COMBINED LIAISON TRAINING

FEBRUARY 15, 2024

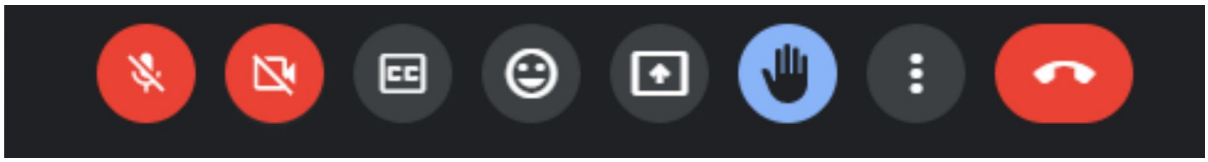
Maryland
GOVERNOR'S OFFICE
OF SMALL, MINORITY & WOMEN
BUSINESS AFFAIRS

COMBINED LIAISON TRAINING

FEBRUARY 15, 2024

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



Y. Maria Martinez – Special Secretary Pamela Gregory -Chief of Staff Alison Tavik -Director of Communications & Outreach Davon K. Gardner -Director of Policy & Legislative Affairs Eduardo Hayden -Small Business Outreach Manager Lisa Mitchell Sennaar -SBR Compliance Manager Tanita Johnson -SBR Compliance Manager Danielle N. Davis -VSBE Compliance Manager Nichelle Johnson -MBE Ombudsman Karen Reyes -MBE Compliance Manager Gerald Stinnett -MBE Compliance Manager – VLT Operations



SPECIAL SECRETARY MARIA MARTINEZ

TODAY’S AGENDA

- Opening Remarks
- Outreach
- General Section
- MBE Ombudsman
- MBE Program
- BREAK
- VSBE Program
- SBR Program

OUTREACH

PRESENTED BY ALISON TAVIK

DIRECTOR OF COMMUNICATIONS & OUTREACH

STAKEHOLDER ENGAGEMENT

Alison Tavik Director of Communications & Outreach February 15, 2024

“DO THE BEST YOU CAN UNTIL YOU KNOW BETTER. THEN, WHEN YOU KNOW BETTER, DO BETTER.”

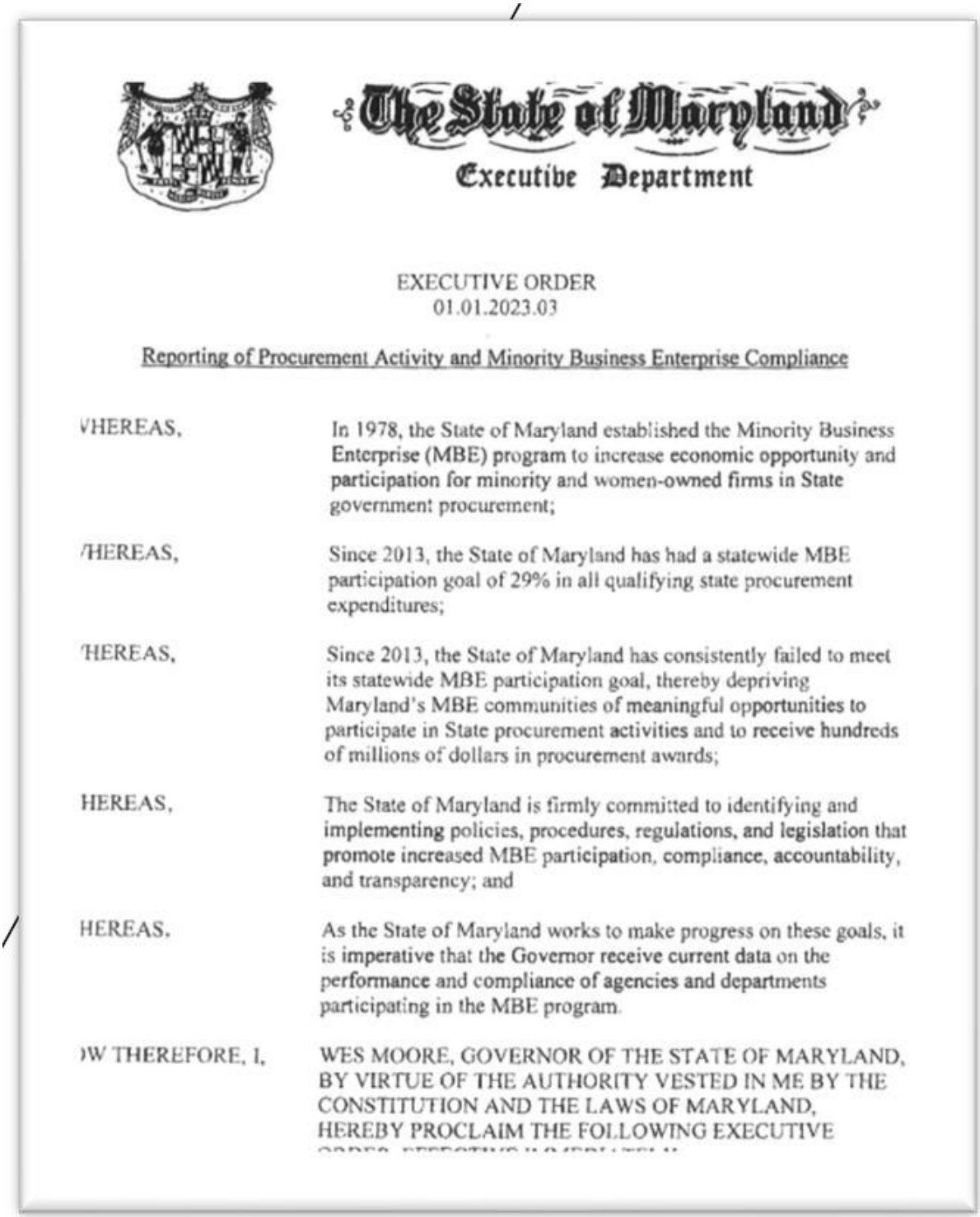
-Maya Angelou



- Stakeholder Engagement -

EXECUTIVE ORDER 01.01.2023.03

The State of Maryland is firmly committed to identifying and implementing policies, procedures, regulations, and legislation that promote increased MBE participation, compliance, accountability, and transparency.



The State of Maryland
Executive Department

EXECUTIVE ORDER
01.01.2023.03

Reporting of Procurement Activity and Minority Business Enterprise Compliance

VHEREAS, In 1978, the State of Maryland established the Minority Business Enterprise (MBE) program to increase economic opportunity and participation for minority and women-owned firms in State government procurement;

/HEREAS, Since 2013, the State of Maryland has had a statewide MBE participation goal of 29% in all qualifying state procurement expenditures;

'HEREAS, Since 2013, the State of Maryland has consistently failed to meet its statewide MBE participation goal, thereby depriving Maryland's MBE communities of meaningful opportunities to participate in State procurement activities and to receive hundreds of millions of dollars in procurement awards;

HEREAS, The State of Maryland is firmly committed to identifying and implementing policies, procedures, regulations, and legislation that promote increased MBE participation, compliance, accountability, and transparency; and

HEREAS, As the State of Maryland works to make progress on these goals, it is imperative that the Governor receive current data on the performance and compliance of agencies and departments participating in the MBE program.

)W THEREFORE, I, WES MOORE, GOVERNOR OF THE STATE OF MARYLAND, BY VIRTUE OF THE AUTHORITY VESTED IN ME BY THE CONSTITUTION AND THE LAWS OF MARYLAND, HEREBY PROCLAIM THE FOLLOWING EXECUTIVE

- Stakeholder Engagement -

RESULTS

84%

44%

38%

15%

Submitted the mandatory FY2023 Strategic Plan to GOSBA

Facilitated matchmaking of MBE vendors with buyers

Did not conduct outreach and marketing activities directed toward MBEs

Do not have resources available for vendors to understand how to do business with them

UTILIZE TOOLS Handouts

Executive Order 01.01.2023.03

- Stakeholder Engagement -

2 KEY ELEMENTS FOR SUCCESS

HAVE A PLAN

UTILIZE TOOLS

- Stakeholder Engagement -

HAVE A PLAN



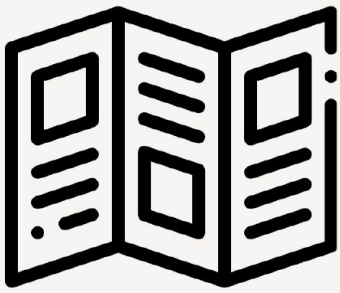
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MODIFY & REPEAT

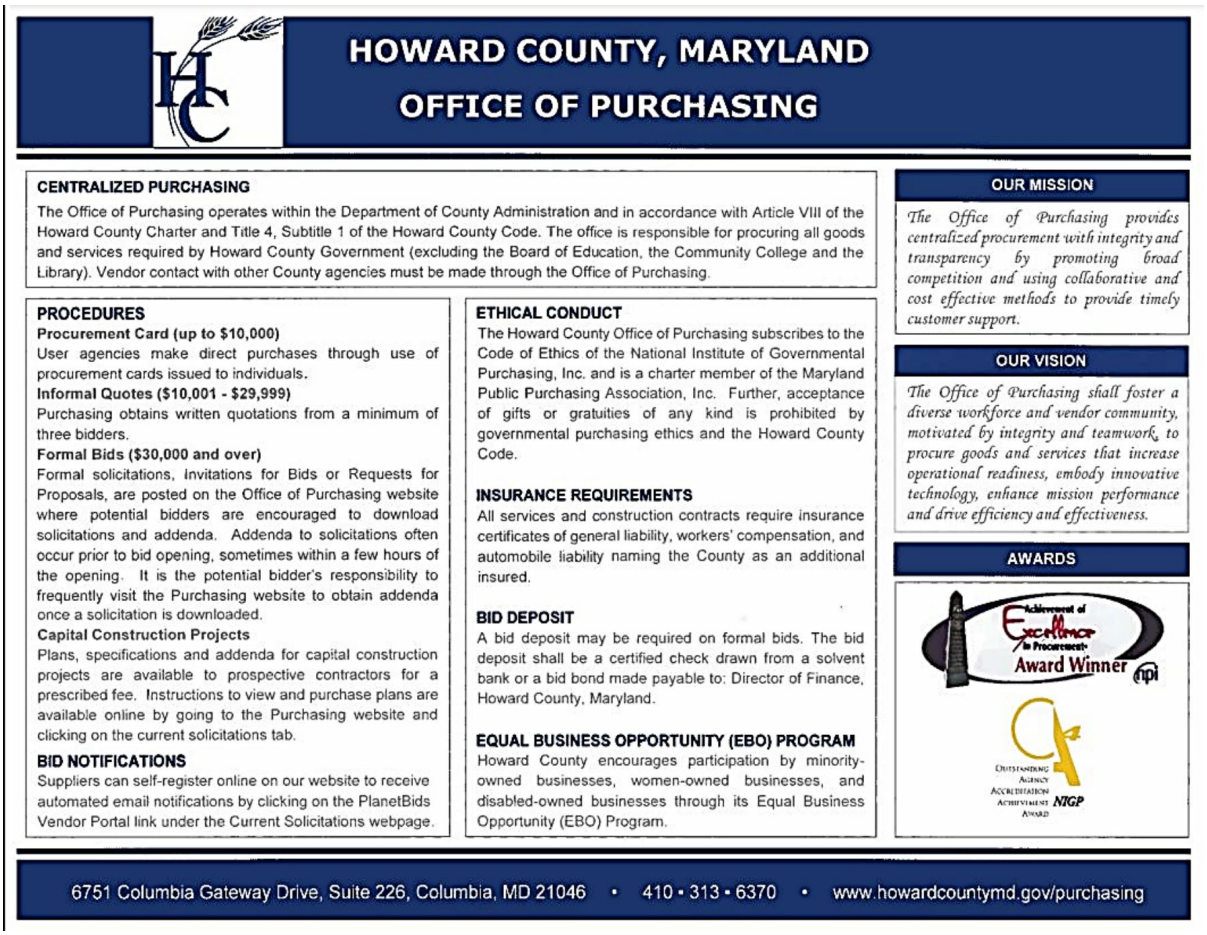


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UTILIZE TOOLS

Handouts	Digital (Website)
	

- Stakeholder Engagement -



HOWARD COUNTY, MARYLAND
OFFICE OF PURCHASING

CENTRALIZED PURCHASING

The Office of Purchasing operates within the Department of County Administration and in accordance with Article VIII of the Howard County Charter and Title 4, Subtitle 1 of the Howard County Code. The office is responsible for procuring all goods and services required by Howard County Government (excluding the Board of Education, the Community College and the Library). Vendor contact with other County agencies must be made through the Office of Purchasing.

PROCEDURES

Procurement Card (up to $10,000)
User agencies make direct purchases through use of procurement cards issued to individuals.

Informal Quotes ($10,001 - $29,999)
Purchasing obtains written quotations from a minimum of three bidders.

Formal Bids ($30,000 and over)
Formal solicitations, Invitations for Bids or Requests for Proposals, are posted on the Office of Purchasing website where potential bidders are encouraged to download solicitations and addenda. Addenda to solicitations often occur prior to bid opening, sometimes within a few hours of the opening. It is the potential bidder's responsibility to frequently visit the Purchasing website to obtain addenda once a solicitation is downloaded.

Capital Construction Projects
Plans, specifications and addenda for capital construction projects are available to prospective contractors for a prescribed fee. Instructions to view and purchase plans are available online by going to the Purchasing website and clicking on the current solicitations tab.

BID NOTIFICATIONS
Suppliers can self-register online on our website to receive automated email notifications by clicking on the PlanetBids Vendor Portal link under the Current Solicitations webpage.

ETHICAL CONDUCT
The Howard County Office of Purchasing subscribes to the Code of Ethics of the National Institute of Governmental Purchasing, Inc. and is a charter member of the Maryland Public Purchasing Association, Inc. Further, acceptance of gifts or gratuities of any kind is prohibited by governmental purchasing ethics and the Howard County Code.

INSURANCE REQUIREMENTS
All services and construction contracts require insurance certificates of general liability, workers' compensation, and automobile liability naming the County as an additional insured.

BID DEPOSIT
A bid deposit may be required on formal bids. The bid deposit shall be a certified check drawn from a solvent bank or a bid bond made payable to: Director of Finance, Howard County, Maryland.

EQUAL BUSINESS OPPORTUNITY (EBO) PROGRAM
Howard County encourages participation by minority-owned businesses, women-owned businesses, and disabled-owned businesses through its Equal Business Opportunity (EBO) Program.

OUR MISSION

The Office of Purchasing provides centralized procurement with integrity and transparency by promoting broad competition and using collaborative and cost effective methods to provide timely customer support.

OUR VISION

The Office of Purchasing shall foster a diverse workforce and vendor community, motivated by integrity and teamwork, to procure goods and services that increase operational readiness, embody innovative technology, enhance mission performance and drive efficiency and effectiveness.

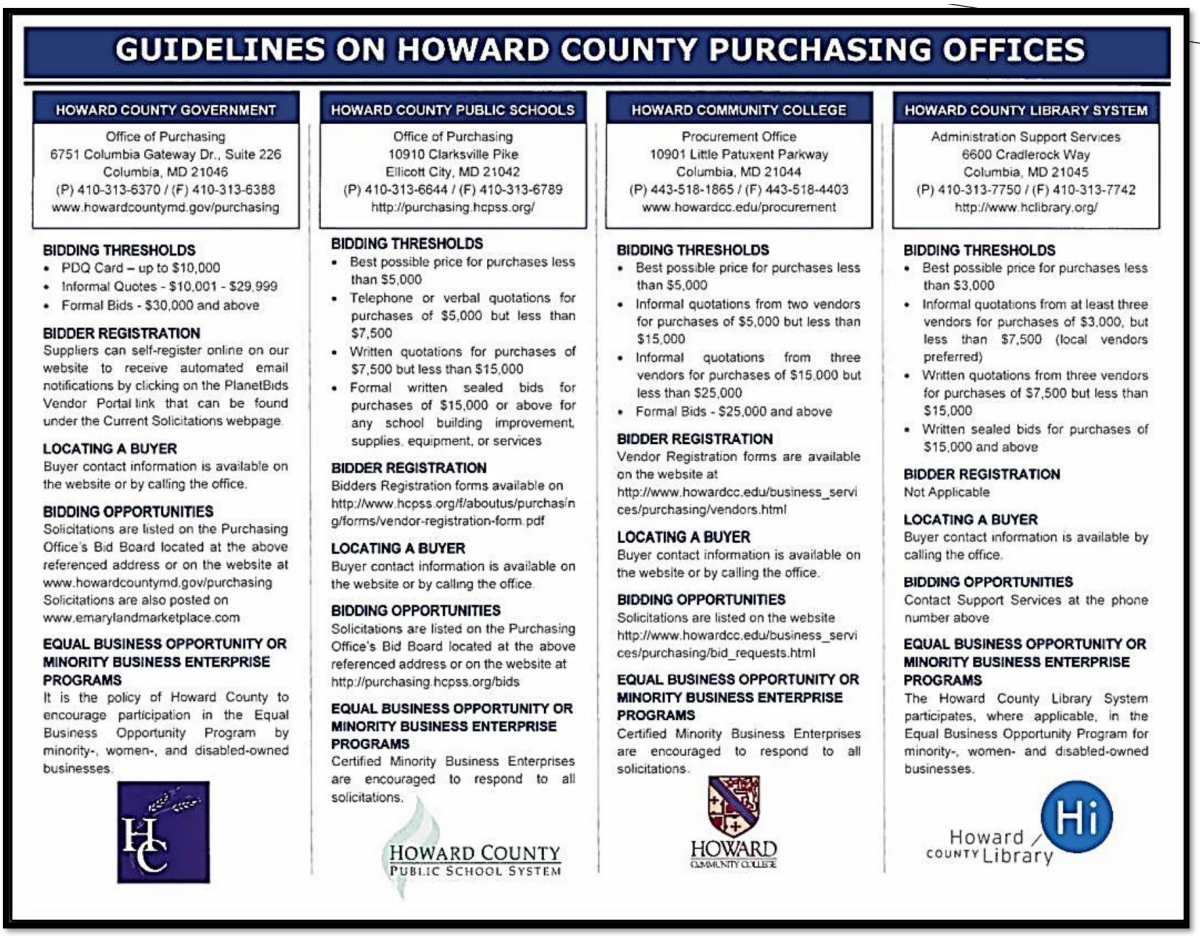
AWARDS

Achievement of Excellence in Procurement Award Winner npi

Outstanding Agency Accreditation Achievement NIGP

6751 Columbia Gateway Drive, Suite 226, Columbia, MD 21046 • 410 • 313 • 6370 • www.howardcountymd.gov/purchasing

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GUIDELINES ON HOWARD COUNTY PURCHASING OFFICES

HOWARD COUNTY GOVERNMENT

Office of Purchasing
6751 Columbia Gateway Dr., Suite 226
Columbia, MD 21046
(P) 410-313-6370 / (F) 410-313-6388
www.howardcountymd.gov/purchasing

BIDDING THRESHOLDS

- PDQ Card – up to $10,000
- Informal Quotes - $10,001 - $29,999
- Formal Bids - $30,000 and above

BIDDER REGISTRATION

Suppliers can self-register online on our website to receive automated email notifications by clicking on the PlanetBids Vendor Portal link that can be found under the Current Solicitations webpage.

LOCATING A BUYER

Buyer contact information is available on the website or by calling the office.

BIDDING OPPORTUNITIES

Solicitations are listed on the Purchasing Office's Bid Board located at the above referenced address or on the website at www.howardcountymd.gov/purchasing Solicitations are also posted on www.emarylandmarketplace.com

EQUAL BUSINESS OPPORTUNITY OR MINORITY BUSINESS ENTERPRISE PROGRAMS

It is the policy of Howard County to encourage participation in the Equal Business Opportunity Program by minority-, women-, and disabled-owned businesses.

HOWARD COUNTY PUBLIC SCHOOLS

Office of Purchasing
10910 Clarksville Pike
Ellicott City, MD 21042
(P) 410-313-6644 / (F) 410-313-6789
http://purchasing.hcpss.org/

BIDDING THRESHOLDS

- Best possible price for purchases less than $5,000
- Telephone or verbal quotations for purchases of $5,000 but less than $7,500
- Written quotations for purchases of $7,500 but less than $15,000
- Formal written sealed bids for purchases of $15,000 or above for any school building improvement, supplies, equipment, or services

BIDDER REGISTRATION

Bidders Registration forms available on http://www.hcpss.org/f/aboutus/purchasing/forms/vendor-registration-form.pdf

LOCATING A BUYER

Buyer contact information is available on the website or by calling the office.

BIDDING OPPORTUNITIES

Solicitations are listed on the Purchasing Office's Bid Board located at the above referenced address or on the website at http://purchasing.hcpss.org/bids

EQUAL BUSINESS OPPORTUNITY OR MINORITY BUSINESS ENTERPRISE PROGRAMS

Certified Minority Business Enterprises are encouraged to respond to all solicitations.

HOWARD COMMUNITY COLLEGE

Procurement Office
10901 Little Patuxent Parkway
Columbia, MD 21044
(P) 443-518-1865 / (F) 443-518-4403
www.howardcc.edu/procurement

BIDDING THRESHOLDS

- Best possible price for purchases less than $5,000
- Informal quotations from two vendors for purchases of $5,000 but less than $15,000
- Informal quotations from three vendors for purchases of $15,000 but less than $25,000
- Formal Bids - $25,000 and above

BIDDER REGISTRATION

Vendor Registration forms are available on the website at http://www.howardcc.edu/business_services/purchasing/vendors.html

LOCATING A BUYER

Buyer contact information is available on the website or by calling the office.

BIDDING OPPORTUNITIES

Solicitations are listed on the website http://www.howardcc.edu/business_services/purchasing/bid_requests.html

EQUAL BUSINESS OPPORTUNITY OR MINORITY BUSINESS ENTERPRISE PROGRAMS

Certified Minority Business Enterprises are encouraged to respond to all solicitations.

HOWARD COUNTY LIBRARY SYSTEM

Administration Support Services
6600 Cradlerock Way
Columbia, MD 21045
(P) 410-313-7750 / (F) 410-313-7742
http://www.hclibrary.org/

BIDDING THRESHOLDS

- Best possible price for purchases less than $3,000
- Informal quotations from at least three vendors for purchases of $3,000, but less than $7,500 (local vendors preferred)
- Written quotations from three vendors for purchases of $7,500 but less than $15,000
- Written sealed bids for purchases of $15,000 and above

BIDDER REGISTRATION

Not Applicable

LOCATING A BUYER

Buyer contact information is available by calling the office.

BIDDING OPPORTUNITIES

Contact Support Services at the phone number above.

EQUAL BUSINESS OPPORTUNITY OR MINORITY BUSINESS ENTERPRISE PROGRAMS

The Howard County Library System participates, where applicable, in the Equal Business Opportunity Program for minority-, women- and disabled-owned businesses.

- Stakeholder Engagement -

- Stakeholder Engagement -

MARYLAND

MINORITY BUSINESS ENTERPRISE (MBE) PROGRAM



The MBE program was created to ensure that socially and economically disadvantaged small businesses have the ability to participate in the state's contract and procurement opportunities.

- Maryland's MBE Program was created in by legislation 1978.
- All state procurements are required to be reviewed on a contract-by-contract basis so that an appropriate MBE goal can be set.
- During the bidding process, prime contractors are required to certify that they will be able to meet the MBE goal assigned to the contract and complete the MBE Participation Schedule where they must list the MBEs that plan to use.
  - » Amendments to that participation schedule may only be granted in cases where good cause is shown.
- Additional forms and invoices are required to be submitted by both the prime contractor and subcontractor throughout the period of the contract to ensure compliance with the goal.
- While MBEs can absolutely be the prime contractor on a state contract, they will still need to subcontract out at least **50%** of the goal for that contract.
  - » For example, if a contract has a **20%** MBE goal and the prime contractor is an MBE, **10%** of the contract must still be subcontracted out to another MBE
- The current statewide MBE participation **goal** is **29%**.
  - » Historically, DHS participated has stayed at around **10%**, however thanks in part to the MDThink project, participation has **risen** and was at **24.03%** in Fiscal Year 2023.
- DHS has many areas of opportunity for MBE prime contracting and subcontracting including:
  - » IT Services
  - » Staffing Services
  - » Security Services
  - » Janitorial Services



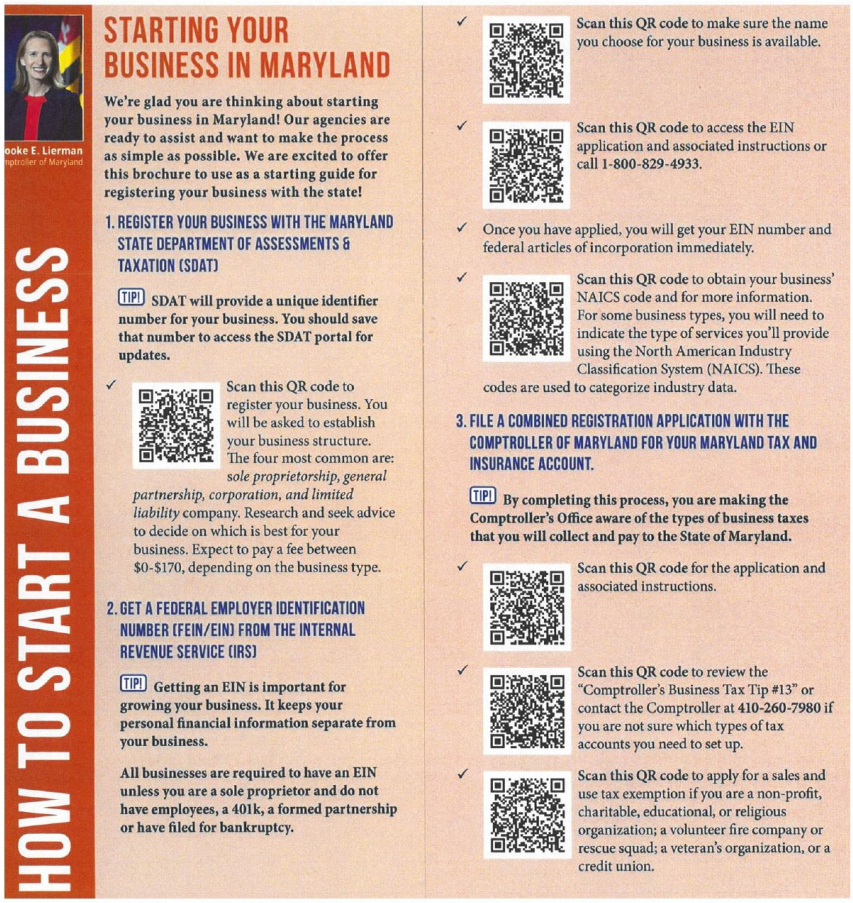
FOR ANY ADDITIONAL INFORMATION OR QUESTIONS
JESSICA HORTON
THE DHS MBE DIRECTOR
CAN BE REACHED AT:
Jessica.horton1@maryland.gov
(410) 767-1693 (office)
(443) 202-7704 (cell)

Maryland Department of Human Services | 311 W. Saratoga St.| Baltimore, MD 21201
www.dhs.maryland.gov

Wes Moore, *Governor* | **Aruna Miller**, *Lt. Governor* | **Rafael López**, Acting *Secretary*



- Stakeholder Engagement -



HOW TO START A BUSINESS

ooke E. Lierman
mptroller of Maryland

STARTING YOUR BUSINESS IN MARYLAND

We're glad you are thinking about starting your business in Maryland! Our agencies are ready to assist and want to make the process as simple as possible. We are excited to offer this brochure to use as a starting guide for registering your business with the state!

1. REGISTER YOUR BUSINESS WITH THE MARYLAND STATE DEPARTMENT OF ASSESSMENTS & TAXATION (SDAT)

TIP! **SDAT will provide a unique identifier number for your business. You should save that number to access the SDAT portal for updates.**

✓ Scan this QR code to register your business. You will be asked to establish your business structure. The four most common are: *sole proprietorship, general partnership, corporation, and limited liability* company. Research and seek advice to decide on which is best for your business. Expect to pay a fee between $0-$170, depending on the business type.

2. GET A FEDERAL EMPLOYER IDENTIFICATION NUMBER (FEIN/EIN) FROM THE INTERNAL REVENUE SERVICE (IRS)

TIP! **Getting an EIN is important for growing your business. It keeps your personal financial information separate from your business.**

All businesses are required to have an EIN unless you are a sole proprietor and do not have employees, a 401k, a formed partnership or have filed for bankruptcy.

✓ **Scan this QR code** to make sure the name you choose for your business is available.

✓ **Scan this QR code** to access the EIN application and associated instructions or call **1-800-829-4933.**

✓ Once you have applied, you will get your EIN number and federal articles of incorporation immediately.

✓ **Scan this QR code** to obtain your business' NAICS code and for more information. For some business types, you will need to indicate the type of services you'll provide using the North American Industry Classification System (NAICS). These codes are used to categorize industry data.

3. FILE A COMBINED REGISTRATION APPLICATION WITH THE COMPTROLLER OF MARYLAND FOR YOUR MARYLAND TAX AND INSURANCE ACCOUNT.

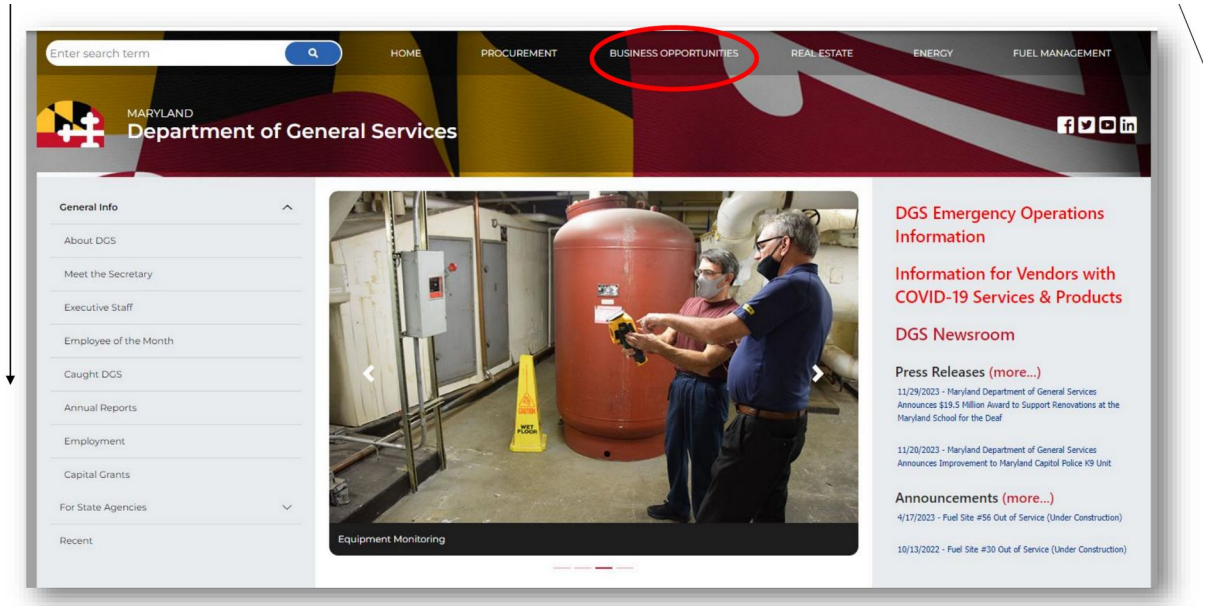
TIP! **By completing this process, you are making the Comptroller's Office aware of the types of business taxes that you will collect and pay to the State of Maryland.**

✓ **Scan this QR code** for the application and associated instructions.

✓ **Scan this QR code** to review the "Comptroller's Business Tax Tip #13" or contact the Comptroller at **410-260-7980** if you are not sure which types of tax accounts you need to set up.

✓ **Scan this QR code** to apply for a sales and use tax exemption if you are a non-profit, charitable, educational, or religious organization; a volunteer fire company or rescue squad; a veteran's organization, or a credit union.

- Stakeholder Engagement -





Maryland Department of General Services https://dgs.maryland.gov/Pages/default.aspx

- Stakeholder Engagement -



Business Opportunities

Small businesses are the foundation of a strong, healthy and vibrant economy. The Office of Business Programs (OBP) helps small, minority, woman and veteran-owned businesses grow by providing companies with access to procurement opportunities with DGS.

Small Business Programs
Minority Business Enterprise
Veteran-Owned Small Business Programs

Business Assistance & Access To Opportunities

It is the mission of the Office of Business Programs to ensure businesses have access to the information they need to effectively compete on state contracts.

"Doing Business with DGS" Training Program
Receive information on how to compete effectively on contracts and how to leverage your certifications to participate in contracting opportunities.

Business Opportunities Information Sessions
Receive information on upcoming contracting opportunities related to specific projects and services DGS will be procuring.

For more details on these events, and for a listing of other business events OBP participates in, view the OBP Outreach Calendar.

Notification of Opportunities

Complete the Business Opportunities Notification Form to begin receiving notifications of business opportunities and events relevant to your business.

Program Compliance

OBP monitors the compliance of businesses participating in the Small Business Reserve (SBR), Minority Business Enterprise (MBE), and Veteran-owned Small Business Enterprise (VSBE) programs to ensure small, minority, and veteran-owned companies are receiving their fair share of contracting opportunities with DGS.

Each year, the State compiles program reports to summarize the State's participation in these programs. Reports are available on the Board of Public Works and the Governor's Office of Small, Minority, and Women Business Affairs websites.

Small Business Resources

- Maryland Department of Commerce
- Governor's Office of Small, Minority, and Women Business Affairs (GOSBA)
- Small Business Development Center (SBDC)
- Procurement Technical Assistance Program (PTAP)
- Service Corps of Retired Executives (SCORE)
- Small Business Administration (SBA)
- Office of Minority Business Enterprise (MDOT)
- Office of Small & Disadvantaged Business Utilization
- Veteran's Business Services
- Maryland Women's Business Center

Procurement Resources

- Procurement Website
- Information for Vendors and Businesses
- How to do Business with the State of Maryland

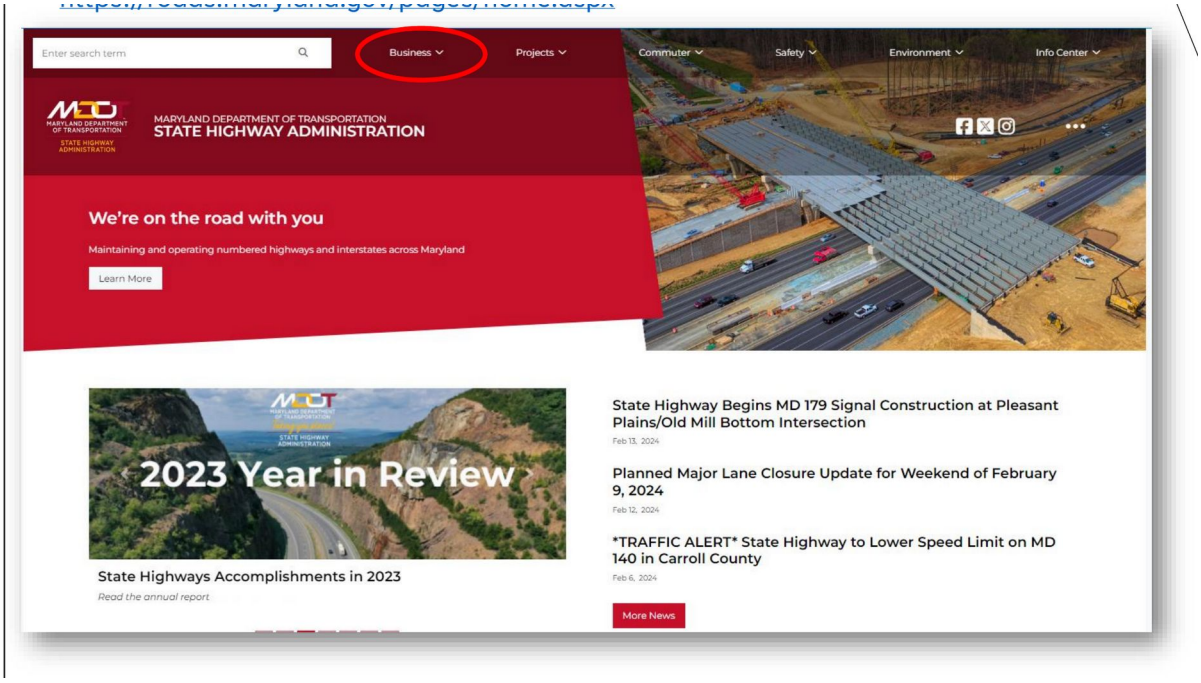
Information about DGS

Maryland Department of General Services https://dgs.maryland.gov/Pages/default.aspx

- Stakeholder Engagement -

Maryland State Highway Administration

https://roads.maryland.gov/pages/home.aspx

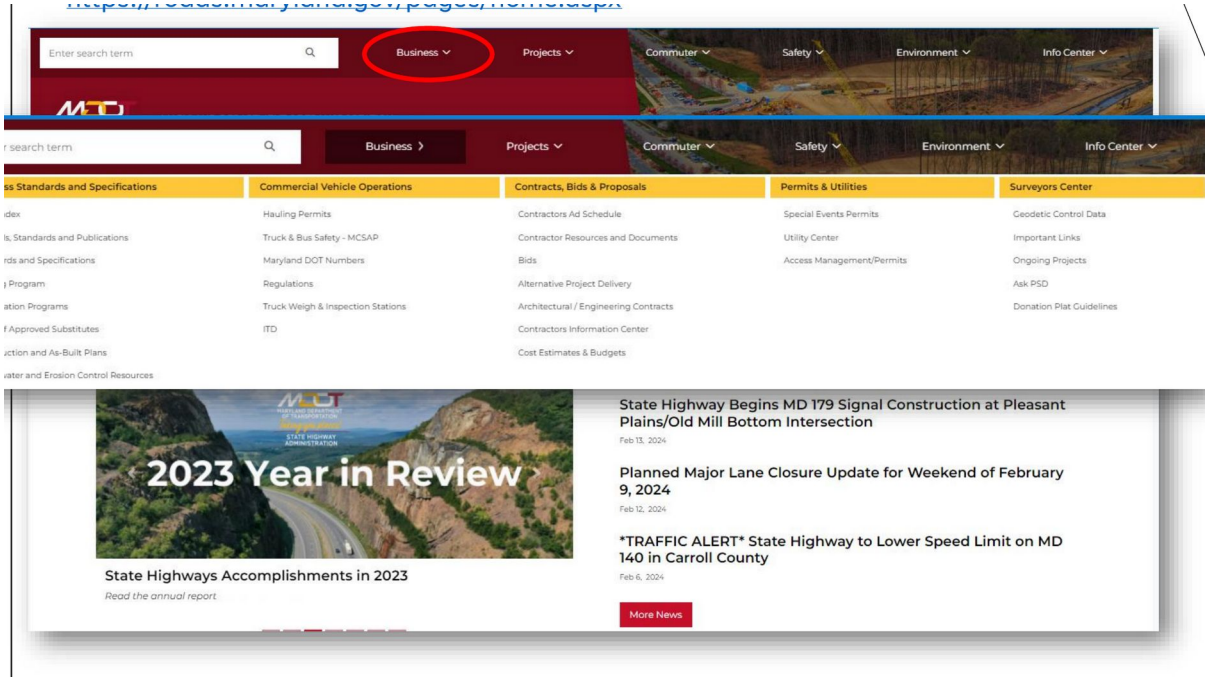


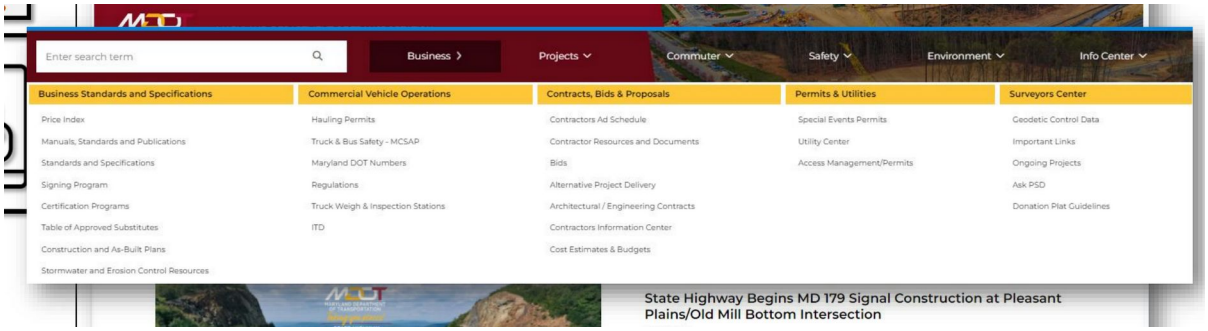


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Maryland State Highway Administration

https://roads.maryland.gov/pages/home.aspx



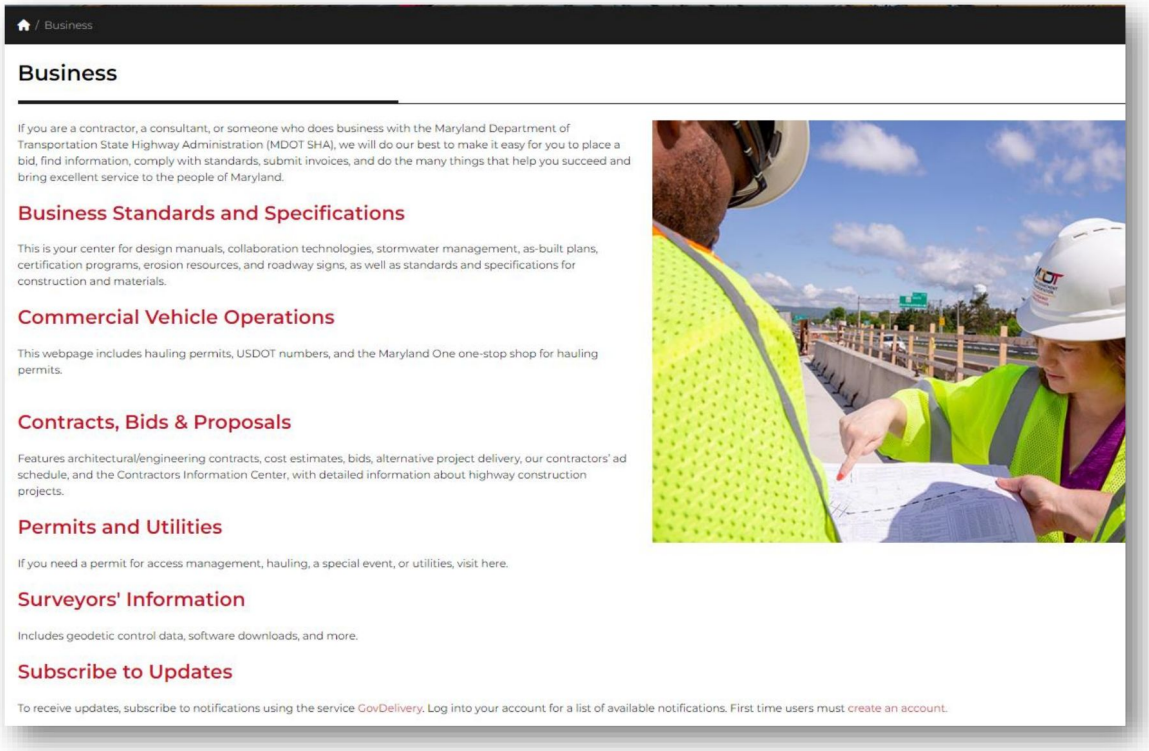




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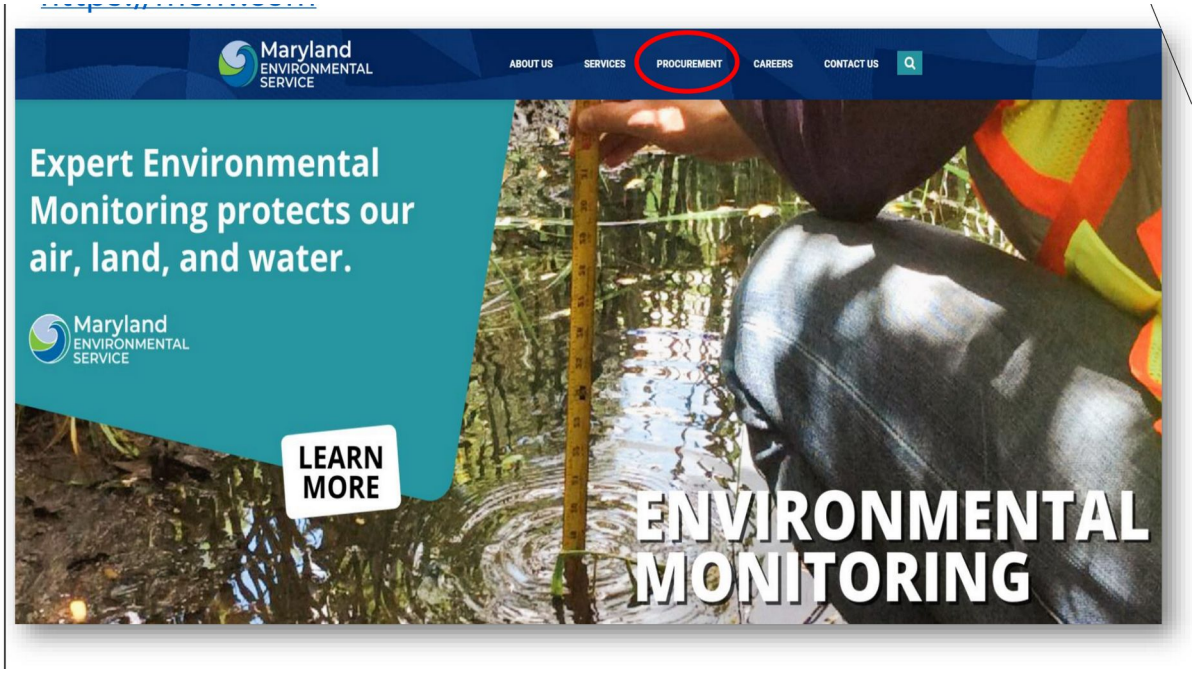
Maryland State Highway Administration

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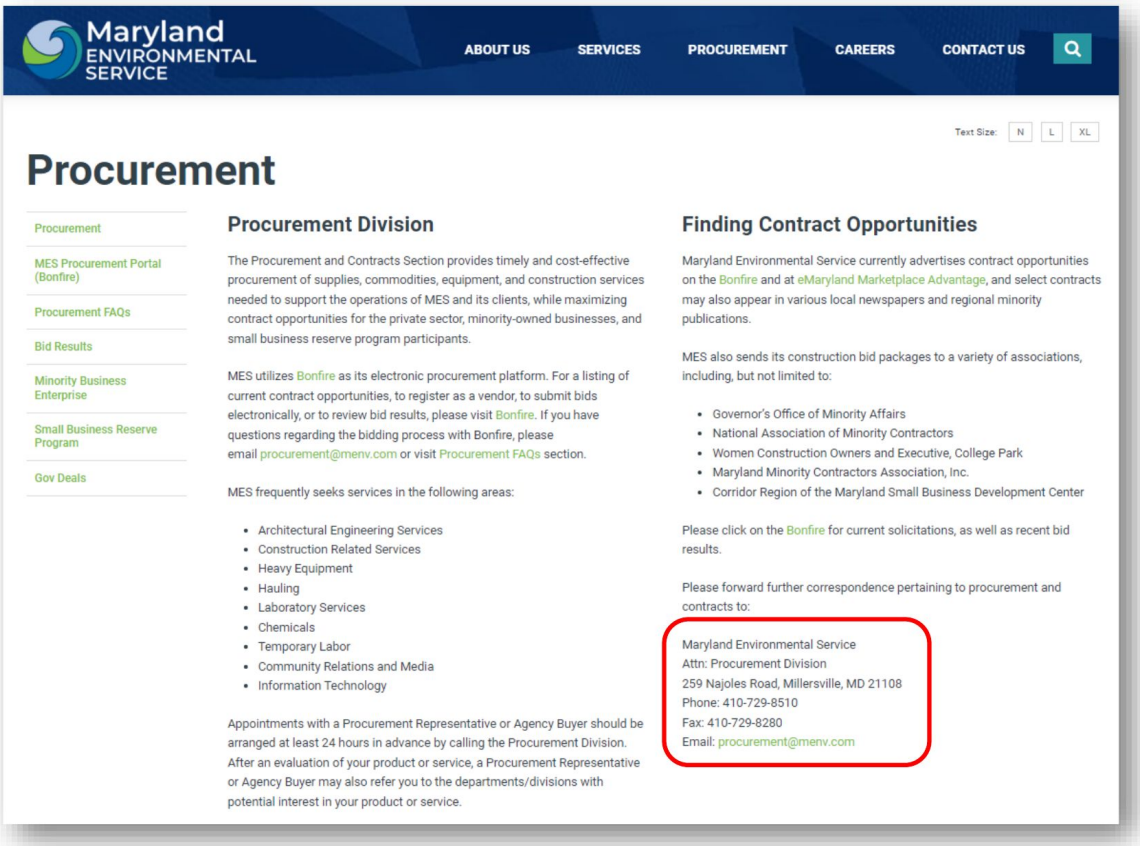
Maryland Environmental Service https://menv.com





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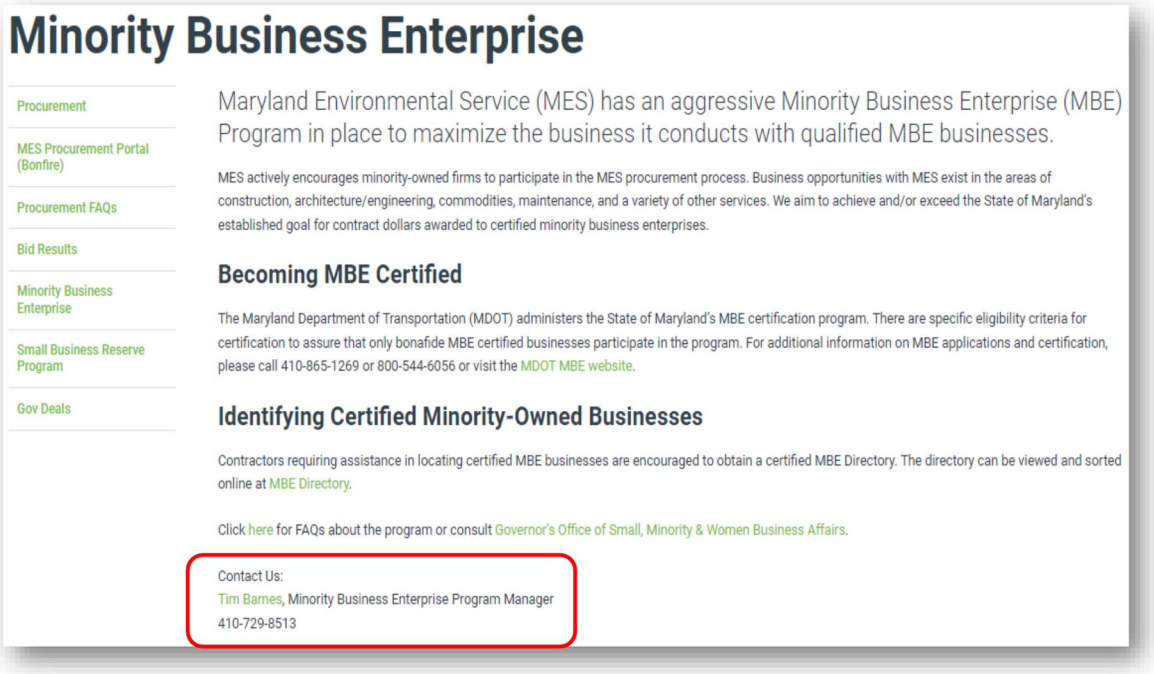
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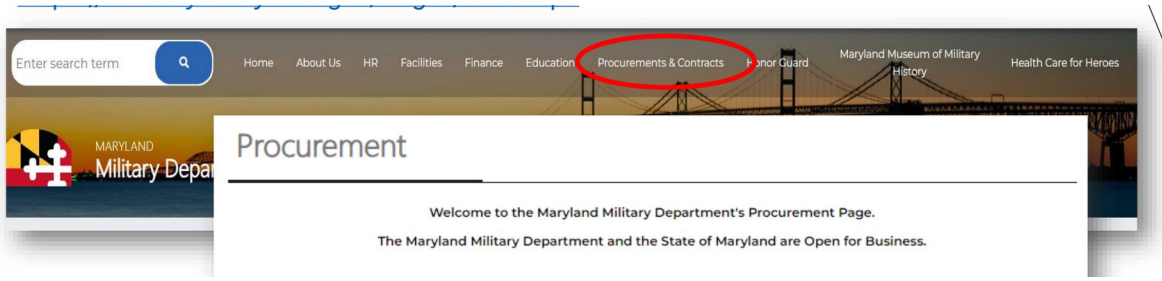
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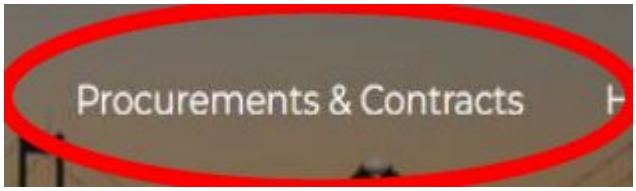


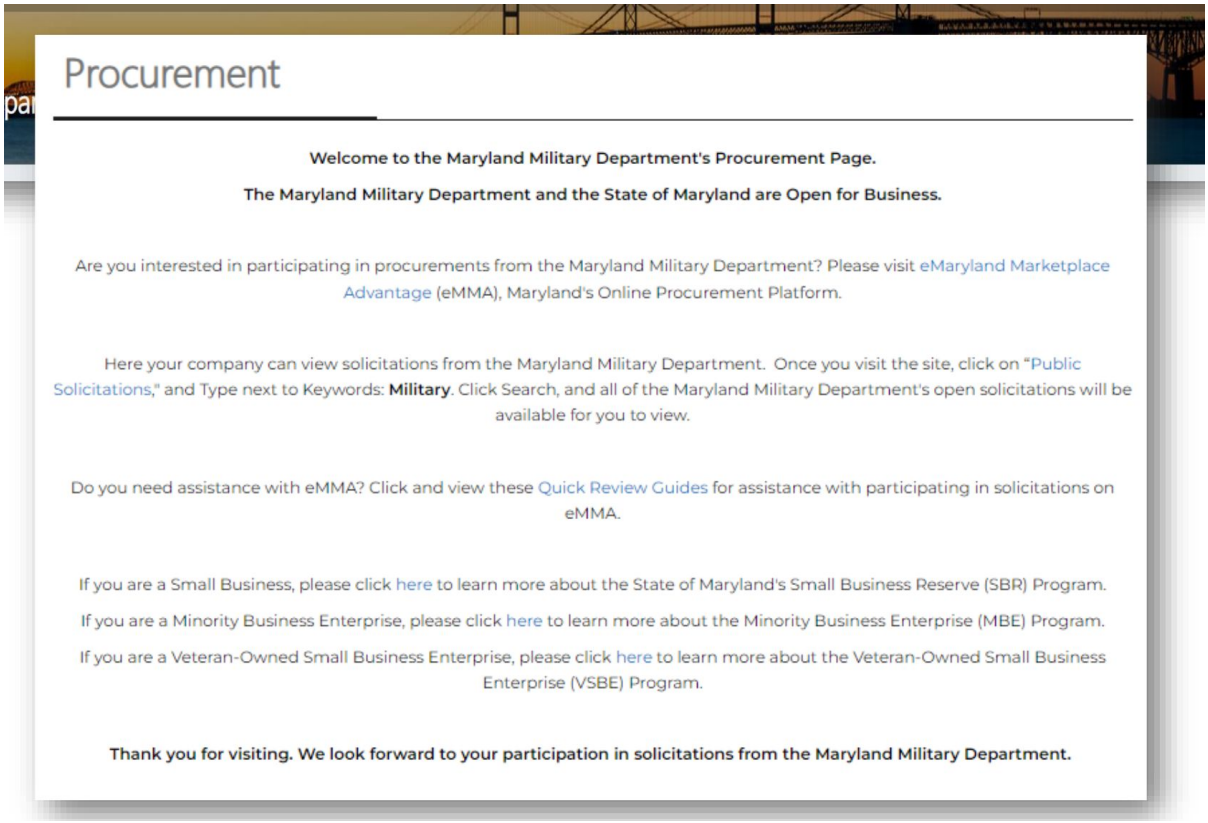


- Stakeholder Engagement -

Maryland Military Department https://military.maryland.gov/Pages/bids.aspx

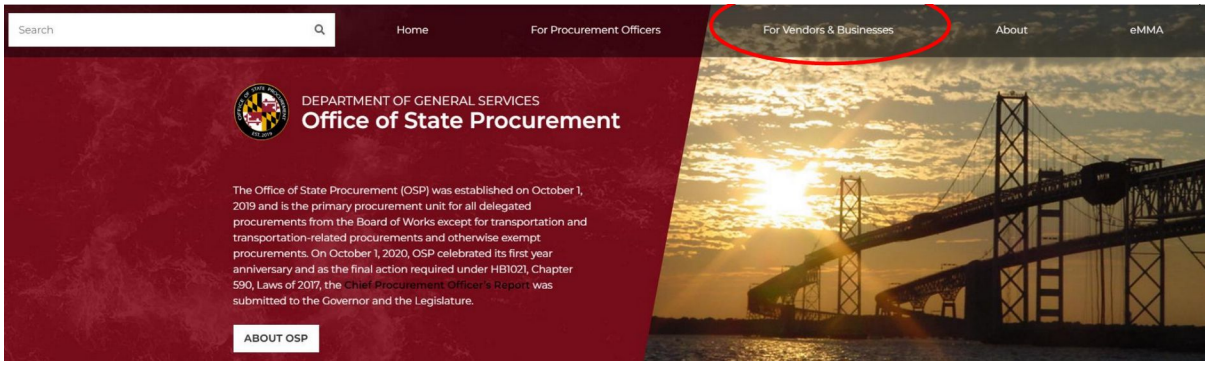


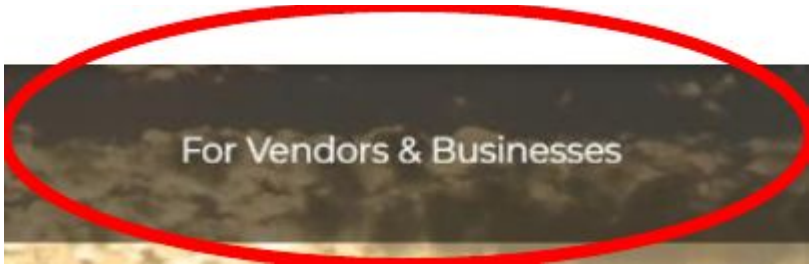




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Office of State Procurement https://procurement.maryland.gov/

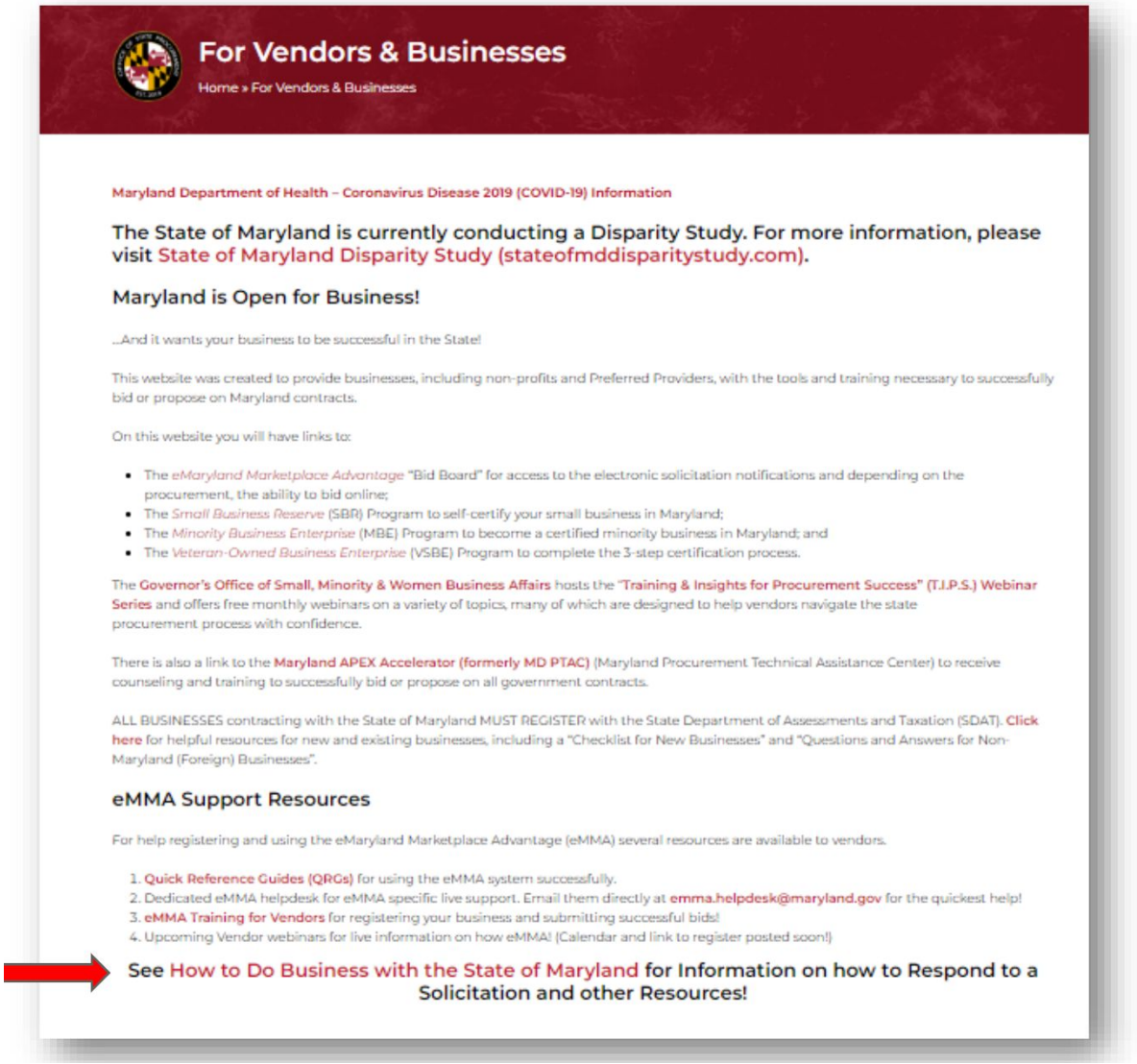




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Office of State Procurement https://procurement.maryland.gov/

laryland.gov/



For Vendors & Businesses

Home » For Vendors & Businesses

Maryland Department of Health – Coronavirus Disease 2019 (COVID-19) Information

The State of Maryland is currently conducting a Disparity Study. For more information, please visit State of Maryland Disparity Study (stateofmddisparitystudy.com).

Maryland is Open for Business!

...And it wants your business to be successful in the State!

This website was created to provide businesses, including non-profits and Preferred Providers, with the tools and training necessary to successfully bid or propose on Maryland contracts.

On this website you will have links to:

- The *eMaryland Marketplace Advantage* "Bid Board" for access to the electronic solicitation notifications and depending on the procurement, the ability to bid online;
- The *Small Business Reserve* (SBR) Program to self-certify your small business in Maryland;
- The *Minority Business Enterprise* (MBE) Program to become a certified minority business in Maryland; and
- The *Veteran-Owned Business Enterprise* (VSBE) Program to complete the 3-step certification process.

The **Governor's Office of Small, Minority & Women Business Affairs** hosts the **"Training & Insights for Procurement Success" (T.I.P.S.) Webinar Series** and offers free monthly webinars on a variety of topics, many of which are designed to help vendors navigate the state procurement process with confidence.

There is also a link to the **Maryland APEX Accelerator (formerly MD PTAC)** (Maryland Procurement Technical Assistance Center) to receive counseling and training to successfully bid or propose on all government contracts.

ALL BUSINESSES contracting with the State of Maryland MUST REGISTER with the State Department of Assessments and Taxation (SDAT). **Click here** for helpful resources for new and existing businesses, including a "Checklist for New Businesses" and "Questions and Answers for Non-Maryland (Foreign) Businesses".

eMMA Support Resources

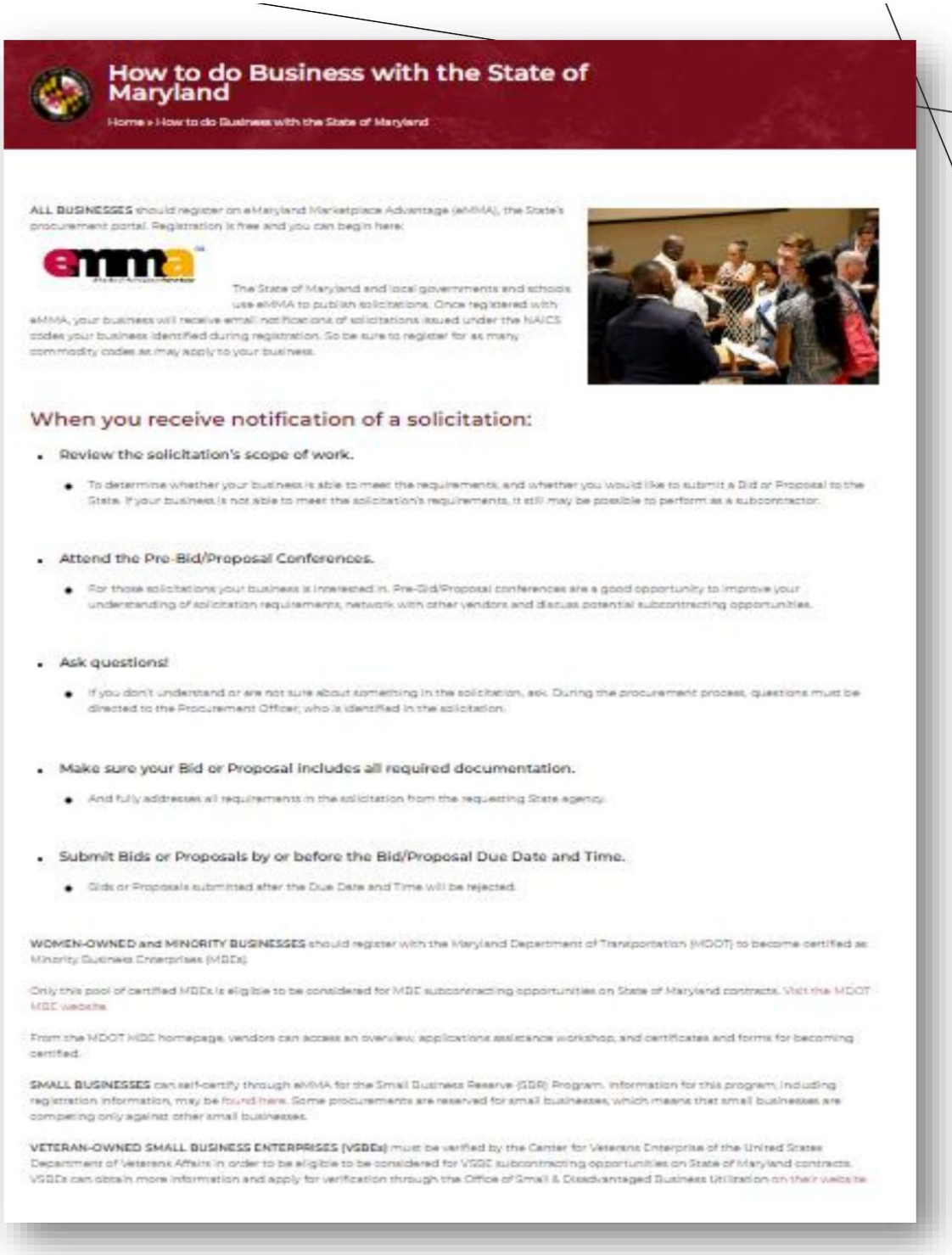
For help registering and using the eMaryland Marketplace Advantage (eMMA) several resources are available to vendors.

1. **Quick Reference Guides (QRGs)** for using the eMMA system successfully.
2. Dedicated eMMA helpdesk for eMMA specific live support. Email them directly at **emma.helpdesk@maryland.gov** for the quickest help!
3. **eMMA Training for Vendors** for registering your business and submitting successful bids!
4. Upcoming Vendor webinars for live information on how eMMA! (Calendar and link to register posted soon!)

See How to Do Business with the State of Maryland for Information on how to Respond to a Solicitation and other Resources!

- Stakeholder Engagement -

Office of State Procurement https://procurement.maryland.gov/



How to do Business with the State of Maryland

Home » How to do Business with the State of Maryland

ALL BUSINESSES should register on eMaryland Marketplace Advantage (eMMA), the State's procurement portal. Registration is free and you can begin here:

The State of Maryland and local governments and schools use eMMA to publish solicitations. Once registered with eMMA, your business will receive email notifications of solicitations issued under the NAICS codes your business identified during registration. So be sure to register for as many commodity codes as may apply to your business.

When you receive notification of a solicitation:

- **Review the solicitation's scope of work.**
  - To determine whether your business is able to meet the requirements, and whether you would like to submit a Bid or Proposal to the State. If your business is not able to meet the solicitation's requirements, it still may be possible to perform as a subcontractor.
- **Attend the Pre-Bid/Proposal Conferences.**
  - For those solicitations your business is interested in. Pre-Bid/Proposal conferences are a good opportunity to improve your understanding of solicitation requirements, network with other vendors and discuss potential subcontracting opportunities.
- **Ask questions!**
  - If you don't understand or are not sure about something in the solicitation, ask. During the procurement process, questions must be directed to the Procurement Officer, who is identified in the solicitation.
- **Make sure your Bid or Proposal includes all required documentation.**
  - And fully addresses all requirements in the solicitation from the requesting State agency.
- **Submit Bids or Proposals by or before the Bid/Proposal Due Date and Time.**
  - Bids or Proposals submitted after the Due Date and Time will be rejected.

WOMEN-OWNED and MINORITY BUSINESSES should register with the Maryland Department of Transportation (MDOT) to become certified as Minority Business Enterprises (MBEs).

Only this pool of certified MBEs is eligible to be considered for MBE subcontracting opportunities on State of Maryland contracts. Visit the MDOT MBE website.

From the MDOT MBE homepage, vendors can access an overview, applications assistance workshop, and certificates and forms for becoming certified.

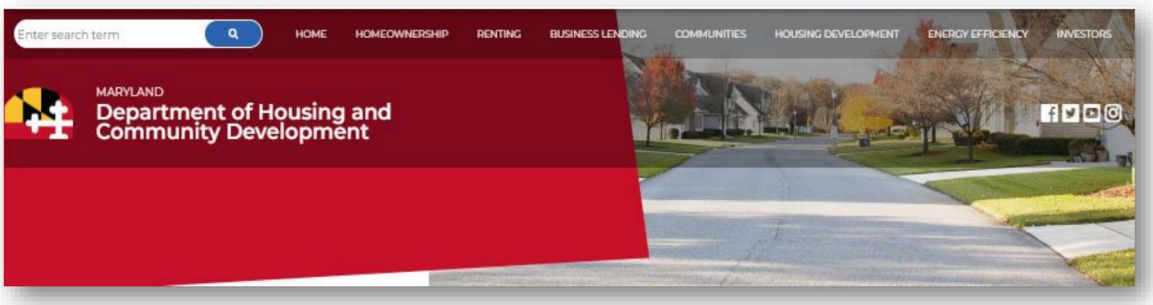
SMALL BUSINESSES can self-certify through eMMA for the Small Business Reserve (SBR) Program. Information for this program, including registration information, may be found here. Some procurements are reserved for small businesses, which means that small businesses are competing only against other small businesses.

VETERAN-OWNED SMALL BUSINESS ENTERPRISES (VSBEs) must be verified by the Center for Veterans Enterprise of the United States Department of Veterans Affairs in order to be eligible to be considered for VSBE subcontracting opportunities on State of Maryland contracts. VSBEs can obtain more information and apply for verification through the Office of Small & Disadvantaged Business Utilization on their website.

Department of Housing and Community Development https://dhcd.maryland.gov/Pages/default.aspx

- Stakeholder Engagement -

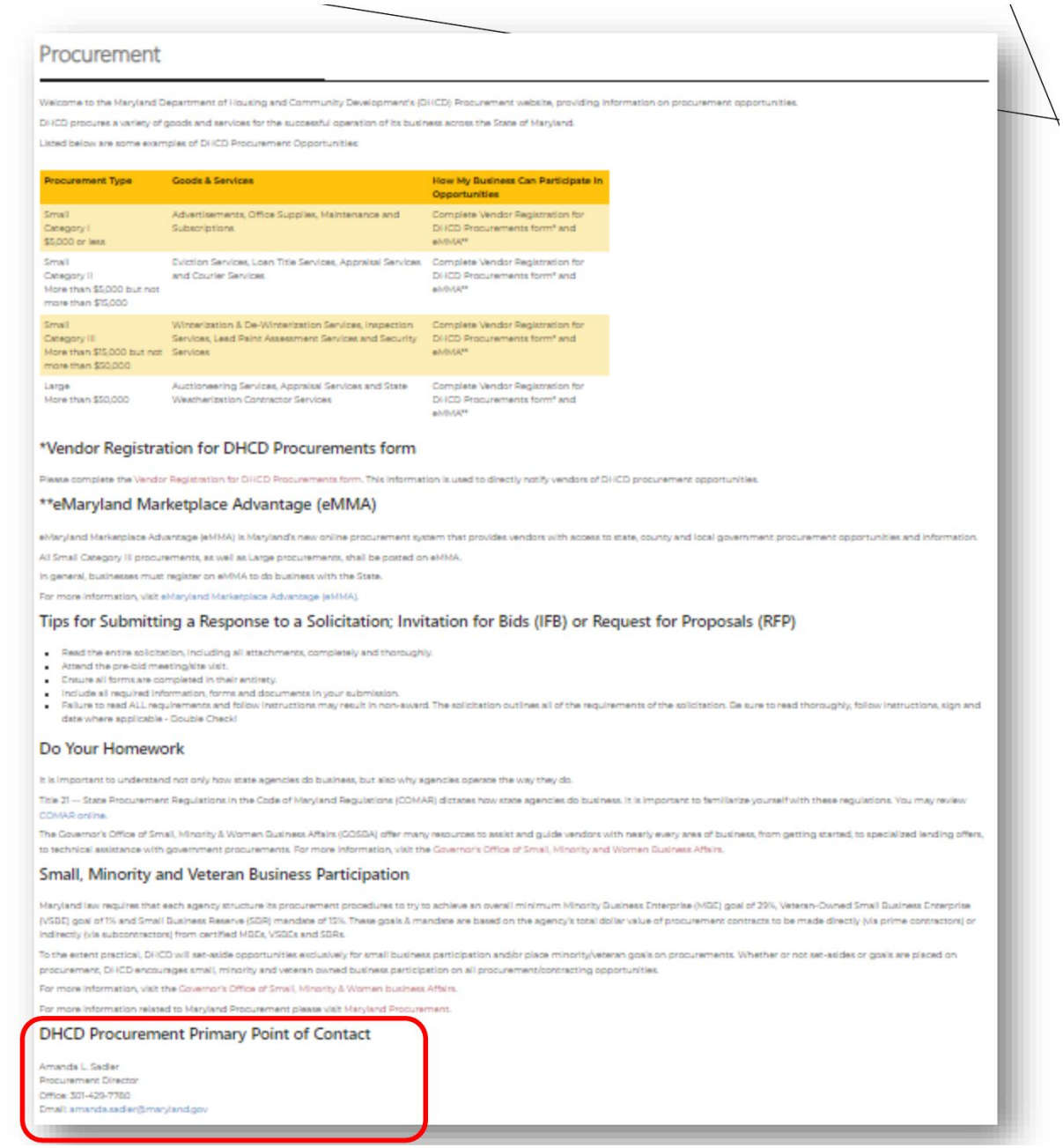
Search: Procurement



Search: Procurement

Department of Housing and Community Development https://dhcd.maryla nd.gov/Pages/defau lt.aspx

- Stakeholder Engagement -



Procurement

Welcome to the Maryland Department of Housing and Community Development's (DHCD) Procurement website, providing information on procurement opportunities.

DHCD procures a variety of goods and services for the successful operation of its business across the State of Maryland.

Listed below are some examples of DHCD Procurement Opportunities:

Procurement Type	Goods & Services	How My Business Can Participate In Opportunities
Small Category I $5,000 or less	Advertisements, Office Supplies, Maintenance and Subscriptions	Complete Vendor Registration for DHCD Procurements form* and eMMA**
Small Category II More than $5,000 but not more than $15,000	Eviction Services, Loan Title Services, Appraisal Services and Courier Services	Complete Vendor Registration for DHCD Procurements form* and eMMA**
Small Category III More than $15,000 but not more than $50,000	Winterization & De-Winterization Services, Inspection Services, Lead Paint Assessment Services and Security Services	Complete Vendor Registration for DHCD Procurements form* and eMMA**
Large More than $50,000	Auctioneering Services, Appraisal Services and State Weatherization Contractor Services	Complete Vendor Registration for DHCD Procurements form* and eMMA**

*Vendor Registration for DHCD Procurements form

Please complete the Vendor Registration for DHCD Procurements form. This information is used to directly notify vendors of DHCD procurement opportunities.

**eMaryland Marketplace Advantage (eMMA)

eMaryland Marketplace Advantage (eMMA) is Maryland's new online procurement system that provides vendors with access to state, county and local government procurement opportunities and information.

All Small Category III procurements, as well as Large procurements, shall be posted on eMMA.

In general, businesses must register on eMMA to do business with the State.

For more information, visit eMaryland Marketplace Advantage (eMMA).

Tips for Submitting a Response to a Solicitation; Invitation for Bids (IFB) or Request for Proposals (RFP)

- Read the entire solicitation, including all attachments, completely and thoroughly.
- Attend the pre-bid meeting/site visit.
- Ensure all forms are completed in their entirety.
- Include all required information, forms and documents in your submission.
- Failure to read ALL requirements and follow instructions may result in non-award. The solicitation outlines all of the requirements of the solicitation. Be sure to read thoroughly, follow instructions, sign and date where applicable - Double Check!

Do Your Homework

It is important to understand not only how state agencies do business, but also why agencies operate the way they do.

Title 21 — State Procurement Regulations in the Code of Maryland Regulations (COMAR) dictates how state agencies do business. It is important to familiarize yourself with these regulations. You may review COMAR online.

The Governor's Office of Small, Minority & Women Business Affairs (GOSBA) offer many resources to assist and guide vendors with nearly every area of business, from getting started, to specialized lending offers, to technical assistance with government procurements. For more information, visit the Governor's Office of Small, Minority and Women Business Affairs.

Small, Minority and Veteran Business Participation

Maryland law requires that each agency structure its procurement procedures to try to achieve an overall minimum Minority Business Enterprise (MBE) goal of 29%, Veteran-Owned Small Business Enterprise (VSBE) goal of 1% and Small Business Reserve (SBR) mandate of 10%. These goals & mandate are based on the agency's total dollar value of procurement contracts to be made directly (via prime contractors) or indirectly (via subcontractors) from certified MBEs, VSBEs and SBRs.

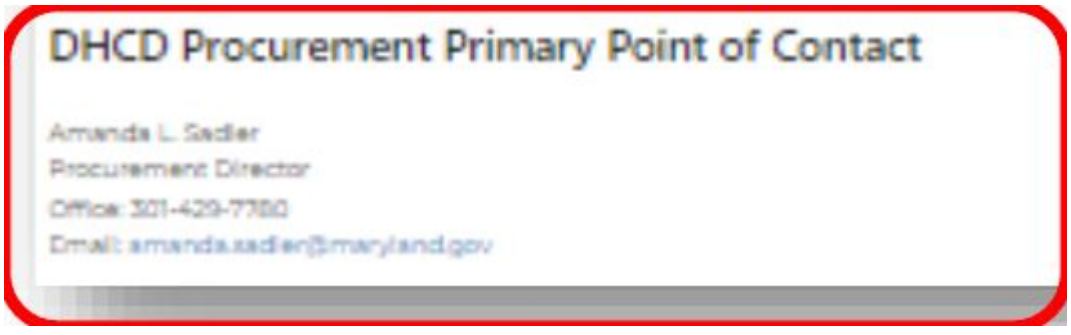
To the extent practical, DHCD will set-aside opportunities exclusively for small business participation and/or place minority/veteran goals on procurements. Whether or not set-asides or goals are placed on procurement, DHCD encourages small, minority and veteran owned business participation on all procurement/contracting opportunities.

For more information, visit the Governor's Office of Small, Minority & Women Business Affairs.

For more information related to Maryland Procurement please visit Maryland Procurement.

DHCD Procurement Primary Point of Contact

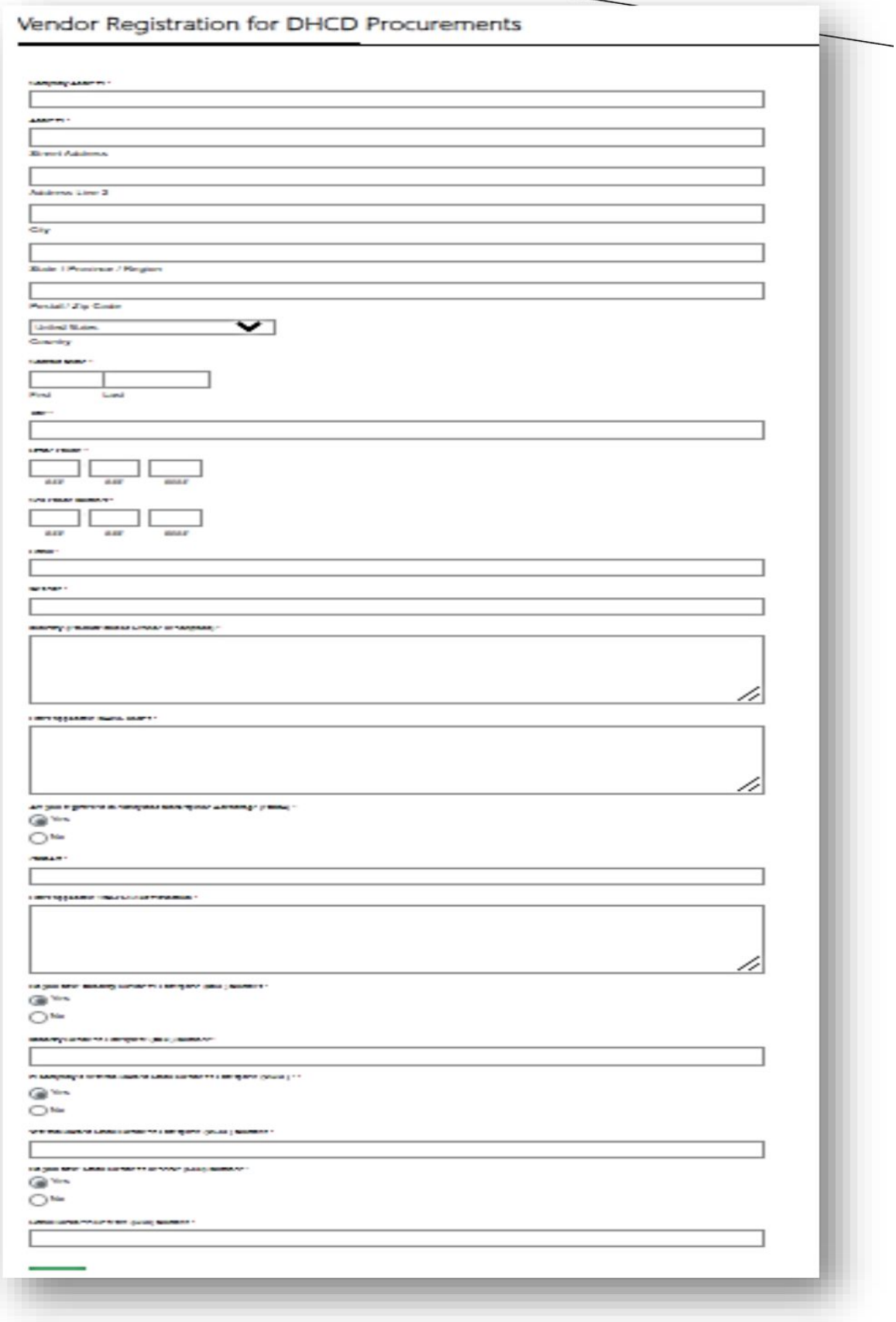
Amanda L. Sadler
Procurement Director
Office: 301-429-7760
Email: amanda.sadler@maryland.gov



DHCD Procurement Primary Point of Contact

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Procurement Director
Office: 301-429-7760
Email: amanda.sadler@maryland.gov

- Stakeholder Engagement -

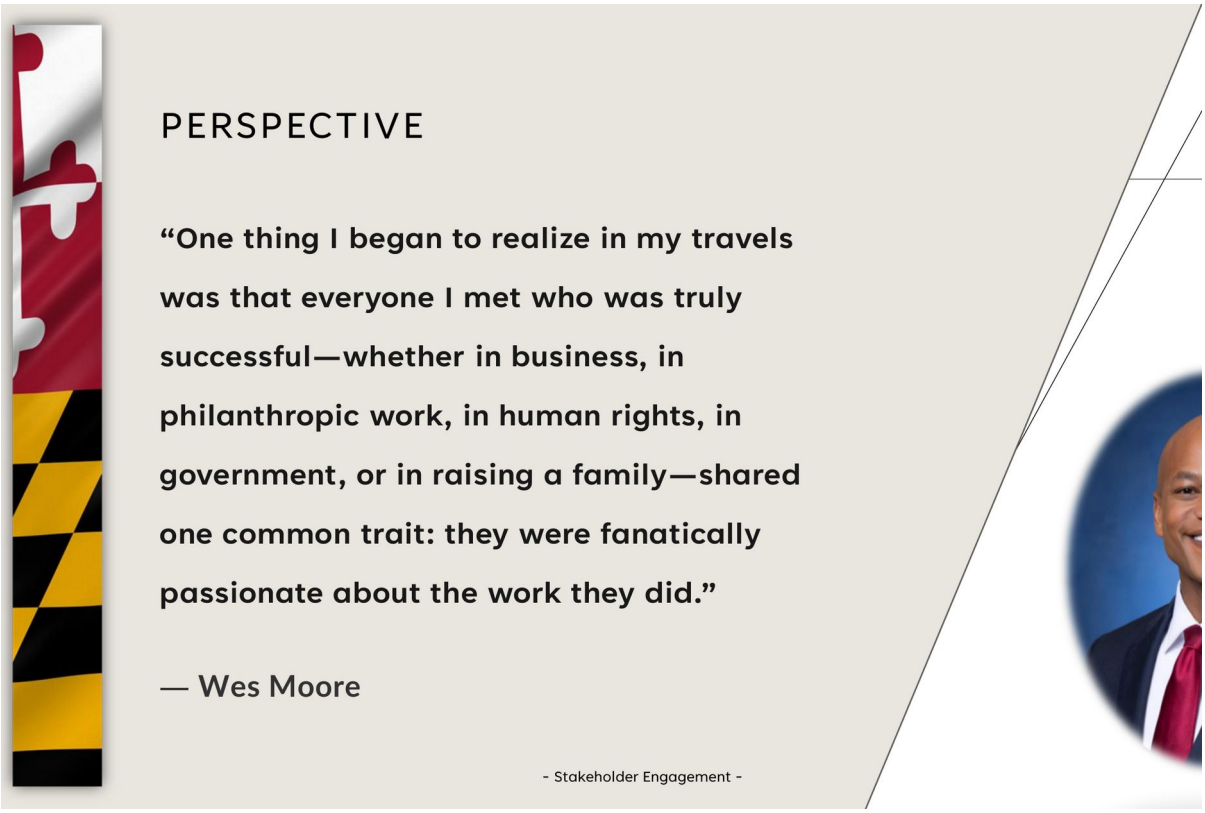


Department of Housing and Community Development https://dhcd.maryla nd.gov/Pages/defau lt.aspx

LIAISON JOB DUTIES

- Coordinating agency outreach efforts to the community
- Reviewing agency contracting procedures to ensure compliance
- Assisting in the resolution of contracting issues
- Submitting required reports and information

- Stakeholder Engagement -



Thanks! STAKEHOLDER ENGAGEMENT

Q&A Alison Tavik

PERSPECTIVE



“One thing I began to realize in my travels was that everyone I met who was truly successful—whether in business, in philanthropic work, in human rights, in government, or in raising a family—shared one common trait: they were fanatically passionate about the work they did.”

— Wes Moore

- Stakeholder Engagement -

STAKEHOLDER ENGAGEMENT

Alison Tavik Director of Communications & Outreach February 15, 2024

Q&A

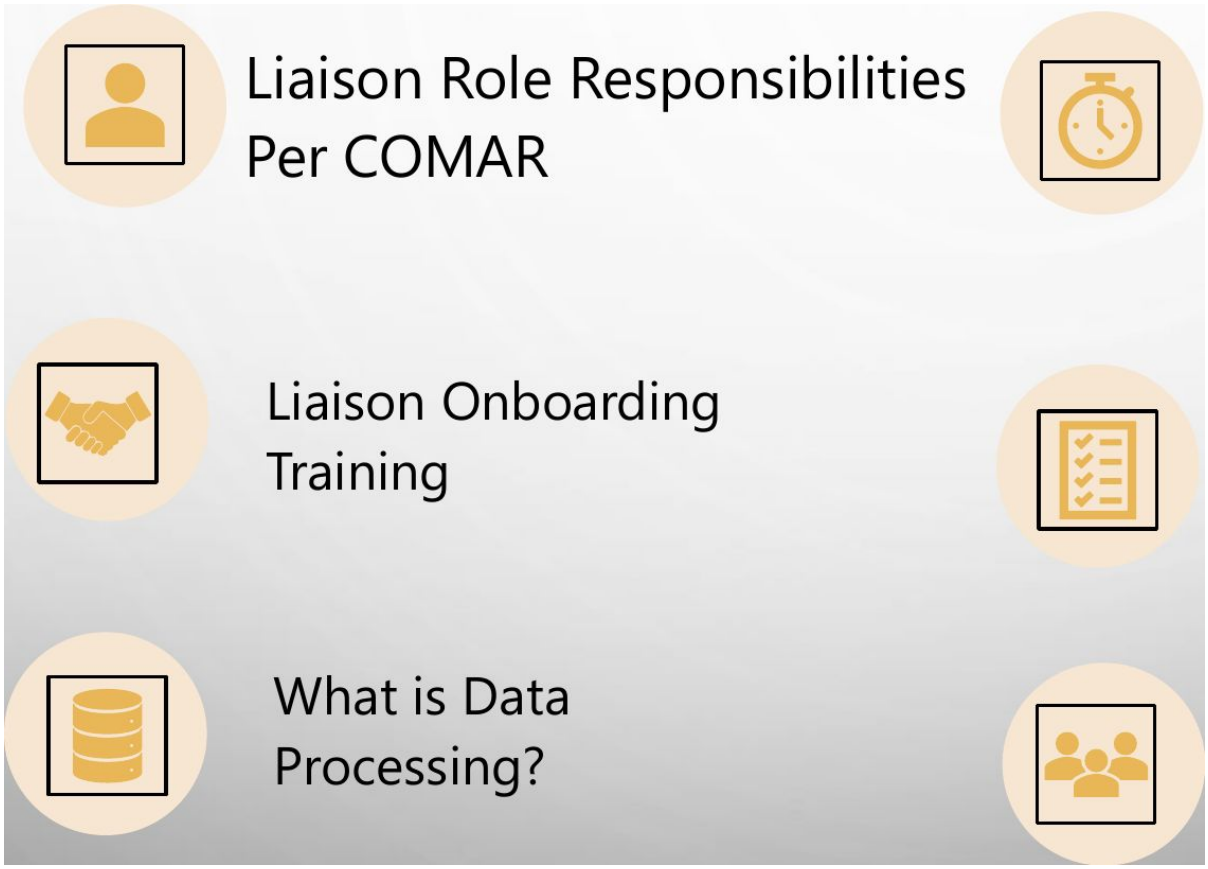
Thanks!

GENERAL LIAISON TRAINING

PRESENTED BY KAREN REYES

MBE COMPLIANCE MANAGER

GENERAL SECTION AGENDA



GENERAL SECTION AGENDA Liaison Role Responsibilities Per COMAR

Upcoming Deadlines

Agencies Data Responsibilities

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

LIAISON ONBOARDING TRAINING

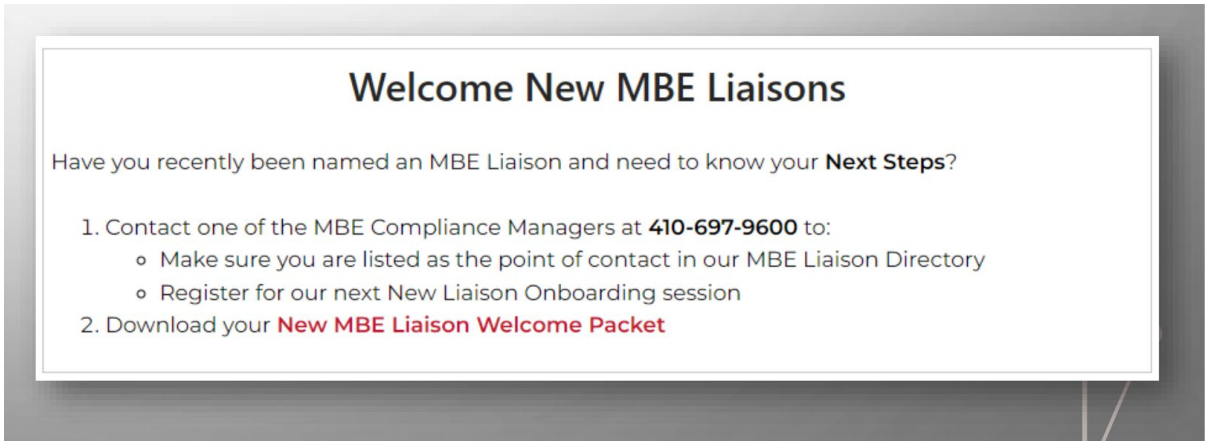


Whether you are a new liaison or are looking for a refresher on all that encompasses the liaison role always remember liaison onboarding training & welcome packets are available on the SBR, MBE, & VSBE Toolkits!



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

LIAISON ONBOARDING TRAINING





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

REPORTING DEADLINES

Date	Reports
April 30, 2024	SBR & MBE Quarter 3 Reports Due
September 30, 2024	SBR & MBE Annual Report
October 1, 2024	VSBE Annual Report

UPCOMING MEETING DATES

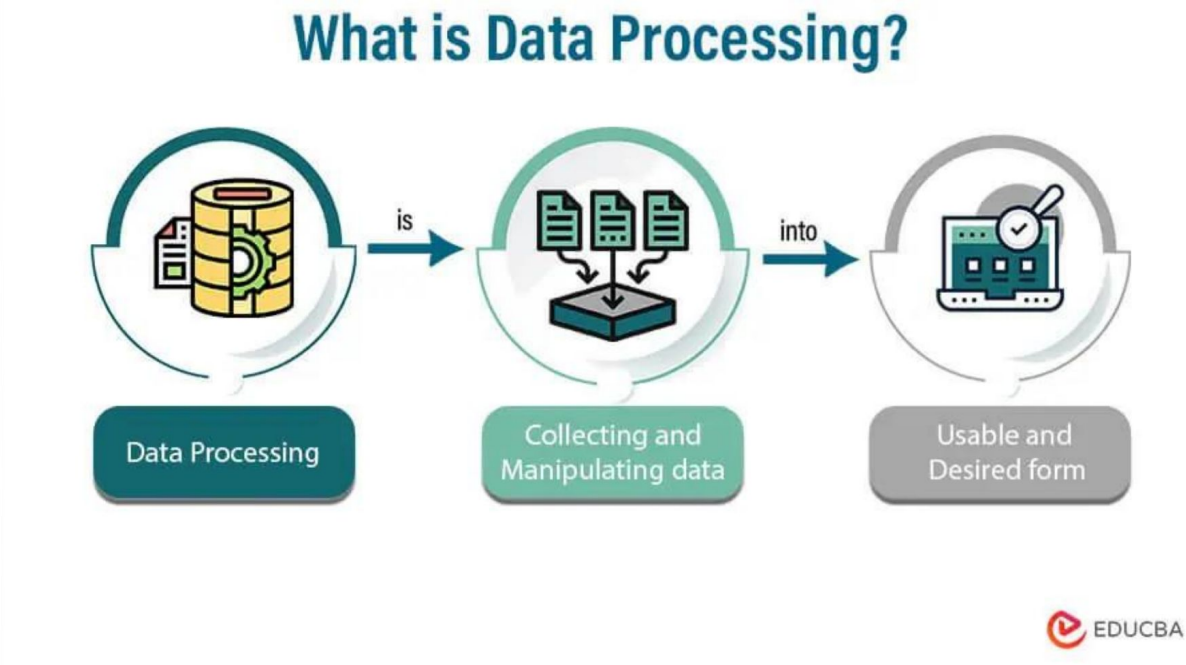
Date	Meetings
March 7, 2024	Quarterly Compliance Call
March 19, 2024	Liaison Onboarding Training
(TBD) May 2024	Combined Liaison Training

GAD LIST WORKGROUP

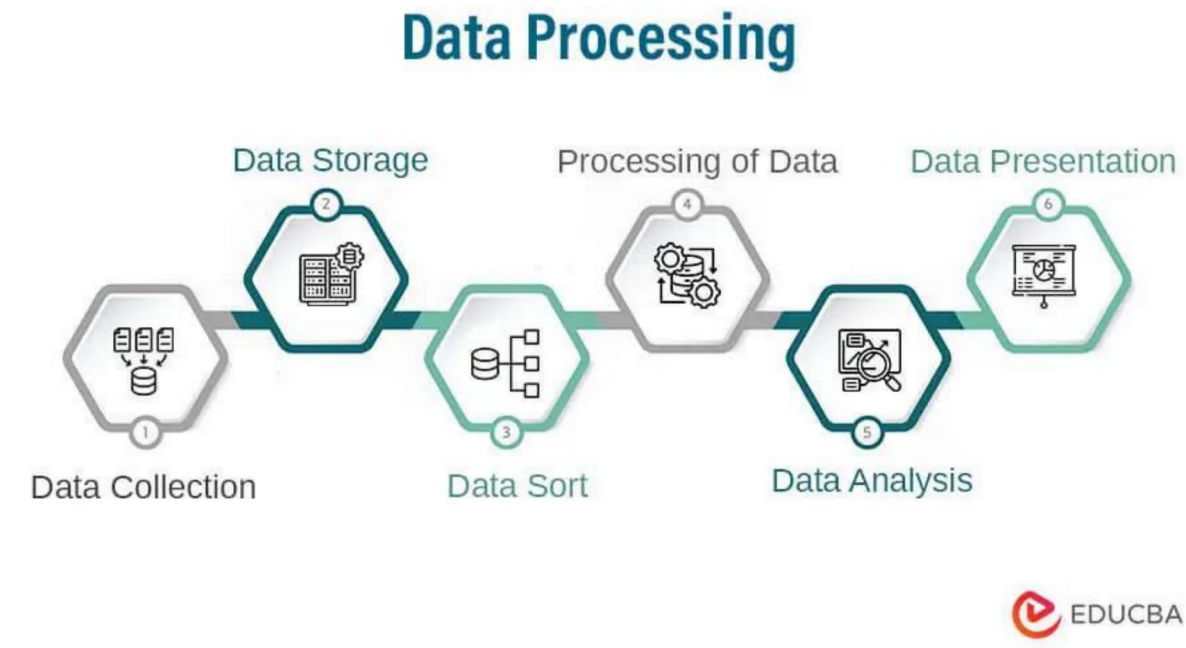
GENERAL UPDATES

WHAT IS DATA PROCESSING?

DATA PROCESSING IS ESSENTIAL FOR ACCURATE & CONCISE QUARTERLY & ANNUAL REPORTS!



GENERAL OVERVIEW OF DATA PROCESSING



DATA COLLECTION

- Each agency has a unique process for the collection of socioeconomic data
- Be sure to become familiar with your specific agency's data collection process
- A few examples include:
    - Internal data within a spreadsheet
    - ANSWERS data
    - MDOT utilizes iFMIS
    - Some Universities utilize PeopleSoft

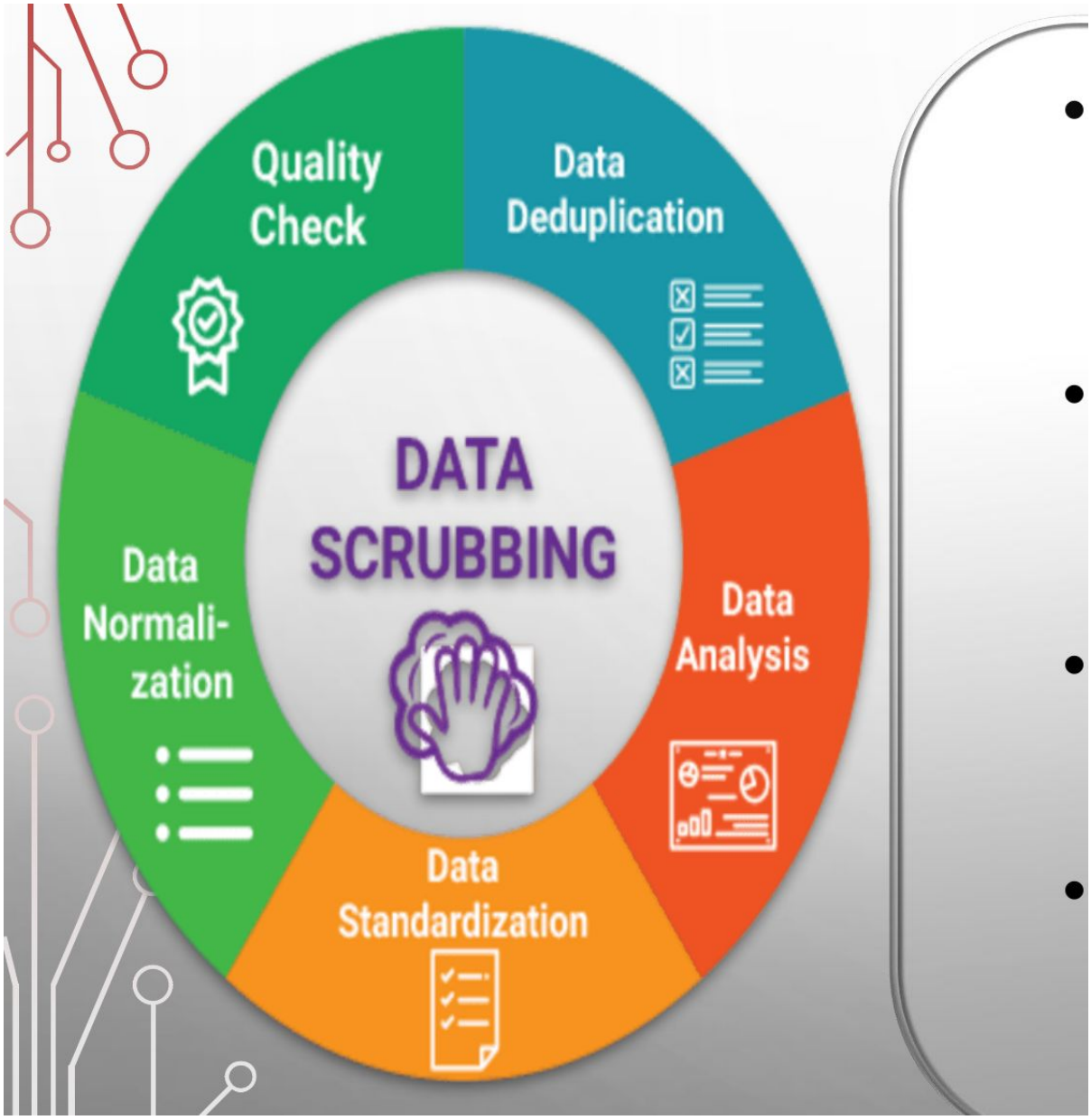
DATA STORAGE

- Agencies are responsible for storing their data in a centralized location to ensure that the historical data is persevered
- For example:
    - If an agency experiences turnover and the previous report preparer stored the report data in their personal documents on their laptop the agency no longer will have access to the historical data. This will cause issues when the new report preparer needs to be trained on reporting.

DATA SORTING/SCRUBBING

- Sorting and filtering also known as Scrubbing data is necessary to organize the data into a meaningful order and extract only the required information.
- This enables better understanding, visualization, and analysis of the data.
- When performing this step keep in mind that one of the top priorities is preserving the integrity of the data

WHAT TO LOOK OUT FOR WHEN DATA SORTING



• 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

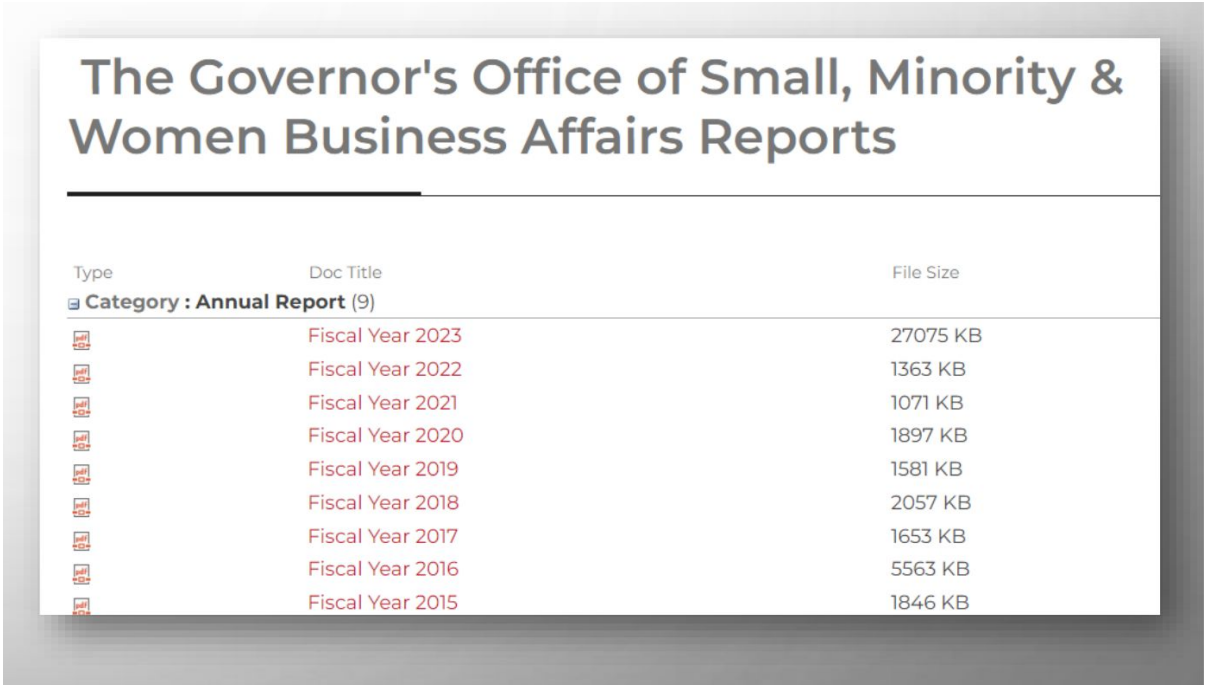
PROCESSING OF DATA

- Data processing occurs when data is collected and translated into usable information. Usually performed by a data scientist or in this case a data scientist liaison ☺
- Data processing starts with data in its raw form and converts it into a more readable format (organized backup data, GOSBA excel templates, etc.), giving it the form and context necessary to be interpreted by computer databases and utilized by employees throughout an organization
- It is important for data processing to be done correctly as not to negatively affect the end product

DATA PROCESSING FOR SOCIOECONOMIC REPORTING

- Your agency is responsible for downloading the most up to date templates provided by GOSBA in each 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 make the annual report you see at the end of the year



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

FINAL STEP: DATA PRESENTATION

- Data presentation is the process of displaying data and analysis results in a way that is understandable and interpretable to the intended audience
    - This is a crucial step in the data analysis process because it allows the insights gained from the agencies report preparer to be shared and acted upon with the GOSBA compliance team
- Agencies are responsible for submitting the completed reporting templates without any errors
    - If you encounter errors within the template prior to submission, be sure to contact your designated compliance manager for the program you are reporting for prior to submitting your report

WE HOPE EVERY LIAISON/REPORT PREPARER FEELS MORE EQUIP TO TACKLE DATA PROCESSING AFTER TODAY'S SESSION! ☺

MBE OMBUDSMAN UNIT

PRESENTED BY NICHELLE JOHNSON

MBE OMBUDSMAN

•§9–303.3. (HB 389/SB 487, Acts of 2022) (a) In this section, “Ombudsman” means the Minority Business Enterprise Ombudsman in the Office. (b) There is a Minority Business Enterprise Ombudsman appointed by the Special Secretary. (c) In accordance with the State budget, the Special Secretary shall allocate the staff and Office resources to the Ombudsman necessary for the Ombudsman to fulfill the duties of the Ombudsman.

Nichelle Johnson Maryland’s first MBE Ombudsman



MBE OMBUDSMAN

- Assist the procurement officers managing contracts in attempts to resolve disputes between minority business enterprises and prime contractors, including disputes over contract SCOPE and PAYMENTS with the authority to:
    a. COMPEL prime contractors and minority business enterprises to provide documentation related to contract performance and payments; and
    b. ASSIST the procurement officer managing the contract in ordering any relevant payments to be made in conjunction with a dispute resolution.
    c. UTILIZE the guidance of the assistant Attorney General assigned to the Office in resolving contract disputes.

MBE OMBUDSMAN

- Serve as resource to MBE liaisons and Procurement Officers in units of State government, prime contractors, and MBE vendors in resolving disputes related to contracts that include an MBE participation goal.
- Conduct training for Procurement Officers in units of State government on enforcement of the requirements of 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.

MBE OMBUDSMAN

- Strategies
    - Tracking performance on contracts with MBE Goals through annual compliance assessment data
    - Enhanced training for procurement officers and compliance staff
    - Targeted Training for prime contractors and subcontractors focusing on compliance and best practices
    - Helping MBEs navigate state procurement by providing resources and guidance

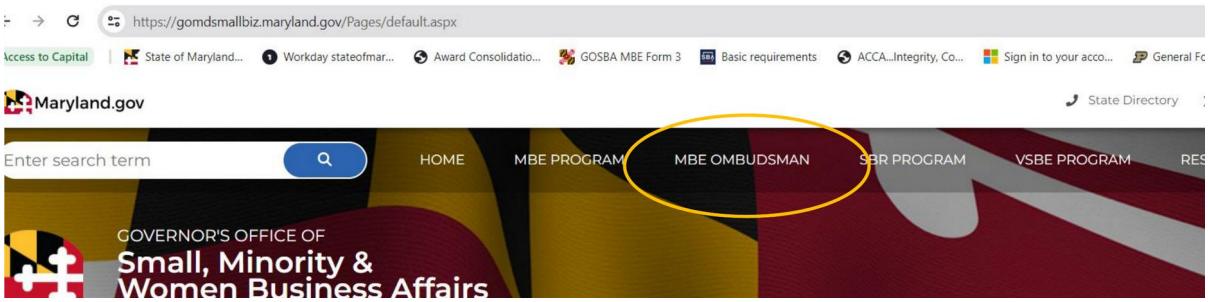
MBE OMBUDSMAN

WE DO NOT HANDLE

- Matters that are before the courts or MSBCA
- Matters where debarment or legal action has been taken by the state
- Complaints that are not under our purview

WE DO NOT HANDLE oMatters that are before the courts or MSBCA oMatters where debarment or legal action has been taken by the state oComplaints that are not under our purview

WEBSITE UPDATE: MBE OMBUDSMAN





WEBSITE UPDATE: MBE OMBUDSMAN

Prior to contacting our office, we request that you

Step 1: Contact the Prime Contractor to resolve any issues

Step 2: Contact the State Agency Contract Monitor and/or MBE Liaison for assistance

Step 3: After following these steps, please contact the MBE Ombudsman

Contact Us



Have a quick question? Call our office 410-697-9605

Business Resources

State Agency Resources



WEBSITE UPDATE: MBE OMBUDSMAN

MBE Ombudsman - State Agency Resources

Upcoming Training Sessions

Upcoming Training: Liaison Training is scheduled for February 15, 2024, 9am
Audience: State Agency Staff (Procurement / Compliance / Liaisons)

Do you want to request a special MBE Program Compliance Training? Contact the Ombudsman to Schedule a session for your agency staff.

Training Videos (Coming Soon)

Policy Tools:
Liquidated Damages Guidelines

Liquidated Damages Model Policy

PRG Tools:
BPW Advisory 2001-1

Subgoal Guidance (Full PRG Paperwork is located on the Procurement Maryland Website)

Sample MBE Forms

AS ALWAYS, IF YOU HAVE QUESTIONS AFTER TODAY'S TRAINING, PLEASE CONTACT US: NICHELLE JOHNSON – MBE OMBUDSMAN NICHELLE.JOHNSON1@MARYLAND.GOV 410-697-9605 667-232-1369

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

MBE PROGRAM

PRESENTED BY KAREN REYES

MBE COMPLIANCE MANAGER

MBE AGENDA

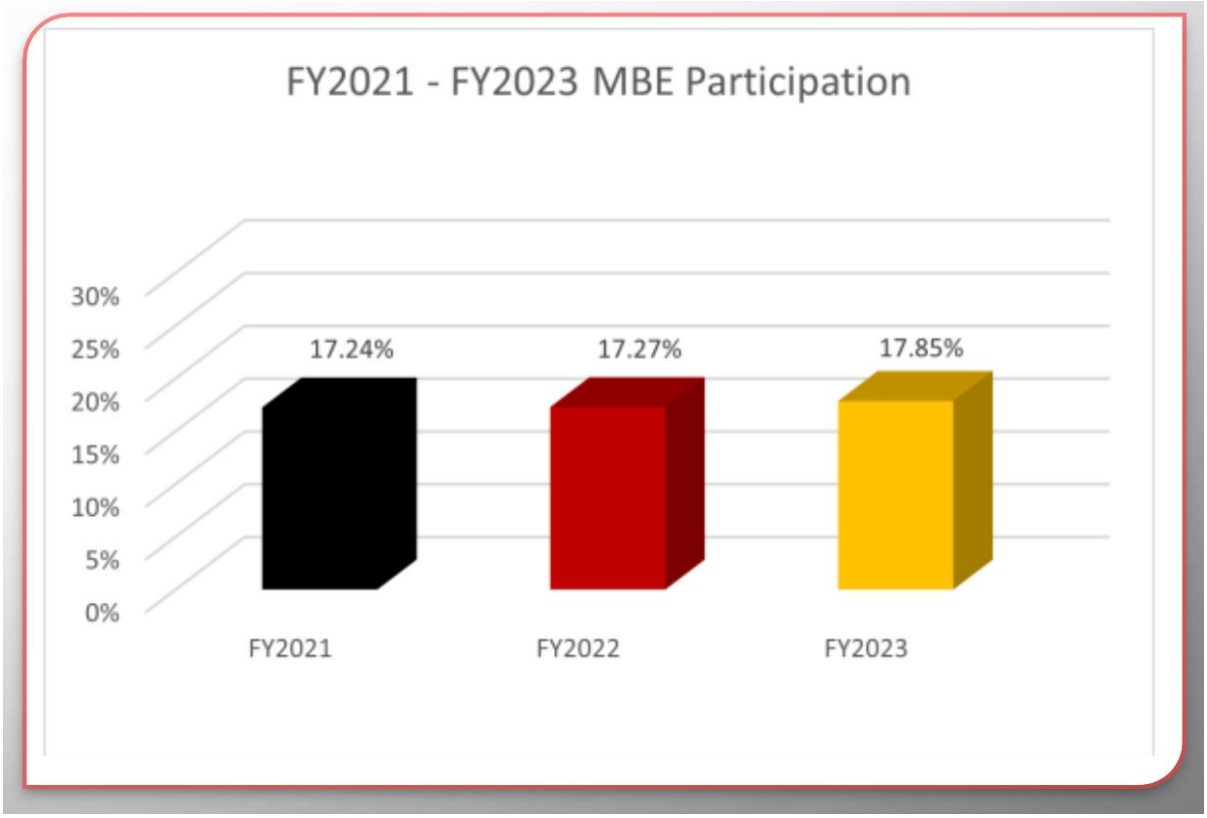
- Annual Report Data Findings
- MBE Reporting Requirements
- MBE Specific Goal Setting Reminders
- MBE Forms Training Video
- MBE Waiver Guidance
- MBE Program Compliance / Best Practices

FISCAL YEAR 2023 ANNUAL REPORT



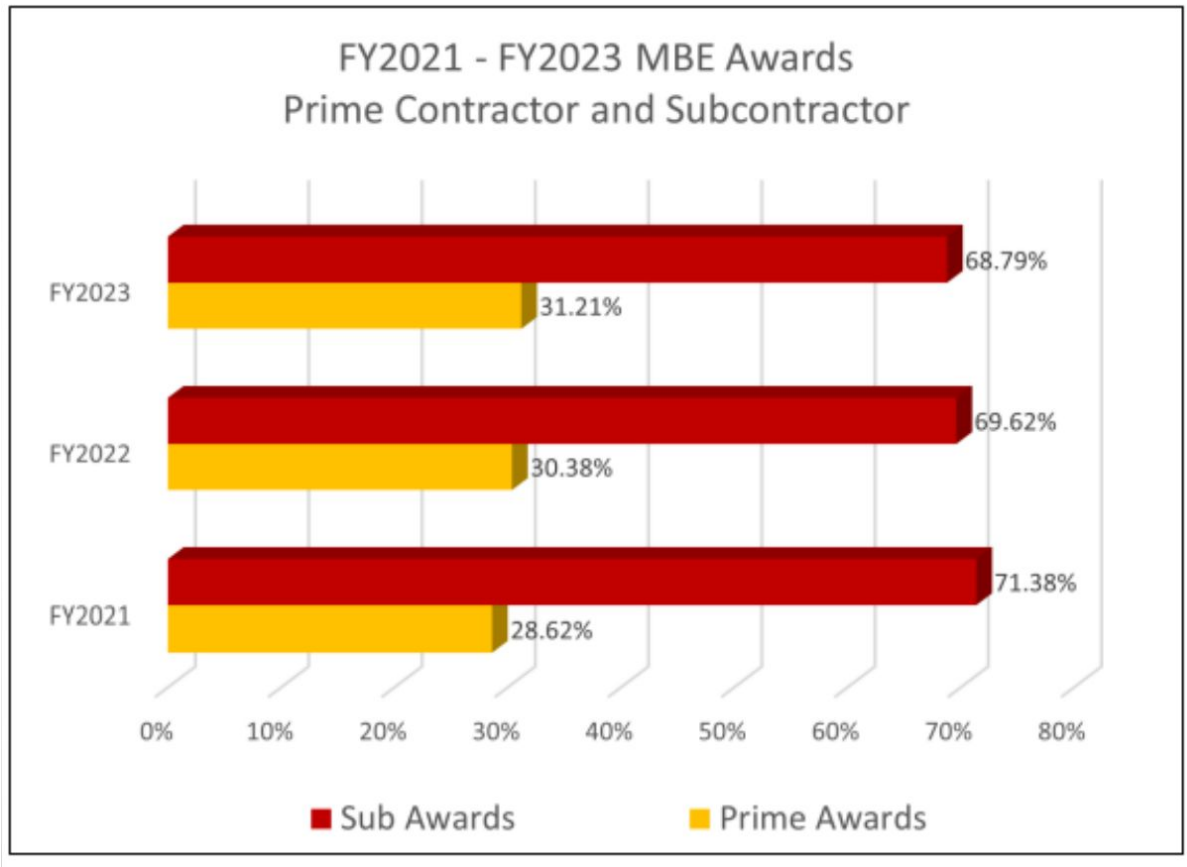
MBE ANNUAL REPORT FINDINGS

- It is important to note the overall progression of the MBE program has remained static
- The statewide aspirational goal is 29% in order to increase the current attainment it is important for agencies to understand key elements of success within the MBE program such as:
    - Implementation of best practices
    - Evaluation of individual contract goal setting
    - Contract compliance through the life of the contract



MBE ANNUAL REPORT AWARD & PAYMENT HIGHLIGHT

- This chart reference MBE Awards to prime and subcontractors. We note a steady increase in Prime awards and a slight decrease in Sub awards
- Payments to MBE subcontractors decreased by 14 percent while payments to MBE prime contractors increased by 27 percent this reporting period
    - MBE firms are receiving greater opportunities to perform at the prime contractor level, likely through direct solicitations



MBE AGENCY CONTRACT COMPLIANCE ASSESSMENT

Exhibit Q: Overall Agency Compliance Rate

Fiscal Year 2023	
MBE Participating Agency/Department	**Overall Compliance Rate***
AVIATION ADMINISTRATION	**75%**
BALTIMORE CITY COMMUNITY COLLEGE	**84%**
BOWIE STATE UNIVERSITY	**100%**
COMMERCE	**100%**
COMPTROLLER	**98%**
COPPIN STATE UNIVERSITY	**81%**
ENVIRONMENT	**100%**
ENVIRONMENTAL SERVICES	**85%**
FROSTBURG STATE UNIVERSITY	**100%**
GENERAL SERVICES	**68%**
HEALTH	**47%**

Exhibit P: Agency Contract Compliance Assessment

Fiscal Year 2023			
MBE Participating Agency/Department	**Completed Contracts**	**Number of Contracts that Met MBE Goal**	**Percentage of Contracts that Met MBE Goal**
AVIATION ADMINISTRATION	6	3	**50%**
BALTIMORE CITY COMMUNITY COLLEGE	1	0	**0%**
BOWIE STATE UNIVERSITY	1	1	**100%**
COMMERCE	1	1	**100%**
COMPTROLLER	1	0	**0%**
COPPIN STATE UNIVERSITY	1	0	**0%**
ENVIRONMENT	1	1	**100%**
ENVIRONMENTAL SERVICES	50	29	**58%**
FROSTBURG STATE UNIVERSITY	1	1	**100%**
GENERAL SERVICES	95	26	**27%**
HEALTH	14	4	**29%**
HEALTH BENEFIT EXCHANGE	2	2	**100%**
HOUSING & COMMUNITY DEVELOPMENT	19	7	**37%**

- Agencies that had MBE contracts close out in FY23 are listed on the Compliance Assessment be sure to check out your agency's overall compliance within the report

MBE AWARDS BY PROCUREMENT CATEGORY

- The annual report shows a detailed view of each procurement/industry category within the report
- It is important for agencies to enter their industry data correctly to ensure the data is being captured accurately

Exhibit C: FY2023 MBE Awards by Procurement Category

Fiscal Year 2023					
Procurement Category	**MBE Prime Contract Awards**	**MBE Subcontract Awards**	**Total MBE Awards**	**Total ALL AWARDS**	**MBE Participation**
Architectural	$8,851,618	$76,538,620	$85,390,238	$314,468,442	**27.15%**
Engineering	$4,508,684	$127,632,896	$132,141,580	$450,786,067	**29.31%**
Construction	$97,049,211	$393,235,548	$490,284,759	$2,042,942,426	**24.00%**
Construction Related Services	$253,460	$5,667,283	$5,920,743	$17,307,656	**34.21%**
Maintenance	$64,449,326	$64,056,396	$128,505,722	$1,021,244,693	**12.58%**
Services	$67,208,155	$80,009,777	$147,217,932	$1,118,922,754	**13.16%**
Supplies & Equipment	$15,171,006	$29,545,193	$44,716,199	$455,911,658	**9.81%**
IT Services	$65,466,763	$48,071,686	$113,538,449	$610,230,693	**18.61%**
IT Supplies & Equipment	$29,981,757	$12,245,803	$42,227,560	$271,350,053	**15.56%**
Human, Cultural, Social & Educational Services	$3,277,331	$1,635,474	$4,912,805	$25,003,007	**19.65%**
Corporate Credit Card	$4,787,897	$0	$4,787,897	$219,978,962	**2.18%**
Direct Voucher	$19,409,388	$0	$19,409,388	$281,227,385	**6.90%**
TOTAL	**$380,414,596**	**$838,638,676**	**$1,219,053,272**	**$6,829,373,796**	**17.85%**

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

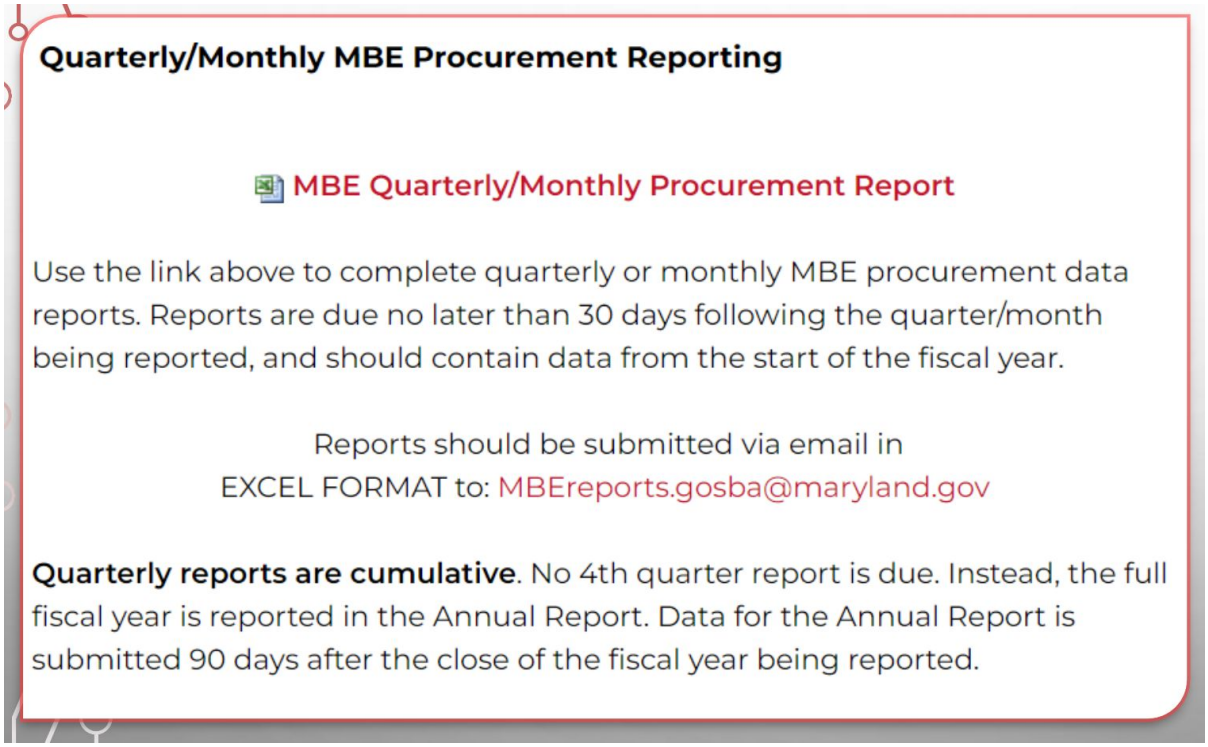
- Waiver Determinations as granted
- Copy our office on the Annual Waiver report to BPW
- MBE Form Amendment Consent/Approval
- We should receive PRG paperwork for solicitations 25 Million and over.

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. 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.

QUARTERLY REPORT REQUIREMENTS



- Next Quarterly Report will be due on April 30, 2024
- Template and instructions are available within the MBE Reporting Toolkit!

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 **NEW

QUARTER REPORT INSTRUCTIONS

- Instructions on how to complete the Quarter report is in the MBE Reporting Manual Page 54

Instructions MBE Quarterly Report Submissions

Overview

To proactively monitor progress toward achievement of the statewide goals, agencies/departments participating in the MBE program will report performance on a quarterly basis beginning with the new 2024 fiscal year. Quarterly reporting has previously been an option. ***It will now be mandatory.*** The quarterly data (which is cumulative) shall be submitted to GOSBA within 30 days of the quarter's closing date. GOSBA will have 15 days to prepare a statewide report for the governor, lieutenant governor, and the governor's cabinet. Timely submission of the quarterly reports is critical.

Quarterly/Monthly Reporting

Awards - *Purchase Orders & Blanket Purchase Orders*

The data required to complete most of the procurement categories for the awards tables on Forms 1 & 2 will come from ADPICS standard reports 709, 710, and 720 for agencies using the State's financial management information system (FMIS). (For MDOT FMIS users, the standard report 711 diagnostic is the equivalent of the Statewide 710 report.) Agencies not using FMIS would use reports from their respective financial systems or other method(s) of tracking all purchase orders/blanket purchase orders. Running these reports on a cumulative basis should significantly decrease – if not eliminate – the need to make numerous corrections to previous monthly reports, as change orders, cancelled POs, corrections, and other modifications will be captured in the cumulative reporting. These cumulative reports should be run for POs/BPOs in the following procurement categories:

- Architectural
- Engineering
- Construction
- Construction Related Services
- Maintenance
- Services
- Supplies & Equipment
- IT Services
- IT Supplies & Equipment
- Human, Cultural, Social, & Educational Services.

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

Input total scrubbed data here.

Example if you add each month separately: In July and August, Agency/Department A reported the following in credit card and direct voucher total awards:

	July 2015		August 2015		*TOTAL YTD*	
Corporate Credit Card	716	$12,578	1,002	$24,693	*1,718*	*$37,271*
Direct Voucher	92	$8,067	281	$20,947	*373*	*$29,014*

QUARTERLY REPORT FORM #2

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
	# of Contract														0
Engineering	Total Dollars														$0
	# of Contract														0
Construction	Total Dollars														$0
	# of Contract														0
Construction Related Services	Total Dollars														$0
	# of Contract														0
Maintenance	Total Dollars														$0
	# of Contract														0
Services	Total Dollars														$0
	# of Contract														0
Supplies & Equipment	Total Dollars														$0
	# of Contract														0
IT Services	Total Dollars														$0
	# of Contract														0
IT Supplies & Equipment	Total Dollars														$0
	# of Contract														0
Human, Cultural, Social & Educational Services	Total Dollars														$0
	# of Contract														0
Corporate Credit Card	Total Dollars														$0
	# of Contract														0
Direct Voucher	Total Dollars														$0
	# of Contract														0
Total	Total Dollars	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0			$0	$0
	# of Contract	0	0	0	0	0	0	0	0	0	0			0	0

Total MBE Prime Contract Payments

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

QUARTERLY REPORT FORM #1

Total Contract Awards by Procurement Categories

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

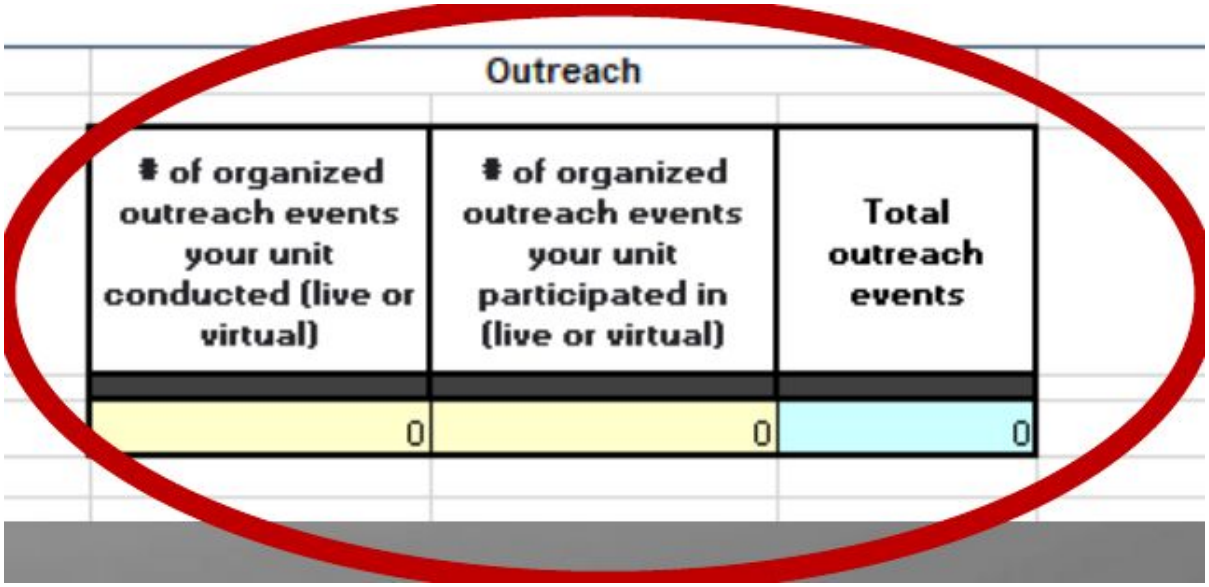
Note(s):

Total Contract Payments

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

Outreach

# of organized outreach events your unit conducted (live or virtual)	# of organized outreach events your unit participated in (live or virtual)	Total outreach events
0	0	0



Outreach		
# of organized outreach events your unit conducted (live or virtual)	# of organized outreach events your unit participated in (live or virtual)	Total outreach events
0	0	0

MBE SPECIFIC GOAL SETTING

GOALS: STATEWIDE VS. CONTRACT

- The statewide of 29% is an aspirational overall goal
- Individual contract goals must be considered on a contract-by-contract basis through the PRG Process

DON'T put a blanket 29% goal on projects without a legitimate justification.

PROCUREMENT REVIEW GROUP

Process for reviewing any:

All contracts ranging from $50,000 to $500k automatic SBR Program Designation

- (a) Contract solicitations;
- (b) proposed sole-source contracts; and
- (c) proposed contract renewal options

Contracts expected to exceed $100,000 in value evaluate for Minority Business Enterprise

Contracts expected to exceed $200,00 in value should be considered for subgoals (For procurements that are not expected to have a value that equals or exceeds $200,000, completion of the MBE Subgoal Process is discretionary.)

PRG PARTICIPANTS

- There should be at least one or more standing procurement review group(s).
- The group shall be comprised of:
  - Agency's chief procurement official or senior-level procurement official designated to act in his/her place
  - MBE Liaison Officer or senior level alternate
- Do rely on agency legal counsel to provide support and advice as necessary

RECOMMENDATIONS

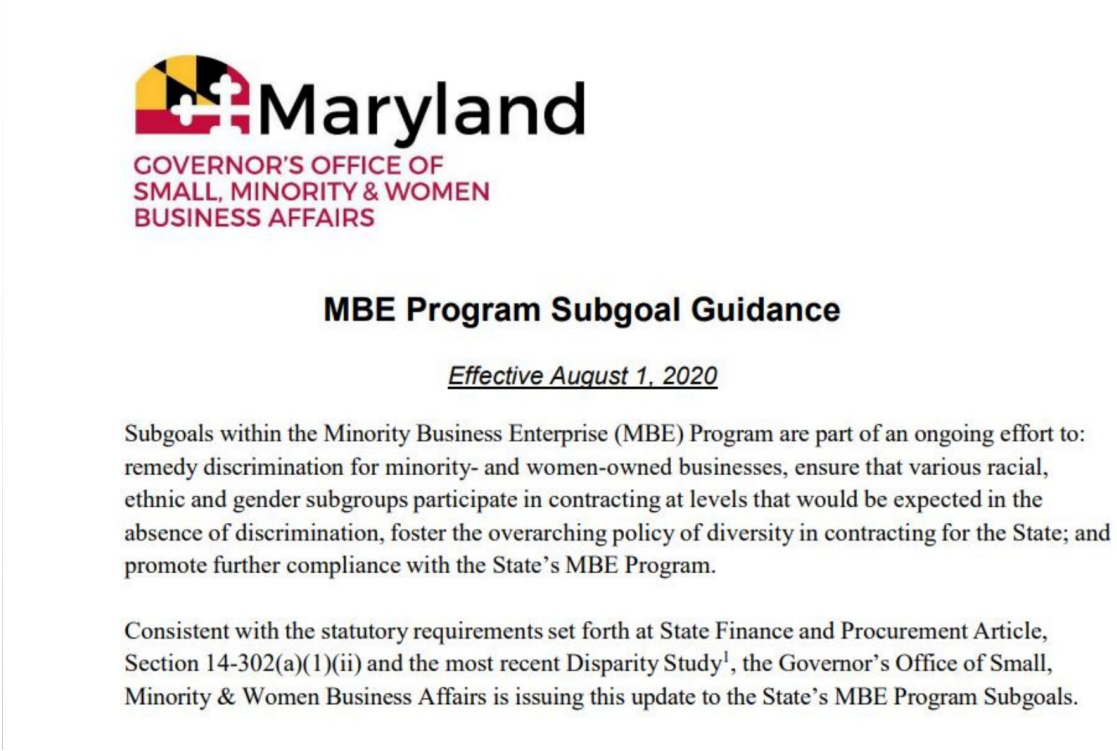
- Group makes decisions concerning specific procurement methods for maximizing inclusion

Best Practice Tips:

- Don't automatically exempt emergency procurements or SBR procurements from MBE goal consideration

- SBR Procurement can have MBE Goals

MBE PROGRAM SUBGOAL GUIDANCE



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

MBE Program Subgoal Guidance

Effective August 1, 2020

Subgoals within the Minority Business Enterprise (MBE) Program are part of an ongoing effort to: remedy discrimination for minority- and women-owned businesses, ensure that various racial, ethnic and gender subgroups participate in contracting at levels that would be expected in the absence of discrimination, foster the overarching policy of diversity in contracting for the State; and promote further compliance with the State's MBE Program.

Consistent with the statutory requirements set forth at State Finance and Procurement Article, Section 14-302(a)(1)(ii) and the most recent Disparity Study[1], the Governor's Office of Small, Minority & Women Business Affairs is issuing this update to the State's MBE Program Subgoals.

- This guidance is available for download on the MBE Reporting Toolkit

PRELIMINARY GOAL CONSIDERATIONS

- (1) Goals and subgoals shall be set on a contract-by-contract basis
- (2) Goals and subgoals shall only be set on contracts that actually have subcontracting opportunities
- (3) The unit shall examine the type of work involved in the contract
- (4) The unit shall determine whether there are certified MBEs available to perform the work

MBE FORMS TRAINING VIDEO

MBE FORMS TRAINING VIDEO

- This training video is available within the MBE Reporting toolkit on the bottom right-hand side
- This is an in-depth training that covers:
    - MBE Utilization and Fair Solicitation Affidavit and MBE Participation Schedule
    - Waiver Guidance
    - Good Faith Efforts Documentation
    - Outreach Efforts Compliance Statement
    - Certified MBE Subcontractor Project Participation Certification
    - MBE Prime Project Participation Certification
    - Prime Contractor Paid/Unpaid Invoice Report
    - MBE Prime Contractor Report
    - MBE Subcontractor Paid/Unpaid Invoice Report

Video Training Series

Form 3 Payment Portal Training Video



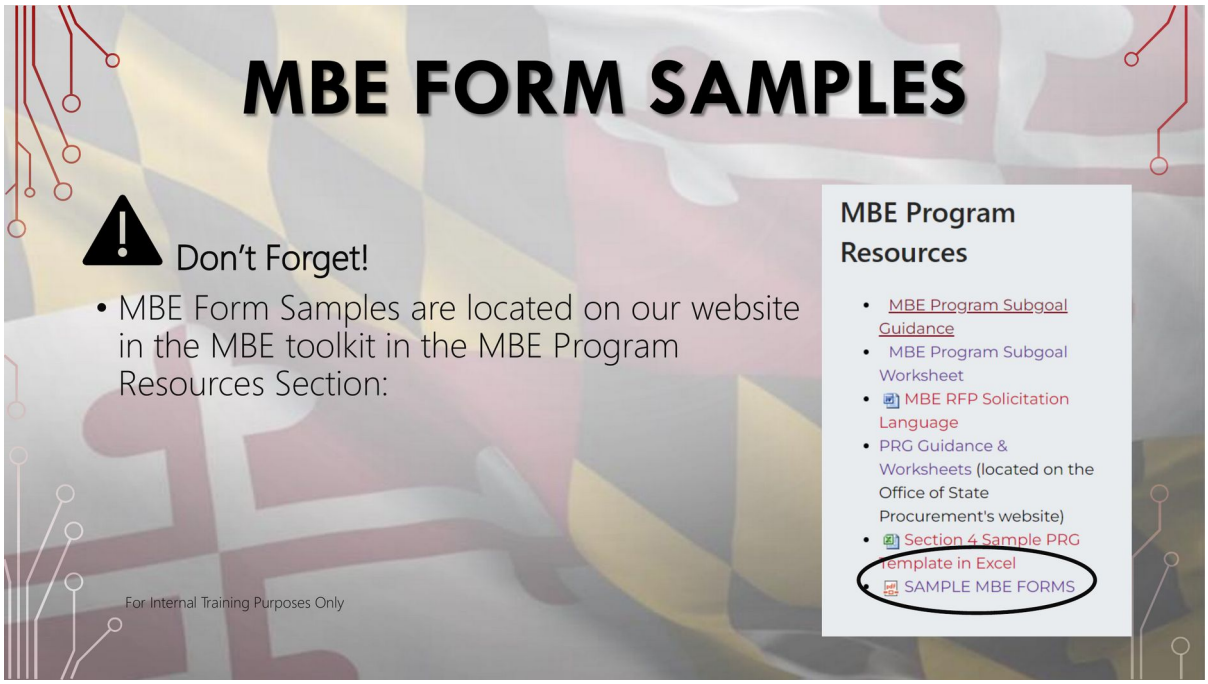
Form 3 Payment Portal Training Slide Deck

MBE Forms Training Video



MBE Forms Training Slide Deck





MBE FORM SAMPLES

- Don't Forget!
- MBE Form Samples are located on our website in the MBE toolkit in the MBE Program Resources Section:

MBE Program Resources

- MBE Program Subgoal Guidance
- MBE Program Subgoal Worksheet
- MBE RFP Solicitation Language
- PRG Guidance & Worksheets (located on the Office of State Procurement's website)
- Section 4 Sample PRG Template in Excel
- SAMPLE MBE FORMS

Template in Excel
- SAMPLE MBE FORMS

MBE FORMS IMPORTANT REMINDER

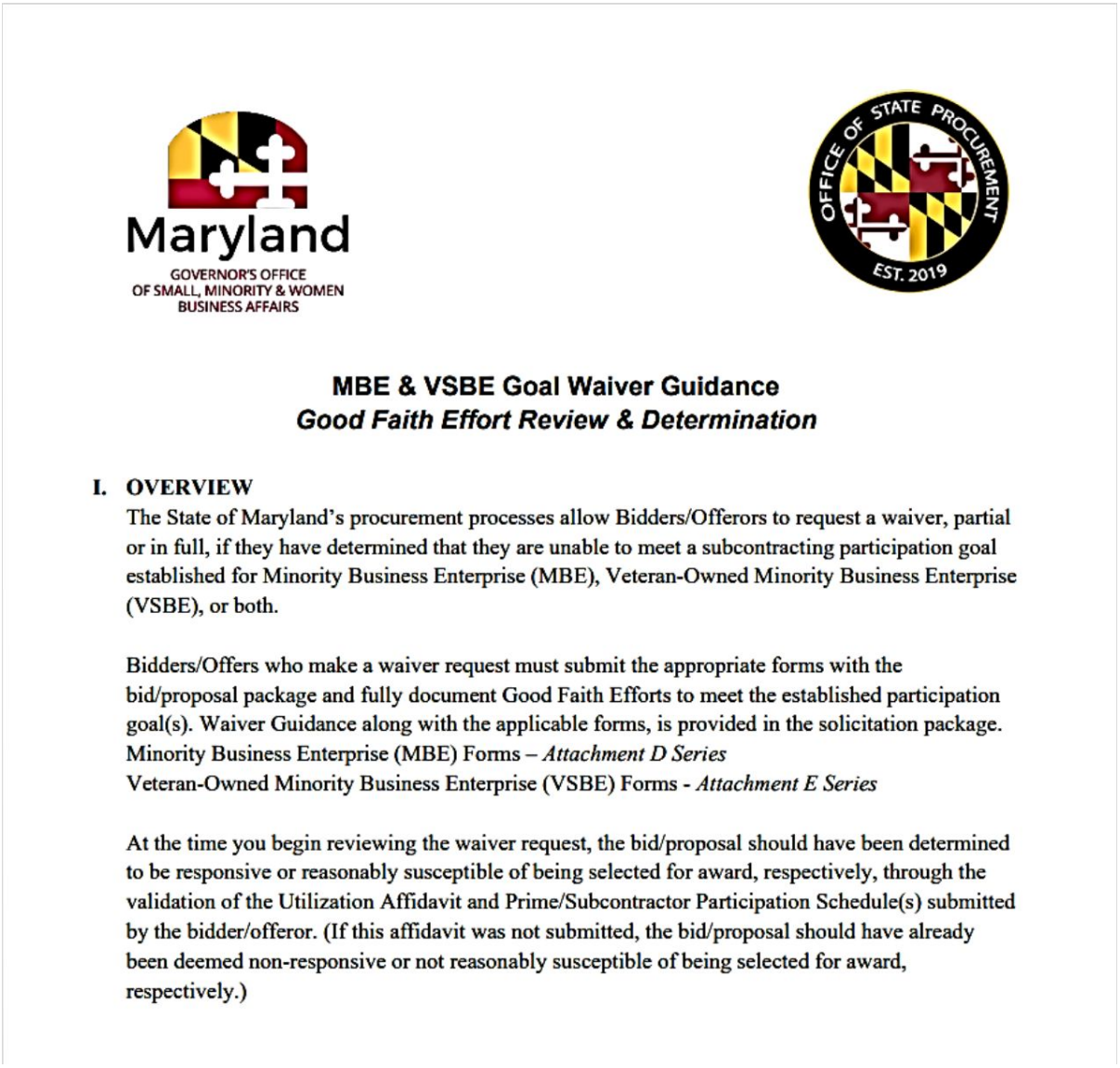
Governor’s Office of Small, Minority & Women Business Affairs

Your agency is required to submit an MBE Liaison’s written Consent to Amend an MBE participation schedule

This directive is found in COMAR 21.11.03.12 (E) 3

(3) The procurement agency shall send a copy of the MBE liaison written consent to the Governor's Office of Small, Minority & Women Business Affairs.

MBE WAIVER RESOURCES



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

OFFICE OF STATE PROCUREMENT
EST. 2019

MBE & VSBE Goal Waiver Guidance
Good Faith Effort Review & Determination

I. OVERVIEW

The State of Maryland's procurement processes allow Bidders/Offerors to request a waiver, partial or in full, if they have determined that they are unable to meet a subcontracting participation goal established for Minority Business Enterprise (MBE), Veteran-Owned Minority Business Enterprise (VSBE), or both.

Bidders/Offers who make a waiver request must submit the appropriate forms with the bid/proposal package and fully document Good Faith Efforts to meet the established participation goal(s). Waiver Guidance along with the applicable forms, is provided in the solicitation package.
Minority Business Enterprise (MBE) Forms – *Attachment D Series*
Veteran-Owned Minority Business Enterprise (VSBE) Forms - *Attachment E Series*

At the time you begin reviewing the waiver request, the bid/proposal should have been determined to be responsive or reasonably susceptible of being selected for award, respectively, through the validation of the Utilization Affidavit and Prime/Subcontractor Participation Schedule(s) submitted by the bidder/offeror. (If this affidavit was not submitted, the bid/proposal should have already been deemed non-responsive or not reasonably susceptible of being selected for award, respectively.)

https://procurement.maryland.gov/wp-content/uploads/sites/12/2022/11/BP-MBE_VSBE-Waiver-Guidance-v1-10.17.2022.pdf

MBE COMPLIANCE REMINDERS

718 PAYMENT REPORT

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

- When reporting we have noted that many agencies are utilizing payment reports to report awards
- Your PCHL718 (MBE Prime Voucher Payments made from BPO/PO) CANNOT be used to compile data to report AWARDS
- This report should only be used to report payments on PO/BPOs

REPORTING STATEWIDE CONTRACTS

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

- A reminder that Statewide contracts should not be reported within AWARDS they should only be reported within PAYMENTS
- DGS is responsible for reporting the AWARD of a statewide contract and Agencies are responsible for reporting the PAYMENTS made on the statewide contract

SUBCONTRACT AGREEMENTS

- Subcontract Agreements are now required Per COMAR 21.11.03.10

(2) An MBE subcontractor project participation statement shall be furnished, signed by the bidder or offeror and each MBE listed in the MBE participation schedule, which includes:

(a) A statement of intent to enter into a subcontract agreement between the apparent successful bidder or offeror and each proposed MBE subcontractor at the time the State contract is awarded to the apparent successful bidder or offeror;

(b) A copy of each subcontract agreement between the apparent successful bidder or offeror and each proposed MBE subcontractor, that the apparent successful bidder or offeror and each proposed MBE subcontractor intend to enter into contingent upon the State's contract award to the apparent successful bidder or offeror, containing all necessary terms, including pricing, required for the MBE to perform its proposed work and for the apparent successful bidder or offeror to pay the MBE for its work during the contract term; and

(c) The amount and type of bonds required of MBE subcontractors, if any.

REVIEW OF SUBCONTRACT AGREEMENTS

- Per COMAR 21.11.03.10
- (6) The procuring agency shall review the documentation submitted under §B(2)—(5) of this regulation and confirm in writing that the submitted documents meet the requirements of this regulation, including verifying that all MBE subcontract agreements contain necessary terms, prior to any State contract award with MBE subcontractor participation.
- (2) Upon review of the documentation submitted under §B of this regulation, the procurement agency shall make a finding whether the apparent successful bidder or offeror has complied in good faith with the outreach efforts required under Regulation .09C(2)(a)—(e) of this chapter. If the procurement agency finds that the apparent successful bidder or offeror has not complied in good faith, the agency may require the apparent successful bidder or offeror to renegotiate any MBE subcontract agreement with a proposed MBE to attempt to meet compliance, without altering the MBE's proposed participation included in the MBE utilization affidavit or MBE participation schedule. Any renegotiated MBE subcontract agreement shall be reviewed and approved by the procurement agency for compliance prior to any State contract award to the apparent successful bidder or offeror. If the procurement agency finds that the apparent successful bidder or offeror has complied in good faith, the agency may not require the the apparent successful bidder or offeror to renegotiate any subcontract in order to achieve a different result.

THINGS TO NOTE ABOUT SUB AGREEMENTS:

- MBE D3 Forms now require a Subcontractor Agreement with the recommended awardee
- Agencies should rely on their legal counsel when seeking guidance on the terms of a Subcontractor Agreement
- Subcontractor Agreement Guidance will be coming soon for more clear guidelines

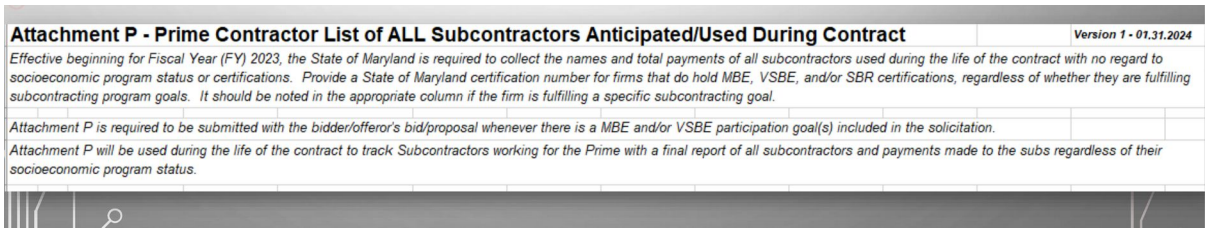
LIAISONS ROLE IN THE REVIEW PROCESS OF SUB AGREEMENTS

- Liaisons will work with the Procurement Office to ensure that the Sub agreement is sufficient and has the minimum requirements
- Example of some terms within an agreement:
    - Pricing & Payment Terms
        - How much will be paid out?

- How often will it be paid out?
- Payment terms should not conflict with Prompt Payment requirements

RESOURCE TO AID IN THE COLLECTION OF COMPLIANCE ASSESSMENT DATA

- Office of State Procurement provided a great resource in the January 2024 SPAG Meeting!
- Attachment P-Prime Contractor List of ALL subcontractors
- If you have any questions about this resource, contact the Office of State Procurement directly



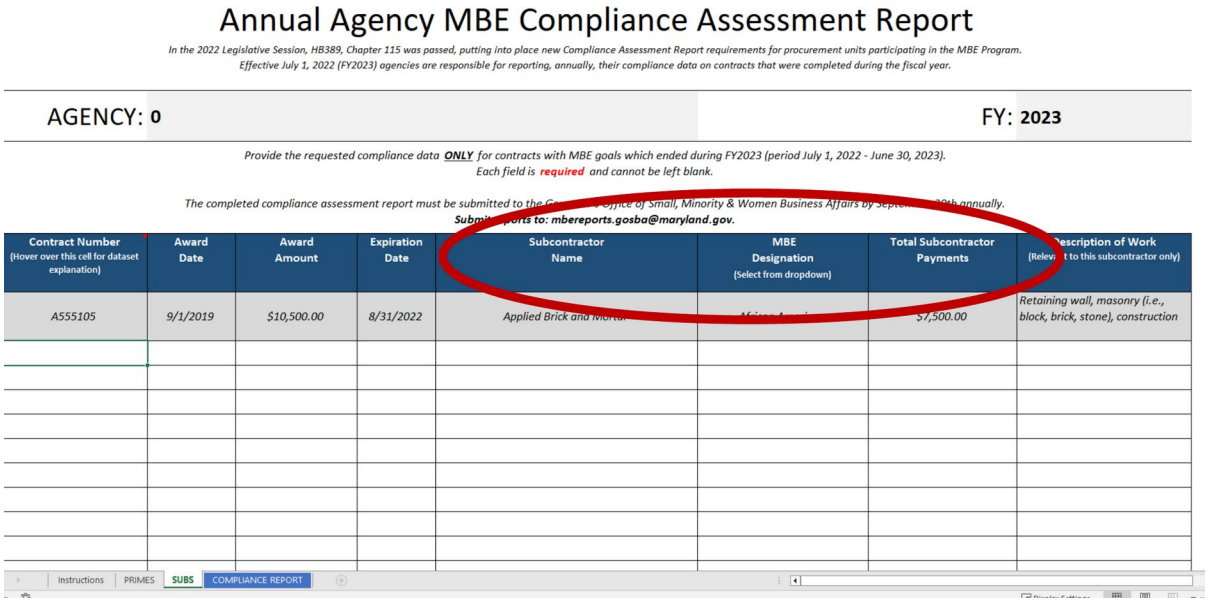
Attachment P - Prime Contractor List of ALL Subcontractors Anticipated/Used During Contract *Version 1 - 01.31.2024*

Effective beginning for Fiscal Year (FY) 2023, the State of Maryland is required to collect the names and total payments of all subcontractors used during the life of the contract with no regard to socioeconomic program status or certifications. Provide a State of Maryland certification number for firms that do hold MBE, VSBE, and/or SBR certifications, regardless of whether they are fulfilling subcontracting program goals. It should be noted in the appropriate column if the firm is fulfilling a specific subcontracting goal.

Attachment P is required to be submitted with the bidder/offeror's bid/proposal whenever there is a MBE and/or VSBE participation goal(s) included in the solicitation.

Attachment P will be used during the life of the contract to track Subcontractors working for the Prime with a final report of all subcontractors and payments made to the subs regardless of their socioeconomic program status.

COMPLIANCE ASSESMENT REQUIRES DETAILED PRIME AND SUB DATA



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.

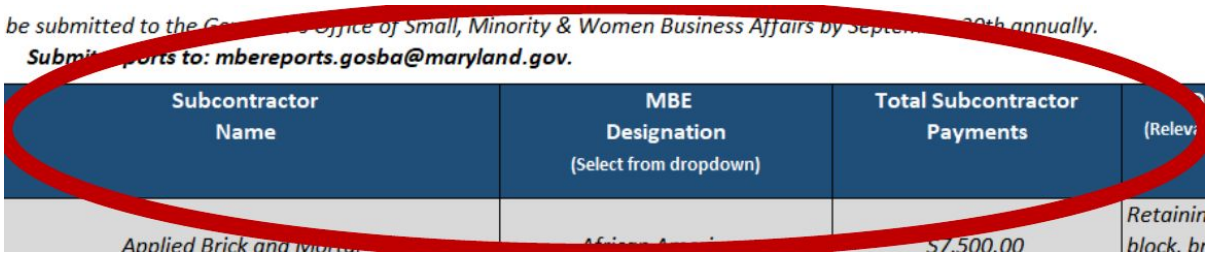
AGENCY: 0 FY: 2023

*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)
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

Instructions | PRIMES | SUBS | COMPLIANCE REPORT



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

Subcontractor Name	MBE Designation (Select from dropdown)	Total Subcontractor Payments	(Relevant
Applied Brick and Mortar	African American	$7,500.00	Retaining block, br

AS ALWAYS, IF YOU HAVE QUESTIONS AFTER TODAY'S TRAINING, PLEASE CONTACT: KAREN REYES KAREN.REYES@MARYLAND.GOV 410-697-9608 443-346-0630

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

TRAINING IS SCHEDULED TO RESUME AT 12PM



VSBE PROGRAM

PRESENTED BY DANIELLE N. DAVIS

VSBE COMPLIANCE MANAGER

Combined Liaison Training Program

February 5, 2024

VSBE Program

February 15, 2024

VSBE Training Agenda

- VSBE Liaison Responsibilities
- VSBE Compliance
- VSBE Certification

- Best Practices
- VSBE Outreach
- FY23 Annual VSBE Report Findings
- VSBE Updates

.05 VSBE Liaison The head of each procurement agency shall designate an employee to be a VSBE liaison officer in the administration of that agency’s VSBE Program. The VSBE liaison officer shall be a high-level employee reporting directly to a Secretary, Deputy Secretary, or head of a procurement agency. The VSBE liaison officer is responsible for coordinating agency outreach efforts to the veteran business community, reviewing agency contracting procedures to ensure compliance with this chapter, assisting in the resolution of contracting issues, and for submitting required VSBE Program reports or information.

https://dsd.maryland.gov/regulations/Pages/21.11.14.05.aspx

VSBE COMAR 21.11.14.05 .05 VSBE Liaison The head of each procurement agency shall designate an employee to be a VSBE

VSBE COMAR 21.11.14.05

VSBE Liaison Compliance

.11 Compliance. 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.

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

VSBE COMAR 21.11.14.11 .11 Compliance. To ensure compliance with VSBE subcontract participation goals, the procurement agency shall verify that the VSBEs

VSBE COMAR 21.11.14.11

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

VSBE COMAR 21.11.14.09 Waivers D. When a waiver is granted, except waivers under §C of this

VSBE COMAR 21.11.14.09

https://procurement.mar yland.gov/wp-content/uploads/sites/12 /2022/11/BP-MBE_VSBE-Waiver-Guidance-v1-10.17.2022.pdf

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

OFFICE OF STATE PROCUREMENT
EST. 2019

MBE & VSBE Goal Waiver Guidance
Good Faith Effort Review & Determination

I. OVERVIEW

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Bidders/Offers who make a waiver request must submit the appropriate forms with the bid/proposal package and fully document Good Faith Efforts to meet the established participation goal(s). Waiver Guidance along with the applicable forms, is provided in the solicitation package.
Minority Business Enterprise (MBE) Forms – *Attachment D Series*
Veteran-Owned Minority Business Enterprise (VSBE) Forms - *Attachment E Series*

.07 Procurement Solicitations C. VSBE Subcontracting Provisions. The veteran-owned firm shall be a certified VSBE at the time of submission of the bid or proposal. https://dsd.maryland.gov/regulations/Pages/21.11.14.07.aspx

VSBE COMAR 21.11.14.07 .07 Procurement Solicitations

VSBE COMAR 21.11.14.07

https://procurement.maryland.gov/wp-content/uploads/sites/12/2018/04/AttachmentE-VSBEForms.pdf

Attachment E. Veteran-Owned Small Business Enterprise (VSBE) Forms

E-1
VSBE UTILIZATION AFFIDAVIT AND PRIME/SUBCONTRACTOR PARTICIPATION SCHEDULE

(Submit with Bid/Proposal)

This document **MUST BE** included with the Bid/Proposal. If the Bidder/Offeror fails to complete and submit this form with the Bid/Proposal, the procurement officer may determine that the Bid/Proposal is not responsive/not reasonably susceptible of being selected for award.

In conjunction with the Bid/Proposal submitted in response to Solicitation No._____, I affirm the following:

1. **VSBE Participation (PLEASE CHECK ONLY ONE)**

☐ I acknowledge and intend to meet IN FULL the overall verified VSBE participation goal of __%. Therefore, I will not be seeking a waiver.

OR

☐ After making good faith outreach efforts prior to making this submission, I conclude that I am unable to achieve the VSBE participation goal. I hereby request a waiver, in whole or in part, of the overall goal. Within 10 Business Days of receiving notice that our firm is the apparent awardee, I will submit all required waiver documentation in accordance with COMAR 21.11.14.09. If this request is for a partial waiver, I acknowledge that I must complete Attachment E-1A (VSBE Subcontractor Participation Schedule) and Attachment E-1B (Signature Page) for the portion of the VSBE goal that I intend to meet. I acknowledge that by checking this box and requesting a full waiver of the stated goal, I must complete Attachment E-1B (Signature Page) in order to be considered for award.

Additional VSBE Documentation

I understand that if I am notified that I am the apparent awardee, I must submit the following additional documentation within 10 days of receiving notice of the apparent award or from the date of conditional award (in accordance with COMAR 21.11.14.08), whichever is earlier.

(a) VSBE Waiver Request Affirmation and Good Faith Efforts Documentation to Support Waiver Request (Attachment E-1E)

(b) VSBE Outreach Efforts Compliance Statement (Attachment E-2); and

(c) Any other documentation, including waiver documentation, if applicable, required by the Procurement Officer to ascertain Bidder/Offeror responsibility in connection with the VSBE participation goal.

RECAP of VSBE Compliance

• Coordinate Outreach to veteran business community • Review agency contracting procedures to ensure compliance • Assist with resolution of contracting issues • Submit required VSBE reports or information

• Ensure compliance with VSBE subcontracting participation goals • Verify VSBE's listed in the participation schedule and actually performing work and receiving compensation • Submit any granted VSBE Waivers

Certifications

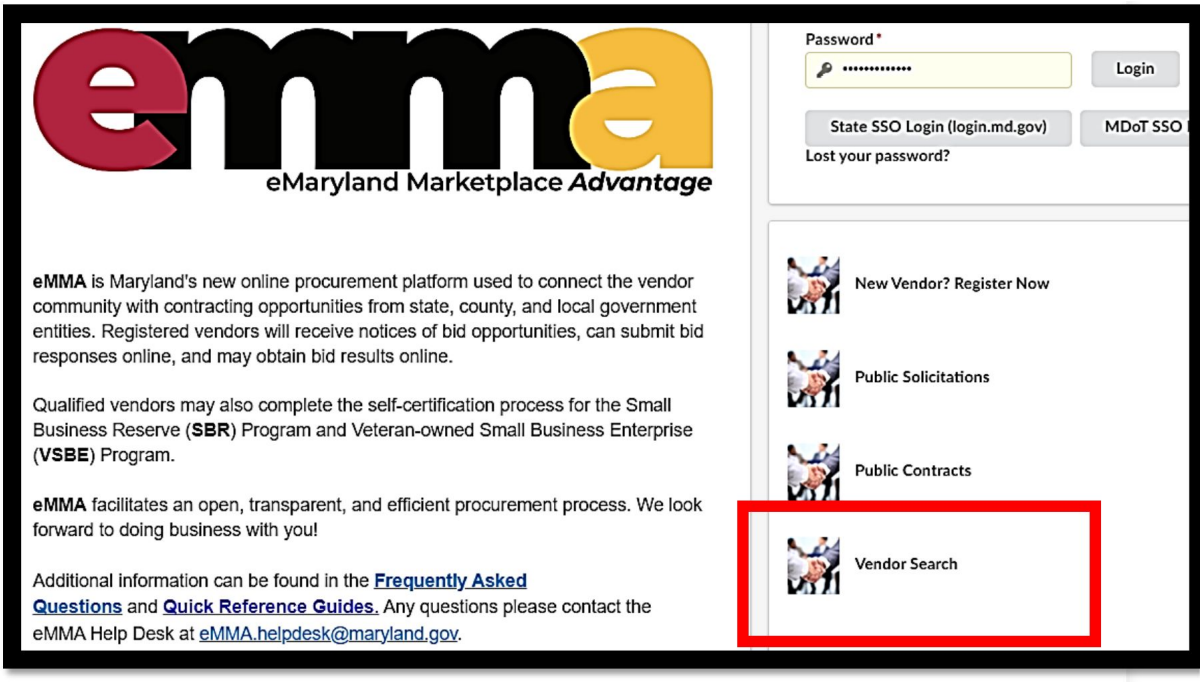
eMMA is the only platform to verify vendors in the VSBE Program!

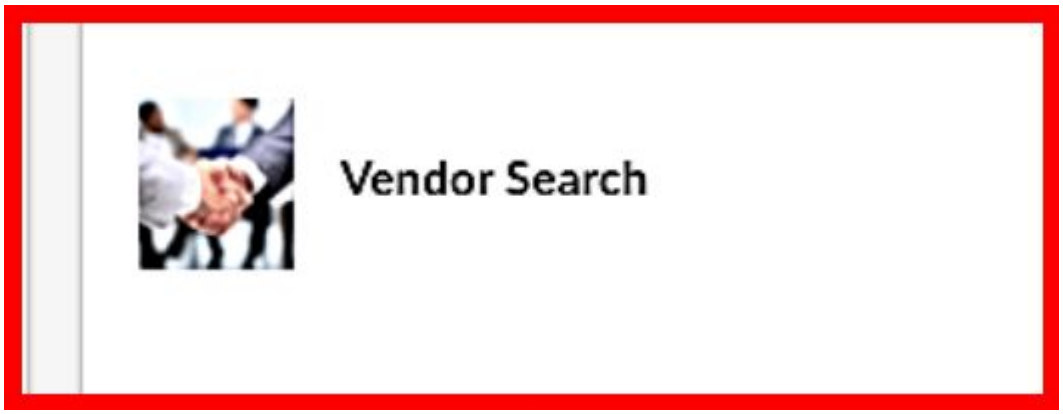
The VSBE Certification process takes place in eMMA for vendors

As of today, there are 752 certified VSBEs in the Public Vendor Search in eMMA!

Best Practice to Verify a VSBE

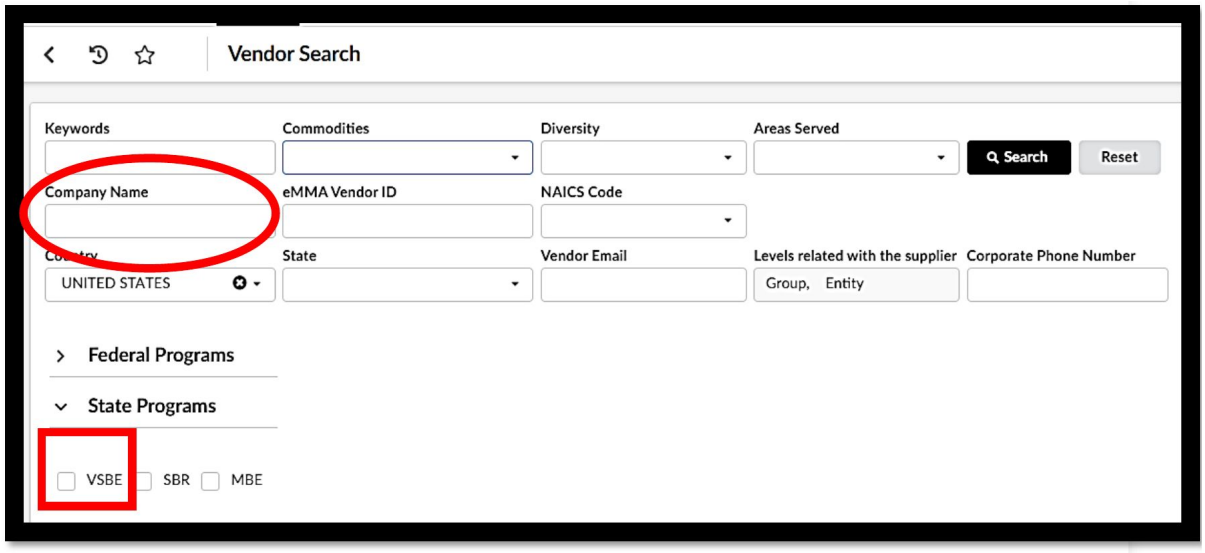
Step 1 - Go to https://emma.mary land.gov/Step 2 – Click on Vendor Search

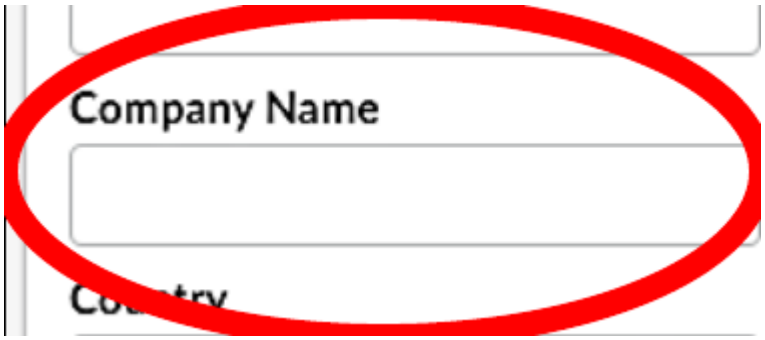




Best Practice to Verify a VSBE

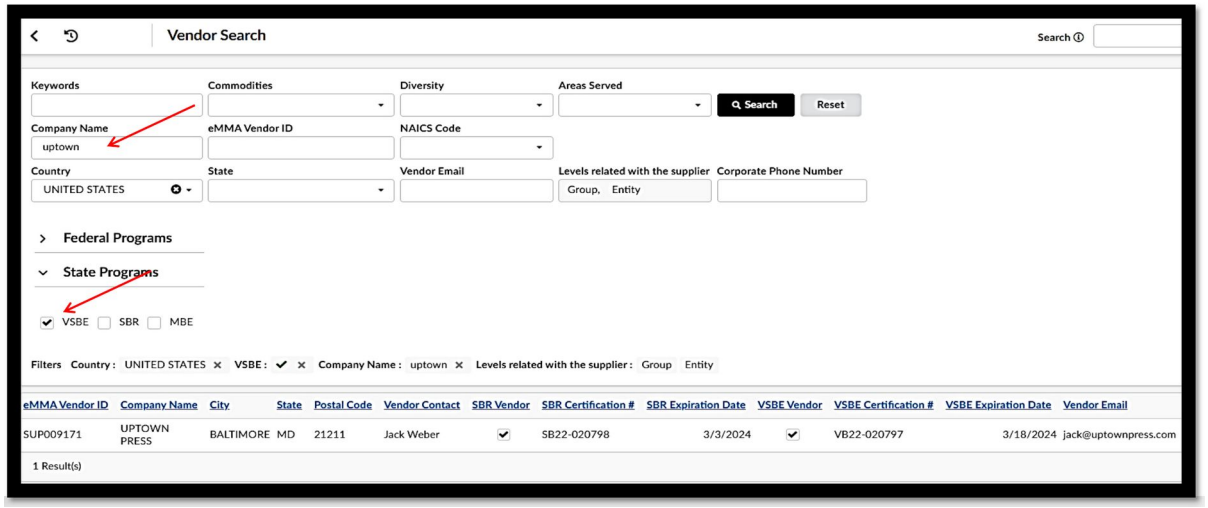
Step 3 – Place VSBE Company Name in Search Field AND check the VSBE Vendor flag *IMPORTANT NOTE* If you use the Company Name & Keywords Field, that will only yield vendors with that keyword in the name of the business.





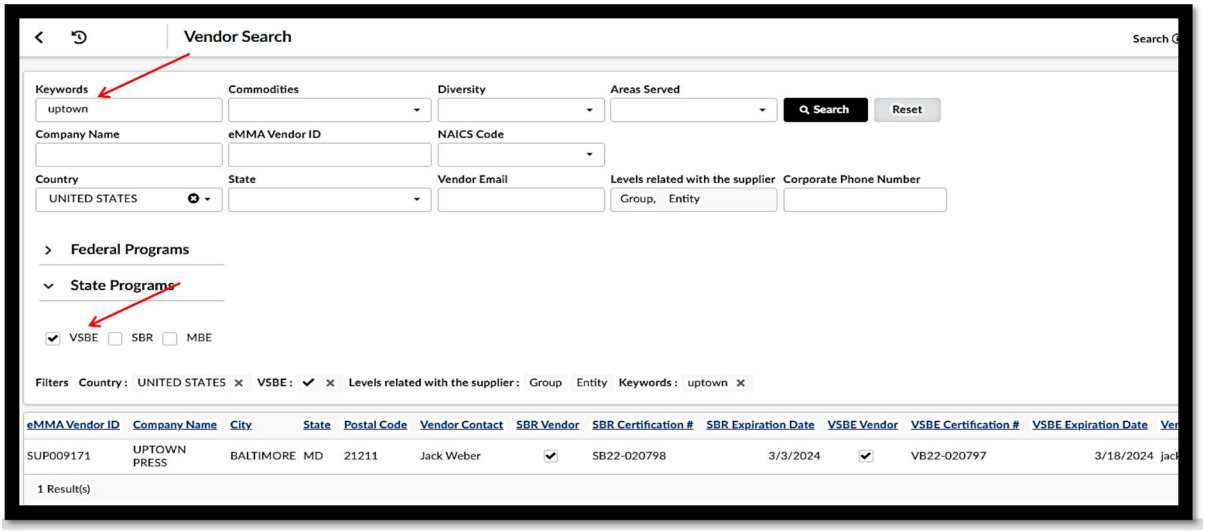
Best Practice to Verify a VSBE

Example: Uptown in Company Name



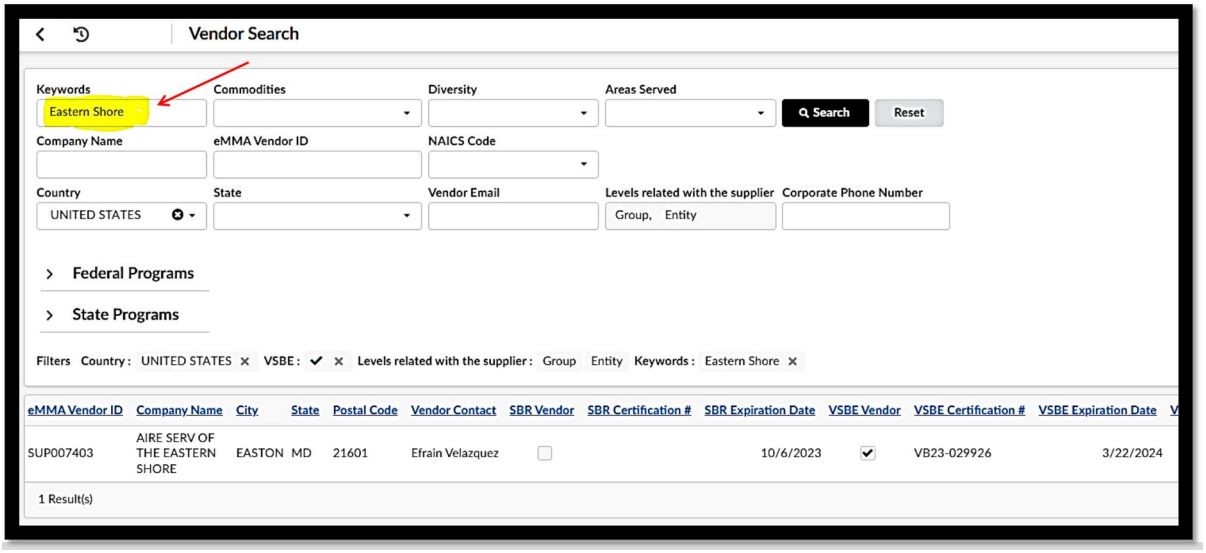
Best Practice to Verify a VSBE

Example: Uptown in Keywords Field



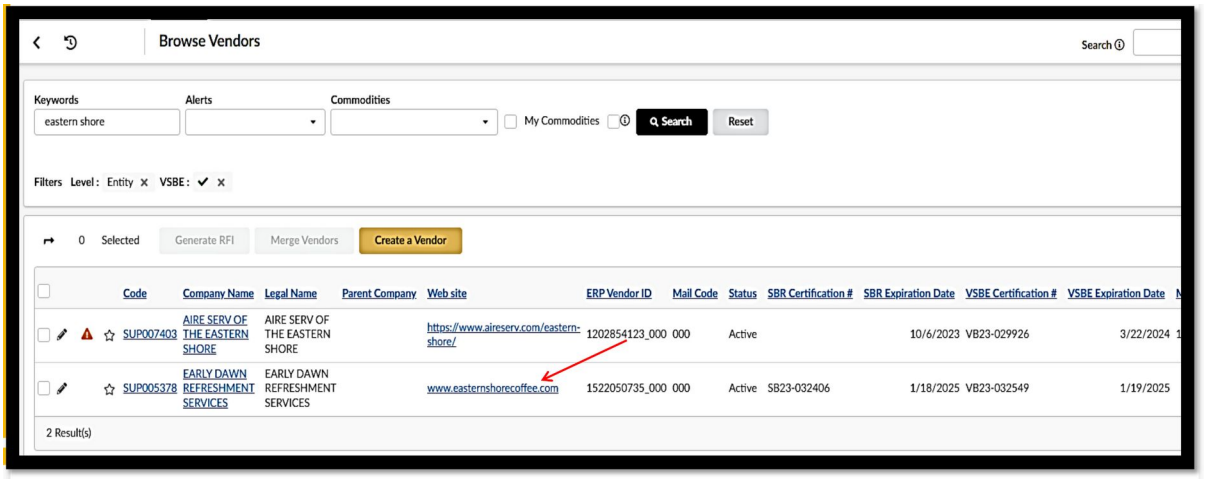
Always Exceptions to the Rule

Example: Looking for Eastern Shore Coffee & Water



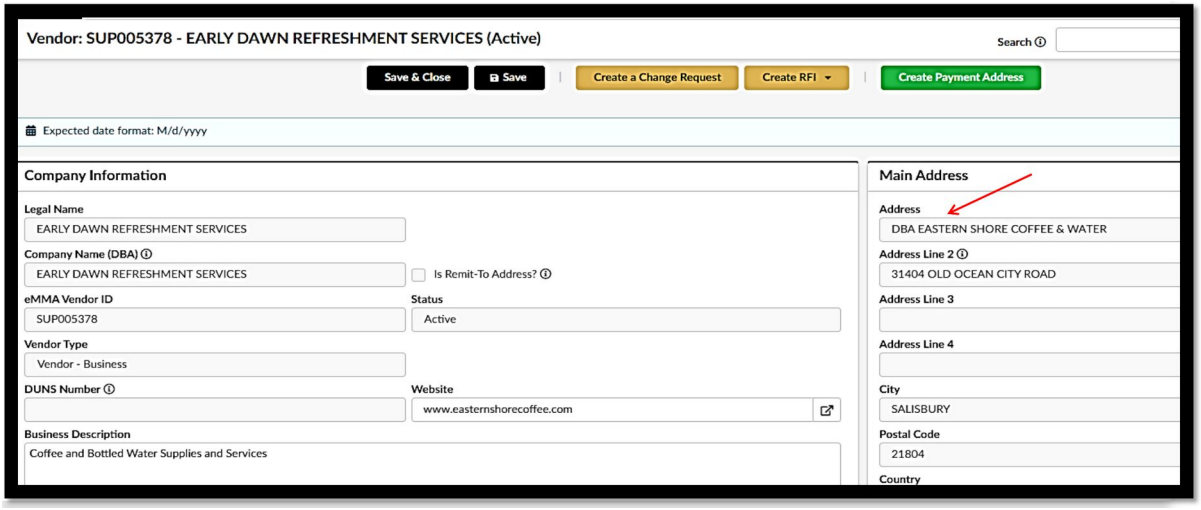
Always Exceptions to the Rule

Example: Looking for Eastern Shore Coffee & Water



Always Exceptions to the Rule

Example: Looking for Eastern Shore Coffee & Water


Vendor: SUP005378 - EARLY DAWN REFRESHMENT SERVICES (Active)
Search
Save & Close
Save
Create a Change Request
Create RFI
Create Payment Address
Expected date format: M/d/yyyy
Company Information
Legal Name
EARLY DAWN REFRESHMENT SERVICES
Company Name (DBA)
EARLY DAWN REFRESHMENT SERVICES
Is Remit-To Address?
eMMA Vendor ID
SUP005378
Status
Active
Vendor Type
Vendor - Business
DUNS Number
Website
www.easternshorecoffee.com
Business Description
Coffee and Bottled Water Supplies and Services
Main Address
Address
DBA EASTERN SHORE COFFEE & WATER
Address Line 2
31404 OLD OCEAN CITY ROAD
Address Line 3
Address Line 4
City
SALISBURY
Postal Code
21804
Country

VSBE Program Guide

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

This helpful internal resource was created for Liaisons and procurement officers to understand the basics regarding the VSBE program.

It is located under the VSBE Toolkit.

VSBE Program Guide This helpful internal resource was created for Liaisons and procurement officers to understand the basics regarding the VSBE program.

Veteran Firms NOT Certified

- Oakland Consulting Group
- Techno Rescue
- Express Services/Express Personal

IF you have any of these on contracts, they ARE NOT currently a certified VSBE





RECAP of VSBE Certification

• We are in this TOGETHER • It is strongly encouraged for the Liaison to have Internal eMMA access, it yields more conclusive results • If you would like assistance, I am here to help

• VSBE Certification directly effects participation goals and verifying VSBEs which will also lead to reviewing them being listed in the participation schedule, performing work and receiving compensation.

Outreach



2023 VSBE APPRECIATION BREAKFAST


MARIA MAR
SPECIAL SECRI
Maryland
GOVERNOR'S OFFICE
OF SMALL, MINORITY & WOMEN
BUSINESS AFFAIRS
Live!
CASINO+HOTEL


Thank you

VSBE Outreach

Maryland has over 50,000 veteran-owned small businesses that gross over $20 million in sales and employ thousands.

Only together can we reach these veterans that do not know about the VSBE Program!

https://veteran.com/military-calendar-holidays-events-observances/

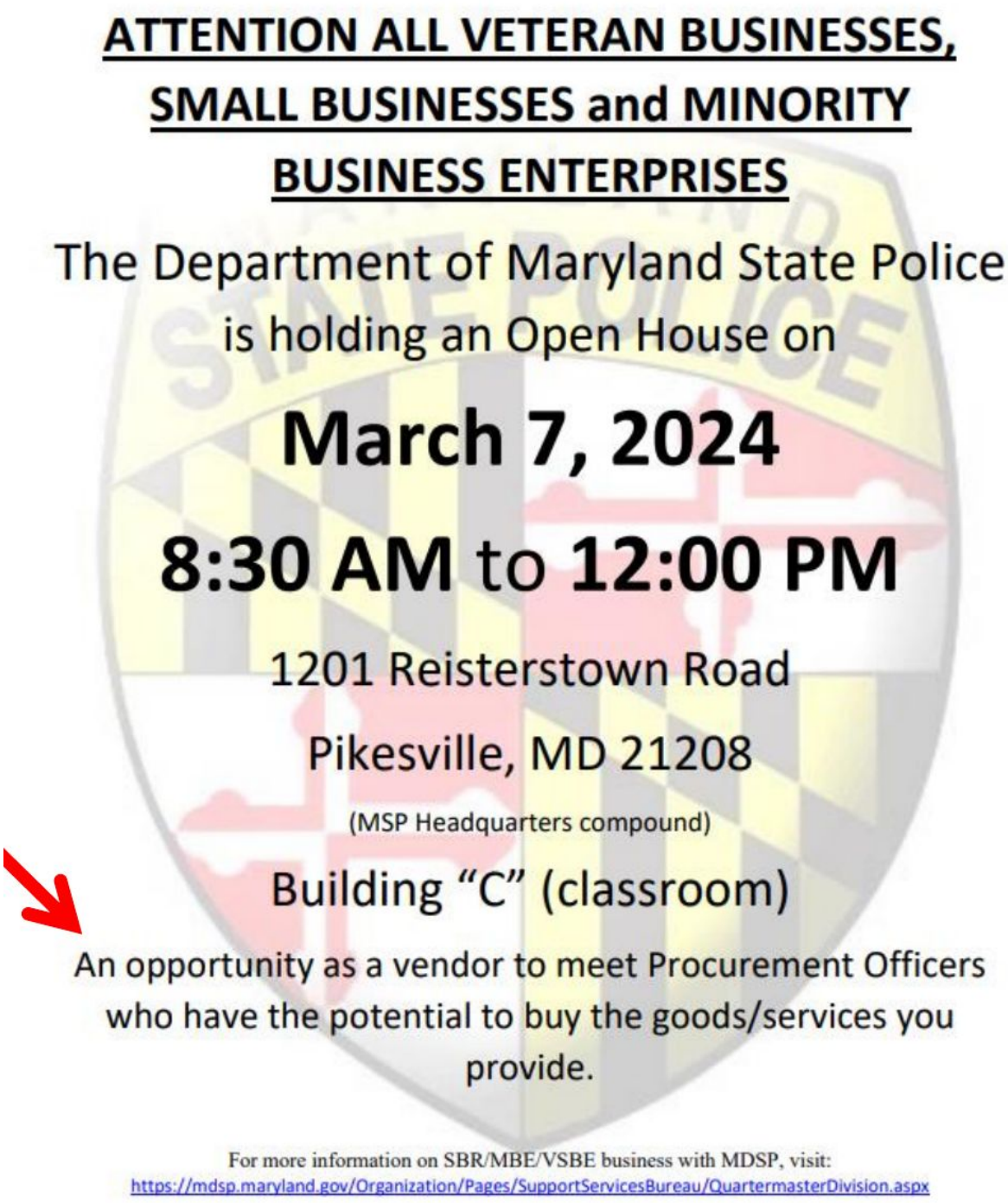


Best Practice of VSBE Outreach

- Step 1 – Collaborate
- Step 2 – Secure a Location & Date
- Step 3 – Give advanced notice and advertise
- Step 4 – Purpose well defined

*Please make sure to notify GOSBA

so we can assist in helping to promote*



Best Practice of VSBE Outreach

Communication

- All agencies & departments need to check their websites to ensure VSBE Program information, directing a vendor to our VSBE Webpage
- All language should be consistent - The veteran-owned firm shall be a certified VSBE at the time of submission of the bid or proposal. COMAR 21.11.14.07. This should be said during the pre-bid meetings also

Ideas of VSBE Outreach

Tap into the community o Chamber of Commerce/Economic Development Centers o Veteran Associations/American Legion/VFW o Foster an environment of help In-Person Certification Assistance o If you have a facility that can foster 25+ with a computer lab/access

Make sure to count GOSBA event related participation: o RSG o VSBE Events o Other Events Your Team may be involved in (not just the Liaison)

2024 VSBE Outreach

- May – Military Appreciation Breakfast
- June – Women Veteran Conference
- October – VSBE Appreciation Breakfast
- November – TBA

VSBE FY23 REPORT FINDINGS



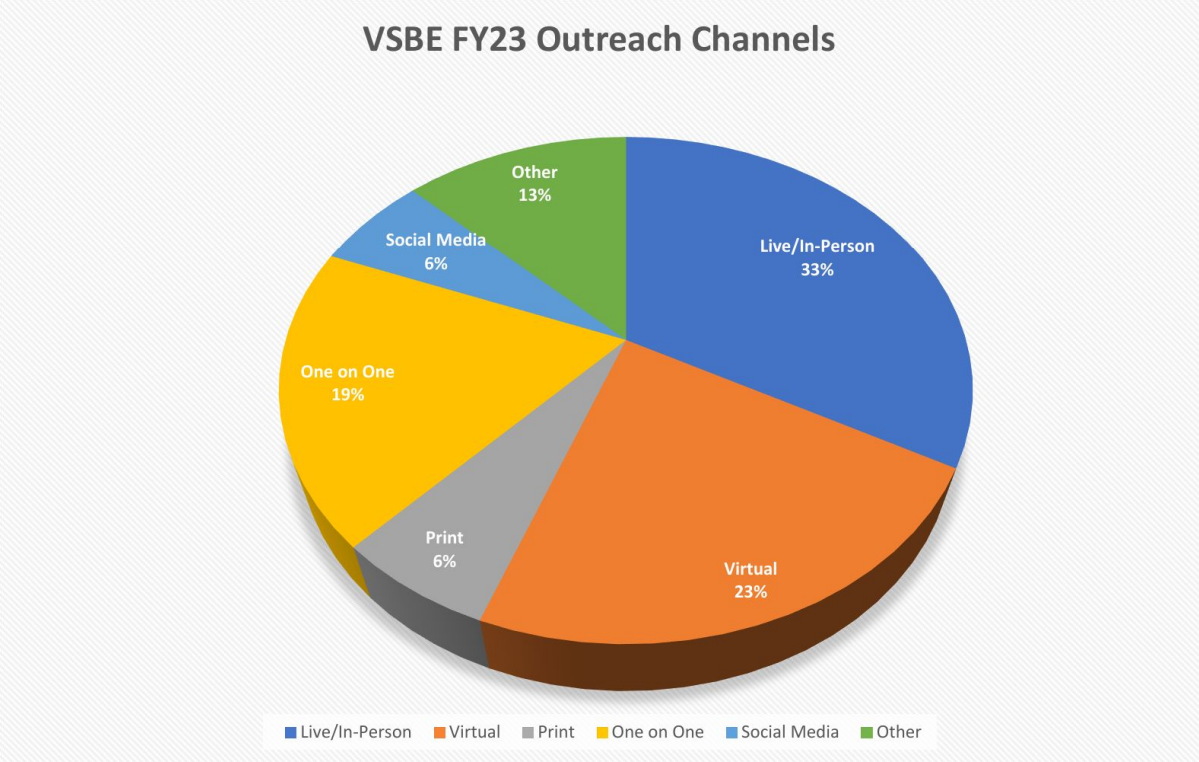
FY23 VSBE Program Performance

1. $35.6 million was made in Awards to VSBEs 2. $141 Million was made in Payments to VSBEs 3. 322 VSBEs were named as prime or subcontractors 4. Only 9 agencies/departments meet the minimum 1% VSBE goal 5. 22 Agencies/Departments made $0 in awards to any VSBEs 6. Overall VSBE statewide participation rate was 0.76 percent 7. Saw an 18% growth in the VSBE database

FY23 VSBE Program Outreach Results

1. Six agencies hosted their own veteran outreach events while 18 units did not host or participate in

ANY. 2. A combined 91 events were attended or hosted to the veteran community 3. Top 3 communication channels across all state agencies/departments were In-Person, Virtual and One on One.



Other 13% Social Media 6%

FY23 VSBE Program Outreach Results

Most Common Comment Themes: 1. Commodities and services that there are very few VSBEs certified in those categories 2. Ramping up outreach efforts in FY24/Hiring new staff or had vacancies 3. Does not have a defined outreach strategy toward the veteran community

RECAP of VSBE FY23 Annual Data

• Awards to VSBE vendors in FY2023 totaled $35.6 million, a 32 percent decrease from $52 million in FY2022 • Decrease comes from two major factors: • Exclusive VSBE Certification platform moved to eMMA July 2023 • Change of Federal Certification Platform

• VSBE Certification directly effects participation goals and verifying VSBEs which will also lead to reviewing them being listed in the participation schedule, performing work and receiving compensation. • The data emphasizes the need for increased outreach efforts, particularly among agencies that reported no VSBE awards.

VSBE Regulation Updates

Primary Regulation Language Updates

1. Change all current references of “Directory” to “Database” 2. Change all current references of “VetBiz” to “U.S. Small Business Administration” 3. Update “Verification” to “Certification” where needed

21.11.14.02

.02 Definitions.

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

B. Terms Defined.

(1) "Certification" means a verified veteran who meets the requirements outlined in §B(6) of this regulation and who registers and applies for the Veteran-Owned Small Business Enterprise Program through the State's Directory. To maintain certification as a VSBE, a veteran-owned business shall renew certification every year, no later than on the anniversary date of the initial certification.

(2) "Directory" means the State's internet-based electronic procurement system.

(3) "Procurement agency" means units subject to control of State Finance and Procurement Article, Division II, Annotated Code of Maryland.

(4) "Verification" means a business that is verified by the Maryland Department of Veterans Affairs or United States Department of Veterans Affairs Vets First Verification Program (VetBiz) as being owned by a veteran.

(5) "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.

(6) "Veteran-owned small business enterprise (VSBE)" means a for-profit business that:

(a) Meets the size standards adopted by the United States 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.

Primary Regulation Language Updates

Purpose Update language to align with other programs and provide additional depth and context such as:

04 Procurement Agency Responsibility.

A.—D. (text unchanged).

E. Before awarding a contract that includes a VSBE goal, the procurement officer shall use the Database to verify that the VSBE vendor named to fulfill an established VSBE contract goal is certified by the Governor's Office of Small, Minority, and Women Business Affairs (GOSBA).

[(4)] *(8)* "Verification" means a business *owner* that is verified by the Maryland Department of Veterans Affairs or [United States Department of Veterans Affairs Vets First Verification Program (VetBiz)] *the U.S. Small Business Administration* as [being owned by] a veteran.

B. Terms Defined.

(1)"Certification" means a [verified veteran who meets the requirements outlined in §B(6) of this regulation and who registers and applies for the Veteran-Owned Small Business Enterprise Program through the State's Directory. To maintain certification as a VSBE, a veteran-owned business shall renew certification every year, no later than on the anniversary date of the initial certification.] *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.

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

Primary Regulation Language Updates

Changed the entire Verification section to Certification

.12 [Verification] *Certification*.

General

A. The Governor's Office of Small, Minority, and Women Business Affairs is the office designated to certify, recertify, and decertify VSBEs. A procurement agency may not permit a person to participate in a procurement as a certified VSBE unless this office has certified the business as a veteran-owned small business enterprise.

B. Procedure.

(1) Veteran firms seeking VSBE certification shall register as a vendor in eMaryland Marketplace Advantage (eMMA), submit veteran verification and the VSBE Program application in eMMA. Certification procedures are set forth in COMAR 21.11.14.02.

C. Information Which May Be Requested. GOSBA 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;

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

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

E. Failure of a VSBE to maintain certification in the VSBE Program [program] may not be the sole cause of the termination of the VSBE contractual relationship for the remainder of the term of the contract.

VSBE Compliance FY2025



How can your agency/department can do better with the VSBE Program?

- Comments, emails, help me understand your challenges with this program

SBR PROGRAM

PRESENTED BY TANITA JOHNSON

SBR COMPLIANCE MANAGER

SBR PROGRAM

PRESENTED BY TANITA JOHNSON

SBR COMPLIANCE MANAGER

SBR LIAISON TRAINING

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TRAINING TOPICS:

-SBR Vendor Certification/Verification

-FY2023 Annual Report Data Findings

-Ways to Increase/Meet 15% SBR Goal

SBR LIAISON TRAINING TRAINING TOPICS: -SBR Vendor Certification/Verification -FY2023 Annual Report Data Findings -Ways to Increase/Meet 15% SBR Goal

-SBR Best Practices/Waivers

SMALL BUSINESS RESERVE (SBR) PROGRAM PROVIDES SMALL BUSINESSES THE OPPORTUNITY TO PARTICIPATE AS PRIME CONTRACTORS BY ESTABLISHING A UNIQUE MARKETPLACE WHERE SMALL BUSINESSES COMPETE AGAINST OTHER SMALL BUSINESSES INSTEAD OF LARGER COMPANIES.

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SBR PROGRAM-COMAR

COMAR 21.11.01.06I

I. SBR Liaison Officer… The SBR liaison officer shall be responsible for coordinating the procurement unit's outreach efforts to the small business community, reviewing the unit's contracting procedures to ensure compliance with small business reserve requirements, assisting in the resolution of small business reserve contracting issues, and submitting required small business reserve program reports or information.

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SBR PROGRAM-COMAR

COMAR 21.11.01.06B

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.

https://dsd.maryland.gov/regulations/Pages/21.11.01.06.aspx

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SBR PROGRAM-COMAR

COMAR 21.11.01.06A(2)

A procurement with a total dollar value between $50,000 and $500,000 shall be designated for the small business reserve.

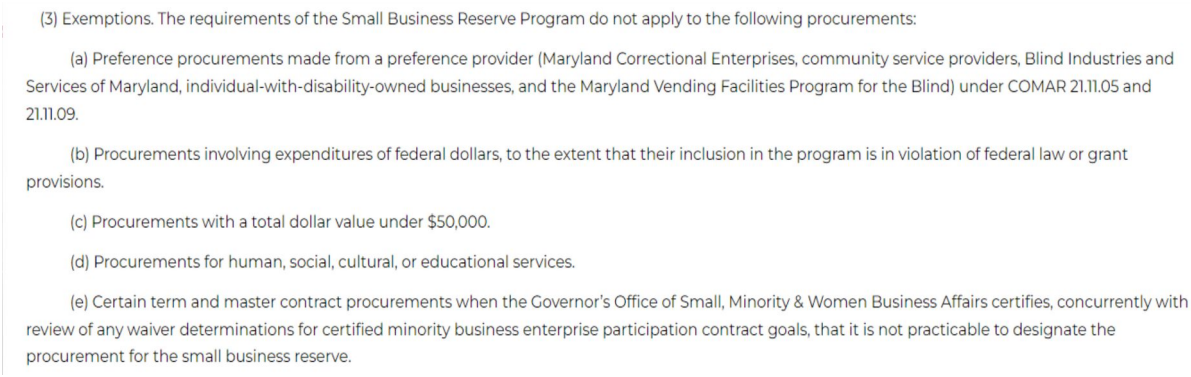
There are certain exemptions-additional information can be found at COMAR 21.11.01.06A(3)(a-e).

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SBR PROGRAM-COMAR

COMAR 21.11.01.06A(3)(a-e) https://dsd.maryland.gov/regulations/Pages/21.11.01.06.aspx

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(3) Exemptions. The requirements of the Small Business Reserve Program do not apply to the following procurements:

(a) Preference procurements made from a preference provider (Maryland Correctional Enterprises, community service providers, Blind Industries and Services of Maryland, individual-with-disability-owned businesses, and the Maryland Vending Facilities Program for the Blind) under COMAR 21.11.05 and 21.11.09.

(b) Procurements involving expenditures of federal dollars, to the extent that their inclusion in the program is in violation of federal law or grant provisions.

(c) Procurements with a total dollar value under $50,000.

(d) Procurements for human, social, cultural, or educational services.

(e) Certain term and master contract procurements when the Governor's Office of Small, Minority & Women Business Affairs certifies, concurrently with review of any waiver determinations for certified minority business enterprise participation contract goals, that it is not practicable to designate the procurement for the small business reserve.

SBR PROGRAM-VENDOR CERTIFICATION

- Over 20% of all open solicitations are designated to SBR certified vendors. Once a solicitation has been designated as "SBR," an award can only be made to a certified SBR vendor.
- We encourage you to encourage vendors to join the SBR Program
- Small business vendors can receive same day SBR certification through eMaryland Marketplace Advantage

(eMMA-emma.maryland.gov)

goMDsmallbiz.maryland.gov

SBR PROGRAM-VENDOR CERTIFICATION

Vendors can reach out to our office for assistance with applying to the program OR you can direct them to the

Quick Reference Guide (QRG)/Vendor Instructions

- gomdsmallbiz.maryland.gov/Pages/sbr-Program.aspx
- eMMA.maryland.gov
- mdprocurement.freshdesk.com

goMDsmallbiz.maryland.gov

SBR PROGRAM-VERIFYING VENDOR CERTIFICATION

Verify SBR Vendors in eMMA

Internal or Public Vendor Search

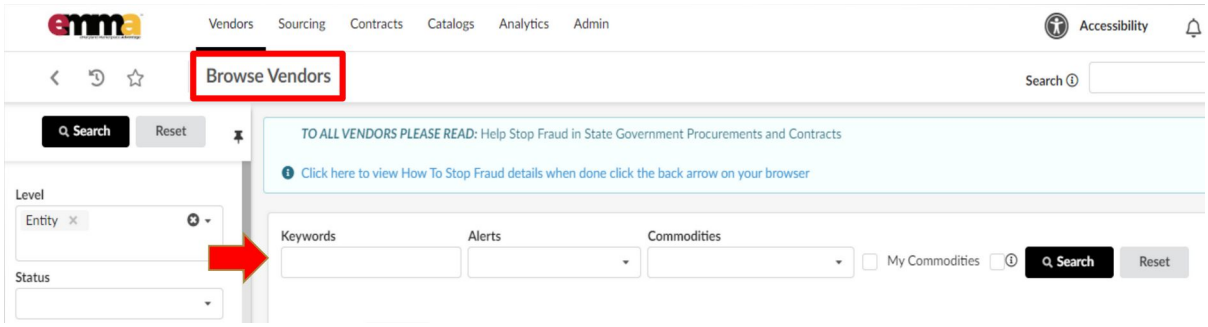
emma.maryland.gov

goMDsmallbiz.maryland.gov

SBR PROGRAM-VERIFYING VENDOR CERTIFICATION

Verify SBR Vendors in eMMA -Internal Vendor Search

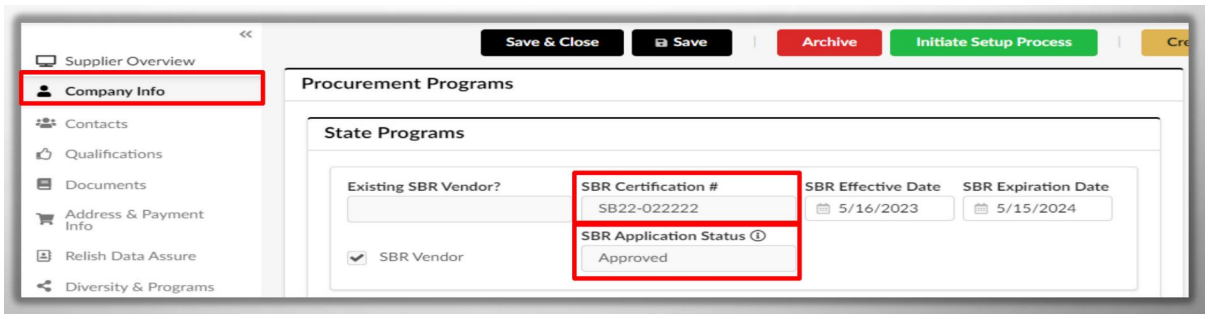
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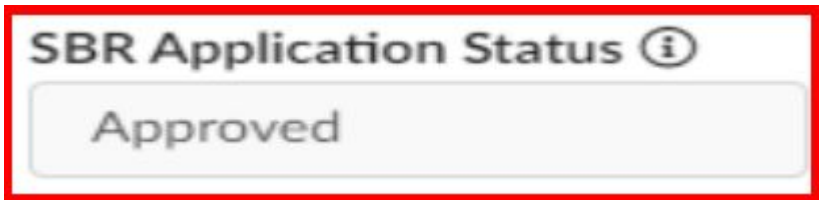
SBR PROGRAM-VERIFYING VENDOR CERTIFICATION

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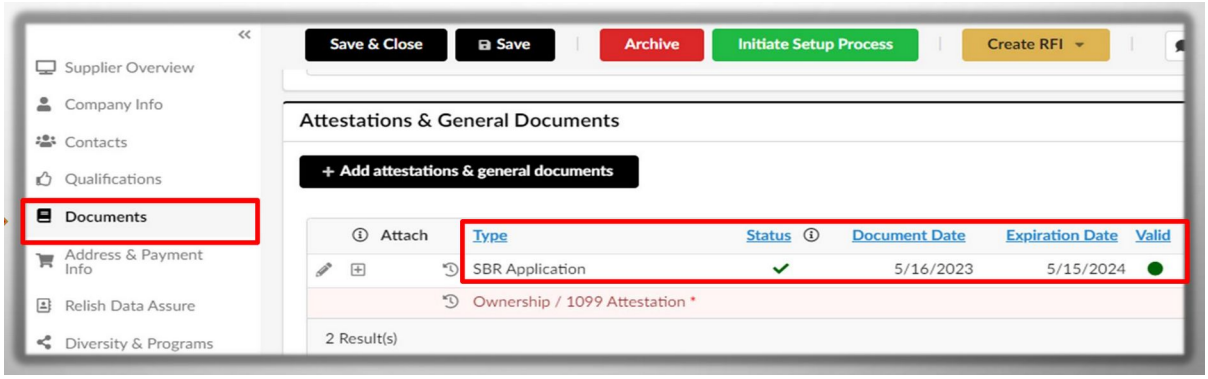




Internal “Browse Vendor” Search- Must locate SBR info in both “Company Info” & “Documents” sections

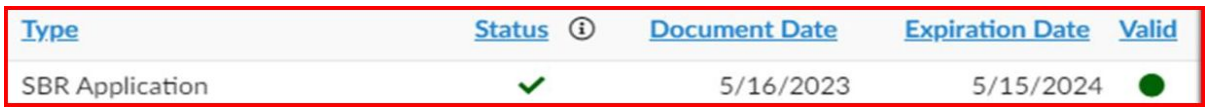


goMDsmallbiz.maryland.gov



Internal “Browse Vendor” Search- Must locate SBR info in both “Company Info” & “Documents” sections



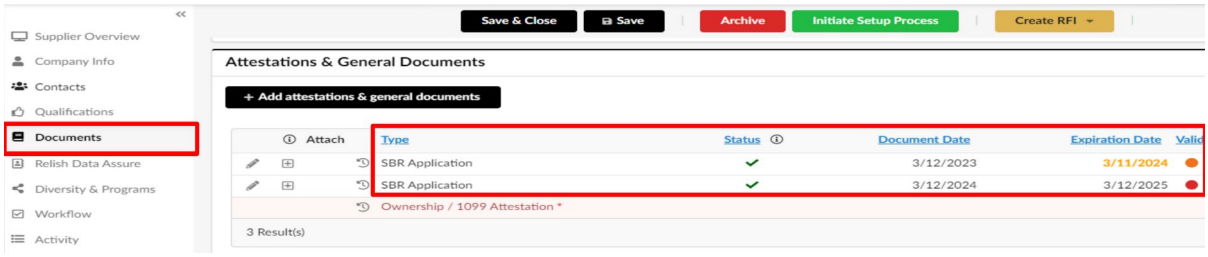


SBR PROGRAM- VERIFYING VENDOR CERTIFICATION

SBR PROGRAM-VERIFYING VENDOR CERTIFICATION

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Internal “Browse Vendor” Search-- Must locate SBR info in both “Company Info” & “Documents” sections

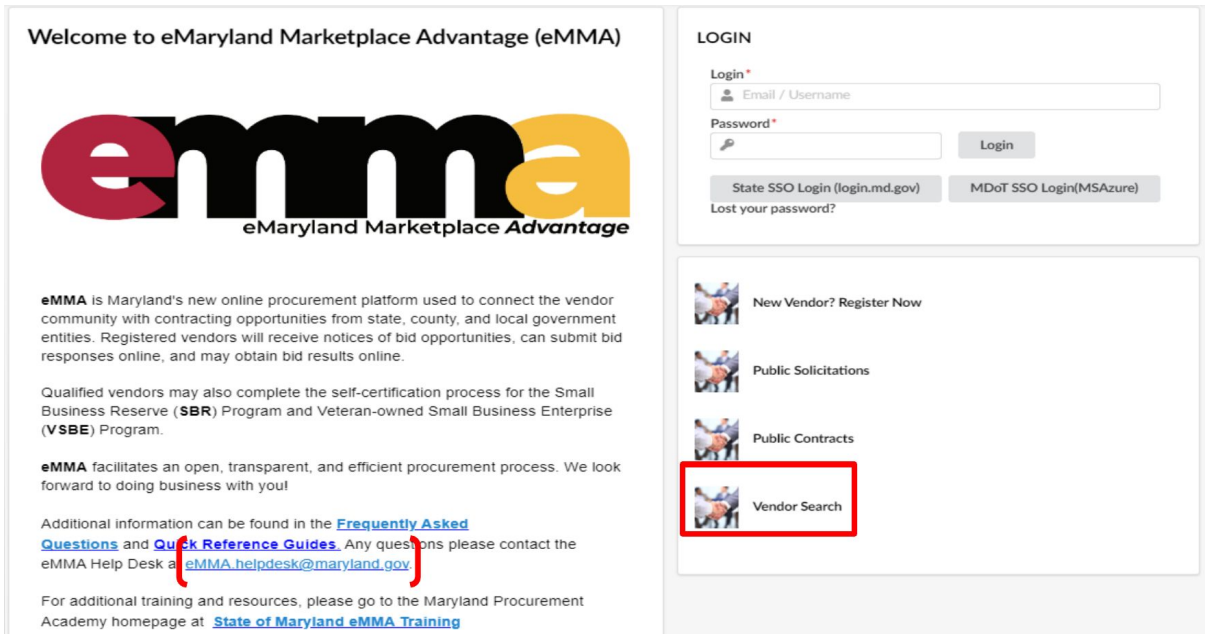


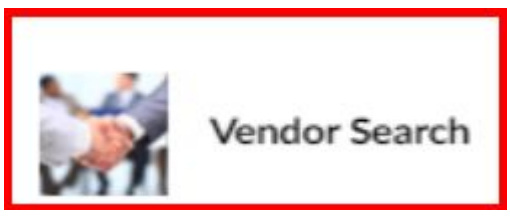


SBR PROGRAM-VERIFYING VENDOR CERTIFICATION

Verify SBR Vendors in eMMA -Public Vendor Search

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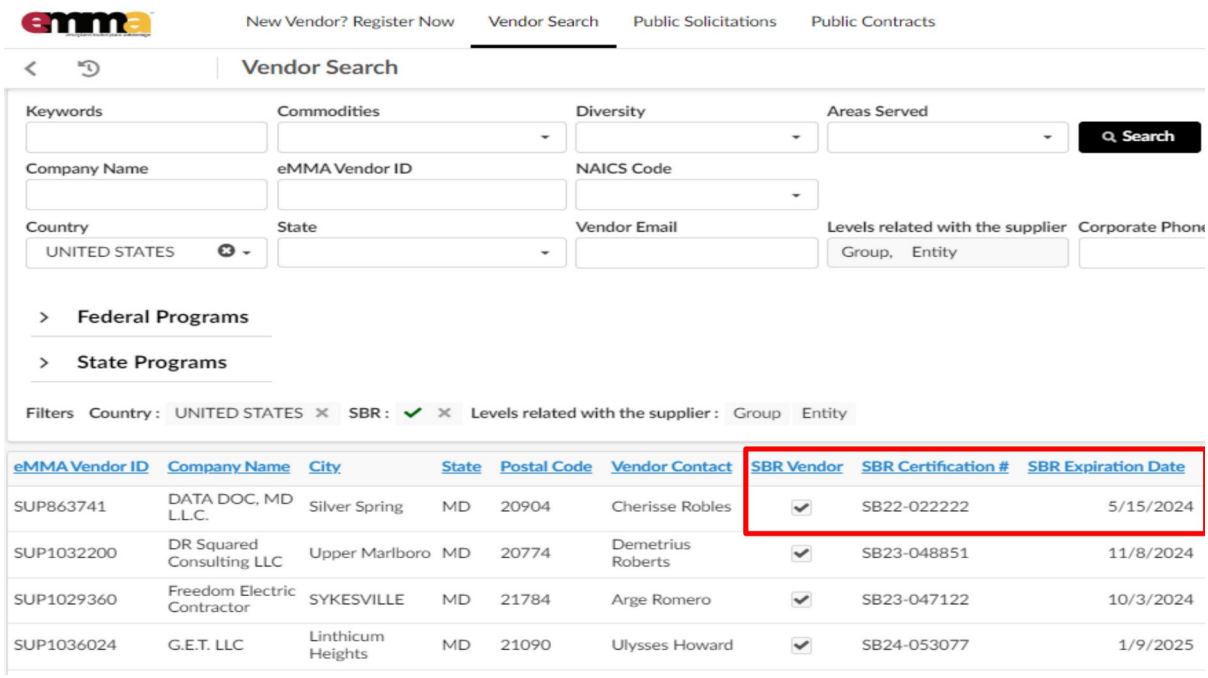


ck Reference Guides. Any quest
eMMA.helpdesk@maryland.gov.

SBR PROGRAM-VERIFYING VENDOR CERTIFICATION

Verify SBR Vendors in eMMA -Public Vendor Search

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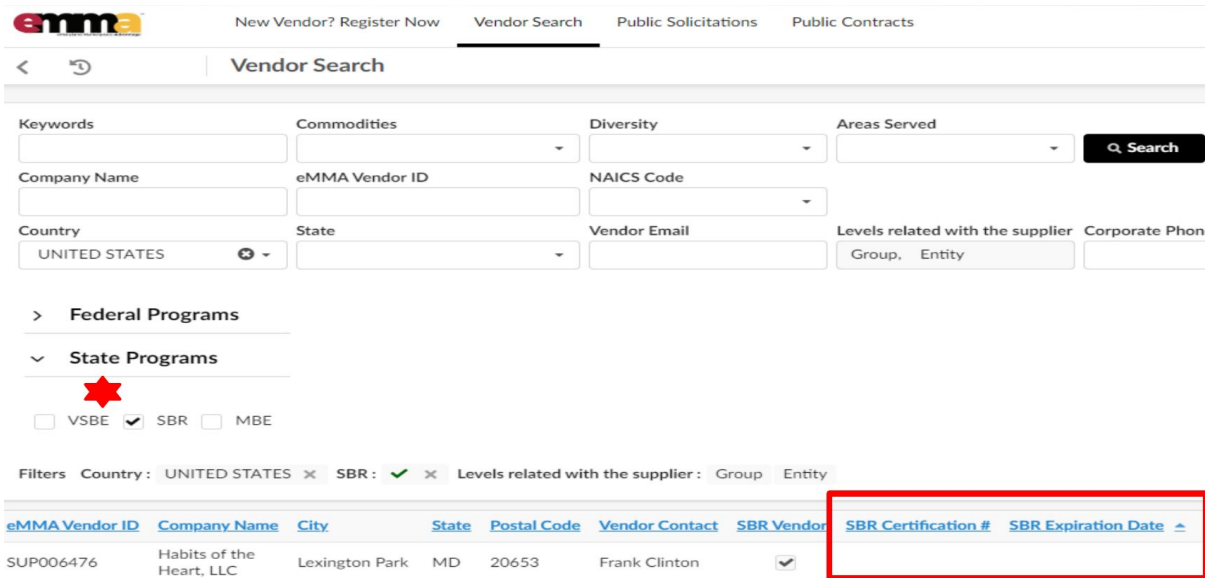




SBR PROGRAM-VERIFYING VENDOR CERTIFICATION

Verify SBR Vendors in eMMA -Public Vendor Search

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SBR PROGRAM-VERIFYING VENDOR CERTIFICATION

CURRENTLY THERE ARE

4400+ SBR CERTIFIED VENDORS

in eMMA

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FY2023 ANNUAL REPORT DATA FINDINGS

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- During FY2023, the SBR vendor numbers increased from 3400 to 3800
- Small amount of agencies met 15% set-aside (less than 10)
- Increased the “Total SBR Payments”

(FY2022-$432 million to FY2023-$600 million)

FY2023 ANNUAL REPORT DATA FINDINGS

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- Non-Designated SBR Spend Increased

(FY2022-$304 million to FY2023-$460 million)

- Designated SBR Spend Increased

(FY2022-$128 million to FY2023-$140 million)

How can we increase the SBR Designated amount?

SBR PROGRAM-WAYS TO INCREASE/MEET THE 15% SBR SET-ASIDE

How are you increasing/meeting the 15% SBR set-aside?

A. Completing the PRG Process & Designating SBR (when applicable)

B. Direct Soliciting SBR Vendors/Small Businesses qualified for SBR Program

C. Hosting/Attending Outreach Events for Small Businesses

D. Reaching out to SBR Vendors with small purchase opportunities

E. Some of the above

F. All of these (Items A-D)

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SBR PROGRAM-WAYS TO INCREASE/MEET THE 15% SBR SET-ASIDE

Completing the Procurement Review Group (PRG) Process

- PRG Process Documents are available on procurement.maryland.gov
- If you are not currently using the PRG, refer to the Worksheet/Guidance Documents and/or ask your agency why it is not included within your process

- We are aiming for the SBR Designated Percentage to significantly increase during FY2024– more SBR Designation should be a focus and will help with the numbers

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SBR PROGRAM-SBR WAIVERS

SBR Waivers

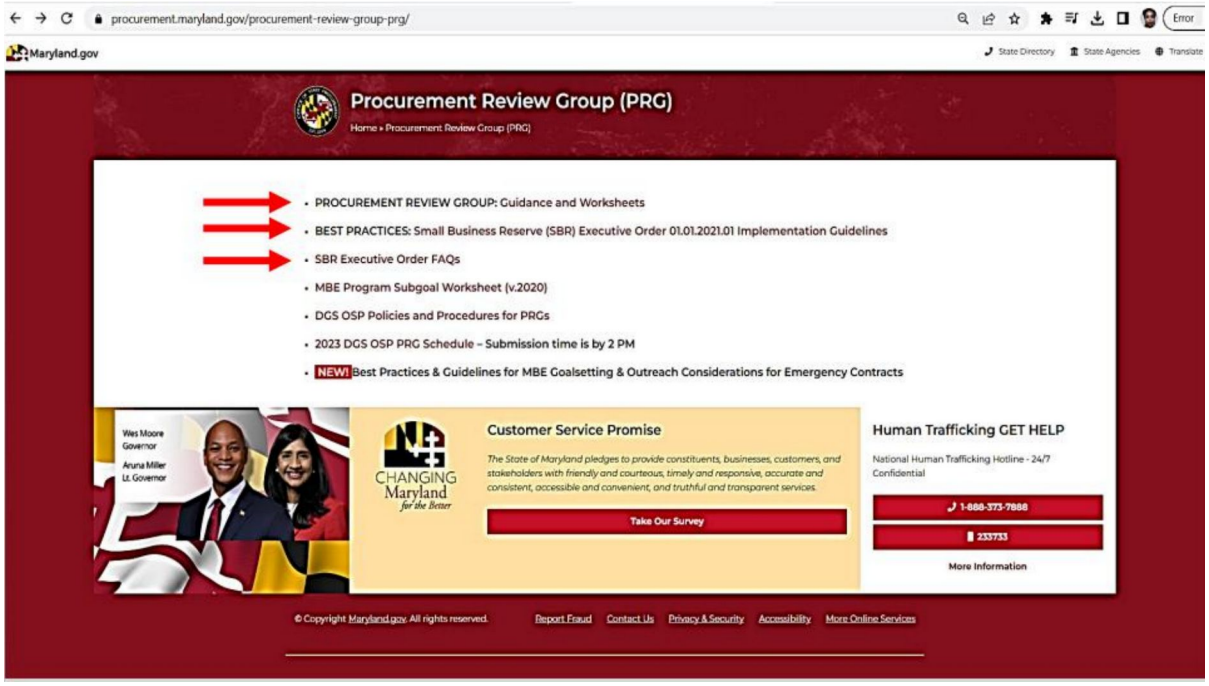
The procurement process allows the participating agency to request a waiver of the SBR designation if they have determined it to be exempt during the PRG.

SBR PROGRAM- SBR WAIVERS procurement.maryland.gov/procurement-review-group-prg/

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SBR PROGRAM-SBR WAIVERS

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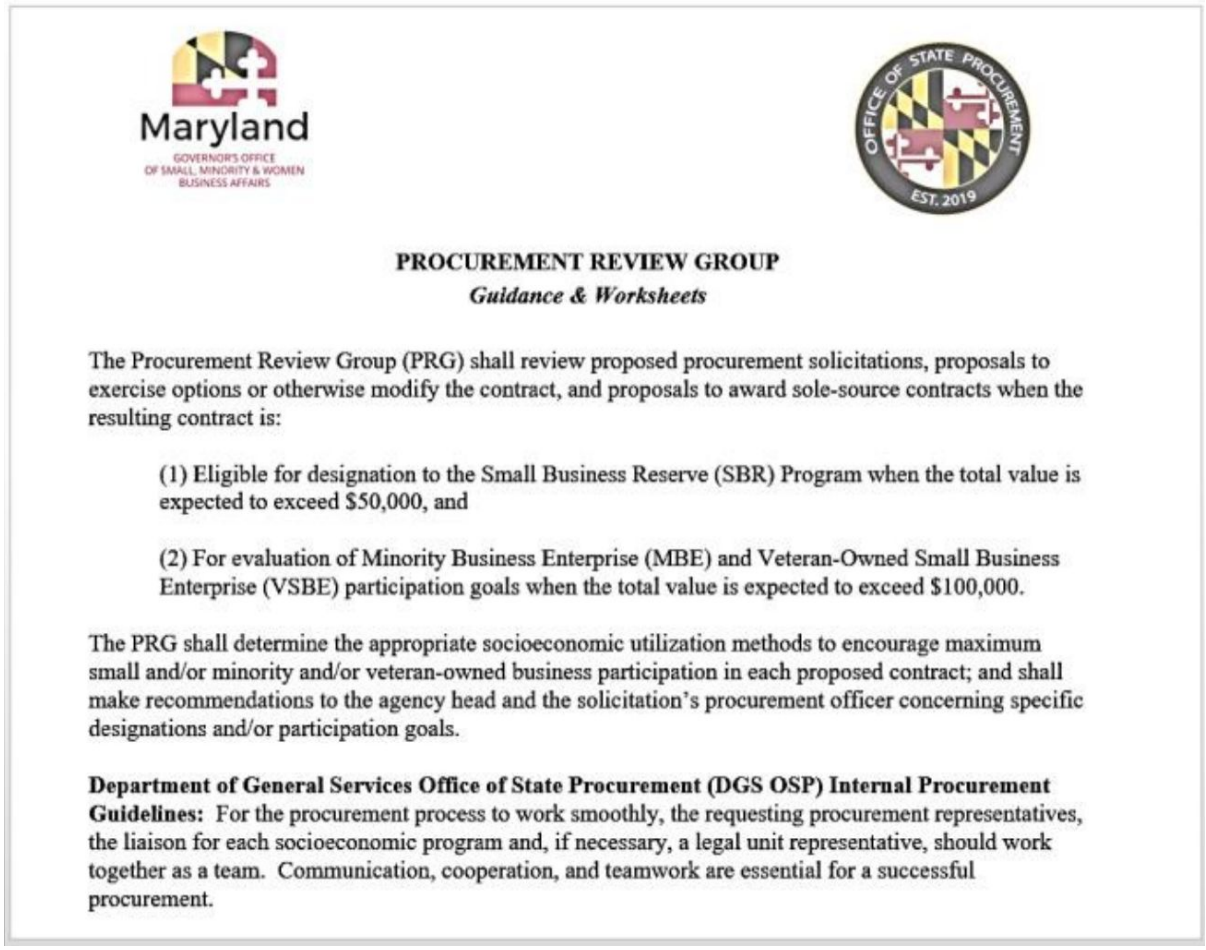
procurement.maryland.gov/procurement-review-group-prg/

SBR PROGRAM-SBR WAIVERS

-Per the PRG Guidance and Worksheets, any procurement above $50,000 should be considered for SBR designation.

-Procurements above $500,000 that are not designated as SBR, do not require a SBR Waiver, but should be considered for SBR designation

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

OFFICE OF STATE PROCUREMENT EST. 2019

PROCUREMENT REVIEW GROUP

Guidance & Worksheets

The Procurement Review Group (PRG) shall review proposed procurement solicitations, proposals to exercise options or otherwise modify the contract, and proposals to award sole-source contracts when the resulting contract is:

(1) Eligible for designation to the Small Business Reserve (SBR) Program when the total value is expected to exceed $50,000, and

(2) For evaluation of Minority Business Enterprise (MBE) and Veteran-Owned Small Business Enterprise (VSBE) participation goals when the total value is expected to exceed $100,000.

The PRG shall determine the appropriate socioeconomic utilization methods to encourage maximum small and/or minority and/or veteran-owned business participation in each proposed contract; and shall make recommendations to the agency head and the solicitation's procurement officer concerning specific designations and/or participation goals.

Department of General Services Office of State Procurement (DGS OSP) Internal Procurement Guidelines: For the procurement process to work smoothly, the requesting procurement representatives, the liaison for each socioeconomic program and, if necessary, a legal unit representative, should work together as a team. Communication, cooperation, and teamwork are essential for a successful procurement.

SBR PROGRAM-SBR WAIVER & AMENDMENT PROCESS

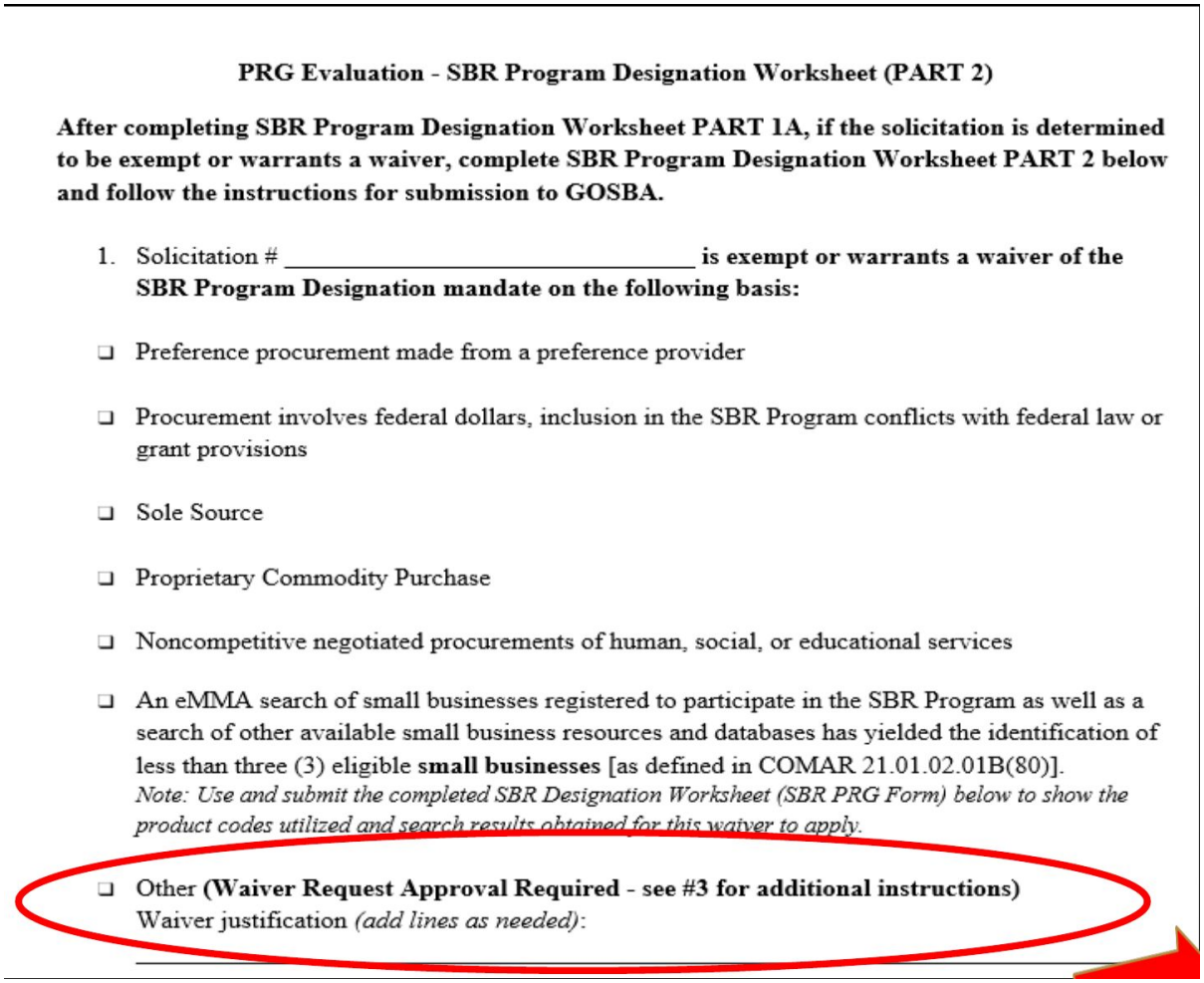
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After completing the SBR Program Designation Worksheet PART 1A, if the solicitation:

1. Meets the mandatory designation requirement, continue normal processes for PRG review and an SBR designated procurement, including MBE/VSBE participation goals as determined.
2. Is determined to be exempt or warrants a waiver, complete SBR Program Designation Worksheet PART 2 and follow the instructions for submission to GOSBA.
3. Is amended during the procurement to remove the SBR designation and open the solicitation to all vendors, complete SBR Program Designation Worksheet PART 3 and follow the instructions for submission to GOSBA.

SBR PROGRAM-SBR DESIGNATION WORKSHEET (PART 2) REQUESTING WAIVER

-If the procurement does not fall under one of the pre-determined exemptions, you will need to request a waiver and submit for approval -Select “Other” and follow the instructions in #3



PRG Evaluation - SBR Program Designation Worksheet (PART 2)

After completing SBR Program Designation Worksheet PART 1A, if the solicitation is determined to be exempt or warrants a waiver, complete SBR Program Designation Worksheet PART 2 below and follow the instructions for submission to GOSBA.

1. Solicitation # _____ **is exempt or warrants a waiver of the SBR Program Designation mandate on the following basis:**

❑ Preference procurement made from a preference provider

❑ Procurement involves federal dollars, inclusion in the SBR Program conflicts with federal law or grant provisions

❑ Sole Source

❑ Proprietary Commodity Purchase

❑ Noncompetitive negotiated procurements of human, social, or educational services

❑ An eMMA search of small businesses registered to participate in the SBR Program as well as a search of other available small business resources and databases has yielded the identification of less than three (3) eligible **small businesses** [as defined in COMAR 21.01.02.01B(80)].
Note: Use and submit the completed SBR Designation Worksheet (SBR PRG Form) below to show the product codes utilized and search results obtained for this waiver to apply.

❑ Other **(Waiver Request Approval Required - see #3 for additional instructions)**
Waiver justification *(add lines as needed)*:
_____

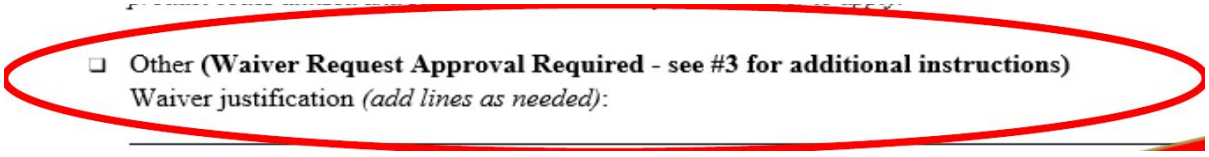


"Agency Name - Requisition # - SBR Program Designation Worksheet"

3. **NOTICE:** SBR Program Designation Waiver Requests identified as "Other" require review by the Governor's Office of Small, Minority & Women Business Affairs (GOSBA) prior to publishing the solicitation. Submit waiver requests to the GOSBA mailbox identified above with the following subject line:

"Agency Name - Requisition # - SBR Program Designation Waiver Request"

GOSBA will respond to the SBR Program Designation Waiver Request within 72 hours with an approval or denial.



❑ Other **(Waiver Request Approval Required - see #3 for additional instructions)**
Waiver justification *(add lines as needed)*:
_____

SBR PROGRAM-SBR DESIGNATION WORKSHEET (PART 2) EXEMPTION/WAIVER

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-When a solicitation is determined to be exempt or warrants a waiver you will fill out the Worksheet (Part 2) and submit to the GOSBA SBR Waiver mailbox: SBRWaiver.GOSBA@maryland.gov

-When submitting, use the subject line below:

"Agency Name - Requisition # - SBR Program Designation Worksheet"

PRG Evaluation - SBR Program Designation Worksheet (PART 2)

After completing SBR Program Designation Worksheet PART 1A, if the solicitation is determined to be exempt or warrants a waiver, complete SBR Program Designation Worksheet PART 2 below and follow the instructions for submission to GOSBA.

1. Solicitation # _____ **is exempt or warrants a waiver of the SBR Program Designation mandate on the following basis:**

- ❑ Preference procurement made from a preference provider
- ❑ Procurement involves federal dollars, inclusion in the SBR Program conflicts with federal law or grant provisions
- ❑ Sole Source
- ❑ Proprietary Commodity Purchase
- ❑ Noncompetitive negotiated procurements of human, social, or educational services
- ❑ An eMMA search of small businesses registered to participate in the SBR Program as well as a search of other available small business resources and databases has yielded the identification of less than three (3) eligible **small businesses** [as defined in COMAR 21.01.02.01B(80)].
  Note: Use and submit the completed SBR Designation Worksheet (SBR PRG Form) below to show the product codes utilized and search results obtained for this waiver to apply.
- ❑ Other **(Waiver Request Approval Required - see #3 for additional instructions)**
  Waiver justification *(add lines as needed)*:
  _____

SBR PROGRAM-SBR DESIGNATION WORKSHEET (PART 3) AMENDMENT

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-If the solicitation is amended during the procurement to remove the SBR designation and open solicitation to all vendors, you will fill out the Worksheet (Part 3) and submit to the GOSBA SBR Waiver mailbox:

SBRWaiver.GOSBA@maryland.gov

-When submitting, use the subject line below:

“Agency Name - Requisition # - SBR Program Designation Worksheet”

PRG Evaluation - SBR Program Designation Worksheet (PART 3)

After completing SBR Program Designation Worksheet PART 1A, if the solicitation is amended during the procurement to remove the SBR designation and open the solicitation to all vendors, complete SBR Program Designation Worksheet PART 3 below and follow the instructions for submission to GOSBA.

4. Solicitation # _____ was designated for the SBR Program.

❑ SBR Program Designation removed. Solicitation amended to remove the SBR designation due to insufficient competition or other determination (justify below).
Date submitted to GOSBA for waiver *(approval not required)*: _____
Amendment justification *(add lines as needed)*:

_____
_____
_____
_____
_____
_____
_____
_____
_____

5. Upon completion of PART 3 of this worksheet, send all SBR Program Designation Worksheets to the following GOSBA mailbox using the subject line below:

SBRWaiver.GOSBA@maryland.gov

"Agency Name - Requisition # - SBR Program Designation Worksheet"

- -WAYS TO INCREASE/MEET THE 15% SBR GOAL DIRECT SOLICITING SBR VENDORS/SMALL BUSINESSES QUALIFIED FOR SBR PROGRAM
- Refer to eMMA to find SBR vendors
- Search for vendors in the MBE (MDOT Certification Database) & VSBE Programs (eMMA)– they can apply to the SBR Program if not already a participant & obtain immediate certification
- Contact small businesses that your unit previously conducted business with

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SBR PROGRAM-WAYS TO INCREASE/MEET THE 15% SBR GOAL

Hosting/Attending Outreach Events for Small Businesses

- Small Businesses want business/sales & want to talk to you about opportunities
- Connect with other agencies–If you have an upcoming event, find if other agencies want to join you; Discuss ways to create an event with another liaison/agency (in-person or virtual); View our SBR Liaison Directory to send an email to invite each other to your outreach events
- Contact our office to speak with our Outreach Manager, Mr. Eduardo Hayden– if you are interested in our Ready, Set, Grow Event

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SBR PROGRAM-WAYS TO INCREASE/MEET THE 15% SBR GOAL

Reach out to SBR Vendors with small purchase opportunities

- From the outreach events, you can find small businesses who are ready to conduct business with the State
- Utilize your Direct Solicitation Email List (if applicable) or create one
- When using credit cards for small purchases, THINK OF SBR VENDORS!
- Refer to prior “Direct Soliciting SBR Vendors” slide

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SBR PROGRAM-BEST PRACTICES

When submitting the SBR Reports, there are some best practices to keep in mind.

SBR PROGRAM- BEST PRACTICES Accessing the SBR Toolkit

- Important information is provided here (SBR Report Instructions/Templates/Examples, etc.)
- Additional Resources: Prior Training Videos/Slide Decks/ Procurement Compliance Bulletins/Policies and Procedures/New Liaison Welcome Packet

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SBR PROGRAM-BEST PRACTICES

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Accessing the SBR Toolkit

SBR PROGRAM-BEST PRACTICES

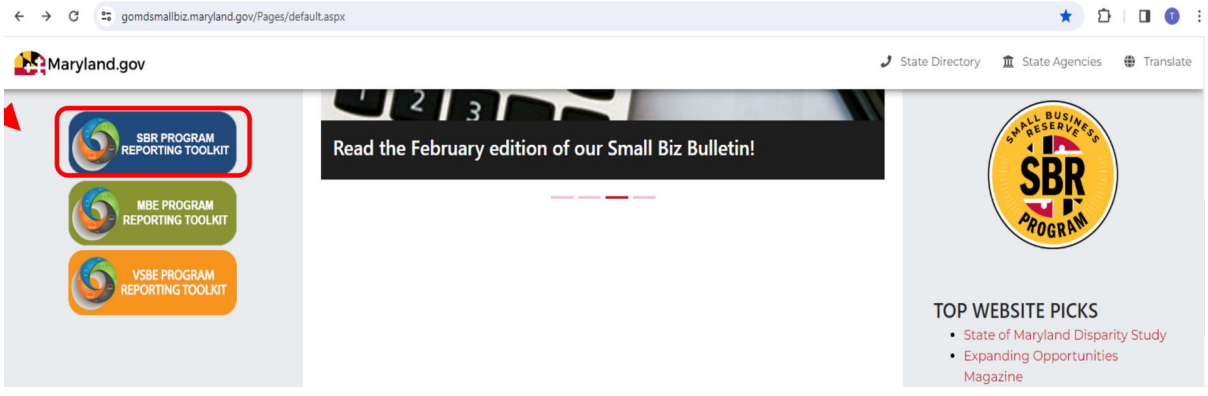
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Access the SBR Toolkit by visiting our website:

SBR PROGRAM- BEST PRACTICES Access the SBR Toolkit by visiting our website:

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gomdsmallbiz.maryland.gov





SBR REPORTS-BEST PRACTICES

Remove non-reportable items

- It is extremely important to remove Non-Reportable Items from the reportable amounts.
- When Non-Reportable Items are included, it can significantly effect the overall SBR Designated Percentage.

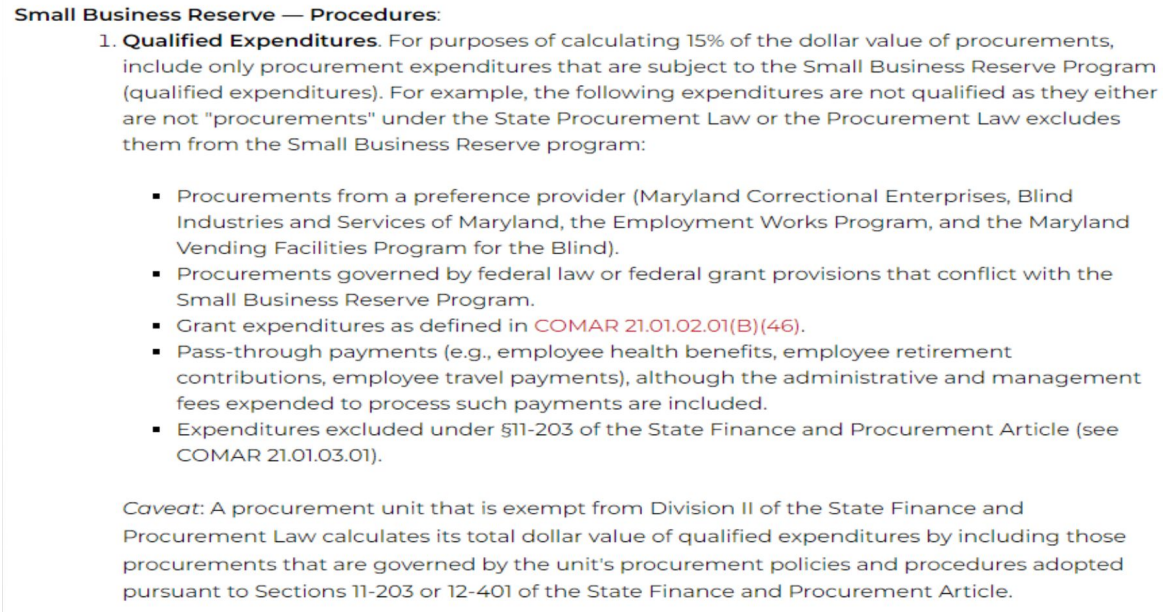
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For example, the following are some listed Non-Reportable Items:

SBR REPORTS- BEST PRACTICES BPW Advisory 2005-1 Small Business Reserve Program (maryland.gov) For example, the following are some listed Non-Reportable Items:

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SBR REPORTS-BEST PRACTICES



Small Business Reserve — Procedures:

1. **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). For example, the following expenditures are not qualified as they either are not "procurements" under the State Procurement Law or the Procurement Law excludes them from the Small Business Reserve program:

   - Procurements from a preference provider (Maryland Correctional Enterprises, Blind Industries and Services of Maryland, the Employment Works Program, and the Maryland Vending Facilities Program for the Blind).
   - Procurements governed by federal law or federal grant provisions that conflict with the Small Business Reserve Program.
   - Grant expenditures as defined in COMAR 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).

   Caveat: A procurement unit that is exempt from Division II of the State Finance and Procurement Law calculates its total dollar value of qualified expenditures by including those procurements that are governed by the unit's procurement policies and procedures adopted pursuant to Sections 11-203 or 12-401 of the State Finance and Procurement Article.

BPW Advisory 2005-1 Small Business Reserve Program (maryland.gov)

SBR REPORTS-BEST PRACTICES

If the following was a list of items that were included within an SBR Report

and the Non-Reportable Items remained in the totals…

Example Agency/Department

Verizon-$5,000

Food Catering Business (SBR vendor)-$2,000

Target-$3,000

Security Business-$10,000

Janitorial Business (SBR vendor)-$3,000

BGE-$5,000

The New York Journal-$2,000

Total-$30,000 (… this amount would be inflated)

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SBR REPORTS-BEST PRACTICES

However, if the Non-Reportable Items are removed from the total…

Example Agency/Department

Verizon-$5,000

Food Catering Is Us (SBR vendor)-$2,000

Target-$3,000

Secure Security-$10,000

Janet’s Janitorial (SBR vendor)-$3,000

BGE-$5,000

The New York Journal-$2,000

Total-$18,000 (… this amount would not be inflated)

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SBR REPORTS-BEST PRACTICES

Example Agency/Department

Verizon-$5,000

Food Catering Is Us (SBR vendor)-$2,000

Target-$3,000

Secure Security-$10,000

Janet’s Janitorial (SBR vendor)-$3,000

BGE-$5,000

The New York Journal-$2,000

Total-$30,000 (Non-Reportable Included)

SBR Designated Percentage-17%

($5,000/$30,000)

Example Agency/Department

Verizon- $5,000

Food Catering Is Us (SBR vendor)- $2,000

Target- $3,000

Secure Security- $10,000

Janet’s Janitorial (SBR vendor)- $3,000

BGE- $5,000

The New York Journal- $2,000

Total- $18,000 (Non-Reportable Removed)

SBR Designated Percentage- 28% ($5,000/$18,000)

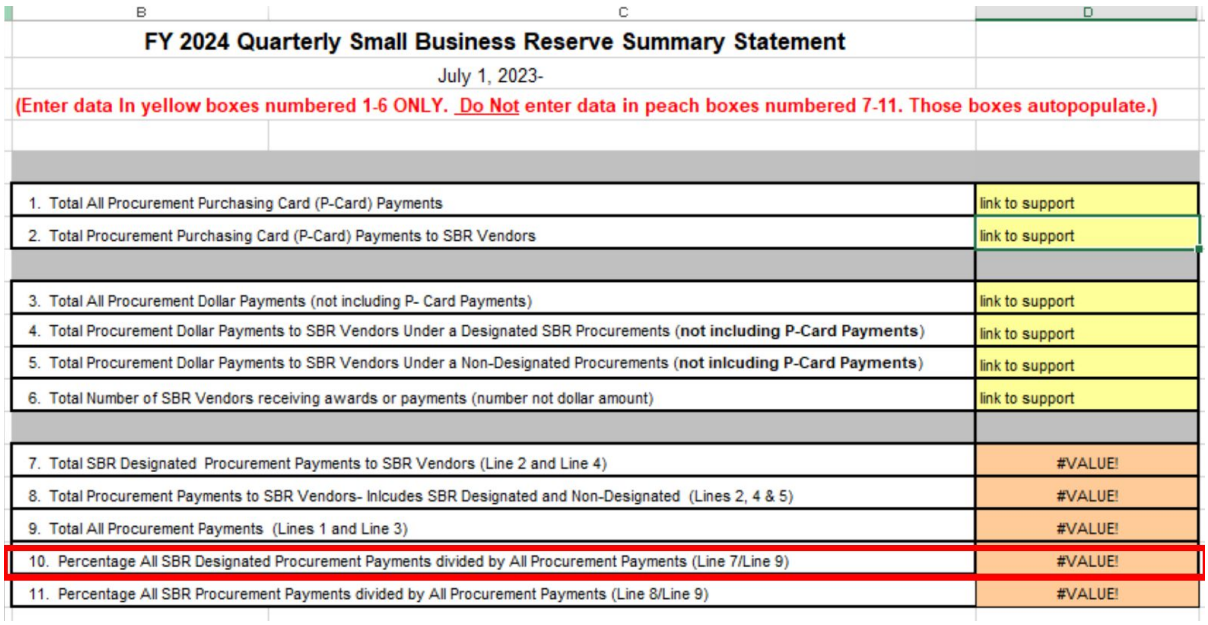
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Be sure to remove the Non-Reportable Items

SBR REPORTS-BEST PRACTICES

Percentage of SBR Designated Payments counts toward 15% Set-Aside

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FY 2024 Quarterly Small Business Reserve Summary Statement

July 1, 2023-

(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!

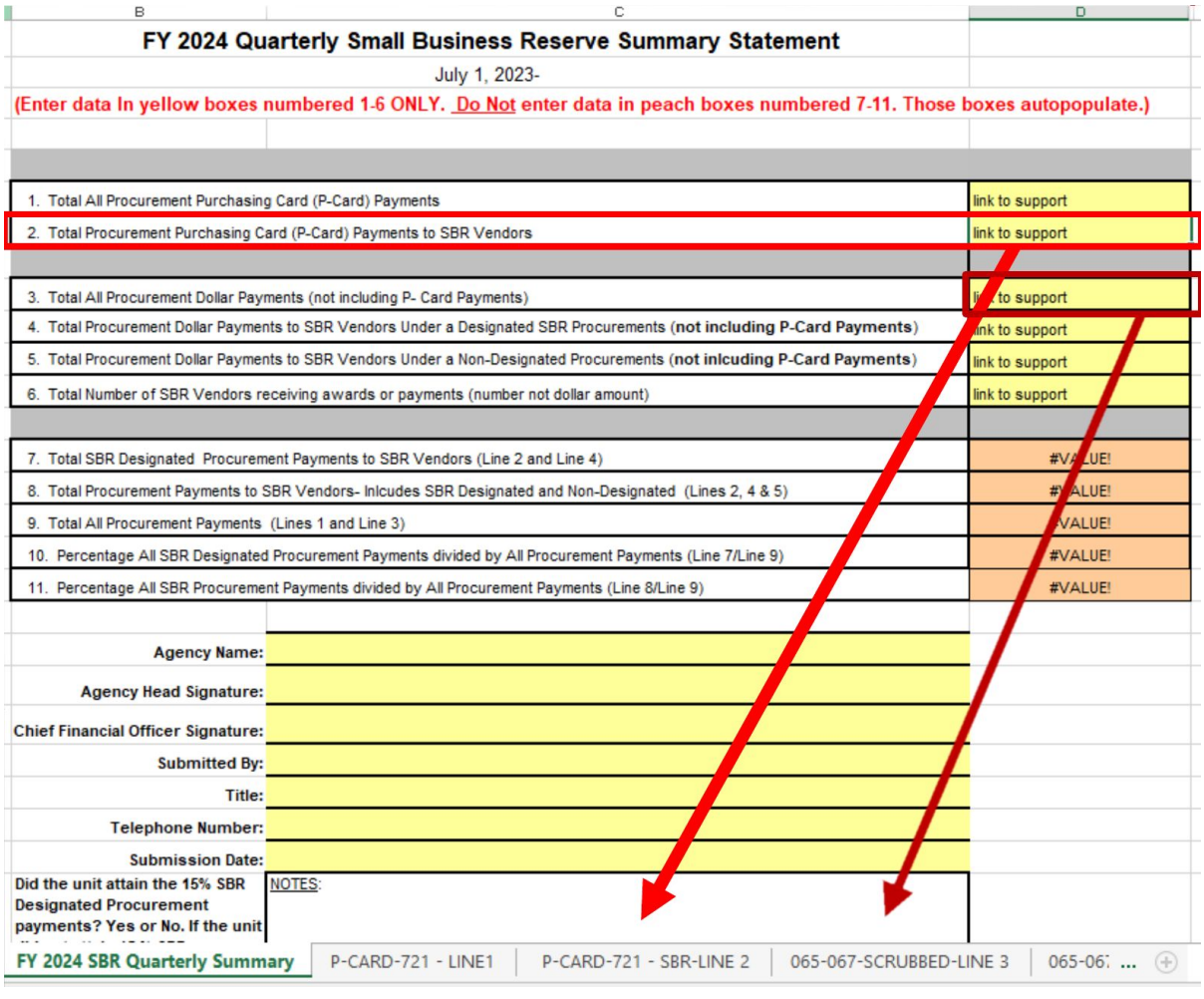
The “All SBR Designated Procurement Payments” Percentage (not the “All SBR Procurement Payments” Percentage) counts toward the 15% SBR set-aside

SBR REPORTS-BEST PRACTICES

-Make certain amounts on Summary Statement match amounts/ supporting documentation in related tabs.

-Signatures not required on quarterly reports (only needed on Annual Report)

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FY 2024 Quarterly Small Business Reserve Summary Statement

July 1, 2023-

(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	NOTES:

FY 2024 SBR Quarterly Summary | P-CARD-721 - LINE1 | P-CARD-721 - SBR-LINE 2 | 065-067-SCRUBBED-LINE 3 | 065-067 ...

SBR REPORTS-BEST PRACTICES

With the 065/067 ANSWERS Reports, when both “SBR Vend” & “SBR Procure Ind” (SBR Procurement Indicator/Designated as SBR Procurement) columns have “Y” listed, this indicates that an SBR Vendor has received a payment from a Designated SBR Procurement.

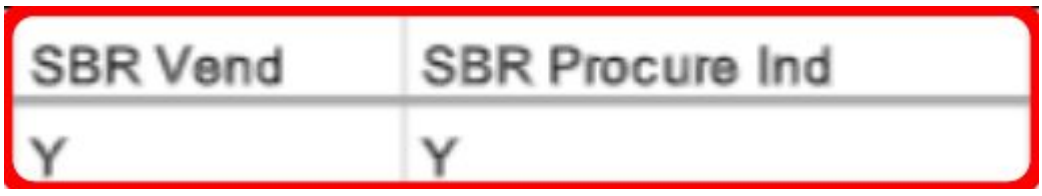
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SBR Vend	SBR Procure Ind
Y	Y
Y	
Y	
Y	Y
Y	
Y	
Y	
Y	
Y	
Y	
Y	
Y	
Y	
Y	
Y	
Y	



Department Title	Dept Code	Proc Method	Work Categor	Voucher Id	Vendor No Maske	Vendor Name	Po Bpo Id	Effective Date	Contract Title	Voucher Amount	Reportable Amount	SBR Vend	SBR Procure Ind	MBE Status	Due Date	Line No - Comm Id



SBR Vend	SBR Procure Ind
Y	Y

SBR REPORTS-BEST PRACTICES

If only the “SBR Vend” column has a “Y” listed (and “SBR Procure Ind” column is blank) on the 065/067 ANSWERS Report, this indicates that an SBR vendor received a payment for a Non-Designated purchase.

(Note: If the “SBR Vend” box is ever blank but you verified that the vendor was in the SBR Program at time of payment, you can manually update that column by entering “Y” & including it within specified purchase.)

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SBR Vend	SBR Procure Ind
Y	
Y	
Y	
Y	
Y	
Y	

SBR Vend	SBR Procure Ind
Y	
Y	
Y	
Y	
Y	
Y	

SBR REPORTS-BEST PRACTICES

If both “SBR Vend” & “SBR Procure Ind” boxes are blank on the 065/067 ANSWERS Report, a company that is NOT AN SBR Vendor has received a Non-Designated payment. This purchase SHOULD NOT be included within the SBR Designated or Non-Designated Amounts.

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SBR Vend	SBR Procure Ind
Y	
Y	
Y	
Y	
Y	
Y	

SBR REPORTS-BEST PRACTICES

For 721 ANSWERS Reports, when there is a “Y” in the “SBR Flag” column, this indicates that the credit card purchase was paid to an SBR Vendor.

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SBR_Flag
Y
Y
Y
Y

Vendor_No_Masked	Vendor_Name	MBE_Certification	MBE_Exclude	Effective_Date	Cur_Doc_No	Cur_Doc_Sfx	Number_Tran	Payment_Amt	Reportable_Amt	Reportable_MBE_Amt	Vet_Flag	SBR_Flag	Pref_Provider

SBR REPORTS-BEST PRACTICES

If you need to obtain access to the ANSWERS Database, refer to our SBR Toolkit to obtain information.

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A working knowledge of **EXCEL** is required to prepare the MBE and SBR reports. If you are not familiar with this software application, click here to access Microsoft training resources or visit **The HUB**, Maryland's Learning Management System (LMS), to access a catalog of training classes available to State employees.

To assist agencies using Statewide FMIS, the **ANSWERS** database allows certain FMIS standard reports to be downloaded electronically. **DoIT has just launched an updated and enhanced version of ANSWERS. You may need new logins and passwords. Read about the changes:** NEW ANSWERS Announcement

SBR REPORTS-BEST PRACTICES

When determining the T-Factor, the number of unique vendors should be counted (including credit cards & other payments)

Credit Card Payments Other Payments/ Procurements

Other Payments/ Procurements Vendor D- $700 Vendor E- $800 Vendor F- $900 Vendor G- $1000 Vendor H- $1100 Vendor H- $1200

Vendor A-$100 Vendor D-$700

Vendor A-$200 Vendor E-$800

Vendor B-$300 Vendor F-$900

Vendor C-$400 Vendor G-$1000

Vendor D-$500 Vendor H-$1100

Vendor D-$600 Vendor H-$1200

T-Factor = 8 is the number of unique vendors that received payments

(If a vendor was paid multiple times, they would only be counted once.)

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SBR PROGRAM-STRATEGIC PLAN

SBR & MBE Consolidated Strategic Plans

-An overview of your unit's plans for the upcoming Fiscal Year that includes how you will utilize SBR vendors, designate SBR solicitations and provide outreach to these participants

-Submission of Strategic Plan annually, June 30th

-Available in Toolkit

goMDsmallbiz.maryland.gov

SBR PROGRAM-PROCUREMENT FORECAST

Procurement Forecasts

-Units are to forward projected purchases for the fiscal year, which are included within Procurement Forecast Portal on our website

-Provided to the public and serves as important tool for the small, minority, women, and veteran business community.

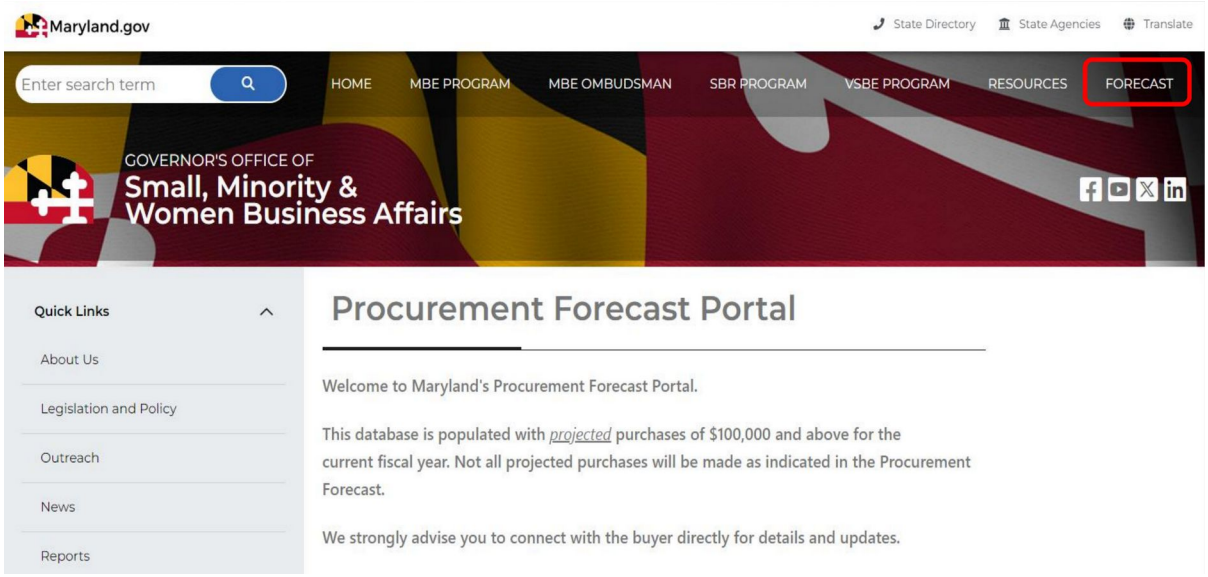
-Due annually– make certain to use updated template (located in all Toolkits)

(Be certain to include purchases that are highly likely to become solicitations)

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SBR PROGRAM-PROCUREMENT FORECAST

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SBR PROGRAM-IMPORTANT TO KNOW…

- Reports are mandatory and must be submitted by due date

Quarterly Reports due no later than 30 days following quarter being reported (remember that 3rd Qtr Reports will be due April 30th)

Annual Report must be completed and submitted by September 30

Forward completed reports via email to: sbrreports.gosba@maryland.gov

- SBR Toolkit

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

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QUESTIONS?