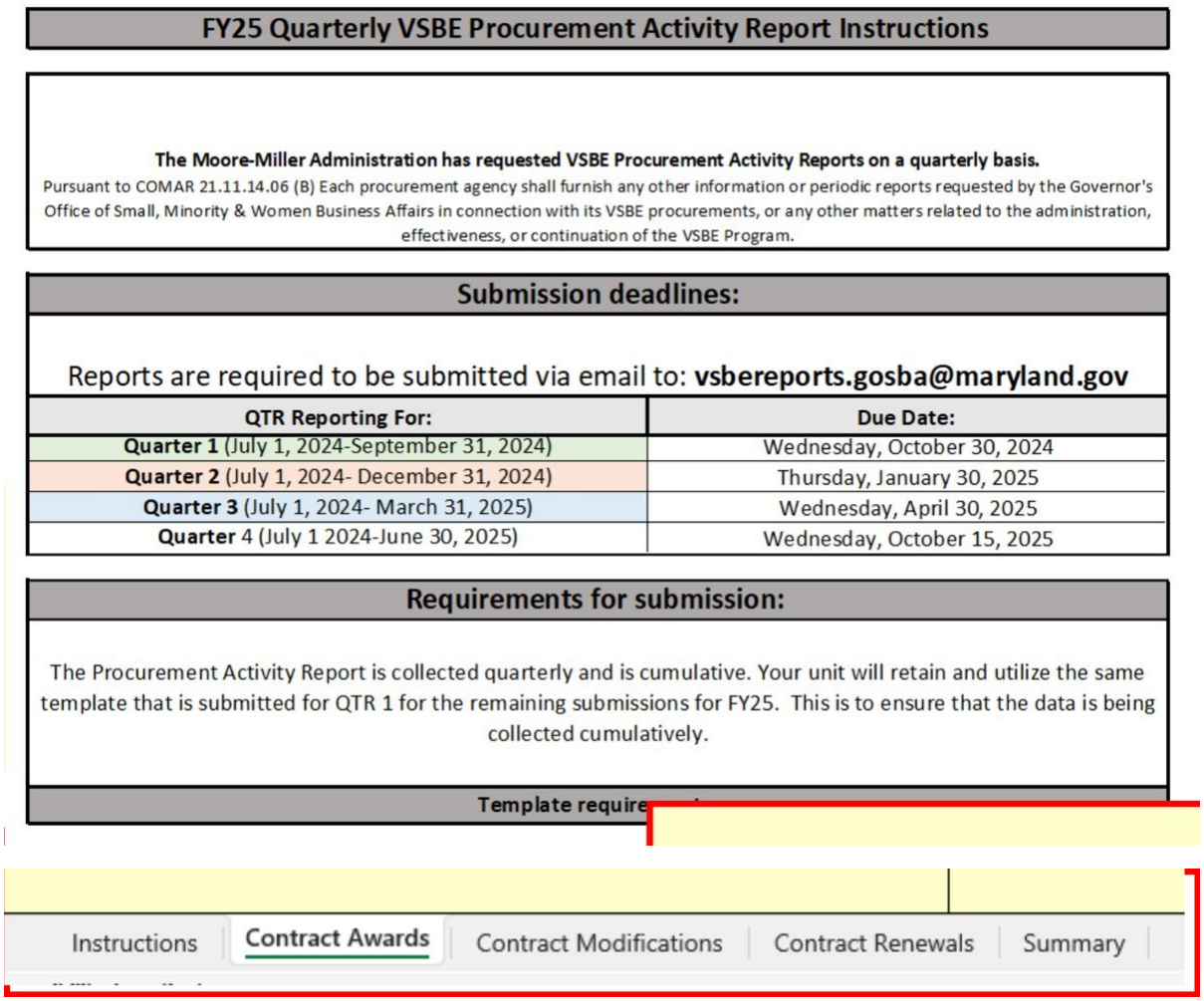
Now just like MBE, VSBE participating units will be REQUIRED to report new data points in FY25. These will include:

- Awards made to VSBEs on a quarterly basis
- Payments made to VSBEs on a quarterly basis
- VSBE Contracts Awarded ONLY
- VSBE Contracts Modified ONLY
- VSBE Contract Renewals ONLY

VSBE FY25

REPORTING

FY25 NEW QUARTERLY DATA COLLECTION



FY25 Quarterly VSBE Procurement Activity Report Instructions

The Moore-Miller Administration has requested VSBE Procurement Activity Reports on a quarterly basis.
Pursuant to COMAR 21.11.14.06 (B) Each procurement agency shall furnish any other information or periodic reports requested by the Governor's Office of Small, Minority & Women Business Affairs in connection with its VSBE procurements, or any other matters related to the administration, effectiveness, or continuation of the VSBE Program.

Submission deadlines:

Reports are required to be submitted via email to: **vsbereports.gosba@maryland.gov**

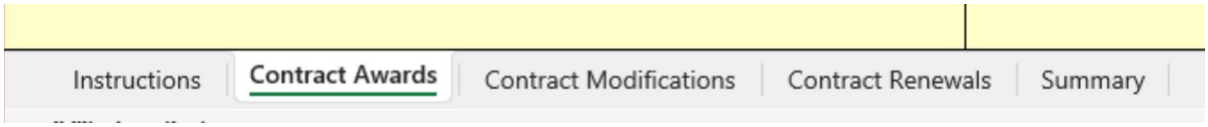
QTR Reporting For:	Due Date:
Quarter 1 (July 1, 2024-September 31, 2024)	Wednesday, October 30, 2024
Quarter 2 (July 1, 2024- December 31, 2024)	Thursday, January 30, 2025
Quarter 3 (July 1, 2024- March 31, 2025)	Wednesday, April 30, 2025
Quarter 4 (July 1 2024-June 30, 2025)	Wednesday, October 15, 2025

Requirements for submission:

The Procurement Activity Report is collected quarterly and is cumulative. Your unit will retain and utilize the same template that is submitted for QTR 1 for the remaining submissions for FY25. This is to ensure that the data is being collected cumulatively.

Template require

NEW FY25 Quarterly VSBE Program Procurement Activity Report



Submission Requirements

The Procurement Activity Report is collected quarterly and is cumulative

Only include reportable data consistent with how procurement data is reported for the quarterly and annual VSBE reports

Donot include credit card or direct voucher transactions (i.e. purchases that did not require a formal solicitation)

Report all VSBE resulting awards subject to the PRG process, regardless of the dollar value



Submission Requirements (continued)

Canceled solicitations should not be reported

Preferred providers are not reported with VSBE data and should not be reported in response to this data request

Your unit will retain and utilize the same template that is submitted for QTR 1 for the remaining submissions for FY25.

This is to ensure that the data is being collected cumulatively

Data Field Requirements

Identification #

Is synonymous with the Contract #

Enter the number that your agency utilizes to identify solicitations, awards, modifications, and renewals

VSBE Goal (%)

If the item had no VSBE Goal (%) leave the field blank

VSBE Prime Contractor

Select ‘yes or no’ to identify if the contract is being performed by an VSBE Prime Contractor

Contracts Awards Tab

VSBE Program Procurement Activity Report

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

Agency Name:

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

Contracts Modifications Tab

Contracts Renewals Tab

VSBE Program Procurement Activity Report

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

Agency Name:

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

VSBE Program Procurement Activity Report

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

Agency Name:

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

Summary Tab *Data Entry Is Not Required*

VSBE Program Procurement Activity Report

The Moore-Miller Administration has requested VSBE Procurement Activity Reports on a quarterly basis.
Pursuant to COMAR 21.11.14.06 (B) Each procurement agency shall furnish any other information or periodic reports requested by the Governor's Office of Small, Minority & Women Business Affairs in connection with its VSBE procurements, or any other matters related to the administration, effectiveness, or continuation of the VSBE Program.

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

Completed Reports should be submitted electronically by email to **vsbereports.*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, 2025.*

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

Questions?

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