



Maryland
OPEN FOR BUSINESS

Combined SBR, MBE, and VSBE Liaison Training

October 4, 2022

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



Maryland
OPEN FOR BUSINESS

General Overview of All Programs

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

Socioeconomic Procurement Programs Overview

• MBE

- Comprehensive Application process through MDOTs Office of Minority Business Enterprise (OMBE)
- Directory held with MDOT- must be MBE certified when named on a bid/offer
- Annual recertification process with MDOT
- Reports submitted to GOSBA quarterly and annually (payments and awards)
- 29% Aspirational Goal

• SBR

- Self-certification process in eMMA
- Database held in eMMA- Must be certified at time of award (payments to firms that fail to recertify will not be counted toward SBR achievement)
- Annual recertification process with eMMA
- Reports submitted to GOSBA quarterly and annually (payments)
- 15% Set Aside

• VSBE

- Self-certification process with veteran verification requirement in eMMA
- Database held in eMMA - must be certified when named on a bid/offer
- Annual recertification process with eMMA
- Reports submitted to GOSBA annually (payments and awards)
- 1% Aspirational Goal minimum

Universal Fundamentals

Liaisons



SBR Liaison

COMAR 21.11 01.06

MBE Liaison

COMAR 21.11.03.05

VSBE Liaison

COMAR 21.11.14.05



- The head of each procurement agency shall designate an employee to serve as a liaison officer in the administration of that agency's SBR, MBE and VSBE program.
- Liaisons Role:
 - Reports directly to a Secretary, Deputy Secretary, or head of a procurement agency
 - Coordinate agency outreach efforts
 - Review's agency contracting procedures to ensure compliance with COMAR
(this includes review of appropriate solicitation forms during the bidding process)
 - Assists in the resolution of contracting issues
 - Submits required reports or information as required in COMAR

Liaison's Procurement Tasks

May include:

- Pre-Contract (Review Agency Contracting Procedures)
 - Participation in Procurement Review Group (PRG)
 - Participate in Pre-bid Conferences
 - Review bid/proposal paperwork (especially concerning MBE and VSBE goals)
- Post-Contract
 - Monitoring contract performance (as it relates to MBE & VSBE utilization)
 - Monitoring contract payments (to MBE firms)
 - Participate in discussions on contract performance issues and assist with corrective action plans
 - Review requests to amend MBE participation schedules

Liaisons = Teamwork!

- Liaison works hand-in-hand with procurement staff.
- Who are your SBR, MBE, & VSBE Liaisons (If these are separate people)?
- The Governor's Office of Small, Minority & Women Business Affairs website has the latest Liaison listing with contact information:
 - <https://gomdsmallbiz.maryland.gov/Pages/default.aspx>





Liaisons = Teamwork!

Remember your teammates at the Governor's Office of Small, Minority & Women Business Affairs when you are MOVING to another position, RETIRING, or LEAVING state service.

Why? Our office must have a designated liaison or POC for liaison duties within each state agency that participates in the SBR, MBE, and VSBE Programs.

Universal Fundamentals

Procurement Review Group



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, SBR, and VSBE Liaison Officers***, or senior level alternate
- *Rely on agency legal counsel to provide support and advice as necessary*

Procurement Review Group (PRG)

- The Governor's Office of Small, Minority & Women Business Affairs and the Office of State Procurement recently revised the PRG process due to the mandatory requirement to designate contracts between \$50,000 - \$500,000 as SBR.
 - OSP website: <https://procurement.maryland.gov/procurement-staff/>
 - PRG guidance and worksheets: <https://procurement.maryland.gov/procurement-review-group-prg/>
- Also, refer to the BPW Advisory 2001-1 (<https://bpw.maryland.gov/Pages/adv-2001-1.aspx>) it instructs State agencies on the processes for determining socioeconomic preference through the PRG.

PRG (cont.)

- Consider race & gender-neutral measures first
- Consider race & gender specific measures next
 - Subcontracting Opportunities
 - MBE Goal
 - MBE Subgoal
 - VSBE Goal

Consider Race Neutral Measures

(COMAR 21.11.03.07)

Race neutral methods are those that assist businesses without **consideration** of social, economic, race or gender

Small Business Reserve

Small Business Preference

Divide larger procurements into several smaller procurements where feasible

Directly notifying qualified small businesses including MBEs & VSBEs

Relaxed bonding requirements

Simplifying bidding requirements to the extent permitted by law

Pre-Solicitation Conferences

Clarify complex solicitations

Connect subs and primes

Advising businesses of what successful bidders are doing “right”

Consider Race & Gender Specific Measures

- Does the contract structure support subcontracting?
- List all possible subcontracting North American Industry Classification System (NAICS) Codes / United Nations Standard Products and Services Codes (UNSPSC) on the PRG Form
 - Are small, minority, women, and veteran-owned businesses available in the categories identified?
 - Does it make sense geographically?
- Treat the MBE & VSBE Programs as mutually exclusive
 - Dually-certified firms can count toward both program goals)
- Provide as much detail and context as possible on your PRG Determination (for historical purposes and protest)



PRG (cont.)



Our office must review
the PRG of all
solicitations & task
orders of \$25M and
above.

Submissions must go to the compliance.gosba@maryland.gov email box.

Consolidated Reporting Requirements



Procurement Forecast

COMAR 21.13.01.03

COMAR 21.11.03.17

- The Procurement Forecast is used to report projected purchases of \$100,000 and above for the upcoming fiscal year.
- Many agencies include information below the mandated threshold as well.
- ***This is a powerful tool for the small business community.***
- Agency procurement contact information must be included for each projected purchase.
- Plans are due to the Governor's Office of Small, Minority & Women Business Affairs by June 30th. Agencies only need to submit one report with all projected procurements, including SBR designated procurements and those with MBE and VSBE goals.
- The Procurement Forecast is posted on our website:
<https://gomdsmallbiz.maryland.gov/Pages/Forecasting.aspx>



Consolidated Strategic Plan

COMAR 21.13.01.03

COMAR 21.11.03.17

- The Strategic Plan is intended to help participating agencies/department analyze their prior SBR/MBE efforts and develop a plan for the new fiscal year.
- Agencies only need to submit one report, which is inclusive of the SBR and MBE Programs. Agencies who do not participate in the SBR Program need not complete that portion of the plan.
- Plans are due to the Governor's Office of Small, Minority & Women Business Affairs office by June 30th.



Consolidated Strategic Plan

COMAR 21.13.01.03

COMAR 21.11.03.17

- Thank you to the 48 agencies that submitted the FY2023 SBR/MBE Consolidated Strategic Plan.
- For those who did not submit a Strategic Plan, please remember:
 - the purpose of this plan is to improve upon your agency's past performance.



Universal Fundamentals

Outreach



Outreach

- Outreach to small, minority, women, and veteran-owned businesses is part of all our jobs.
- Procurement staff and liaisons should routinely create ways to engage with stakeholders and notify them about both small and large opportunities.
- Host your own events, or join events hosted by others to achieve outreach goals.



Share business development events information with your vendor network!

Notify us of your outreach events and we will promote them on our website and social media platforms

Collaboration is Key

Successful implementation of the socioeconomic program requires collaboration.

The Governor's Office of Small, Minority & Women Business Affairs supports your efforts through:

- Updates at SPAG meetings
- Compliance Bulletin and Compliance Call
- Liaison Training
- Advocacy Support



Governor's Office of Small, Minority & Women Business Affairs
410-697-9600
goMDsmallbiz.maryland.gov



Maryland
OPEN FOR BUSINESS

SBR Liaison Training

Presented by Lisa Mitchell Sennaar and Tanita Johnson

SBR Program

What is the SBR Program?

- Provides small businesses the opportunity to participate as prime contractors on specific state contracts
- Establishes a unique marketplace where small businesses compete against other small businesses (as opposed to larger, more established companies)
- Under state procurement law, the SBR Program directs participating agencies/departments to spend at least 15% of its fiscal year procurement expenditures with qualified small businesses



SBR Quiz

YES

NO

MAYBE





SBR QUIZ- Question 1

Add your answer within the “Polls”
section.

Are you new to the SBR liaison position?

Yes

No



SBR QUIZ- #1

**If you are a new liaison, WELCOME to the
SBR Program!**



SBR QUIZ- Question #2

Add your answer within the “Polls”
section.

**During the FY2022, did your agency/department
attain the 15% SBR designated spend/payments?**

Yes (we met or exceeded the 15%)

No (we did not meet the 15%)


Not Sure





SBR QUIZ- #2

Let's all find ways to meet and/or exceed the 15% SBR designated spend/payments each fiscal year!





SBR QUIZ- Question #3

Add your answer within the “Polls”
section.

**Can procurements over \$500,000 be
designated as SBR-only?**

Yes

No



SBR QUIZ- #3

YES!!!

Procurements over \$500,000 can be designated as SBR-only!





SBR QUIZ- Question #4

Add your answer within the “Polls”
section.

**Should the Procurement Review Group (PRG)
include procurements that exceed \$50,000?**

Yes

No

SBR QUIZ- #4

Per the Procurement Review Group (PRG) *Guidance & Worksheets*, as found on the procurement.maryland.gov website, the answer is

YES...

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

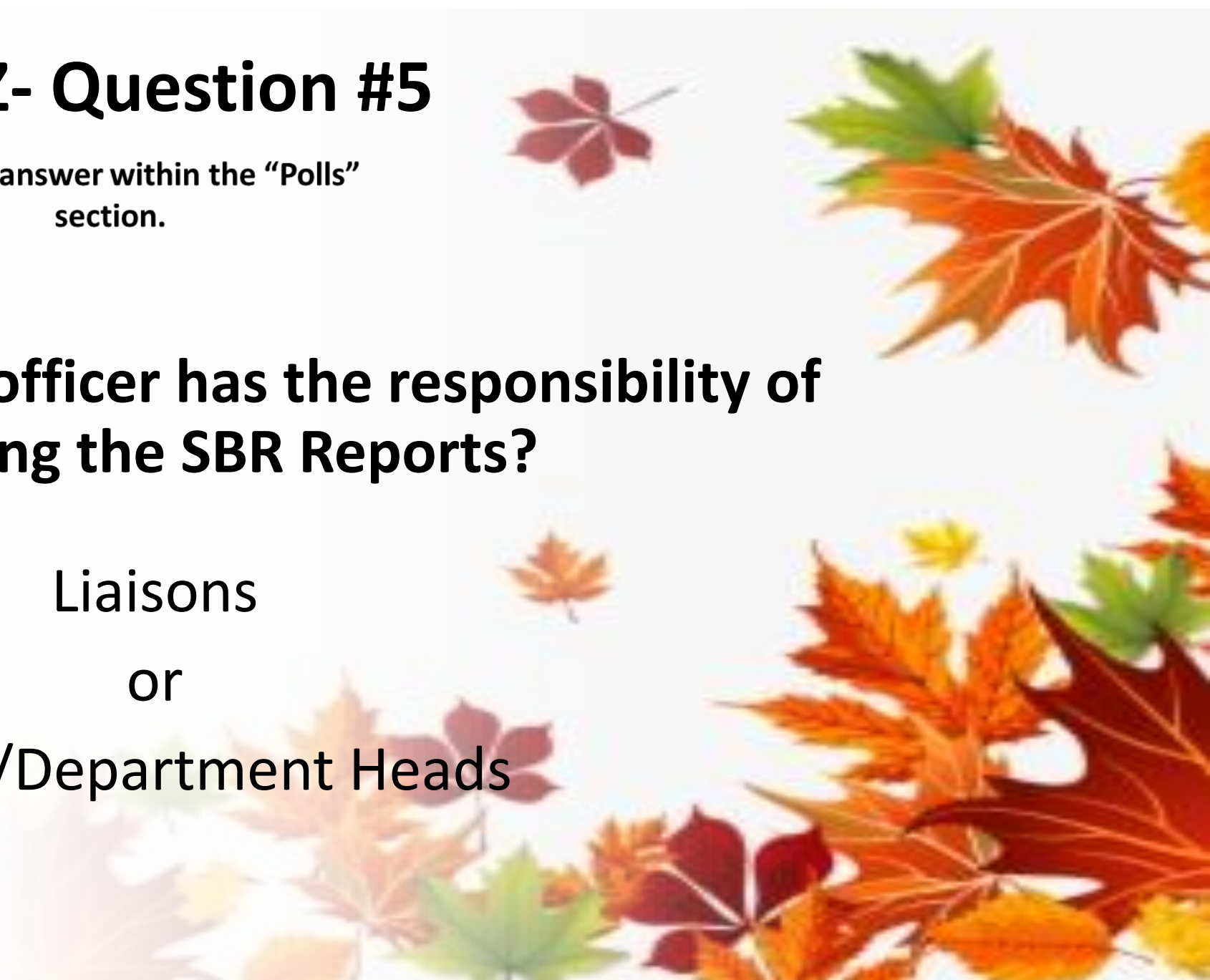


SBR QUIZ- Question #5

Add your answer within the “Polls”
section.

**Per COMAR, what officer has the responsibility of
submitting the SBR Reports?**

Liaisons
or
Agency/Department Heads






SBR QUIZ- #5



According to COMAR (21.11.01.06):

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.



SBR Quiz

**THANK YOU FOR
PARTICIPATING IN
OUR QUIZ!!**



SBR Certification/Verification

- A business must be listed as a certified SBR vendor within eMaryland Marketplace Advantage (eMMA) prior to being awarded an SBR Designated Solicitation/Procurement
- A company must submit an approved SBR Application in their eMMA account to become a certified SBR vendor
- When an SBR solicitation/procurement is awarded, verification of the SBR certification must take place by the awarding procurement officer/agency



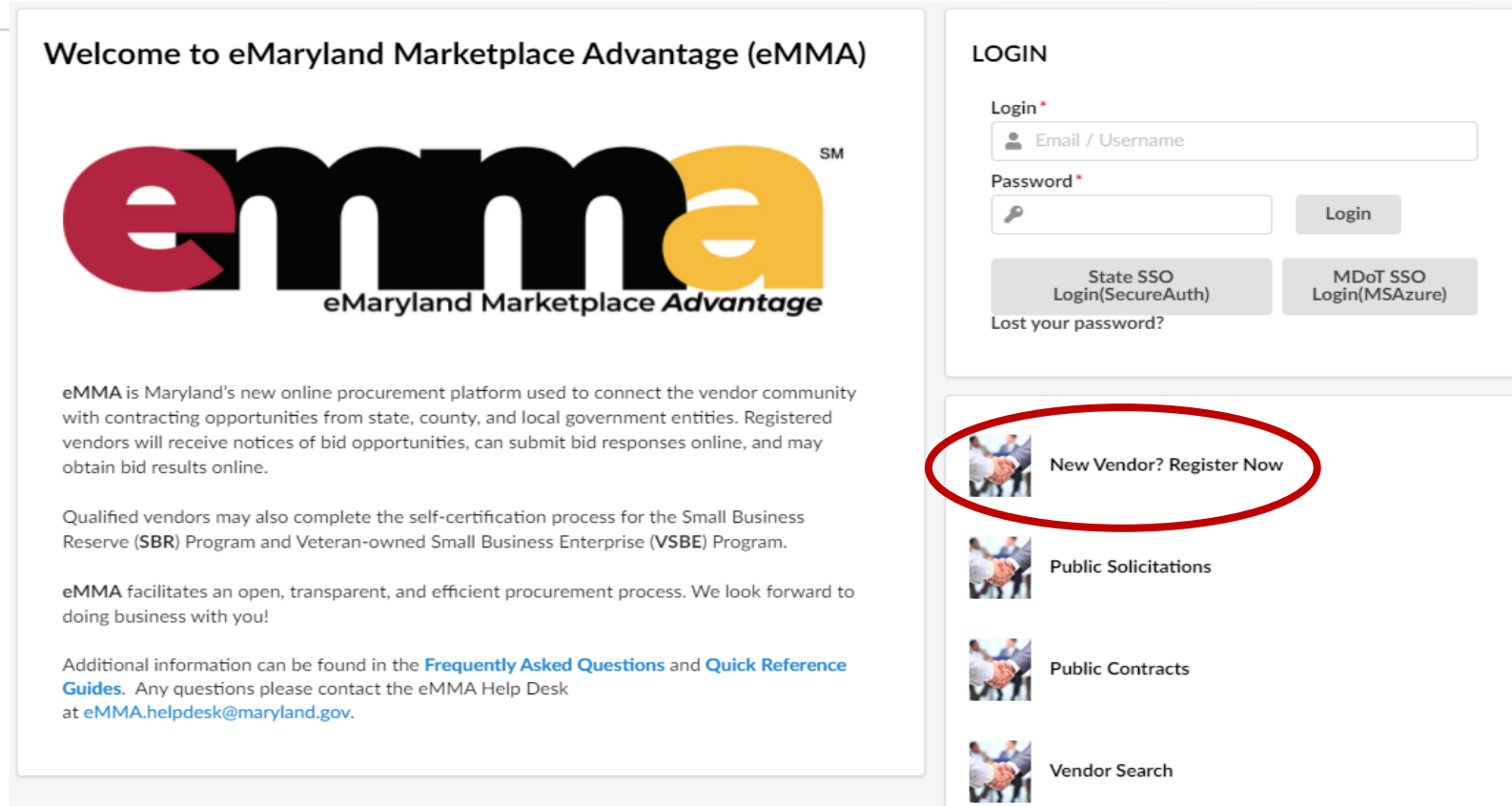


SBR Certification/Verification


- Remember that it is important to make certain that any awarded SBR vendors maintain their certification throughout the entire contract
- Note that you cannot count payments for SBR designated awards if a vendor's SBR certification has expired at the time of payment
- Encourage vendor participation in the SBR Program
- Certification/verification benefits the small businesses and agencies

SBR Vendor Certification

Registration within eMaryland Marketplace Advantage (eMMA)



Welcome to eMaryland Marketplace Advantage (eMMA)



eMMA is Maryland's new online procurement platform used to connect the vendor community with contracting opportunities from state, county, and local government entities. Registered vendors will receive notices of bid opportunities, can submit bid responses online, and may obtain bid results online.

Qualified vendors may also complete the self-certification process for the Small Business Reserve (SBR) Program and Veteran-owned Small Business Enterprise (VSBE) Program.

eMMA facilitates an open, transparent, and efficient procurement process. We look forward to doing business with you!

Additional information can be found in the [Frequently Asked Questions](#) and [Quick Reference Guides](#). Any questions please contact the eMMA Help Desk at eMMA.helpdesk@maryland.gov.

LOGIN


Login*


Password*


Login


State SSO Login(SecureAuth) MDoT SSO Login(MSAzure)

Lost your password?

 **New Vendor? Register Now**

 Public Solicitations

 Public Contracts

 Vendor Search

SBR Vendor Certification eMMA Registration Application

We'd love to connect with you, but first tell us all about your company!

Company Information		Main Address	
Legal Name *	Tax ID Type *	Address *	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Company Name (DBA) ⓘ *	Tax ID ⓘ *	Address Line 2 ⓘ	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Do You Have a DUNS Number? *	DUNS ⓘ	City *	State/Territory/Province *
<input type="radio"/> Yes	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/> No		Postal Code *	
<input type="radio"/> I don't know		<input type="text"/>	
Ownership Type ⓘ *		Country *	
<input type="text"/>		<input type="text"/>	
Website		Corporate Contact Information ⓘ	
<input type="text"/>		Corporate Email	Corporate Phone ⓘ *
Business Description		<input type="text"/>	<input type="text"/>
<input type="text"/>		Corporate Fax ⓘ	
		<input type="text"/>	

SBR Vendor Certification

eMMA Registration Application (cont'd)

Procurement Programs

State Programs

[For information regarding the programs listed below, click here.](#)

Is your company currently enrolled in any of the following programs?

Small Business Reserve (SBR)*	Would you like to apply to the SBR Program? ⓘ*
<input type="radio"/> No <input type="radio"/>	<input type="radio"/> Yes <input type="radio"/>

Veteran-Owned Small Business Enterprise (VSBE)*

Minority Business Enterprise (MBE)*

Federal Programs

[For information regarding certification for the programs listed below, click here.](#)

Is your company enrolled in the following programs?

Disadvantaged Business Enterprise (DBE)*

Small Business Enterprise (SBE)*

Airport Concessionaire Disadvantaged Business Enterprise (ACDBE)*

Contact Information

First Name* Last Name*

Position*

Email* Confirm Email*

Password ⓘ* Confirm Password*



SBR Vendor Certification

eMMA Registration Application (cont'd)



Vendor Declarations

Products & Services Offered

Product & Service Categories ⓘ*

Service Area

State & Counties ⓘ*

SBR Vendor Certification

eMMA Registration Application (cont'd)

Products & Services Offered

Product & Service Categories ⓘ*

- 10000000 - Live Plant and Animal Material and Accessories and Supplies
- 10100000 - Live animals
- 10101500 - Livestock
- 10101501 - Cats
- 10101502 - Dogs
- 10101506 - Horses
- 10101507 - Sheep
- 10101508 - Goats

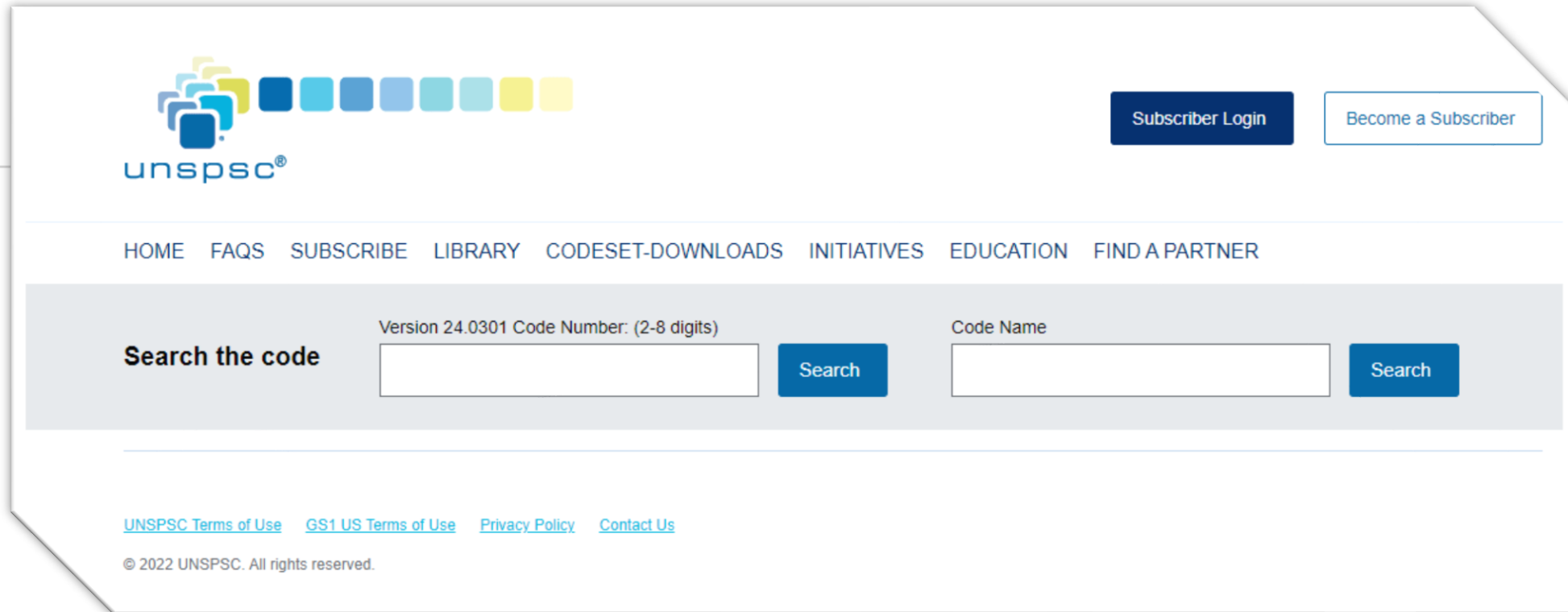
Note: Vendors can visit the following websites to locate “Product & Service Categories” (i.e. Commodity Codes) that pertain to their business:

<https://www.unspsc.org/search-code>

<https://www.ungm.org/Public/UNSPSC>

SBR Vendor Certification

Product & Service Categories



The screenshot shows the UNSPSC website interface. At the top left is the UNSPSC logo, which consists of a stylized graphic of overlapping colored squares (blue, green, yellow) above the text "unspsc®". To the right of the logo are two buttons: "Subscriber Login" (dark blue) and "Become a Subscriber" (white with blue border). Below the logo is a horizontal navigation menu with links: HOME, FAQs, SUBSCRIBE, LIBRARY, CODESET-DOWNLOADS, INITIATIVES, EDUCATION, and FIND A PARTNER. The main content area features a search section with two input fields. The first field is labeled "Search the code" and has a placeholder "Version 24.0301 Code Number: (2-8 digits)". The second field is labeled "Code Name". Both fields have a blue "Search" button to their right. At the bottom of the page, there are links for "UNSPSC Terms of Use", "GS1 US Terms of Use", "Privacy Policy", and "Contact Us", followed by the copyright notice "© 2022 UNSPSC. All rights reserved."

United Nations Standard Products and Services Code® (UNSPSC®)
-Classification of products and services

<https://www.unspsc.org/search-code>

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

SBR Vendor Certification

Product & Service Categories



UNITED NATIONS
GLOBAL MARKETPLACE

Export to Excel



Product coding is used to classify goods and services. UN Procurement Officers select one or more UNSPSC code to indicate the product or service their agency needs to procure or search for potential suppliers registered and accepted by one or more UN agency from the UNGM database. It is, therefore, vitally important that you select the most accurate UNSPSC codes to describe your goods/services.

Search:

- A - Raw Materials, Chemicals, Paper, Fuel >
- B - Industrial Equipment & Tools >
- C - Components & Supplies >
- D - Construction, Transportation & Facility Equipment & Supplies >
- E - Medical, Laboratory & Test Equipment & Supplies & Pharmaceuticals >
- F - Food, Cleaning & Service Industry Equipment & Supplies >
- G - Business, Communication & Technology Equipment & Supplies ▾**
- 43000000 - Information Technology Broadcasting and Telecommunications >
- 44000000 - Office Equipment and Accessories and Supplies ▾**
- 44100000 - Office machines and their supplies and accessories >
- 44110000 - Office and desk accessories >
- 44120000 - Office supplies >
- 45000000 - Printing and Photographic and Audio and Visual Equipment and Supplies >
- 55000000 - Published Products >
- H - Defense, Security & Safety Equipment & Supplies >
- I - Personal, Domestic & Consumer Equipment & Supplies >
- J - Services >

<https://www.ungm.org/Public/UNSPSC>

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

SBR Vendor Certification

Quick Reference Guides (QRGs)/Vendor Instructions

Welcome to eMaryland Marketplace Advantage (eMMA)



eMMA is Maryland's new online procurement platform used to connect the vendor community with contracting opportunities from state, county, and local government entities. Registered vendors will receive notices of bid opportunities, can submit bid responses online, and may obtain bid results online.

Qualified vendors may also complete the self-certification process for the Small Business Reserve (SBR) Program and Veteran-owned Small Business Enterprise (VSBE) Program.

eMMA facilitates an open, transparent, and efficient procurement process. We look forward to doing business with you!

Additional information can be found in the [Frequently Asked Questions](#) and [Quick Reference Guides](#). Any questions please contact the eMMA Help Desk at emma_helpdesk@maryland.gov.

LOGIN

Login*

Password*

Login

State SSO
Login(SecureAuth)

MDoT SSO
Login(MSAzure)

[Lost your password?](#)



[New Vendor? Register Now](#)



[Public Solicitations](#)



[Public Contracts](#)



[Vendor Search](#)

emma.maryland.gov

SBR Vendor Certification

Quick Reference Guides (QRGs)/Vendor Instructions/eMMA State User Guides

emma Maryland DGS - Office of State Procurement (OSP)

Home Solutions Forums

How can we help you today?

Enter your search term here...

+ New Support Ticket + Check Ticket Status

Knowledge base

eMMA Frequently Asked Questions (FAQs)

eMMA Vendor FAQs (1)	eMMA Buyer FAQs (1)
VENDOR FAQs	BUYER FAQs

eMMA Vendor Guides & Training

Vendor Instruction (13)	Vendor Admin Instruction (2)
Start Your Vendor Registration, Part I (Ve...	Complete Your Vendor Onboarding (Vend...
Invite Users, Add Contacts and Roles (Ve...	Change Your Vendor Profile Data (Vendo...
Adding Product and Service Categories (...	
Browse and Add Solicitations (Vendor)	
Responding to Solicitations - IFB (Vendor)	

Vendor Guides (1)

- [User Guide - Vendor](#)

eMMA State User Guides & Training

eMMA General Information (4)

- [How to Log In to eMMA](#)
- [Public Search for Vendors in eMMA](#)
- [Browse and Filter Contracts in eMMA](#)
- [Browse and Filter Sourcing Projects in e...](#)

Accounting (4)

- [Create a Profile for a Vendor \(Accounting\)](#)
- [Create a Remit-To Address Change Req...](#)
- [Change a Main Address for a Vendor \(Ac...](#)
- [Inactivate or Activate a Vendor Profile \(Ac...](#)

Vendor Coordinator (5)

- [Create a Profile for a Vendor \(Vendor Co...](#)
- [Review a New Vendor Profile \(Vendor Co...](#)
- [Create or Respond to a Remit-To Address...](#)
- [Create a Change Request for a Vendor N...](#)
- [Archive a Vendor Document \(Vendor Co...](#)

Procurement Officer (25)

- [Create a Profile for a Vendor \(Procureme...](#)
- [Initiate Vendor Onboarding \(Procurement...](#)
- [Create an IFB Sourcing Project \(PO\)](#)
- [Create an RFP Double and Triple Envelo...](#)
- [Create a Small Category 1 Sourcing Proj...](#)

[See all 25 articles](#)

MDOT (3)

- [Requesting a New eMMA User Account \(...](#)
- [MDOT SSO Login](#)
- [Manual Login \(MDOT\)](#)

User Guides (3)

- [User Guide - Procurement Officer](#)
- [User Guide - Accounting](#)
- [User Guide - Vendor Coordinator](#)

SBR Vendor Certification

Quick Reference Guides (QRGs)/Vendor Instructions

Responding to Solicitations - RFP (Vendor)

Overview This Quick Reference Guide (QRG) is designed to help Vendors respond to a double envelope RFP (Request for Proposal) in the eMaryland Marketplace ...

Tue, 22 Mar, 2022 at 10:46 AM

Submit a Bid to an Amended Solicitation (Vendor)

Overview Amendments, or Rounds, are used in the eMaryland Marketplace Advantage (eMMA) to modify existing procurement solicitations or contracts. A Procure...

Tue, 22 Mar, 2022 at 10:47 AM

Viewing Awarded Contracts (Vendor)

Overview This Quick Reference Guide (QRG) is designed to show Vendors how to view awarded contracts in eMMA. NOTE: For best results, use the Google Chrome...

Tue, 22 Mar, 2022 at 10:47 AM

SBR Certification and Recertification (Vendors)

Overview This Quick Reference Guide (QRG) shows you how to apply for the Small Business Reserve (SBR) Certification and recertify in eMMA, once you're regi...

Mon, 21 Mar, 2022 at 2:17 PM

Public Vendor Search (Vendors)

Article in Attachment...

Thu, 24 Mar, 2022 at 12:27 PM

This is a glance of the SBR QRG:

SBR Certification and Recertification (Vendors)

Print

Modified on: Mon, 21 Mar, 2022 at 2:17 PM

Overview

This Quick Reference Guide (QRG) shows you how to apply for the Small Business Reserve (SBR) Certification and recertify in eMMA, once you're registered.

NOTE: For best results, access eMMA using the Google Chrome browser.

If you need help with eMMA at any point, please email the eMMA helpdesk at emma.helpdesk@maryland.gov.

For additional assistance with the certification or recertification process, call the Governor's Office of Small, Minority & Women Business Affairs at 410-997-9600 and ask to speak with an SBR Compliance Manager.

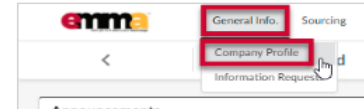
Step-by-Step Instructions

SBR Certification

1. Navigate to eMMA at <https://emma.maryland.gov> and log in with your credentials.

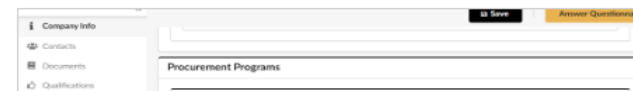


2. Click **General Info** tab at the top of the webpage and click on the **Company Profile** option from the dropdown menu.



3. Scroll down to the **State Programs** section, under **Is your company currently enrolled in SBR Program?**

NOTE: The **Small Business Reserve (SBR)** field displays the **No** selection by default. Do not change it.



Related Articles

- ☐ VENDOR FAQs
- ☐ VSBE Certification/Recertification (Vendor)
- ☐ Start Your Vendor Registration, Part I (Ve...
- ☐ Complete Your Vendor Onboarding (Ven...
- ☐ Public Vendor Search (Vendors)
- ☐ User Impact - To Certain GOSBA Employ...
- ☐ Create a Sourcing Project (PO)
- ☐ Create a Profile for a Vendor (Vendor Co...
- ☐ Create a Profile for a Vendor (Accounting)
- ☐ User Impact - Vendors

SBR Vendor Certification

Questions listed within the SBR Application:

Edit document : Attestations & General Documents

Document

I have read and agree to the Small Business Reserve Program disclaimer. *

NOTE: Please "hover-over" each tooltip (i) for explanation before selecting a response.

a Organization Type (i) *

b Is this business independently owned and operated? (i) *

c Is this business a subsidiary of another business? (i) *

d Is this a not-for-profit/nonprofit business? (i) *

e Are you a Broker? (i) *

f Is this business dominant in its field of operation at the national level? (i) *

g Total number of employees on the payroll? (i) *

Gross Sales (i)

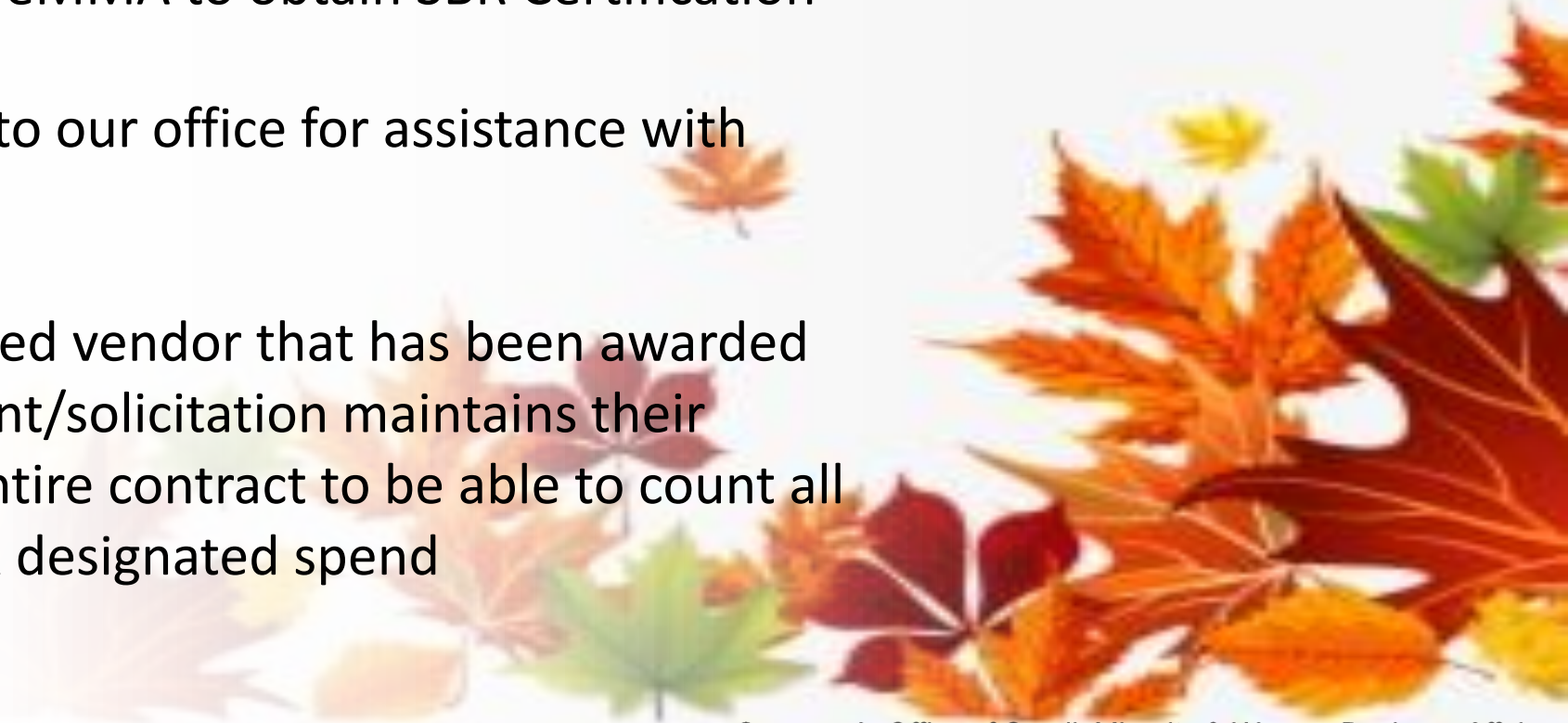
New Business? (i) *



SBR Vendor Certification



Things to remember with SBR Vendor Certification:

- Vendor needs to apply within eMMA to obtain SBR Certification
 - You can forward any vendors to our office for assistance with applying to the SBR Program
 - Be certain that any SBR certified vendor that has been awarded an SBR Designated procurement/solicitation maintains their certification throughout the entire contract to be able to count all payments toward the 15% SBR designated spend
- 

Verification of SBR Vendors

Instructions for Public Vendor Search in eMMA

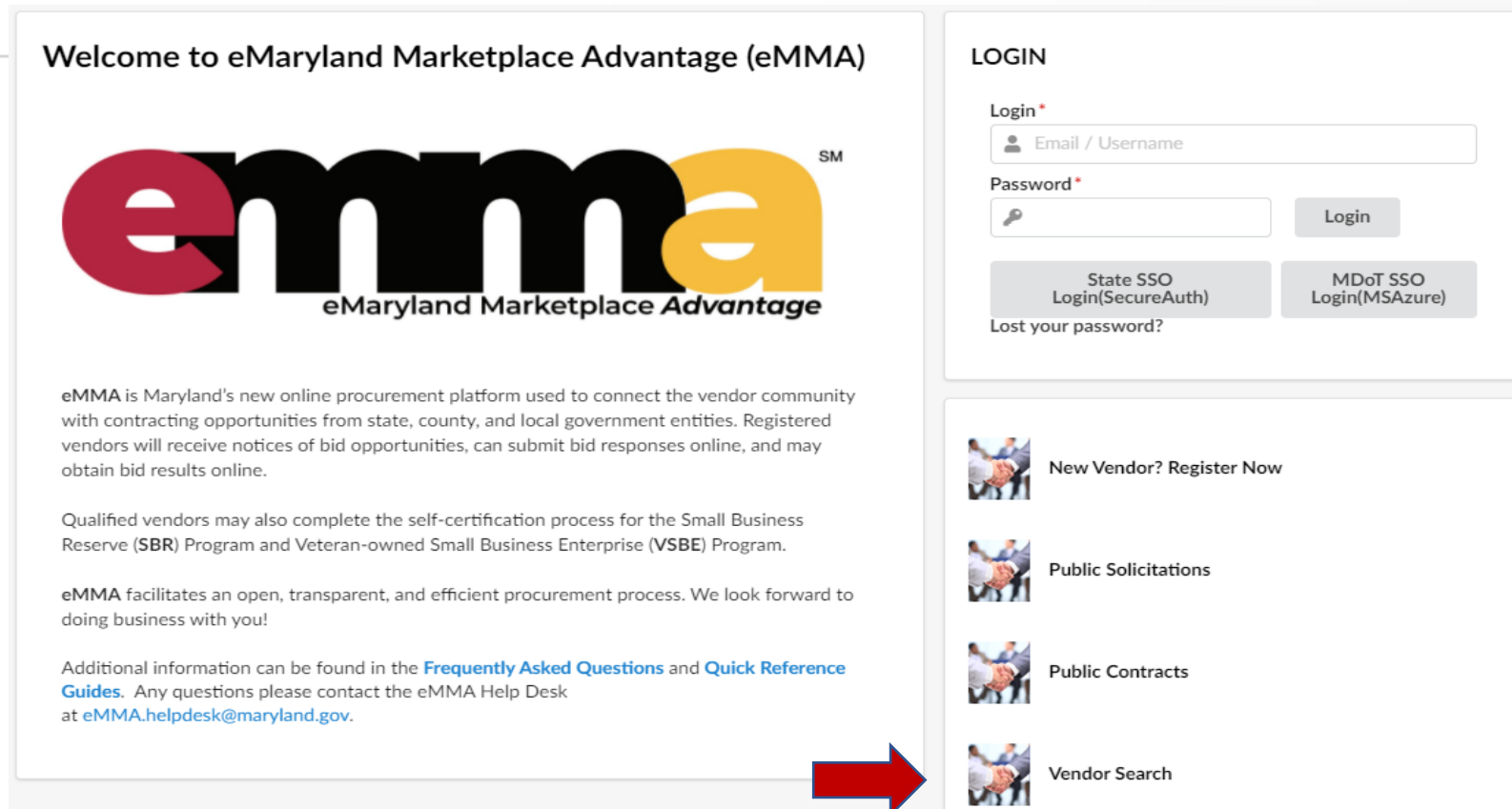
Use the Vendor Search option in eMMA to identify potential SBR vendors. This method will yield both SBR certified and non-certified vendors.

- 1) Visit the <https://emma.maryland.gov/> website.
- 2) Click on the “Vendor Search” option.
- 3) Select the “SBR Vendor” box.
- 4) Click on the “Search” button to identify potential SBR vendors.


Verification of SBR Vendors

Instructions for Public Vendor Search in eMMA

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- 2) Click on the “Vendor Search” option.



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Additional information can be found in the [Frequently Asked Questions](#) and [Quick Reference Guides](#). Any questions please contact the eMMA Help Desk at eMMA.helpdesk@maryland.gov.

LOGIN

Login*

Password*

[Lost your password?](#)

-  [New Vendor? Register Now](#)
-  [Public Solicitations](#)
-  [Public Contracts](#)
-  [Vendor Search](#)

emma.maryland.gov

Verification of SBR Vendors

Instructions for Public Search for Vendors in eMMA

- 3) Select the “SBR Vendor” box.
- 4) Click on the “Search” button to identify potential SBR vendors.

emmm New Vendor? Register Now Vendor Search Public Solicitations Public Contracts

Vendor Search

Keywords Commodities Areas Served

Company Name eMMA Vendor ID

Country State Levels related with the supplier
UNITED STATES Group, Entity

VSBE Vendor SBR Vendor

Filters Country: UNITED STATES x SBR Vendor: x Levels related with the supplier: Group Entity

eMMA Vendor ID	Company Name	City	State	Postal Code	Vendor Contact	SBR Vendor	SBR Certification #	SBR Expiration Date
SUP006836	2 Health Nuts	Sandy Spring	MD	20860	Daria Shaw	<input checked="" type="checkbox"/>	SB20-008494	5/22/2023
SUP018959	20/20 DESIGN & CONSTRUCTION, LLC	SILVER SPRING	MD	20910	Eman amirian	<input checked="" type="checkbox"/>	SB20-011452	11/17/2022
SUP018621	2020 Teknology	Ashburn	VA	20147	James Alder	<input checked="" type="checkbox"/>	715841	
SUP010346	21ST CENTURY SECURITY LLC	BALTIMORE	MD	21227	Karen Fisher	<input checked="" type="checkbox"/>	SB22-021356	3/29/2023
SUP180314	2B SECURITY CONSULTING &	LEXINGTON PARK	MD	20653	Patricia Biscoe	<input checked="" type="checkbox"/>	SB21-017572	11/17/2022
SUP856636	2CLEAN4U CLEANING SERVICES	DISTRICT HEIGHTS	MD	20747	DENEEN Robinson	<input checked="" type="checkbox"/>	SB22-021680	4/14/2023

Remember, this is a public search tool to help identify potential SBR vendors. The search will yield both certified and non-certified vendors.

Verification of SBR Vendors

Instructions for Public Vendor Search in eMMA

Note that you can also refer to the eMMA State User Guides to locate the QRG for the Public Vendor Search.

- 1) Visit the <https://emma.maryland.gov/> website.
- 2) Click on the “Quick Reference Guides” link.
- 3) Under “eMMA State User Guides & Training”, select “Public Search for Vendors in eMMA”.
- 4) Click on attachment for “17-eMMA-Buyer-QRG-Public-Search-for-Vendors”.

Verification of SBR Vendors

Instructions for Public Vendor Search in eMMA

- 1) Visit the <https://emma.maryland.gov/> website.
- 2) Click on the “Quick Reference Guides” link.



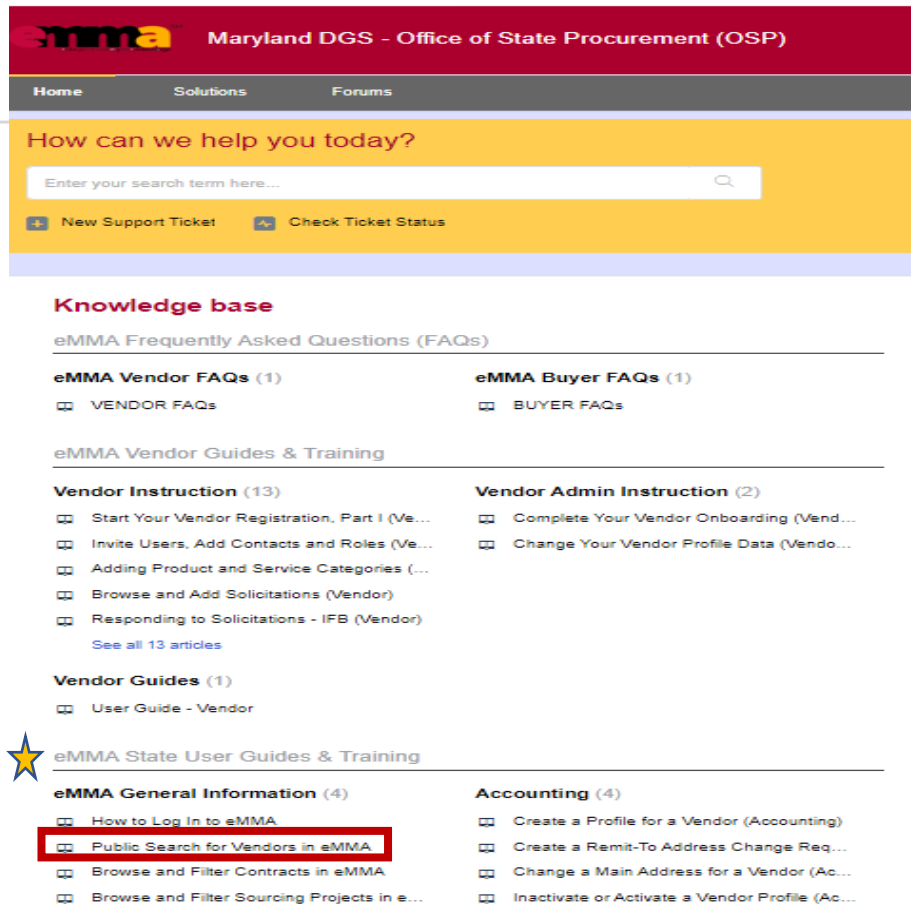
A screenshot of the eMMA website home page. The page is divided into two main columns. The left column features the eMMA logo (with 'emma' in lowercase, 'e' in red, 'mma' in black, and 'a' in yellow) and the text 'eMaryland Marketplace Advantage'. Below the logo, there is a paragraph of text explaining the platform's purpose, followed by information about the Small Business Reserve (SBR) Program and Veteran-owned Small Business Enterprise (VSBE) Program. At the bottom of the left column, there is a link to 'Frequently Asked Questions' and 'Quick Reference Guides' (the latter is circled in red). The right column is titled 'LOGIN' and contains a login form with fields for 'Email / Username' and 'Password', a 'Login' button, and two buttons for 'State SSO Login(SecureAuth)' and 'MDoT SSO Login(MSAzure)'. Below the login form, there is a list of links with small icons: 'New Vendor? Register Now', 'Public Solicitations', 'Public Contracts', and 'Vendor Search'.

emma.maryland.gov/

Verification of SBR Vendors

Instructions for Public Vendor Search in eMMA

3) Under “eMMA State User Guides & Training”, select “Public Search for Vendors in eMMA”.



The screenshot shows the eMMA website's support page. The header includes the eMMA logo and the text "Maryland DGS - Office of State Procurement (OSP)". Below the header is a navigation bar with "Home", "Solutions", and "Forums". A search bar is present with the placeholder text "Enter your search term here...". Below the search bar are two buttons: "New Support Ticket" and "Check Ticket Status". The main content area is titled "Knowledge base" and contains several sections of links. The "eMMA State User Guides & Training" section is marked with a star icon and contains a list of links. The link "Public Search for Vendors in eMMA" is highlighted with a red rectangular box.

Knowledge base

eMMA Frequently Asked Questions (FAQs)

eMMA Vendor FAQs (1)

- VENDOR FAQs

eMMA Buyer FAQs (1)

- BUYER FAQs

eMMA Vendor Guides & Training

Vendor Instruction (13)

- Start Your Vendor Registration, Part I (Ve...
- Invite Users, Add Contacts and Roles (Ve...
- Adding Product and Service Categories (...
- Browse and Add Solicitations (Vendor)
- Responding to Solicitations - IFS (Vendor)
- [See all 13 articles](#)

Vendor Admin Instruction (2)

- Complete Your Vendor Onboarding (Vend...
- Change Your Vendor Profile Data (Vendo...

Vendor Guides (1)

- User Guide - Vendor

eMMA State User Guides & Training

eMMA General Information (4)

- How to Log In to eMMA
- Public Search for Vendors in eMMA**
- Browse and Filter Contracts in eMMA
- Browse and Filter Sourcing Projects in e...

Accounting (4)

- Create a Profile for a Vendor (Accounting)
- Create a Remit-To Address Change Req...
- Change a Main Address for a Vendor (Ac...
- Inactivate or Activate a Vendor Profile (Ac...

mdprocurement.freshdesk.com/support/home

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

Verification of SBR Vendors

Instructions for Public Vendor Search in eMMA

4) Click on attachment for “17-eMMA-Buyer-QRG-Public-Search-for-Vendors”.



The screenshot shows the eMMA website interface. At the top, there is a red header with the eMMA logo and the text "Maryland DGS - Office of State Procurement (OSP)". Below the header is a navigation bar with "Home", "Solutions", and "Forums". A search bar is present with the placeholder text "Enter your search term here..." and a "New Support Ticket" button. The main content area displays a breadcrumb trail: "Solution home / eMMA State User Guides & Training / eMMA General Information". The article title is "Public Search for Vendors in eMMA" in red, with a "Print" button to its right. Below the title, it says "Modified on: Tue, 22 Mar, 2022 at 8:52 AM". There is a section for "Article in Attachment..." which contains a PDF icon and the text "17-eMMA-Buy..." (707 KB). At the bottom of the article area, there is a feedback prompt: "Did you find it helpful? -".

mdprocurement.freshdesk.com/support/solutions/articles/70000592939-public-search-for-vendors-in-emma

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

Verification of SBR Vendors

eMMA Internal Vendor Search for Vendors

The screenshot shows the eMMA internal vendor search interface. The top navigation bar includes 'Vendors', 'Sourcing', 'Contracts', 'Analytics', and 'Admin'. The 'Vendors' tab is selected. The page title is 'Browse Vendors'. On the left, under 'Procurement Programs', the 'SBR Vendor' checkbox is checked. In the search area, the 'Keywords' input field is empty. Below the search area, filters show 'Level: Entity' and 'SBR Vendor: ✓'. At the bottom, there are buttons for 'Generate RFI', 'Merge Vendors', and 'Create a Vendor'.

-You can find additional information pertaining to SBR vendors by logging into the internal “Browse Vendor” search.

-Sign into eMMA to perform this verification.

Verification of SBR Vendors

eMMA Internal Vendor Search for Vendors

To determine the SBR certification status, click into the “Documents” section of the vendor’s account. If the “Documents” section has an SBR Application with an approved “Status,” a valid “Expiration Date” (i.e. date has not exceeded/certification not expired with a one-year certification) and green dot (Valid) listed, the vendor is certified within the SBR Program.

Company Info


Contacts

Qualifications

Documents

Attestations & General Documents

+ Add attestations & general documents

Attach	Type	Status	Document Date	Expiration Date	Valid
  	SBR Application	✓	5/15/2022	5/15/2023	●

1 Result(s) Result(s)

Verification of SBR Vendors

eMMA Internal Vendor Search for Vendors

Procurement Programs

- Supplier Overview
- Company Info**
- Contacts
- Qualifications
- Documents

State Programs

Existing SBR Vendor?	SBR Certification #	SBR Effective Date	SBR Expiration Date
<input type="checkbox"/>	SB22-022222	5/15/2022	5/15/2023
<input checked="" type="checkbox"/> SBR Vendor	SBR Application Status ⓘ Approved		

Upon verifying that the SBR Application information is listed correctly within the “Documents” section, you can locate the “SBR Certification #” and approval status in the “Company Information” section.

Verification of SBR Vendors

eMMA Internal Vendor Search for Vendors



Please note the following when you are attempting to verify the certification status of an SBR vendor in eMMA:

- You may find multiple SBR Applications listed in the “Documents” section.
- Be certain to carefully review the information to make certain that the vendor meets the requirements (i.e. SBR Application has an approved “Status”, a valid “Expiration Date” (i.e. date has not exceeded/certification not expired with a one-year certification) and green dot (Valid) listed).
- You are able to download an excel spreadsheet for these vendors. However, you will need to check the vendor accounts to verify their SBR certification.
- If you are unable to determine the SBR certification status, please contact our office for assistance.

Verification of SBR Vendors

eMMA Internal Vendor Search for Vendors- Excel Spreadsheet

The screenshot displays the 'Browse Vendors' interface. On the left, there are filters for Level (Entity), Status, Vendor Type, Tax ID Type, and Procurement Programs. The 'SBR Vendor' checkbox is checked and circled in red. The main table lists vendors with columns for ID, Name, Address, Phone, Status, and Email. A 'Download table' button is circled in red, and a settings gear icon is also circled in red.

ID	Name	Address	Phone	Status	Email
SUP008697	1 Prime Source, LLC	1 Prime Source, LLC	10766378066	Active	1primesourcellc@gmail.com
SUP836347	1 Regal Enterprise, LLC	1 Regal Enterprise, LLC		Registered	manager@regalenterpriseshome.com
SUP751993	1000032248378	Chips Renovations LLC		Registered	miked@chipsrenovations.com
SUP013758	106 Group	The 106 Group Ltd.	10809013080	Registered	info@106group.com
SUP783556	1351 Investigations LLC	1351 Investigations LLC	096572462	Registered	1351investigationllc@gmail.com
SUP015333	1969	ITZ Our Turn LLC	056851633	Active	itzourturn@gmail.com
SUP738606	1HEALTH.IO INC	1HEALTH.IO INC	1464464272_000 000	Active	alarkin@1health.io
SUP775503	1Smart Consulting LLC	1Smart Consulting LLC		Registered	john@1smart.us
SUP028168	1Source Management Consulting, LLC	1Source Management Consulting, LLC		Active	info@1sourcemanagementllc.com
SUP790473	1st choice janitorial service llc	1st choice janitorial service llc		Registered	1stchoicejanitorialservicellc@gmail.com
SUP011856	1st Choice, LLC	1st Choice, LLC	10851819293	Active	mbell@1stchoicegov.com
SUP006836	2 Health Nuts	Serio & Shaw LLC	10851716079	Active	
SUP018959	20/20 Design and Construction, LLC	20/20 Design & Construction, LLC		Active	eman.amirian@2020-dc.com

Verification of SBR Vendors

eMMA Internal Vendor Search for Vendors- Excel Spreadsheet

	A	B	C	D	E	F	G	H
1	Code	Company Name	Legal Name	Parent Company	ERP Vendor ID	Mail Code	Status	SBR Certification #
2	SUP863741	DATA DOC, MD L.L.C.	DATA DOC, MD L.L.C.				Registered	SB22-022222
3	SUP379483	@ Your Request Cleaning Company LLC	@ Your Request Cleaning Company LLC				Registered	SB22-020619
4	SUP008697	1 Prime Source, LLC	1 Prime Source, LLC				Active	SB22-021622
5	SUP836347	1 Regal Enterprise, LLC	1 Regal Enterprise, LLC				Registered	SB22-020122
6	SUP751993	1000032248378	Chips Renovations LLC				Registered	SB21-016490
7	SUP013758	106 Group	The 106 Group Ltd.				Registered	SB11-42
8	SUP783556	1351 Investigations LLC	1351 Investigations LLC				Registered	SB21-015593
9	SUP015333	1969	ITZ Our Turn LLC				Active	SB22-020756
10	SUP738606	1HEALTH.IO INC	1HEALTH.IO INC			000	Active	SB21-015217
11	SUP775503	1Smart Consulting	1Smart Consulting LLC				Registered	SB21-015453
12	SUP028168	1Source Management Consulting LLC	1Source Management Consulting, LLC				Active	SB21-017327
13	SUP790473	1st choice janitorial service llc	1st choice janitorial service llc				Registered	SB21-017028

ANY QUESTIONS?



BEST PRACTICES: Small Business Reserve (SBR) Executive Order 01.01.2021.01 Implementation Guidelines



Procurement Review Group (PRG)

Home » Procurement Review Group (PRG)

- **PROCUREMENT REVIEW GROUP: Guidance and Worksheets**
- **BEST PRACTICES: Small Business Reserve (SBR) Executive Order 01.01.2021.01 Implementation Guidelines**
- **SBR Executive Order FAQs**
- **2020 MBE Program Subgoal Worksheet**
- **OSP Policies and Procedures for PRGs**
- **OSP PRG eMail Submissions Process**
- **2022 OSP PRG Schedule** – Submission time is by 2 PM
- **NEW!** Best Practices & Guidelines for MBE Contracting & Outreach Considerations for Emergency Contracts

SBR PRG Program Guidance and 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 PRG Program Guidance and Worksheets

Steps for All New Solicitations/Secondary Competition

- ❑ Complete PRG Evaluation - SBR Program Designation Worksheet (PART 1A)
MANDATORY: All solicitations, including those over \$500,000, shall continue to be evaluated for SBR Program Designation. (SBR Program Designation is automatic for procurements greater than \$50,000 and up to/including \$500,000, unless certain conditions apply.)
- ❑ Complete PRG Evaluation - MBE Participation Worksheet (PART 1B)
- ❑ Complete PRG Evaluation - VSBE Participation Worksheet (PART 1C)
- ❑ Complete PRG Evaluation - SBR Program Designation Worksheet (PART 2)
CONDITIONAL: Submit only if the procurement is determined to be exempt or warrants a waiver based upon the results in PART 1A
- ❑ Complete PRG Evaluation – SBR Program Designation Worksheet (PART 3)
CONDITIONAL: Submit only if during the procurement, the mandatory SBR Program Designation is removed via an amendment

SBR PRG Program Guidance and Worksheets

Steps for Sole Source

- New – same as for new solicitation
- Renewed sole source – same as for new solicitations

Steps for Options (for contracts with MBE and VSBE participation goals)

- Complete Sections 1, 2, 3 and 5 of MBE Participation Worksheet and VSBE Participation Worksheet. In Section 5, write a brief summary pertaining to whether or not the participation goal is being met, and if not, what corrective action is being taken.
- Attach original MBE participation goal justification
- Attach original VSBE participation goal justification

Steps for Contracts under \$200,000

- Submit same attachments as listed above
- Add list from MDOT for direct solicitations of certified MBEs if an MBE participation goal is not feasible
- Add list from eMMA for direct solicitations of certified VSBEs if an MBE participation goal is not feasible

For Internal Training Purposes Only

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

SBR PRG Program Guidance and Worksheets

PRG Evaluation - SBR Program Designation Worksheet

Pursuant to SFP § 14-301.1(9) providing that race-neutral measures will be employed to the maximum extent practicable to drive inclusion prior to the employment of race-conscious measures as well as pursuant to Executive Order 01.01.2021.01, it is required:

Any procurement of an Executive agency, for goods, supplies, services, maintenance, construction, construction-related services, architectural services, and engineering services, and with a total dollar value between \$50,000 and \$500,000, shall be designated for the Small Business Reserve (SBR) Program.

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 Designation Worksheet (PART 1A)
PRG Evaluation to Establish SBR Designation for

Solicitation #:

Procurement Contract Title:

The extent to which direct solicitation, subcontracting, race-neutral measures, or a combination will most likely result in maximum small business participation.	Answer these questions
Are SBRs and small businesses available to perform contracts at the prime contract level?	Answer these questions
Geographical proximity of SBRs to the work location	Answer these questions
Does the number of small businesses (as defined in COMAR 21.01.02.01B (80)) warrant designating the procurement as a small business preference procurement under COMAR 21.11.01?	Answer these questions
Are the evaluation factors (when the solicitation is by competitive sealed proposals) designed to ensure that they do not unreasonably limit or inhibit participation by small businesses, including SBRs? Should the solicitation include the economic-benefits evaluation factor under COMAR 21.05.03.03A (3)?	Answer these questions
Are the structure, specifications, and requirements of the solicitation designed to ensure that they do not unreasonably limit or inhibit participation by small businesses, including SBRs? Inhibiting factors may include unnecessary or prohibitive bonding requirements, restrictive specifications, unnecessary or unreasonable performance parameters, and unnecessary or unreasonable experience requirements.	Answer these questions
Is it feasible to divide a complex procurement into separate procurements consistent with SBR and small business capacity?	Answer these questions
<i>Sole-source contracts:</i> Are there work components that can reasonably be subcontracted to SBRs and other small businesses?	Answer these questions
<i>Renewal options:</i> What are the benefits of exercising the option versus re-competing the contract? Consider such factors as past performance, potential for cost reduction, and current opportunities for small business or SBR participation.	Answer these questions
Deliverables take into consideration what is important to the agency and the success of the project (i.e. time, cost requirements).	Answer these questions
Requirements and specifications are prioritized.	Answer these questions
Deliverables are defined in terms of what is expected and when schedules, deadlines and mandatory items are defined.	Answer these questions

 (Ctrl) ▾

SBR PRG Program Guidance and Worksheets

Procurement Review Group (PRG) SBR Designation Worksheet			
SECTION 1 – PRG REVIEW GROUP			
Requesting Agency:	Complete this form		
MBE Liaison Officer:	Complete this form	Date:	Complete this form
SBR Liaison Officer:	Complete this form	Date:	Complete this form
Program Manager or Contract Monitor:	Complete this form	Date:	Complete this form
Procurement Officer:	Complete this form	Date:	Complete this form
Procurement Director:	Complete this form	Date:	Complete this form
SECTION 2 – SOLICITATION INFORMATION			
IFB/RFP Number:	Complete this form		
IFB/RFP Title:	Complete this form		
Brief Description of the IFB/RFP	Complete this form		
IFB/RFP Contract Term	Complete this form	Options (Enter amount)	Complete this form
Is there a Current Contract?	Yes or - No	Current SBR Designation	


SBR PRG Program Guidance and Worksheets



SBR Research for Project No. _____ Complete this form _____		
Results of Search by UNSPSC, NAICS, NIGP or other Product/Commodity Codes		
Product Code	Description	# SBRs in eMMA Directory or other Database/Resource
Complete this form	Complete this form	Complete this form

SBR PRG Program Guidance and Worksheets

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.

BEST PRACTICES: Small Business Reserve (SBR) Executive Order 01.01.2021.01 Implementation Guidelines



Procurement Review Group (PRG)

Home » Procurement Review Group (PRG)

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- **BEST PRACTICES: Small Business Reserve (SBR) Executive Order 01.01.2021.01 Implementation Guidelines**
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- [2020 MBE Program Subgoal Worksheet](#)
- [OSP Policies and Procedures for PRGs](#)
- [OSP PRG eMail Submissions Process](#)
- [2022 OSP PRG Schedule](#) – Submission time is by 2 PM
- **NEW!** [Best Practices & Guidelines for MBE Contracting and Outreach Considerations for Emergency Contracts](#)

BEST PRACTICES: Small Business Reserve (SBR) Executive Order 01.01.2021.01 Implementation Guidelines




PROCEDURES FOR SBR DESIGNATION FOR COMPETITIVE PROCUREMENTS & SECONDARY COMPETITION ON STATEWIDE & MASTER CONTRACTS

For Competitive Procurements or Statewide and Master Contracts with secondary competition, designation to the SBR Program is required, unless a waiver or exemption is determined appropriate. In making this determination, the agency must research and confirm if adequate competition exists. A Procurement Review Group (PRG) evaluation for an SBR Program procurement designation must be conducted using the available “PRG Evaluation - SBR Program Designation Worksheet”.

If there are at least three (3) small businesses that *are capable of performing the services or providing the required products*, the procurement or secondary competition should be designated as an SBR Program procurement. *(These three small businesses may not necessarily be certified in eMMA at the time of solicitation publication.)*

BEST PRACTICES: Small Business Reserve (SBR) Executive Order 01.01.2021.01 Implementation Guidelines

HELPFUL HINTS & TIPS (*NOTE)

1. How to conduct market research to find small businesses.
 -  a. Utilize Google to see what small businesses in the market area provide the goods or services the agency is seeking.
 - i. Upon locating any firms that appear to meet the scope of work, look through their website for examples of their work. If it is unclear if they do the work you need, reach out to them via email or phone call.
 -  ii. If the vendor is not registered in eMMA, reach out to them and let them know about the opportunities available to them. Include the below information: **Maryland is Open for Business!** Maryland's new eProcurement platform "eMMA" is live! Vendors seeking business with Maryland's public bodies can [CLICK HERE](#) to register for access to business opportunities and to access [Quick Reference Guides](#) and [FAQs](#) or go to <https://emma.maryland.gov>. For questions contact emma.helpdesk@maryland.gov.
 -  b. Utilize other databases and resources to consider to find small businesses, see below:
 - i. the [State of Maryland Minority Business Enterprise Program](#) Directory
 - ii. Veteran-Owned Small Business Enterprises list in eMaryland Marketplace Advantage (eMMA)
 - iii. SBA Dynamic Small Business Search portal https://web.sba.gov/pro-net/search/dsp_dsbs.cfm
 - iv. Public Spend Forum/GovShop <https://www.publicspendforum.net/>
 - v. The Vets First Verification Program directory <https://www.va.gov/osdbu/verification/>

BEST PRACTICES: Small Business Reserve (SBR) Executive Order 01.01.2021.01 Implementation Guidelines

PROCEDURES FOR SBR DESIGNATED SOLICITATIONS

→ Prior to designating a procurement for the SBR Program, the agency must conduct thorough market research (using multiple sources* besides eMMA) to assure sufficient small businesses are available. *[This information should have been included on the PRG Evaluation - SBR Program Designation Worksheet form that was submitted and reviewed by DGS OSP (or the appropriate agency control authority) and/or GOSBA prior to issuing the solicitation.]*

→ All small businesses found from this market research should be directly solicited when the solicitation is posted on eMMA. The direct solicitation email should include the following language:

→ The State of Maryland [**Agency Name**] invites your firm to participate in the attached procurement that has been designated as a Small Business Reserve (SBR). In order to obtain an award, your firm must be registered and certified in the SBR Directory in the State's eProcurement system eMaryland Marketplace Advantage (eMMA). Refer to the attached link on how to register to become a certified small business eligible for the SBR Program using the eMMA Quick Reference Guide (QRG) [7. SBR Certification/Recertification \(eMMA QRG\) \(maryland.gov\)](#)

→ Once the SBR-designated solicitation has been issued, the agency procurement officer should continually monitor small business interest during the solicitation process. Some examples of how this can be accomplished include:

- Reviewing what firms have looked at the solicitation and indicated interest in responding via eMMA;
- Reviewing attendance sign-ins from the Pre-Bid/Proposal Conference to see which firms indicated they are small businesses;
- Tracking phone calls and emails regarding the solicitation and keeping a log of firms and their small business status; and
- Monitoring the number of small businesses that submit bids/proposals in advance of the bid/proposal due date.

BEST PRACTICES: Small Business Reserve (SBR) Executive Order 01.01.2021.01 Implementation Guidelines

If it becomes evident to the Procurement Officer that there is unlikely to be sufficient response (more than one bid/proposal) to the solicitation, the agency may determine that it is in the best interest of the State to amend the solicitation and remove the SBR designation to seek more competition. Depending on how much time is remaining prior to the bid/proposal due date, the agency should consider extending the bid/proposal response due date to provide other potential vendors time to respond. It may be beneficial for the Procurement Officer to consider holding a second Pre-Bid/Proposal Conference.



To notify vendors that this amendment is a possibility, the solicitation should include the following language at the end of the SBR notice on the solicitation cover page:



However, if small businesses do not show interest in this solicitation, the Procurement Officer has the right to remove the SBR designation via an Amendment on eMMA.



When the solicitation SBR designation is changed, the PRG Evaluation - SBR Program Designation Worksheet (PART 3) must be completed and submitted to GOSBA prior to issuing the Amendment on eMMA.

SBR PRG Program Guidance and Worksheets

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 PRG Program Guidance and Worksheets

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 # Fill this in _____ 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*): _____ **Must add justification for the waiver to apply.**





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" Activate

SBR PRG Program Guidance and Worksheets

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 Executive Order FAQs



Question: If an exemption is determined, how do we obtain a waiver for procurements between the Executive Orders threshold?

Answer: The process for obtaining approval for an exemption is outlined in the PROCUREMENT REVIEW GROUP: Guidance & Worksheets issued by OSP and GOSBA. In most cases, GOSBA is simply notified of the waiver.

BEST PRACTICES: Small Business Reserve (SBR) Executive Order 01.01.2021.01 Implementation Guidelines

If the PRG evaluation shows that adequate competition does not exist, the agency may request an SBR Program Designation Waiver Request of the SBR Program designation requirement, using the PRG Evaluation - SBR Program Designation Worksheet (PART 2). In submitting its request for a SBR Program Designation Waiver, the agency should address as many reasons as possible and provide supporting applicable documentation.

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 # Fill this in 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*):

You must select one of the boxes for the waiver to apply. These fall in the prescribed guidelines.

SBR PRG Program Guidance and Worksheets

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”

SBR Executive Order FAQs

Question: If an exemption is determined, how do we obtain a waiver for procurements between the Executive Orders threshold?

Answer: If the exemption does not fall within prescribed guidelines, GOSBA must review and approve the waiver **before** the solicitation can be posted.

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 # Fill this in 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*):

You must select the other box and provide a written justification.

BEST PRACTICES: Small Business Reserve (SBR) Executive Order 01.01.2021.01 Implementation Guidelines

If indicating “Other” as the reason for the SBR Program Designation Waiver Request, approval from GOSBA is required before submitting agency PRGs to the DGS OSP PRG (for DGS OSP delegated procurements) or other agency control authority as required.

BEST PRACTICES: Small Business Reserve (SBR) Executive Order 01.01.2021.01 Implementation Guidelines

Send SBR Program Designation Waiver Requests to GOSBA at SBRWaiver.GOSBA@maryland.gov with the subject line:

“[Agency Name] - Requisition # - SBR Program Designation Waiver Request”.

For DGS OSP delegated procurements, response from GOSBA will be emailed within 72 hours to the DGS.OSP-PRG@maryland.gov email address in addition to the agency procurement officer.

SBR Quarterly Reporting

SBR Quarterly report data is cumulative. Quarterly Summary Reports are due no later than 30 days following the fiscal quarter being reported and should contain data from the start of the fiscal year up to the end of the quarter being reported on.

SBR Quarterly Reporting

GENERAL GUIDELINES:

The objective of the Small Business Reserve (SBR) Program.

B. Scope. To the extent practicable, each procurement unit shall structure its procurement procedures to achieve the result that a minimum of 15 percent of the unit's total dollar value of procurements for goods, supplies, services, maintenance, construction, construction-related services, architectural services, and engineering services are expended directly with certified small businesses at the prime contract level. per **COMAR 21.11.01.06 (B)**. (b) Only those payments resulting from a procurement designated as a small business reserve procurement may be applied towards the procurement unit's overall small business reserve payment achievement.

SBR Quarterly Reporting

I. The total dollar value of all procurement payments made during the fiscal year, including corporate purchasing card payments (the DENOMINATOR).

II. The total dollar value of all procurement payments made to SBR firms during the fiscal year, including purchasing card payments (the NUMERATOR).

III. A breakdown of SBR payments resulting from designated procurements (NUMERATOR).

SBR Quarterly Reporting

IV. The number of unique SBR firms to receive a designated award or payment. This is the “T” Factor now being measured by GOSBA.

Accessing ANSWERS

- If you already have an ANSWERS account visit: <https://net.md.gov/apps/Answers/> and simply log in.
- If you have not created an ANSWERS account, follow the instructions :
 - Underneath 'New to ANSWERS?' create your login using your state email address.
 - You will receive an email confirming your new account.
 - Use the credentials you created to login to the ANSWERS portal.

Home Help Sign In

DEPARTMENT OF INFORMATION TECHNOLOGY
ANSWERS FINANCIAL REPORTING

Sign In

Use another service to Sign In

connect.md.gov

Sign In

New to ANSWERS?

To get started, create your account by clicking the button below and creating an account.

Create your Account



SBR Quarterly Reporting

State FMIS agencies must use the ANSWERS application to access the

- PCH065/067 SBR Payments Report
- PCH068 SBR Designated Awards Report
- PCH721 Credit Card Report (includes MBE and SBR flags)

- (**Note:** If teleworking, you must be connected
• to Pulse Secure (VPN) to access ANSWERS.)



SBR Quarterly Reporting

SMALL BUSINESS RESERVE FY2023 QUARTERLY SUMMARY REPORT INSTRUCTIONS

https://gomdsmallbiz.maryland.gov/Documents/SBR_Toolkit/FY2023%20Quarterly%20Reporting%20Docs/SBR%20FY2023%20Quarterly%20Report%20Instructions.pdf

Governor's Office of Small, Minority & Women Business Affairs
FY 2023 Small Business Reserve Quarterly Summary Statement

July 1, 2022-

(Only Enter Data in Boxes Marked "link to support." "#VALUE!" Boxes are Autopopulated)

1. Total Credit Card Payments	link to support
2. Total Credit Card Payments to SBR Contractors	link to support
3. Total Procurement Payments (not including Credit Card Payments)	link to support
4. Total Dollars Paid to SBR Contractors Under a Designated SBR Procurement	link to support
5. Total Dollars Paid to SBR Contractors Under a Non-Designated Procurement	link to support
6. Total Number of SBR Contractors receiving award and payments	link to support
7. Total DESIGNATED SBR Procurement Payments (Lines 2 and 4)	#VALUE!
8. Total SBR Procurement Payments (Lines 2, 4 and 5)	#VALUE!
9. Total Procurement Payments (Lines 1 and Line 3)	#VALUE!
10. Percentage All SBR Designated Payments to All Payments (Line 7/Line 9)	#VALUE!
11. Percentage All SBR Payments to All Payments (Line 8/Line 9)	#VALUE!

Use the Toolkit

Use the SBR Toolkit to retrieve the latest Reporting Instructions and Templates

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



Due Now
FY2023 Small Business Reserve (SBR) Quarterly Report

SBR Quarterly report data is cumulative. Quarterly Reports for the first three quarters are due no later than 30 days following the quarter being reported, and should contain data from the start of the fiscal year. No 4th quarter report is due. Instead, the full fiscal year is reported in the Annual Report. Data for the Annual Report is submitted 90 days after the close of the fiscal year being reported.

[SBR Quarterly Report Instructions](#)
[SBR Quarterly Report Template](#)

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

Contact SBR Compliance Managers
Lisa Mitchell Sennaar or Tanita Johnson with questions at
lisa.sennaar@maryland.gov or tanita.johnson1@maryland.gov

Past Due
FY2022 Small Business Reserve (SBR) Annual Report

The SBR Annual Report must be completed and submitted by September 30, 2022. The Annual Report covers the period from July 1, 2021 to June 30, 2022.
Please take time to read the SBR Annual Report Instructions and utilize the SBR Annual Report Template.

[SBR Annual Report Instructions](#)
[SBR Annual Report Template - "Notes" Section on the Summary Page](#)

[GAD List](#)
[AGENCY Example Report](#)

If you have any questions, after today's training please contact your designated SBR Compliance Manager.

SBR Compliance Managers:

Lisa Mitchell Sennaar

Lisa.sennaar@Maryland.gov

(410) 697-9613

(410) 508-8089

Tanita Johnson

Tanita.johnson1@maryland.gov

(410) 697-9619

(667) 232-1368



Maryland

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



Maryland
OPEN FOR BUSINESS

MBE Liaison Training

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

AGENDA

- 1. MBE Specific Goalsetting/Counting Reminders**
- 2. Forms Review**
- 3. Quarterly/Annual Reporting & Best Practices**
- 4. Form 3 Payment Portal – Karen Reyes**
- 5. Errors and Omissions**
- 6. Required Submissions**
- 7. FY2023 New Reporting Requirement**
- 8. Important Upcoming Dates & Reminders**



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

For Internal Training Purposes Only

MBE QUIZ



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

For Internal Training Purposes Only

MBE QUIZ Question #1

What type of awards should not be included on your Form 1/2 submission?

Choices:

Delegated Contracts

Statewide Contracts

MBE QUIZ Answer #1

What type of awards should not be included on your Form 1/2 submission?

Statewide Contracts

(Note, Undelegated Contracts would not appear on Form 1 / 2 also but delegated contracts would)

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

For Internal Training Purposes Only

MBE QUIZ Question #2

Both the Form 3 template and manual entry of data is required in the Form 3.

Choices:

True

False

MBE QUIZ Answer #2

Both the Form 3 template and manual entry of data is required in the Form 3.

FALSE

Only one method may be used to enter data

MBE QUIZ Question #3

Can your PCHL718 (MBE Prime Voucher Payments made from BPO/PO) be used to compile data to report AWARDS on your Form 1 / 2?

Choices:

Yes

No

MBE QUIZ Answer #3

Can your PCHL718 (MBE Prime Voucher Payments made from BPO/PO) be used to compile data to report AWARDS on your Form 1 / 2?

NO

This report should only be used to report payments on PO/BPOs

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

For Internal Training Purposes Only

MBE QUIZ Question #4

Is your agency required to submit an MBE Liaison's written Consent to Amend an MBE participation schedule?

Choices:

Yes

No

MBE QUIZ Answer #4

Is your agency required to submit an MBE Liaison's written Consent to Amend an MBE participation schedule?

YES

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.

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

MBE QUIZ Question #5

Can Sole-Source and/or Emergency procurements contain MBE Goals?

Choices:

Yes

No

MBE QUIZ Answer #5

Can Sole-Source and/or Emergency procurements contain MBE Goals?

YES

when the contract can reasonably include MBE/VSBE participation goals. This directive is found in COMAR

MBE Specific Goalsetting / Counting Reminders



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

For Internal Training Purposes Only

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

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

MDOT Directory

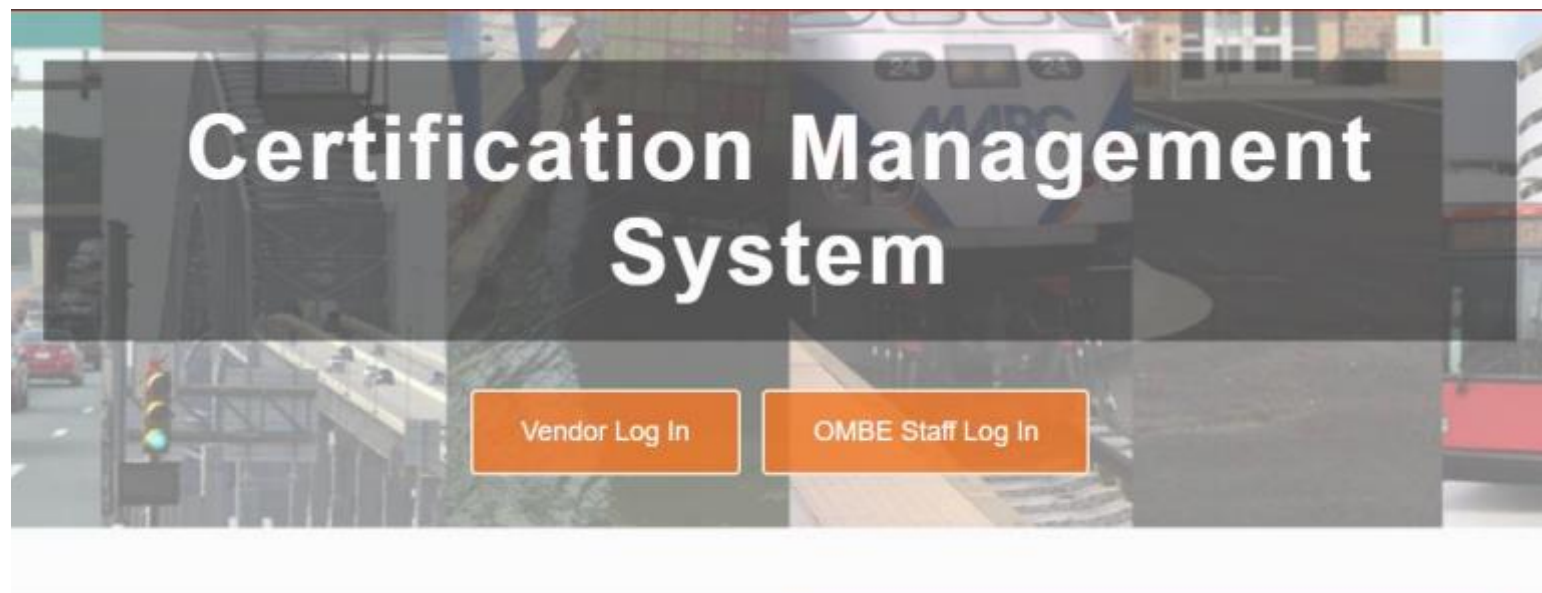
At www.mdot.maryland.gov – Select MBE in the Menu Bar



The screenshot displays the MDOT MBE website. On the left is a vertical navigation menu with the following items: "MBE Home", "Directory of Certified Firms" (highlighted with a red border), "Certifications & Forms", "Annual Review", "Expansion of Service", "Minority Business Enterprise Advisory Committee (MBEAC)", and "Certification Application Assistance Workshops". The main content area features the heading "Small, Minority & Disadvantaged Business" above a photograph of a diverse group of professionals. To the left of the photo is the circular logo for the "Office of Minority Business Enterprise" (MBE), established in 1978, which is Maryland's official certification agency. Below the photo, the text reads "Maryland's Official Certification Agency" and provides a description of the agency's role in certifying Minority Business Enterprises (MBE), Disadvantaged Business Enterprises (DBE), and Airport Concessions Disadvantaged Business Enterprises (ACDBE).

MDOT Directory

Scroll down to search the Directory



About the System

Learn more about this system and how it works today

[Information for Business Users](#)

System Training

Search Directory of Certified Firms

[Search Directory of Certified Firms](#)

[Apply for Certification / Submit Annual Review / Submit a Change](#)

MDOT Directory

- **Use Is Mandated in Statute**

State Finance & Procurement Articles 14-302 (a) (1) (iv) (3)

(ii) [Each unit shall] implement a program that will enable the unit to evaluate each contract to determine the appropriate minority business enterprise participation goals, if any, for the contract based on:

1. the potential subcontract opportunities available in the prime procurement contract;
2. the availability of certified minority business enterprises to respond competitively to the potential subcontract opportunities;





Searching the MDOT Directory

- Reasons:
 - To identify number of certified MBEs per subcontracting opportunity (identified by NAICS code(s)) during the PRG process for setting goals/subgoals
 - To verify the MBE status of an MBE firm named on MBE Forms during the bidding process
- Used by Procurement Staff, Liaisons, vendors & others

Search by NAICS Code

Search Commodity Codes

Click any **Add** link to select a code. You can also search again, sort the list, or click **Br** available, you can change the selected codeset in the drop down list under the search to close this panel.

NAICS: North American Industry Classification System ▾

Actions	Code Type	Code	Code Description
Add	NAICS	237	Heavy and Civil Engineering Const
Add	NAICS	2379	Other Heavy and Civil Engineering
Add	NAICS	23799	Other Heavy and Civil Engineering
Add	NAICS	237990	Other Heavy and Civil Engineering
Add	NAICS	238320	Engineering structure (e.g., oil sto
Add	NAICS	238910	Dismantling engineering structure
Add	NAICS	238910	Removal of dams, dikes, and othe
Add	NAICS	5413	Architectural, Engineering, and Re
Add	NAICS	54133	Engineering Services
Add	NAICS	541330	Engineering services



Search by Business Description

481 firms with **487** certifications found

Click the certification type for contact information and certification details

Search by Business Description

BUSINESS DESCRIPTION

structural engineering

Tip: Try just a few letters of a keyword.

Reviewing Results

Search Results

18 firms with 18 certifications found

Click the certification type for contact information and certification details

Vendor	Location	View
Alvi Associates, Inc.	Towson, MD	View
AST CONSULTANTS INC.	ELLCOTT CITY, MD	View
ATLAS FOUNDATIONS OF WASHINGTON, LLC	TEMPLE HILLS, MD	View
C.C. JOHNSON & MALHOTRA, P.C.	ROCKVILLE, MD	View
CAGLEY & ASSOCIATES, INC.	ROCKVILLE, MD	View
CMJ Structural Engineering Inc	Columbia, MD	View
FAISANT ASSOCIATES, INC.	BALTIMORE, MD	View
FREDERICK ENGINEERING CONSULTANTS, LLC	BOYDS, MD	View
Hope Furrer Associates, Inc.	Towson, MD	View
IMEC GROUP, LLC	COLUMBIA, MD	View
LEUTERIO THOMAS, LLC	National Harbor, MD	View
MERCADO CONSULTANTS, INC., DBA INNOVATIVE CONSULTANTS, INC.	ASHTON, MD	View
MK CONSULTING ENGINEERS, LLC	Baltimore, MD	View
PCB INTERNATIONAL, LLC	Montgomery Village, MD	View
POTOWMAC ENGINEERS, INC.	CAPITOL HEIGHTS, MD	View
STRUCTURAL ENGINEERING GROUP, INC.	Hamilton, VA	View

Reviewing Results

- As you can see, this firm is still listed under the original general NAICS code of 541330 with a specialty in structural engineering

Certified Profile

CLOSE WINDOW 

Certifying Agency	Certification Type
Maryland Department of Transportation	Disadvantaged Business Enterprise
Maryland Department of Transportation	Minority Business Enterprise
Maryland Department of Transportation	Small Business Enterprise
CERTIFIED BUSINESS DESCRIPTION	236220 - Commercial and Institutional Building Construction (SPECIFICALLY: CONSTRUCTION MANAGEMENT, COMMERCIAL AND INSTITUTIONAL BUILDING); 541330 - Engineering services (SPECIFICALLY: CIVIL/ STRUCTURAL ENGINEERING SERVICES)

Commodity Codes

Code	Description
NAICS 236220	DBE MBE SBE Commercial and Institutional Building Construction (SPECIFICALLY: CONSTRUCTION MANAGEMENT, COMMERCIAL AND INSTITUTIONAL BUILDING)
NAICS 541330	DBE MBE SBE Engineering services (SPECIFICALLY: CIVIL/ STRUCTURAL ENGINEERING SERVICES)

Downloading Search Results

Download Search Results

Click to close this box and go back to perform your next search

Download Search Results

Close

You are about to export the search results. Your export will be generated in real-time from the directory. Depending upon the speed of your Internet connection, the number of records, and the size of the export file, it may take a few minutes to generate and download the data.

ALERT: The information provided in the file is not to be used for unsolicited advertising, spam, or any other unauthorized use. Your activities from IP Number 167.102.240.62 on this website are tracked.

To download this export you must enter the following code exactly as it appears:

Enter **2xTGqP** here (case sensitive):

Include Commodity Codes in download

Download to Excel

Download to CSV

Subgoals

			TABLE 2 – RECOMMENDED SUBGOALS					
Combined Industry Category (Check appropriate column per Step 5.)			Cons	AE-CRS	Main	IT	Serv	CSE
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. # of Firms	10. ≥ 3 Y/N	Subgroups						
		African American	8%	7%	9%	10%	—	6%
		Hispanic American	—	—	3%	—	2%	2%
		Asian American	—	—	2%	—	3%	—
		Women	11%	10%	—	10%	10%	8%
Subgoal Total			19%	17%	14%	20%	15%	16%
*Subgoal Total Plus 2% Margin			21%	19%	16%	22%	17%	18%
*The Subgoal Total Plus 2% Margin is the sum of the Recommended Subgoals plus 2%.								

DO use the subgoal worksheet and guidelines to apply subgoals as appropriate

Counting Considerations

- **DO** allow MBE Primes to self-perform 50% of an established contract goal; 100% of any subgoal
- We can now count the participation of a certified woman owned minority firm as both a woman and the firms minority classification for the purposes of meeting multiple subgoals
- **DON'T Forget to Consider the 60% Rule's Impact on Goalsetting**

The 60% Rule



- The Rationale:
 - In a narrowly tailored program, it is important that MBE credit be awarded only for work actually being performed by the MBEs themselves and that we're not claiming that minority firms are actually getting the benefit
 - MBE must be performing a commercially useful function [**defined as when a firm is responsible for execution of the work of the contract and is carrying out its responsibilities by actually performing, managing, and supervising the work involved**]

Understanding the 60% Rule



- Chapter 438, Laws of Maryland 207 (SB 309)
- Became effective Oct. 1, 2017
- Mirrors Federal DBE rules, which define how work performed by DBE suppliers will be counted towards the overall project MBE goal
- Discusses 3 Supplier Classifications:
 - MANUFACTURERS
 - REGULAR DEALERS/ AND OR WHOLESALERS
FURNISH & INSTALL & OTHER SERVICES
 - BROKERS

Understanding the 60% Rule



The 60% Rule is further explained in COMAR 21.11.03.12-1

- Commercially useful function is not met when (Section B):
 - The certified MBE is limited to the role of an extra participant or
 - Performs less than 30% of the work with it's own workforce or
 - Performs less than the industry standard amount of work
- Regular dealer and broker (Section E)

Manufacturers



- **100%** of materials or supplies obtained from an MBE manufacturer, may be counted toward MBE goal achievement
- What is a manufacturer?
 - A firm that operates or maintains a factory or establishment that produces, on the premises, the material, supplies, articles or equipment required under the contract and the general character described by specifications

Regular Dealer



- **60%** of the material or supplies purchased from a regular dealer count toward the project's overall MBE goal
- What is a regular dealer?
 - A firm that owns, operates, or maintains a store, warehouse, or establishment, in which the materials, supplies articles or equipment of the general character described by the specifications and required under the contract are bought, kept in stock, and regularly sold or leased to the public in the usual course of business.

Furnish & Install Services



- Where an MBE supplier, wholesaler, regular dealer, both provides (i.e., furnishes) AND installs the materials, **100%** of the cost of the materials, supplies and labor will count toward the MBE goals.

EXAMPLE

- PAINTER – a wholesale merchant, who maintains a warehouse where he/she regularly keeps in stock and sells paint to prime contractors. Only 60% of the spend with this PAINTER can be counted toward the overall goal of the project
- PAINTER that PAINTS- same scenario as above, except the painter, in addition to selling the paint from their warehouse, will be responsible for doing the actual painting. In this case, we would count 100% of the cost of the material, supplies, and the service toward the MBE project goal.

Broker



- Count the entire amount of:
 - fees or commissions charged for assistance in the procurement of the materials and supplies; or
 - fees of transportation charges for delivery of materials or supplies required on job site
- Caveat
 - Fees must be **reasonable and not excessive** as compared with fees customarily allowed for similar services
 - **Do not count** any portion of the **cost of materials or supplies** themselves

MBE Forms



We will discuss

- MBE Utilization and Fair Solicitation Affidavit and MBE Participation Schedule
- Waiver Guidance
- Good Faith Efforts Documentation
- MBE Outreach Efforts Compliance Statements
- MBE Subcontractor Project Participation Certification
- MBE Prime Contractor Participation Certification

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

IMPORTANT NOTE:

- The latest MBE Forms are always located at the link below. Please make sure you are using the most recent version.

Located here: <https://procurement.maryland.gov/rfp/>

- Some Agencies use their own approved version of the PRG forms such as MDOT and the School Districts for Public School Construction.

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

Regulations

Code of Maryland Regulations

Sec. 21.11.03.09 C Procurement Solicitations

- (3) On forms provided by the procurement agency, a bidder or offeror shall submit with its bid or proposal:
 - (a) A completed MBE utilization and fair solicitation affidavit including either an agreement to meet the certified MBE participation goal or a request for a full or partial waiver; and
 - (b) A completed MBE participation schedule that identifies the certified minority businesses that the bidder or offeror agrees to utilize in the performance of the contract and the percentage of contract value attributed to each MBE.
- (4) The MBE participation schedule shall:
 - (a) Include the name of each certified MBE that will participate in the project including the certification category under which the MBE is participating; and
 - (b) Include the percentage of the contract to be paid to each MBE for the work or supply.
- **(5) The failure of a bidder to accurately complete and submit the MBE utilization affidavit and the MBE participation schedule shall result in a determination that the bid is not responsive unless the inaccuracy is determined to be the result of a minor irregularity that is waived or cured in accordance with COMAR 21.06.02.04.**
- **(6) The failure of an offeror to accurately complete and submit the MBE utilization affidavit and the MBE participation schedule shall result in a determination that the proposal is not reasonably susceptible of being selected for award unless the inaccuracy is determined to be the result of a minor irregularity that is waived or cured in accordance with COMAR 21.06.02.04.**

MBE Utilization and Fair Solicitation Affidavit & MBE Participation Schedule



- Must be submitted with the bid/proposal
- Failure to submit results in the rejection of bid/proposal
- Indicates Primes clear intent to either meet the goal or request a waiver of some or all of the goal(s)
- Must provide specific commitment to each named MBE
- Each named MBE must be fully certified (not pending) and not graduated
- Must describe the specific work each MBE will perform
- Work performed by MBE subs can only be counted if MBE is performing a commercially useful function
- When MBE prime indicates intent to self-perform a portion of subcontract goal(s):
 - Work to be self-performed must be covered by at least one of MBE's NAICS codes

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

MBE Utilization and Fair Solicitation Affidavit

• PART 2 - MBE UTILIZATION AND FAIR SOLICITATION AFFIDAVIT

1. MBE Participation (PLEASE CHECK ONLY ONE)

I acknowledge and intend to meet IN FULL both the overall certified Minority Business Enterprise (MBE) participation goal of percent and all of the following subgoals:

____percent for African American-owned MBE firms

____percent for Hispanic American-owned MBE firms

____percent for Asian American-owned MBE firms

____percent for Women-owned MBE firms

Therefore, I am not seeking a waiver pursuant to COMAR 21.11.03.11. I acknowledge that by checking the above box and agreeing to meet the stated goal and subgoal(s), if any, I **must** complete PART 3 - MBE Participation Schedule and Part 4 Signature Page in order to be considered for award.

OR

After making good faith outreach efforts prior to making this submission, I conclude that I am unable to achieve the MBE participation goal and/or subgoals. I hereby request a waiver, in whole or in part, of the overall goal and/or subgoals I acknowledge that by checking this box and requesting a partial waiver of the stated goal and/or one or more of the stated subgoal(s) if any, I must complete Part 3, the MBE Participation Schedule and Part 4 Signature Page for the portion of the goal and/or subgoal(s) if any, for which I am not seeking a waiver, in order to be considered for award. I acknowledge that by checking this box and requesting a full waiver of the stated goal and the stated subgoal(s) if any, I must complete Part 4 Signature Page in order to be considered for award.

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

MBE Participation Schedule

PART 3 - MBE PARTICIPATION SCHEDULE

D7

SET FORTH BELOW ARE THE (I) CERTIFIED MBEs I INTEND TO USE, (II) THE PERCENTAGE OF THE TOTAL CONTRACT VALUE ALLOCATED TO EACH MBE FOR THIS PROJECT AND, (III) THE ITEMS OF WORK EACH MBE WILL PROVIDE UNDER THE CONTRACT. I HAVE CONFIRMED WITH THE MDOT DATABASE THAT THE MBE FIRMS IDENTIFIED BELOW (INCLUDING ANY SELF-PERFORMING MBE PRIME FIRMS) ARE PERFORMING WORK ACTIVITIES FOR WHICH THEY ARE MDOT-CERTIFIED.

Prime Contractor	Project Description	Project/Contract Number

LIST INFORMATION FOR EACH CERTIFIED MBE FIRM YOU AGREE TO USE TO ACHIEVE THE MBE PARTICIPATION GOAL AND SUBGOALS, IF ANY. **MBE PRIMES:** PLEASE COMPLETE BOTH SECTIONS A AND B BELOW.

SECTION A: For MBE Prime Contractors ONLY (including MBE Primes in a Joint Venture)

<p>MBE Prime Firm Name: _____</p> <p>MBE Certification Number: _____</p> <p>(If dually certified, check only one box.)</p> <p><input type="checkbox"/> African American-Owned <input type="checkbox"/> Hispanic American- Owned <input type="checkbox"/> Asian American-Owned <input type="checkbox"/> Women-Owned <input type="checkbox"/> Other MBE Classification</p> <p>NAICS code: _____</p>	<p>Percentage of total Contract Value to be performed with own forces and counted towards the MBE overall participation goal (up to 50% of the overall goal): _____% Please refer to Item #8 in Part 1- Instructions of this document for new MBE participation guidelines regarding materials and supplies.</p> <p>Percentage of total Contract Value to be performed with own forces and counted towards the subgoal, if any, for my MBE classification (up to 100% of not more than one subgoal): _____%</p> <p><input type="checkbox"/> Supplier, wholesaler and/or regular dealer (count 60%) <input type="checkbox"/> Manufacturer (count 100%) <input type="checkbox"/> Broker (count reasonable fee/commission only) <input type="checkbox"/> Furnish and Install and other Services (count 100%)</p> <p>Complete the applicable prompt (select only one) from prompts A-C below that applies to the type of work your firm is self-performing to calculate amount to be counted towards achieving the MBE Participation Goal and Subgoal, if any.</p> <p>A. Percentage amount of subcontract where the MBE Prime firm is being used for manufacturer, furnish and install, and/or services (excluding products / services from suppliers, wholesalers, regular dealers and brokers) ___%</p> <p>B. Percentage amount for items of work where the MBE Prime firm is being used as supplier, wholesaler, and/or regular dealer (60% Rule). Total percentage of Supplies/Products ___% x 60% = ___%</p> <p>C. Percentage amount of fee where the MBE Prime firm is being used as broker (count reasonable fee/commission only) ___%</p> <p>Description of the Work to be performed with MBE prime's own forces: _____ _____</p>
---	--

D8

SECTION B: For all Contractors (including MBE Primes and MBE Primes in a Joint Venture)

<p>MBE Firm Name: _____</p> <p>MBE Certification Number: _____</p> <p>(If dually certified, check only one box.)</p> <p><input type="checkbox"/> African American-Owned <input type="checkbox"/> Hispanic American- Owned <input type="checkbox"/> Asian American-Owned <input type="checkbox"/> Women-Owned <input type="checkbox"/> Other MBE Classification</p> <p>NAICS code: _____</p>	<p>Please refer to Item #8 in Part 1- Instructions of this document for new MBE participation guidelines regarding materials and supplies.</p> <p><input type="checkbox"/> Supplier, wholesaler and/or regular dealer (count 60%) <input type="checkbox"/> Manufacturer (count 100%) <input type="checkbox"/> Broker (count reasonable fee/commission only) <input type="checkbox"/> Furnish and Install and other Services (count 100%)</p> <p>Complete the applicable prompt (select only one) from prompts A-C below that applies to the type of work that the MBE firm named to the left will be performing to calculate the amount to be counted towards achieving the MBE Participation Goal and Subgoal, if any.</p> <p>A. Percentage amount of subcontract where the MBE firm is being used for manufacturer, furnish and install, and/or services (excluding products/services from suppliers, wholesalers, regular dealers and brokers) ___%</p> <p>B. Percentage amount for items of work where the MBE firm is being used as supplier, wholesaler, and/or regular dealer (60% Rule). Total percentage of Supplies/Products ___% X 60% = ___%</p> <p>C. Percentage amount of fee where the MBE firm is being used as broker (count reasonable fee/commission only) ___%</p> <p>Description of the Work to be Performed: _____ _____</p>
---	---

MBE Participation Schedule (cont.)

D10

PART 4 – SIGNATURE PAGE

To complete Affidavit committing to MBE(s) or requesting waiver,
Bidder/Offeror must sign below:

I solemnly affirm under the penalties of perjury that: (i) I have reviewed the instructions for the MBE Utilization & Fair Solicitation Affidavit and MBE Schedule, and (ii) the information contained in the MBE Utilization & Fair Solicitation Affidavit and MBE Schedule is true to the best of my knowledge, information and belief.

Bidder/Offeror Name
(PLEASE PRINT OR TYPE)

Signature of Authorized Representative

Address

Printed Name and Title

City, State and Zip Code

Date

SUBMIT THIS AFFIDAVIT WITH BID/PROPOSAL

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




MBE Form Samples



Don't Forget!

- Updated MBE Form Samples are located on our website in the MBE toolkit in the MBE Program Resources Section:
- An MBE Forms training video is available on our website in the MBE Reporting Toolkit.

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](#)

Searching to Verify MBE Firms

- **To Search by Name or DBA**
 - Click to uncheck all Certification Types except MBE (if applicable)
 - Enter the Firms Name or DBA in the search field

Search by Certification Type

CERTIFICATIONS

Airport Concessionaire Disadvantaged Business Enterprise (ACDBE)

Disadvantaged Business Enterprise (DBE)

Minority Business Enterprise (MBE)

Small Business Enterprise (SBE)

Search by Business Name or DBA

BUSINESS NAME/DBA

Tip: Try just a few letters of the firm's name.

Searching to Verify MBE Firms

- **To Search by Certification Number**
 - Click to uncheck all Certification Types except MBE (if applicable)
 - Enter the Certification Number

Search by Reference	
MINORITY STATUS	<input type="text" value="Select one or more"/>
CERTIFIED SINCE	Between <input type="text" value="mm/dd/yyyy"/> and <input type="text" value="mm/dd/yyyy"/>
CERTIFICATION NUMBER	<input type="text" value="94-126"/>



Searching to Verify MBE Firms

- **To Search by Contact Person/Owner (If you have this information)**
- Make sure MBE only is checked, then enter the persons first and last name

Search by Certification Type

CERTIFICATIONS

- Airport Concessionaire Disadvantaged Business Enterprise (ACDBE)
- Disadvantaged Business Enterprise (DBE)
- Minority Business Enterprise (MBE)
- Small Business Enterprise (SBE)

Search by Contact Person

CONTACT PERSON/OWNER

First Name

Tip: Use the first letter.

Last Name

Tip: Try the first few letters.



Searching to Verify MBE Firms

- If the correct result is returned, click to view

Search Results		1 firm with 1 certification for
		<small>Click the certification type for contact information and certification details</small>
Vendor	Location	View
RUDOLPH'S OFFICE & COMPUTER SUPPLY, INC.	ELKRIDGE, MD	View

Searching to Verify MBE Firms

- Scroll through to confirm that the MBEs details

Confirm Details such as:

LOCATION

CERTIFICATION TYPE

NAICS Code(s)

Certified Profile CLOSE WINDOW

WEBSITE	http://WWW.RUDOLPHSUPPLY.COM
COUNTY	Anne Arundel (MD)

Certification Information

CERTIFYING AGENCY	Maryland Department of Transportation
CERTIFICATION TYPE	MBE - Minority Business Enterprise
CERTIFIED BUSINESS DESCRIPTION	424120 - Stationery and Office Supplies Merchant Wholesalers (SPECIFICALLY: WHOLESALE OF OFFICE AND COMPUTER SUPPLIES, SOME OFFICE FURNITURE AND MACHINES)

Commodity Codes

Code	Description
NAICS 424120	MBE Stationery and Office Supplies Merchant Wholesalers (SPECIFICALLY: WHOLESALE OF OFFICE AND COMPUTER SUPPLIES, SOME OFFICE FURNITURE AND MACHINES)

Searching to Verify MBE Firms

- Other details you can confirm include

Additional Information

MINORITY STATUS
(MBE Classification /
Subgroup)

CERTIFICATION #

MINORITY STATUS


Female

CERTIFIED SINCE

01/26/1994

CERTIFICATION NUMBER

94-126



If you have trouble accessing a firm within the MDOT Directory and wish to inquire with the certification agency, you may contact:

Director of Office of Minority Business Enterprise

Sabrina Bass
410-865-1240

Intake Operations Manager

Sharonda Baker
410-865-1072



General Office E-Mail
mbe@mdot.maryland.gov

General Office Phone
Local: 410-865-1269

Waiver Guidance and Good Faith Efforts Documentation

- Waiver Guidance - lays out main criteria used to determine good faith efforts
 - Considers quality, quantity and intensity of bidder's efforts
 - Does not cover all factors state may consider
 - Guidance covered on pp. D11 – D14 of MBE Attachment D
- Good Faith Effort Documentation - must be submitted within 10 working days of request
 - Agency's MBE liaison officer and legal counsel should be consulted on minor irregularity determinations and waiver issues **prior to seeking** Governor's Office of Small, Minority & Women Business Affairs weigh in.

Waiver Documentation

D15

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

1. It is hereby certified that the firm of _____
(Name of Minority firm)

located at _____
(Number) (Street)

_____ (City) (State) (Zip)

was offered an opportunity to bid on Solicitation No. _____

in _____ County by _____
(Name of Prime Contractor's Firm)

2. _____ (Minority Firm), is either unavailable for the work/service or unable to prepare a Proposal for this project for the following reason(s):

(Signature of Minority Firm's MBE Representative) (Title) (Date)

(MDOT Certification #) (Telephone #)

3. To be completed by the prime contractor if Section 2 of this form is not completed by the minority firm.
To the best of my knowledge and belief, said Certified Minority Business Enterprise is either unavailable for the work/service for this project, is unable to prepare a Proposal, or did not respond to a request for a price Proposal and has not completed the above portion of this submittal.

(Signature of Prime Contractor) (Title) (Date)

**D-1C
GOOD FAITH EFFORTS DOCUMENTATION TO SUPPORT WAIVER REQUEST**

PAGE __ OF __

Prime Contractor:	Project Description:	PROJECT/CONTRACT
Offeror Company Name, Street Address, Phone		Solicitation #:

D16

Parts 1, 2, and 3 must be included with this certificate along with all documents supporting your waiver request.

I affirm that I have reviewed Attachment D-1B, Waiver Guidance. I further affirm under penalties of perjury that the contents of Parts 1, 2, and 3 of this Attachment D-1C Good Faith Efforts Documentation Form are true to the best of my knowledge, information, and belief.

Company: _____

Company Name (please print or type)

By: _____

Signature of Authorized Representative

Printed Name: _____

Printed Name

Title: _____

Title

Date: _____

Date

Address: _____

Company Address

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

Waiver Documentation (cont.)

GOOD FAITH EFFORTS DOCUMENTATION TO SUPPORT WAIVER REQUEST
PART 1 – IDENTIFIED ITEMS OF WORK OFFEROR MADE AVAILABLE TO MBE FIRMS

PAGE __ OF __

Prime Contractor:	Project Description:	PROJECT/CONTRACT
Offeror Company Name, Street Address, Phone		Solicitation #:

D17

Identify those items of work that the Offeror made available to MBE Firms. This includes, where appropriate, those items the Offeror identified and determined to subdivide into economically feasible units to facilitate the MBE participation. For each item listed, show the anticipated percentage of the total contract amount. It is the Offeror's responsibility to demonstrate that sufficient work to meet the goal was made available to MBE Firms, and the total percentage of the items of work identified for MBE participation equals or exceeds the percentage MBE goal set for the procurement. Note: If the procurement includes a list of Proposal items identified during the goal setting process as possible items of work for performance by MBE Firms, the Offeror should make all of those items of work available to MBE Firms or explain why that item was not made available. If the Offeror selects additional items of work to make available to MBE Firms, those additional items should also be included below.

Identified Items of Work	Was this work listed in the procurement?	Does Offeror normally self-perform this work?	Was this work made available to MBE Firms? If no, explain why not.
	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Please check if Additional Sheets are attached.

GOOD FAITH EFFORTS DOCUMENTATION TO SUPPORT WAIVER REQUEST
PART 2 – IDENTIFIED MBE FIRMS AND RECORD OF SOLICITATIONS

PAGE __ OF __

Prime Contractor:	Project Description:	PROJECT/CONTRACT
Offeror Company Name, Street Address, Phone		Solicitation #:

D18

Identify the MBE Firms solicited to provide quotes for the Identified Items of Work made available for MBE participation. Include the name of the MBE Firm solicited, items of work for which quotes were solicited, date and manner of initial and follow-up solicitations, whether the MBE provided a quote, and whether the MBE is being used to meet the MBE participation goal. MBE Firms used to meet the participation goal must be included on the MBE Participation Schedule. Note: If the procurement includes a list of the MBE Firms identified during the goal setting process as potentially available to perform the items of work, the Offeror should solicit all of those MBE Firms or explain why a specific MBE was not solicited. If the Offeror identifies additional MBE Firms who may be available to perform Identified Items of Work, those additional MBE Firms should also be included below. Copies of all written solicitations and documentation of follow-up calls to MBE Firms must be attached to this form. This list should be accompanied by a Minority Contractor Unavailability Certificate signed by the MBE contractor or a statement from the Offeror that the MBE contractor refused to sign the Minority Contractor Unavailability Certificate (Attachment D-1B - Exhibit A). If the Offeror used a Non-MBE or is self-performing the identified items of work, Part 4 must be completed.

Name of Identified MBE Firm & MBE Classification	Describe Item of Work Solicited	Initial Solicitation Date & Method	Follow-up Solicitation Date & Method	Details for Follow-up Calls	Quote Rec'd	Quote Used	Reason Quote Rejected
Firm Name: MBE Classification (Check only if requesting waiver of MBE subgoal.) <input type="checkbox"/> African American-Owned <input type="checkbox"/> Hispanic American-Owned <input type="checkbox"/> Asian American-Owned <input type="checkbox"/> Women-Owned <input type="checkbox"/> Other MBE Classification		Date: <input type="checkbox"/> Mail <input type="checkbox"/> Facsimile <input type="checkbox"/> E-mail	Date: <input type="checkbox"/> Phone <input type="checkbox"/> Mail <input type="checkbox"/> Facsimile <input type="checkbox"/> E-mail	Time of Call: Spoke with: <input type="checkbox"/> Left Message	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Used Other MBE <input type="checkbox"/> Used Non-MBE <input type="checkbox"/> Self-performing
Firm Name: MBE Classification (Check only if requesting waiver of MBE subgoal.) <input type="checkbox"/> African American-Owned <input type="checkbox"/> Hispanic American-Owned <input type="checkbox"/> Asian American-Owned <input type="checkbox"/> Women-Owned <input type="checkbox"/> Other MBE Classification		Date: <input type="checkbox"/> Mail <input type="checkbox"/> Facsimile <input type="checkbox"/> E-mail	Date: <input type="checkbox"/> Phone <input type="checkbox"/> Mail <input type="checkbox"/> Facsimile <input type="checkbox"/> E-mail	Time of Call: Spoke with: <input type="checkbox"/> Left Message	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Used Other MBE <input type="checkbox"/> Used Non-MBE <input type="checkbox"/> Self-performing

Please check if Additional Sheets are attached.

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

Waiver Documentation (cont.)

GOOD FAITH EFFORTS DOCUMENTATION TO SUPPORT WAIVER REQUEST
PART 3 – ADDITIONAL INFORMATION REGARDING REJECTED MBE QUOTES

PAGE __ OF __

D19

Prime Contractor:	Project Description:	PROJECT/CONTRACT NUMBER:
<i>Offeror Company Name, Street Address, Phone</i>		Solicitation #:

This form must be completed if Part 1 indicates that an MBE quote was rejected because the Offeror is using a Non-MBE or is self-performing the Identified Items of Work. Provide the Identified Items Work, indicate whether the work will be self-performed or performed by a Non-MBE, and if applicable, state the name of the Non-MBE. Also include the names of all MBE and Non-MBE Firms that provided a quote and the amount of each quote.

Describe Identified Items of Work Not Being Performed by MBE (Include spec/ section number from Proposal)	Self-performing or Using Non-MBE (Provide name)	Amount of Non-MBE Quote	Name of Other Firms who Provided Quotes & Whether MBE or Non-MBE	Amount Quoted	Indicate Reason Why MBE Quote Rejected & Briefly Explain
	<input type="checkbox"/> Self-performing <input type="checkbox"/> Using Non-MBE	\$ _____	_____ <input type="checkbox"/> MBE <input type="checkbox"/> Non-MBE	\$ _____	<input type="checkbox"/> Price <input type="checkbox"/> Capabilities <input type="checkbox"/> Other
	<input type="checkbox"/> Self-performing <input type="checkbox"/> Using Non-MBE	\$ _____	_____ <input type="checkbox"/> MBE <input type="checkbox"/> Non-MBE	\$ _____	<input type="checkbox"/> Price <input type="checkbox"/> Capabilities <input type="checkbox"/> Other
	<input type="checkbox"/> Self-performing <input type="checkbox"/> Using Non-MBE	\$ _____	_____ <input type="checkbox"/> MBE <input type="checkbox"/> Non-MBE	\$ _____	<input type="checkbox"/> Price <input type="checkbox"/> Capabilities <input type="checkbox"/> Other
	<input type="checkbox"/> Self-performing <input type="checkbox"/> Using Non-MBE	\$ _____	_____ <input type="checkbox"/> MBE <input type="checkbox"/> Non-MBE	\$ _____	<input type="checkbox"/> Price <input type="checkbox"/> Capabilities <input type="checkbox"/> Other
	<input type="checkbox"/> Self-performing <input type="checkbox"/> Using Non-MBE	\$ _____	_____ <input type="checkbox"/> MBE <input type="checkbox"/> Non-MBE	\$ _____	<input type="checkbox"/> Price <input type="checkbox"/> Capabilities <input type="checkbox"/> Other

Please check if Additional Sheets are attached.

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

Outreach Efforts Compliance Statement

- Not required to be submitted with bid/offer
- Requested from procurement officer in connection with notice of intent to award
- Asks for bidder's MBE outreach efforts and attempts made to assist MBE subcontractors
- Reasonable timeframe to submit (10 working days)
- Failure to submit this form could result in withdrawal of offer (see pg. 5 of Affidavit)

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

For Internal Training Purposes Only

Outreach Efforts Compliance Statement (cont.)

D-2

OUTREACH EFFORTS COMPLIANCE STATEMENT

Complete and submit this form within 10 Business Days of notification of apparent award or actual award, whichever is earlier.

D20

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

1. Offeror identified subcontracting opportunities in these specific work categories:

2. Attached to this form are copies of written solicitations (with Proposal instructions) used to solicit certified MBE firms for these subcontract opportunities.

3. Offeror made the following attempts to personally contact the solicited MDOT-certified MBE firms:

4. Please Check One:

- This project does not involve bonding requirements.
- Offeror assisted MDOT-certified MBE firms to fulfill or seek waiver of bonding requirements. (DESCRIBE EFFORTS):

5. Please Check One:

- Offeror did attend the pre-Proposal conference.
- No pre -Proposal meeting/conference was held.
- Offeror did not attend the pre-Proposal conference.

D21

PLEASE PRINT OR TYPE

Company:

Company Name (please print or type)

By:

Signature of Authorized Representative

Printed Name:

Printed Name

Title:

Title

Date:

Date

Address:

Company Address

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

MBE Project Participation Certifications

MBE Subcontractor Project Participation Certification

- Must be submitted for each named MBE within 10 working days
- Prime must complete sections A, B, & D **before** presenting to subcontractor for signature, note the fraud provisions on this form
- MBE names, dollar amounts, percentages, and work descriptions must be consistent with Utilization Affidavit
- Subcontractors should verify information on form before signing it; and finalize their Subcontract Agreement
- Procurement officer and MBE liaison should answer questions, if any arise
- A copy should be held by the Subcontractor, with one copy sent to the Prime, and the original sent to the Agency directly NOT THROUGH THE PRIME.

MBE Forms - Subcontractor

**D-3A
CERTIFIED MBE SUBCONTRACTOR PARTICIPATION CERTIFICATION**

INSTRUCTIONS:

PRIME CONTRACTOR: After completing SECTIONS A, B, and D, provide this form to *each* certified Minority Business Enterprise subcontractor (MBE) listed on the MBE Participation Schedule (Attachment D-1A) allowing sufficient time for the MBE to respond within the required timeframe.

CERTIFIED MBE SUBCONTRACTOR: Complete SECTION C to acknowledge and certify the information in SECTION A. Return the completed form directly to the Procurement Officer identified in SECTION D within 10 days after notice from the Prime Contractor of the State's intent to award the Contract. Provide a copy to the Prime Contractor.

IF THIS FORM IS NOT RETURNED WITHIN THE REQUIRED TIME, THE PROCUREMENT OFFICER MAY DETERMINE THAT THE PRIME CONTRACTOR IS NOT RESPONSIBLE AND THEREFORE NOT ELIGIBLE FOR CONTRACT AWARD.

SECTION A

Provided that (Prime Contractor) _____ is awarded the State contract in conjunction with Solicitation Number _____, (Prime Contractor) _____ intends to enter into a subcontract with (Certified MBE Subcontractor) _____ with MDOT Certification Number _____ committing to participation by (Certified MBE Subcontractor) _____ of at least \$ _____ which equals _____ % of the Total Contract Value for the following products/services:

NAICS CODE	WORK ITEM, SPECIFICATION NUMBER, LINE ITEMS OR WORK CATEGORIES (IF APPLICABLE)	DESCRIPTION OF SPECIFIC PRODUCTS AND/OR SERVICES

The Contractor and certified MBE each acknowledge that, for purposes of determining the accuracy of the information provided herein, the Procurement Officer may request additional information, including, without limitation, copies of the subcontract agreements and quotes. The Contractor and certified MBE each solemnly affirms under the penalties of perjury that: (i) the information provided in this Certified MBE Subcontractor Participation Certification is true to the best of its knowledge, information and belief, and (ii) it has fully complied with the State Minority Business Enterprise law, State Finance and Procurement Article §14-308(a)(2), Annotated Code of Maryland which provides that, except as otherwise provided by law, a Contractor may not identify a certified MBE in a Bid/Proposal and:

- (1) fail to request, receive, or otherwise obtain authorization from the MBE to identify the MBE in its Bid/Proposal;
- (2) fail to notify the MBE before execution of the Contract of its inclusion of the Bid/Proposal;
- (3) fail to use the MBE in the performance of the Contract; or
- (4) pay the MBE solely for the use of its name in the Bid/Proposal.

D22

D23

SECTION B – Prime Contractor

Signature of Representative: _____

Printed Name and Title: _____

Prime Firm's Name: _____

Federal Identification Number: _____

Street Address, City, State, Zip Code: _____

Phone: _____

Date: _____

SECTION C – Certified MBE Subcontractor

Signature of Representative: _____

Printed Name and Title: _____

MBE Firm's Name: _____

Federal Identification Number: _____

Street Address, City, State, Zip Code: _____

Phone: _____

Date: _____

SECTION D

This completed form is due to the Procurement Officer on or before: _____

Solicitation #: _____ Solicitation Title: _____

Agency/Dept.: _____ Procurement Officer: _____

Phone: _____ Email: _____

Street Address, City, State, Zip Code: _____

MBE Project Participation Certifications

MBE Prime Project Participation Certifications

- Separate attestation for MBE prime self-performance
- Entries here must be consistent with Affidavit/Schedule
- Confirms that a specified percentage of work will be performed by MBE prime's own workforce
- Work must be within NAICS codes and fulfill commercially useful function
- Subject to confirmation via field inspections, office visits, etc.

MBE Participation Certification

D24

**D-3B
MBE PRIME PROJECT PARTICIPATION CERTIFICATION**

Please complete and submit this form to attest to each specific item of work that your MBE firm has listed on the MBE Participation Schedule (Attachment D-1A) for purposes of meeting the MBE participation goals. This form must be submitted within 10 Business Days of notification of apparent award. If the Offeror fails to return this affidavit within the required time, the Procurement Officer may determine that Proposal is not susceptible of being selected for Contract award.

Provided that _____ (Prime Contractor's Name) with Certification Number _____ is awarded the State contract in conjunction with Solicitation No. _____,

such MBE Prime Contractor intends to perform with its own forces at least \$ _____ which equals to _____ % of the Total Contract Amount for performing the following goods and services for the Contract:

NAICS CODE	WORK ITEM, SPECIFICATION NUMBER, LINE ITEMS OR WORK CATEGORIES (IF APPLICABLE) For Construction Projects, General Conditions must be listed separately	DESCRIPTION OF SPECIFIC PRODUCTS AND/OR SERVICES	VALUE OF THE WORK

MBE Prime Contractor

Company: _____

Company Name (please print or type)

FEIN: _____

Federal Identification Number

Company Address: _____

Phone: _____

Printed Name: _____

Title: _____

By: _____

Signature of Authorized Representative

Date: _____

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

Amendment of MBE Forms

Per COMAR 21.11.03.12

72 Hour rule: After bid/proposal submission and *before execution of contract*

- Certified MBE becomes ineligible or unavailable to perform (defined in section B)
- Bidder/Offeror notifies PO within 72 hours of determination
- Bidder/Offeror request MBE form amendment within 5 days of determination

“Good Cause” termination/cancellation: After contract award

- Certified MBE has documented nonperformance or elected to cease work
- Requires written consent of MBE liaison and approval of unit head
- Copy of written consent should go to Governor’s Office of Small, Minority & Women Business Affairs

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

The background of the slide features a soft-focus image of autumn foliage. In the upper portion, there are branches with leaves in shades of yellow, orange, and red, along with clusters of small, dark, round berries. The lower portion of the background is a dense carpet of fallen leaves in similar warm tones, creating a bokeh effect.

MBE Reporting

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

For Internal Training Purposes Only

Reporting Requirements

Code of Maryland Regulations (Last Updated: September 18, 2019)

Sec. 21.11.03.17. Reporting

A. Each procurement agency shall make a report annually within 90 days following the close of the fiscal year to the Governor's Office of Small, Minority & Women Business Affairs, the Department of Transportation, and, subject to State Government Article, §2-1246, Annotated Code of Maryland, to the Joint Committee on Fair Practices and State Personnel Oversight that includes:

- (1) The total number, value, and procurement category of its procurements from State-certified MBEs as prime contractors, and separately as subcontractors, by business name and specific MBE classification;
- (2) The percentages, by specific classification of minority business enterprise, that purchases under §A(1) and (2) of this regulation represent of the total number and value of its procurements for the fiscal year just ended;
- (3) The number of waivers granted pursuant to Regulation .11 of this chapter; and
- (4) An evaluation by the procurement agency of the success of its MBE program, which evaluation shall include a brief description of the procurement agency's outreach efforts to MBE prime contractors and MBE subcontractors.

B. Each procurement agency shall submit to the Board of Public Works and the Governor's Office of Small, Minority & Women Business Affairs by July 31 of each year the report of waivers required under Regulation .11E of this chapter.

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.

D. The Governor's Office of Small, Minority & Women Business Affairs shall prepare an annual report summarizing certified MBE participation throughout the State, for submission by the end of each calendar year to the Board of Public Works, the Legislative Policy Committee of the Maryland General Assembly, and to each procurement agency.

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

Use the Toolkit

Please utilize the MBE Toolkit to retrieve the latest reporting templates, resources, trainings, and announcements!

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

(located on the Office of State Procurement's website).




FY2021 MBE Annual Report

The MBE Annual Report must be completed and submitted on or before September 30, 2021. The Annual Report covers the period *July 1, 2020 - June 30, 2021*.

Please submit the following:

1. Form 1 & 2 as EXCEL sheets (1 file) and the signed signature page
2. Contracts Inventory Report as EXCEL sheets (1 file)
3. Data entry in the Form 3 Web Portal (Contact GOSBA for technical assistance)
4. A completed and signed Summary Sheet (all figures must match your form 3 data and your reports)
5. All backup documentation from both FMIS and non-FMIS users AS EXCEL sheets

All documentation above is mandatory and must be submitted to the MBEreports.gosba@maryland.gov email by **September 30, 2021**. The 2021 report templates, a fill-in summary template, and the 2021 reporting instruction manual are available below:

- **FY21 REPORTING MANUAL**
-  **FY21 FORM 1 & 2 ANNUAL REPORT**
-  **FY21 MBE CONTRACTS INVENTORY**
- **FY21 MBE SUMMARY STATEMENT**
-  **Form 3 Data Import Template.xls**
- Form 3 Web Portal: <https://www.doit.state.md.us/MBEForm3/>

Call 410-687-8605 if you have any questions.

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

MBE Reporting Best Practices

- Reports need to be submitted in **Excel** for importing into database. Why?
 - Combined data is transformed into metrics
 - Measures our success
 - Allows us to see trends (positive or negative)
- Timely data submissions. Why?
 - Allows our office time to review data for errors
 - Allows timely publication of the legislatively mandated annual report.
- When our office reaches out to you to correct a report or to supply a missing document, please respond as soon as possible.



The background of the slide features a soft-focus image of autumn foliage. In the upper portion, there are branches with leaves in shades of yellow, orange, and red, along with clusters of small, dark, round berries. The lower portion of the background is a dense, out-of-focus carpet of fallen leaves in similar warm tones.

Quarterly Reporting

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

For Internal Training Purposes Only

MBE Quarterly Report

- Use the Quarterly Form 1 / 2 only. Found in the MBE Reporting toolkit, scroll down to see it.
- Pull quarterly report data from ANSWERS or your agency's internal records (iFMIS, Workday, PeopleSoft, etc.)
- No Form 3 Payment Portal entries are required for quarterly reports.
- Same general rules as Annual Report, except you ***include payment data*** broken down by MBE Classification on Form 2 and total agency payments including those to MBEs on Form 1.

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

Source Documents

FMIS/ANSWERS DATA COLLECTION CHECKLIST

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

- Generate the following FMIS/ANSWERS MBE Reports:
 - a) PCHL709 (BPO/PO Change Orders from contracts awarded in prior fiscal years)
 - b) PCHL710 (Contract Awards Detail) run by award date
 - c) PCHL711 (Contract Awards Summary) **Use Waiver Data Only**
 - d) ~~PCHL713 (MBE Prime Contract Awards by Ethnicity)~~-Reference Document Only
 - e) PCHL717 (MBE Prime Payments by Direct Voucher; no BPO/PO)
 - f) PCHL718 (MBE Prime Voucher Payments made from BPO/PO)
 - g) PCHL719 (MBE Subcontractor Payments)
 - h) PCHL 720 (MBE Subcontract Awards) run by award date
 - i) PCHL 721 or VIEWDIRECT A30USB11(P-Card Total/MBE Purchases)

Cut along dotted line and post in visible spot

FMIS CHEAT SHEET

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

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

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

**With the exception of control agency statewide contracts*

- III. **DGS Contracts:** Regarding AWARDS, *agency/department-specific* commodities and maintenance contracts awarded by or through the Agency/Department of General Services (DGS) should be included on the *agency/department's* annual report on Forms 1 and 2.
 - a. Non-delegated DGS contracts (i.e., Statewide, Capital Construction, etc.) should be excluded from Forms 1 and 2, as DGS will report these awards.
 - b. Regarding EXPENDITURES, all MBE expenditures **from DGS statewide contracts and delegated contracts** should be included on the using agency/department's Form #3 Payments/Subcontractor Utilization Database

DGS Procurements	Form #1 & 2 - Awards	FORM #3 - Payments
DGS Agency/Agency/Department Specific	Agency/Agency/Department Reports	Agency/Agency/Department Reports
DGS Non-delegated	DGS Reports	Agency/Agency/Department Reports

- c. **DoIT/DBM Master Contracts:** Certain Agency/Department of Budget and Management (DBM) and Agency/Department of Information Technology (DoIT) master contracts have been *DELEGATED* to the using agency/department for purposes of MBE compliance and reporting. All task order **awards** made from these delegated contracts should be reported on Forms 1 and 2 by the using agency/department. **Payments** made to task order contractors (MBE prime and MBE subcontractor) during FY 2019 are to be reported by the using agency/department on Form #3.

For *NON-DELEGATED* DoIT/DBM Statewide contracts, agencies should report only expenditures to MBEs in the Form #3 Payments/Subcontractor Utilization Database. (See the DBM website <http://dbm.maryland.gov/proc-contracts/Pages/MBEDelegation.aspx> (BE SURE TO REVIEW THIS LINK) and the DOIT Master Contracts (on the GOSBA website) for the most current list of contracts for which MBE responsibility has been delegated.)

DoIT/DBM Procurements	Form #1 & 2 - Awards	FORM #3 - Payments
Delegated	Agency/Agency/Department Reports	Agency/Agency/Department Reports
DGS Non-delegated	DGS Reports	Agency/Agency/Department Reports

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

Form 2 Quarterly

Minority Business Enterprise Quarterly/Monthly Procurement Report													Reporting Form #2				
Reporting Department/Agency:																	
Fiscal Year 2020 Reporting Period:		July 1, 2019 - insert date (cumulative to date)															
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
Totals	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 Subcontract Payments																	
	African American	Asian	Hispanic	Native American	Women	African American Women	Asian Women	Hispanic Women	Native American Women	Disabled	Non-Profit (Certified)	Community Service Provider	Disadvantaged	Total			
														\$0.00			

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

For Internal Training Purposes Only

Form 1 Quarterly

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-	Total # of MBE Contracts Awarded- Prime & Sub	Total MBE Participation Percentage
Architectural	0	\$0	0	\$0	0	\$0	0	\$0	0	0	0.00%
Engineering	0	\$0	0	\$0	0	\$0	0	\$0	0	0	0.00%
Construction	0	\$0	0	\$0	0	\$0	0	\$0	0	0	0.00%
Construction Related Services	0	\$0	0	\$0	0	\$0	0	\$0	0	0	0.00%
Maintenance	0	\$0	0	\$0	0	\$0	0	\$0	0	0	0.00%
Services	0	\$0	0	\$0	0	\$0	0	\$0	0	0	0.00%
Supplies & Equipment	0	\$0	0	\$0	0	\$0	0	\$0	0	0	0.00%
IT Services	0	\$0	0	\$0	0	\$0	0	\$0	0	0	0.00%
IT Supplies & Equipment	0	\$0	0	\$0	0	\$0	0	\$0	0	0	0.00%
Human, Cultural, Social & Educational Services	0	\$0	0	\$0	0	\$0	0	\$0	0	0	0.00%
Corporate Credit Card	0	\$0	0	\$0	0	\$0	0	\$0	0	0	0.00%
Direct Voucher	0	\$0	0	\$0	0	\$0	0	\$0	0	0	0.00%
Totals	0	\$0	0	\$0	0	\$0	0	\$0	0	0	0.00%

Note(s):

Total \$ Paid - All Prime Contracts	Total \$ Paid - MBE Prime & MBE Subcontracts	% MBE Payments	MBE Prime Contracts \$ Paid	MBE Subcontracts \$ Paid
\$0	\$0	0.00%	\$0	\$0

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

Form 1 / 2 Report



- Found in the MBE Reporting toolkit Manual.
- Prepare Form 2 First, data will link to the Form 1 cells in blue.
- Direct Vouchers and Credit Cards are considered **both** an Award and Payment and should therefore appear on Form 1 / 2 and Form 3.
- Do not double count payments – If entire contract is listed under a PRIME, do not include it in the subcontractor section (such as in the case of a self performing prime).
- Do not put negative figures in Form 1 / 2.
- If **RED** errors or codes appear in column M when you complete your report, that means something is incorrect, review and, if needed, call Governor's Office of Small, Minority & Women Business Affairs for help. No percentage line can be more than 100% in column L. (See next page)

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

Form 1

Procurement Category	Total # All Prime Contracts (Including	Total All Prime Contracts Dollar Value Awarded (Including MBE)	Total # of Prime Contract Waivers	Total Dollar Value of Prime Contract Waivers	Total # MBE Prime Contracts Awarded	Total MBE Prime Contract Dollar Value Awarded	Total # MBE Subcontracts Awarded	Total MBE Subcontract Dollar Value Awarded	Total # of MBE Contracts Awarded-	Total \$ of MBE Contracts Awarded- Prime & Sub	Total MBE Participation Percentage
Architectural		\$50,000,000			20	\$865,598	3	\$85,505	23	\$951,103	1.90%
Engineering		\$12,000,000			0	\$0	30	\$90,566,658	30	\$90,566,658	754.72%
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		\$3,800,000,000			500	\$99,865,778	0	\$0	500	\$99,865,778	2.63%
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		\$50,000			0	\$0	0	\$0	0	\$0	0.00%
Corporate Credit Card		\$8,544,577			0	\$0			0	\$0	0.00%
Direct Voucher					0	\$0			0	\$0	0.00%
Totals	0	\$3,870,594,577	0	\$0	520	\$100,731,376	33	\$90,652,163	553	\$191,383,539	4.94%
Note(s):											





Annual Reporting Reminders

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

For Internal Training Purposes Only

A Well Completed Form 1

Minority Business Enterprise Annual Procurement Report		Reporting Form #1	
Reporting Department/Agency:	Agency Name		
Fiscal Year 20XX Reporting Month:	July 1, XX - June 30, XX	(cumulative to date)	

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	66	767,387			2	\$567,892	2	\$56,000	4	\$623,892	81.30%
Engineering	10	70,235,987	1	\$1,500,002	1	\$105,200	7	\$35,000	8	\$140,200	0.20%
Construction	42	18,523,695			13	\$2,569,314	58	\$5,246,578	71	\$7,815,892	42.19%
Construction Related Services	10	10,000,000			1	\$26,598	7	\$6,191,340	8	\$6,217,938	62.18%
Maintenance	19	126,864			0	\$0	7	\$45,678	7	\$45,678	36.01%
Services	485	55,896,354	2	\$1,600,000	47	\$5,086,956	15	\$7,091,327	62	\$12,178,283	21.79%
Supplies & Equipment	185	4,441,713			66	\$192,292	15	\$186,900	81	\$379,192	8.54%
IT Services	18	1,112,549			2	\$172,103	4	\$99,500	6	\$271,603	24.41%
IT Supplies & Equipment	22	893,932			5	\$267,897	8	\$98,765	13	\$366,662	41.02%
Human, Cultural, Social & Educational Services	2	56,239			0	\$0	1	\$25,000	1	\$25,000	44.45%
Corporate Credit Card	1,400	1,600,002			198	\$190,804			198	\$190,804	11.93%
Direct Voucher	85	4,369,258			151	\$197,341			151	\$197,341	4.52%
Totals	2,344	\$168,023,980	3	\$3,100,002	486	\$9,376,398	124	\$19,076,088	610	\$28,452,485	16.93%

Note(s):

Prepared by:	Pat Harrison, MBE Director	Additional notes:
	Name and Title	
Date:	09/15/2019	
Telephone:	410-787-9999	
Email Address:	pat.harrison@mmaryland.gov	



Submit
ANNUAL REPORT TEMPLATE
in EXCEL FORMAT

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

Form 3 Web Portal - Data Entry



- <https://doit.state.md.us/MBEFORM #3/>
- Retrieve login info from Governor's Office of Small, Minority & Women Business Affairs, if needed.
- Choose your method, DO NOT DO BOTH
 - Manual Entry OR
 - Import Template
- Be mindful, if you are using the import method, it will overwrite everything currently in working data.
- No matter what method you choose, you must still submit for the reporting year. Problems with submitting, contact Governor's Office of Small, Minority & Women Business Affairs: 410-697-9605

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

Remember our Training Video

- The Form 3 Portal in-depth training video is available on our website in the [MBE Reporting Toolkit](#).
- A slide deck is also provided for your review.

Form 3 Portal - Manual Entry

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

Maryland.gov Phone Directory State Agencies Online Services

MARYLAND .gov GOVERNOR'S OFFICE OF SMALL, MINORITY & WOMEN BUSINESS AFFAIRS Form 3 Payment Portal Welcome Agriculture. (Logout)

HOME AGENCY

Working Data

- > View All Data
- > Add New Contract
- > Import Contracts

Reporting

- > Prime Payments by MBE
- > Sub Payments by MBE
- > Contract Compliance

Submitted Data

- > View All Data

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

Contact Us | Privacy | Accessibility

100 Community Place
Crownsville, MD 21032

GOSBA Helpdesk: 410-697-9605

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

For Internal Training Purposes Only

Form 3 Portal - Manual Entry

Click on contract number and revise data as necessary

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

The screenshot shows the 'Form 3 Payment Portal' for the 'DEPARTMENT OF AGRICULTURE'. The table below displays contract data with a dropdown menu open for filtering.

Contract#	Awards CTD	Payments FY	Payments CTD	Start Date	End Date	MBE Goal
717-718-cpc	\$0.00	\$0.00	\$0.00	7/1/2015	5/30/2016	00%
> 717	\$0.00	\$0.00			5/30/2016	00%
> 717	\$0.00				5/30/2016	00%

The dropdown menu for the first row is open, showing the following options:

- NoFilter
- Contains
- StartsWith
- EndsWith
- EqualTo
- GreaterThan
- LessThan
- GreaterThanOrEqualTo
- LessThanOrEqualTo

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

Form 3 Portal - Manual Entry

The screenshot shows the 'Form 3 Payment Portal' interface. At the top, it says 'GOVERNOR'S OFFICE OF SMALL, MINORITY & WOMEN BUSINESS AFFAIRS' and 'Form 3 Payment Portal'. Below the header, there are navigation links for 'HOME' and 'AGENCY'. The main section is titled 'Prime Data:' and includes a note: 'The * denotes a required field.' There are four buttons: 'Save Changes', 'New', 'View All Records', and 'Delete Record'. The form fields are as follows:

- Name of Prime Contractor: * (Text input: Allegiance Software, Inc)
- Prime Contractor Classification: * (Dropdown menu: Non-Minority)
- MDOT Certification Number: * (Text input:)
- Contract / ID Number: * (Text input: R95P6400857)
- Contract Start Date: * (Date picker: 4/12/2016)
- Contract Expiration Date: * (Date picker: 4/11/2020)
- Agency: * (Dropdown menu: BALTIMORE CITY COMMUNITY CC)
- Prime Contractor Awards CTD: * (Text input: 0.00)
- Prime Contractor Payments FY: * (Text input: 0.00)
- Prime Contractor Payments CTD: * (Text input: 0.00)
- MBE Goal %: * (Text input: 0.00 %)
- Project Title: (Text input: On-Premise Fundraising System Radio Station)

Below the form is the 'MBE Subcontract Information:' section with a table. Three blue arrows point from text boxes to the 'Prime Contractor Awards CTD', 'Prime Contractor Payments FY', and 'Prime Contractor Payments CTD' fields. The text boxes contain the following descriptions:

- Prime Contractor Awards CTD- Total Award Amount
- Prime Contractor Payments FY- Payments made towards that contract that FY
- Prime Contractor Payments CTD- Payments made throughout the entire duration of the Contract regardless of FY

Revise dollar amounts or dates as necessary

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

For Internal Training Purposes Only

Form 3 Portal - Manual Entry

Input a brand new contract:

Maryland.gov Phone Directory State Agencies Online Services

MARYLAND .gov GOVERNOR'S OFFICE OF SMALL, MINORITY & WOMEN BUSINESS AFFAIRS Form 3 Payment Portal Welcome Agriculture. (Logout)

HOME AGENCY

Working Data

- > View All Data
- > **Add New Contract**
- > Import Contracts

Reporting

- > Prime Payments by MBE
- > Sub Payments by MBE
- > Contract Compliance

Submitted Data

- > View All Data

Governor's Office of Small, Minority & Women Business Affairs MBE Form 3 Web Portal

Welcome to the Governor's Office of Small, Minority & Women Business Affairs MBE Form3 payment Web portal.

Now that you are logged in, you can use the Agency link in the main menu as the next step. From there you can enter in your working

Click ADD NEW CONTRACT to manually input Prime Contractor Data

Contact Us | Privacy | Accessibility

100 Community Place
Crownsville, MD 21032

GOSBA Helpdesk: 410-697-9605

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

Form 3 Portal - Manual Entry

Input prime contractor data:

The screenshot shows a web form for entering prime contractor data. The form includes the following fields and sections:

- Prime Data:** A section containing several required fields marked with a red asterisk (*):
 - Name of Prime Contractor: *
 - Contract / ID Number: *
 - Contract Start Date: *
 - Contract Expiration Date: *
 - Prime Contractor Awards CTD: *
 - Prime Contractor Payments FY: *
 - Prime Contractor Payments CTD: *
 - Project Title:
- Agency:** A dropdown menu currently set to "DEPARTMENT OF AGRICULTURE".
- Buttons:** "Save", "New", and "View All Records".
- MBE Subcontract Information:** A section with a note: "Please save the Contract details to allow add".

Callout boxes provide additional instructions:

- Top Left:** "NOTE: Dollar amounts CAN be input with commas. ALWAYS, ALWAYS SAVE YOUR WORK"
- Top Right:** "After all data has been input, click the SAVE button. Hitting the Enter key will not save your data, you must hit the Save button. To move to the next record hit NEW."
- Left Side:** "Reminder, manually input the non-minority vendors, good news is that they will reappear in the future should you need to input them again."
- Bottom Center:** "Note: For direct voucher (DV) or credit card (CC) payments, consolidate multiple amounts for individual vendors (i.e. Rudolph Office Supplies) and indicate in the contract id the type of payment, DV or CC. Use FY dates for Start and Expiration Dates."
- Bottom Right:** "Input information, fields with red asterisk (*) are required."

At the bottom left of the page, there is a footer with the text: "Contact Us | Privacy | Accessibility" and "100 Community Place, Crownsville, MD 21032".

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

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

Form 3 Portal - Manual Entry

HOME AGENCY

Prime Data:

The * denotes a required field.

Save Changes New View All Records Delete Record

Prime Contractor Data was Successfully saved.

Name of Prime Contractor: * LJS Consulting

Prime Contractor Classification: * Non-Minority

MDOT Certification Number:

Contract / ID Number: * AGR2016-001

Contract Start Date: * 7/1/2015

Contract Expiration Date: * 6/30/2016

Agency: * DEPARTMENT OF AGRICULTURE

Prime Contractor Awards CTD: * 10,000

Prime Contractor Payments FY: * 1000

Prime Contractor Payments CTD: * 1000

MBE Goal %: * 23 %

Project Title: Goat Grass Mowing

MBE Subcontract Information:

+ Add New MBE Subcontract

Name	Cert-Number	MBE	Award Amount	Actual Payments FY	Actual Payments CTD
Contractor:			2 BROTHERS LANDSCAPING, LLC		
Cert-Number:	13-063				
MBE Classification:		Hispanic American			
Award Amount:			2300		
Actual Payments FY:				230	
Actual Payments CTD:					230

Save Cancel (All Fields Required)

- Add subcontractor data:
- Click “Add MBE Subcontractor”
- Input Subcontractor Data
- Click SAVE

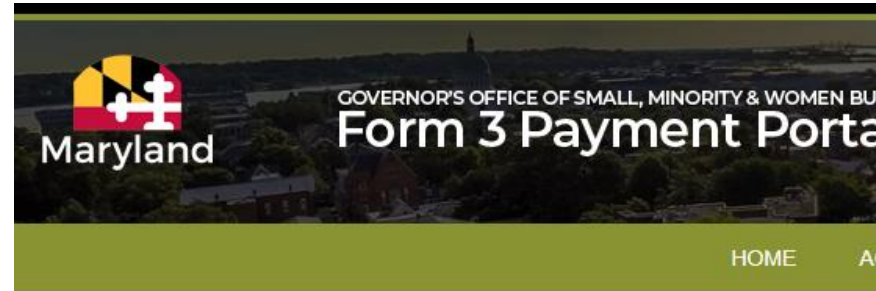
Note: If you can't find an MBE in the drop down, search vendor in the MDOT Database <https://mbe.mdot.maryland.gov/directory/> by certification number and confirm Vendor's legal name.

There may be times when an MBE was decertified during the fiscal year. You may contact the MDOT certification group (410)-865-1269 for exact date of decertification, if needed.

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

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

**Click View All Data
under Working Data**



GOSBA

- > Agency Submissions
- > Missing Agencies
- > View Agency Data (Working)
- > View Agency Data (Submitted)
- > Prime Payments
- > Sub Payments
- > Self Performing
- > FY Unique Vendor Payments

Administration

- > User Management
- > Role Management
- > View Agency List
- > FY Change

Working Data

- > View All Data
- > Add New Contract
- > Import Contracts

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

Welcome to the Governor's Office of Small, Minority & Women Business Enterprises Affairs MBE Form

Now that you are logged in, you can use the system to view your data, or you can select from the submitters.

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

Example FY 22 would be 7/1/2021 – 6/30/2022; so, if a contract or transactions end date is 6/30/2020 this would be a contract or transaction you need to delete.

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

Start Date: 7/1/2018
End Date: 6/30/2019

View Working Data for: AGI
Add New Contract Use til Click
Contract#
> 00001
Description:
> 00002
Description:

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

Click to delete the record,

Prime Data:
The * denotes a required field.

Save Changes New View All Records **Delete Record**

Name of Prime Contractor: *
RGH ENTERPRISES, INC.

Prime Contractor Classification: *
African American

MDOT Certification Number:
97-360

doit.state.md.us says
Are you sure you want to delete?
There is no undoing this!

OK Cancel

Prime Data:
The * denotes a required field.
Prime Contractor Data was Successfully deleted.

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

Form 3 Portal – Import Method

- Use the Form 3 Data Template (Excel Sheet) found in the MBE Reporting Toolkit.
- Fill in all requested information
- Make sure that MBE Designations match the list in the Reporting Manual
- Make sure that Prime IDs are unique for each contract , DV, or CC transaction
- Be sure Prime ID matches subcontractors paid under that Contract

MBE Designations

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

Non-Minority

African American

Asian American

Hispanic American

Native American

Women

African American Women

Asian American Woman

Hispanic American Woman

Native American Women

Disabled

Disadvantaged

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

Form 3 Portal – Import Method

- PRIMES TAB

- The Primes sheet should hold all the prime contractor information.
- It should contain a header row at the top

- Columns are expected in order:

- ID
- Contractor Name
- EFIN
- MBE Designation

- MDOT Cert #
- Contract#
- StartDate
- EndDate
- Award Amount
- Payments FY
- Payments CTD
- MBE Goal
- Description

Form 3 Portal – Import Method

- PRIMES TAB (cont.)

- The ID column will not be stored in the database. It is just used to connect your subcontractors to their primes. You can use whatever naming convention you wish (Numbers or Letters). The ID's just need to be unique for every Contract (so every Excel row should be unique). *The suggestion is to use the contract # for contract awards.*
- The **optional columns** are EFIN and Description. If you have this information, please provide it. The rest are required.
- For the MDOT Cert #, you can use a Zero format [00-000] or a blank for Non-Minorities.
- For transactions that have no Start or End Date, you can use the Fiscal Year Start or end Dates.
- For transactions like Direct Vouchers and P-Card, the FY payment amount, the Award amount and the payments CTD will all be the same.

Form 3 Portal – Import Method

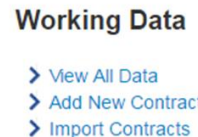

- SUBS TAB
- Columns are expected in this order (Do not move items):
 - Prime ID (This should match the PRIME ID # for the contract the payment is for)
 - Contractor Name
 - MDOT Cert #
 - MBE Designation
 - Award Amount
 - Payments FY
 - Payments CTD
- All columns are required

Form 3 Portal – Import Method

- SUBS TAB (cont.)
 - The Prime ID column will link the subs to their primes. The ID doesn't need to be unique per row, but must match one row in the Primes sheet.
 - Some data may not have all the information. Like P Card may not have Start or End Dates. These can be resolved by using some default data. This must be done for the system to be able to differentiate between data that actually has no value and data that was just forgotten.
 - Default Data can include:
 - Contractor Name – There is no default data that can be substituted. You need to type in the actual contractor name.
 - MBE Designation – There is no default data that can be substituted. A valid MBE from the system must be input.
 - MDOT Cert# – There is no default data that can be substituted. A valid MDOT Cert# should be provided.
 - Start Date – For Credit Card payments, use the Fiscal Year Start Date.
 - End Date – For Credit Card payments, use the Fiscal Year End Date.
 - Award Amount & Payments – No default data, enter correct amounts.

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

Form 3 Portal – Import Method

- Import Instructions:
- On the left hand menu under the “Working Data” section, choose the Import Contracts link. This will get you to the Import page. The link is as shown.  Working Data
 - > View All Data
 - > Add New Contract
 - > Import Contracts
- Once you arrive on the import page you will:
- Select the Agency/Agency/Department from the dropdown list (if not already selected).
- Click on the “Select a File To Upload” button. A dialog box will pop up for you to select which Excel file you want to upload. Only one file can be uploaded at a time.
- Once a file has been selected and completely uploaded, click on the “Import Excel” button.
- A “wait” icon will display while the file is being processed. If everything goes well, you will be greeted with the following message:  Data was Validated & Imported Successfully.
- If instead you receive errors, resolve them, then try importing the Excel file again.
- Should you need to edit your import data, you can edit the Excel file and reimport it.

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

Form 3 Portal – Import Method

- Errors and Resolutions

- There are common errors that arise when importing the Form 3 Data Template.
- Each error will attempt to list which Excel sheet the error occurred in and the Unique Identifier used to identify which row.
- Also included should be the Column Name (if applicable) to identify the column.
- Each Error will be listed as a bulleted list item in red text.
- Don't worry, if you encounter errors, no data in the system will be overwritten until all the errors are fixed.

Form 3 Portal – Import Method

- Errors and Resolutions (cont.)

Duplicate Primes

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

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

Missing Primes

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

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

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

Form 3 Portal – Import Method

- Errors and Resolutions (cont.)

Invalid MBE Designation

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

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

Invalid MDOT Cert#

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

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

Form 3 Portal – Import Method

- Errors and Resolutions (cont.)

Missing Data

- For Prime Contract# MissingDataPrime, the Contractor Name is missing. It is a required field.
 - For Prime Contract# MissingDataPrime, the MBE Designation is missing, it is a required field.
 - For Prime Contract# MissingDataPrime, the MDOT Cert# is missing. It is a required field.
 - For Prime Contract# MissingDataPrime, the Contract# is missing, it is a required field.
 - For Prime Contract# MissingDataPrime, the Start date is missing a Date, it is a required field.
 - For Prime Contract# MissingDataPrime, the End date is missing a Date, it is a required field.
 - For Prime Contract# MissingDataPrime, the Award Amount is missing an amount, it is a required field.
 - For Prime Contract# MissingDataPrime, the Payments FY amount is missing an amount, it is a required field.
 - For Prime Contract# MissingDataPrime, the Payments CTD amount is missing an amount, it is a required field.
 - For Prime Contract# MissingDataPrime, the MBE Goal % is missing, it is a required field.
- The above (Or a subset of) will appear whenever a required column has missing data (a blank cell). The error message will hold whether it was a Prime or subcontractor, the relevant ID string, and the column that is missing the data. Just add or fix the corresponding data column. For contracts that may not have some of the data, you can fill in default data. See the section above for default data for missing data (Ex. A P-Card might not have an end date). **OR IT MIGHT JUST BE A BLANK LINE THAT IS INCLUDED IN YOUR DATA.**

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

Form 3 Portal – Reviewing Data

- Once the manual entry or data import has been completed, you can review and export the summary data.
- The PRIME and Subcontractor summaries should be submitted with your final report

Form 3 Portal – Reviewing Data (cont.)

Export reports to Excel:

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

Maryland.gov Phone Directory State Agencies Online Services

MARYLAND .gov

GOVERNOR'S OFFICE OF SMALL, MINORITY & WOMEN BUSINESS AFFAIRS
Form 3 Payment Portal

Welcome Agriculture. (Logout)

HOME AGENCY

Working Data

- > View All Data
- > Add New Contract
- > Import Contracts

Reporting

- > Prime Payments by MBE
- > Sub Payments by MBE
- > Contract Compliance

Submitted Data

- > View All Data

Contact Us | Privacy | Accessibility

100 Community Place
Crownsville, MD 21032

GOSBA Helpdesk: 410-697-9605

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

Form 3 Portal – Reviewing Data (cont.)

Click the Excel icon and save your file.

The screenshot shows the 'Form 3 Payment Portal' for the 'DEPARTMENT OF AGRICULTURE'. The page title is 'Form 3 Payment Portal' and the subtitle is 'Total Prime Contractor Actual Payments by MBE Classification'. The 'Agency Name' is set to 'DEPARTMENT OF AGRICULTURE' and the 'Data Set' is 'Working'. A table displays the following data:

MBE Classification	Number of Records	Total Amounts Paid
Non-Minority	1	\$0.00
African American	12	\$125,761.53
Asian American	2	\$0.00
Women	32	\$112,931.82
African American Women	2	\$0.00
Asian American Woman	3	\$1,545.35
Hispanic American Woman	3	\$24,674.60
Grand Total - All Actual Payments	55	\$264,913.30

An Excel icon in the top right corner of the table is circled in red, indicating the option to export the data to an Excel file.

Working Data

- > View All Data
- > Add New Contract
- > Import Contracts

Reporting

- > Prime Payments by MBE
- > Sub Payments by MBE
- > Contract Compliance

Submitted Data

- > View All Data

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100 Community Place
Crownsville, MD 21032

GOSBA Helpdesk: 410-697-9605

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

Form 3 Portal – Submitting Data

- After review of data has been completed, you can submit data to Governor's Office of Small, Minority & Women Business Affairs.
- Only one method, either manual entry of data OR imports the template should be used submitted, NOT BOTH.
- Submitting the data makes it final. If there are issues after data has been submitted, please contact Governor's Office of Small, Minority & Women Business Affairs, 410-697-9605.

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

Form 3 Portal – Submitting Data (cont.)

The screenshot shows the 'Form 3 Payment Portal' for the Governor's Office of Small, Minority & Women Business Affairs. The header includes the Maryland state logo and the text 'GOVERNOR'S OFFICE OF SMALL, MINORITY & WOMEN BUSINESS AFFAIRS Form 3 Payment Portal'. A navigation bar contains 'HOME' and 'AGENCY' links. The main content area is divided into three columns: 'Working Data', 'Agency Dashboard', and 'Submitted Data'. The 'Working Data' column lists 'View All Data', 'Add New Contract', and 'Import Contracts'. The 'Agency Dashboard' column has sub-sections for 'Working Data' (Add New Contract Data, View All Working Data, Import Data, Submit Data) and 'Reports' (Prime Contractor Payments by MBE, Subcontractor Payments by MBE, Contract Compliance). The 'Submitted Data' column lists 'View Submitted Data'. A footer contains contact information: 'Contact Us | Privacy | Accessibility', '100 Community Place, Crownsville, MD 21032', and 'GOSBA Helpdesk: 410-697-9605'.

Submitting data to Governor's Office of Small, Minority & Women Business Affairs:

- Click on Agency/Agency/Department (in the middle of top tool bar)
- Under Working Data:
- Click Submit Data
- Choose Year
- Click to Submit
- You will get a confirmation message, Click OK
- You should get this kind of message:

Data submitted for Fiscal Year 2022

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

Contract Inventory Sheet

- **MBE Prime Contractors spreadsheet**

- Number of MBE Prime Contractors: Enter the total number of different MBEs that were awarded prime contracts by the reporting agency/department. **(TOTAL OF THESE ENTRIES MUST EQUAL THE TOTAL ON THE PRIME TABLE OF THE FORM 2)**
- Agency/Agency/Department Name: Enter the name of the State Agency/Agency/Department reporting data.
- MBE Prime Contractor Name: Enter the name of each MBE prime contractor awarded a contract by the agency/department.
- Prime Contractor MBE Cert. #: For each MBE prime contractor, enter the MDOT MBE certification number. (Format: 00-000)
- Prime Contractor MBE Classification: For each MBE prime contractor, **select from the drop-down list the MBE classification.** (African American, African American Woman, Asian, Hispanic, Native American, Woman, African American Woman, Asian Woman, Hispanic Woman, Native American Woman, Disabled, Disadvantaged)
- Agency/Agency/Department Contract #: For each MBE prime contractor, enter all prime contracts awarded. ***IMPORTANT* Do include awards/payments made via corporate credit card or direct voucher (consolidate multiple payments per vendor).**

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

Contract Inventory Sheet (cont.)

- Contract Description (Procurement Category): Enter the appropriate procurement category
- Award Amount: Enter dollar value of award

A	B	C	D	E	F	G	H	I
Minority Business Enterprise MBE Prime Contract Awards Report								
For Fiscal Year 2022								
Date Submitted:								
NEW**								
(List all MBE prime contracts awarded.)								
#	Agency Name	MBE Prime Contractor Name	Prime Contractor MBE Cert. #	Prime Contractor MBE Classification (Select from Dropdown)	Credit Card / Direct Voucher (Select ONLY from the Dropdown)	Contract Description (Procurement Category) (Select from Dropdown)	Award Amount	Contract # ONLY (Please list the contract # or voucher #, do NOT include Credit Card on this line)
1								

Contract Inventory Sheet (cont.)

- **MBE Subcontractors spreadsheet**

- Number of MBE Subcontractors: Enter the total number of different MBEs that were listed as subcontractors on prime contracts awarded by the reporting agency/department **(THE TOTAL OF THE SUBS TAB SHOULD EQUAL THE SUBCONTRACTOR TOTAL OF THE TABLE ON THE FORM 2)**.

- The MBE Subcontractors name and other information similar to what is on the Primes tab is requested on the Subs tab:

Minority Business Enterprise MBE Subcontract Awards Report						
For Fiscal Year 20xx						
Date submitted:						
(List all MBE subcontracts awarded.)						
Agency Name	MBE Subcontractor Name	Subcontractor MBE Cert. #	Subcontractor MBE Classification (Select from Dropdown)	Agency Prime Contract #	Prime Contract Description (Procurement Category) (Select from Dropdown)	Award Amount

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

Common Errors and Omissions in Reporting

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

- **ANSWERS Reports:**

- The Use of the 718 Report for Awards reporting on Form 1 [This is usually a payments report]
- The 711 and 713 Reports are for your reference only
- Submitting PDF formatted backup hinders the verification process
- What to submit for backup data
- Use the reportable column, if applicable, and highlight or show what is being used for awards/payments

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

Common Errors and Omissions in Reporting

- **Form 1 & 2, Form 3 and, Contracts Inventory:**
 - Use the correct Template
 - Statewide Contracts (Note: DGS Statewide Contracts and other master contracts can be searched via links from our MBE Toolkit)
 - Negative Numbers and totals should not be included
 - Contracts Inventory totals should match Form 2
 - Awards vs. Payments
 - Please do not change/add to templates
 - MBE goals are only on contracts with subs, everything else should be zero% (PRIMES) in Form 3.
 - MBE Designations must match those listed in the Manual, p. 35, including using Non-minority for primes with no MBE designation.

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

Common Errors and Omissions in Reporting

- **Summary Statement and Report Checklist:**
 - Missing Signatures
 - Errors in payment totals on Summary sheet rows 2a & 2b(using “,”)
 - Format: \$45,236,000 as 45236000 to be safe
 - Not turning in all required Annual Report components

Annual MBE Summary Statement



Annual Minority Business Enterprise (MBE) Procurement Report

Summary Statement

Reporting Department/Agency:		
Fiscal Year:	4	
Category	Amount	
1. Total dollars awarded to MBEs (Total from Form 1 Spreadsheet)		
2. Total dollars paid to MBEs (Total from Form 3 Database, sum of 2a and 2b below)	0.00	
a. Total Actual Subcontractor Payments by MBE Classification		
b. Total Prime Contractor Actual Payments by Classification (excluding non-minority primes)		
3. Total dollars awarded (Total from Form 1 Spreadsheet)		
4. MBE awards as a percentage of contracts awards (from Form 1 Spreadsheet)		
Secretary/Agency Head Name:		

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

This is a Fill-In Form. Use your Tab Key to move to each input field and enter the information as required.

- The Summary Statement is a Fillable pdf.
- Row #1 Input Total dollars awarded to MBEs (total from Form #1 Spreadsheet cell K23)
- Row #2 Total dollars paid to MBEs is auto-populated from data input from 2a. and 2b.
- 2a. Input Total from FORM #3 Database “Subcontractor Information Report” plus,
- 2b. Input Total from FORM #3 Database “Prime Contractor Actual Payment by Classification Report” minus the amount for non-minority category, DO NOT ENTER COMMAS
- Row #3 Input Total dollars awarded (Total from Form #1 Spreadsheet cell C23)
- Row #4 Input MBE awards as a percentage of contract awards (from Form #1 Spreadsheet cell L23)
- Page #2 OBTAIN Signatures of Report Preparer, Chief Financial Officer and Agency/Agency/Department Head

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

Use Your Checklist

ANNUAL MBE REPORT SUBMISSION CHECKLIST

(For Agency Use)

- Completed Summary Statement, **signed by three representatives**, please plan accordingly (**hard copy mailed with original signature or scanned signed copy e-mailed to GOSBA**)
- Fiscal Year 2019 MBE Strategic Plan (MS Word or PDF file), send to GOSBA due July 31, 2018
- GOSBA Procurement Awards **Annual Reporting Forms 1 and 2** Excel spreadsheets – 1 file *(please note that the ANNUAL Report excel file is slightly different from the monthly version)*, send to GOSBA in excel format.
 - Include Awards Delegated from DGS
 - Include Awards that may not have been posted in timely manner from June BPW Agendas
- GOSBA “MBE CONTRACTS INVENTORY” formerly known as MBE Prime Contractor and MBE Subcontractor Awards Detail Report excel spreadsheets – 1 file, send to GOSBA
- GOSBA Form 3 data entry into web portal**
- GOSBA Form 3 Reports to keep on file, you decide, GOSBA has documentation within the portal**
- Documentation supporting the annual report awards and payments** submitted to GOSBA. (FMIS using agencies should include **RECONCILED* electronic** copies of the reports used to generate award and payment data and any other relevant supporting documentation. Non-FMIS using agencies should include reports from their systems that validate the figures being reported.) This documentation should be submitted via e-mail, Google Drive or as a last result thumb drive or CD by October 1, 2018. **MANDATORY SUBMISSION**



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



MBE Reporting Requirements

Let's review the reporting requirements for our office:

- As we previously discussed our office must receive both Quarterly and Annual MBE Procurement Reports (backup data should be included).
 - Always sent 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.



NEW** Report for FY2023

• MBE Compliance Assessment Report

- Legislatively mandated compliance assessments are already required by agencies when a contract terms end. With the passing of HB0389, our office is introducing a Compliance Assessment Report that will now be due annually starting with fiscal year 2023.
- The Compliance Assessment will only be due during the Annual Reporting Season and will be submitted with the MBE Annual Report documents.



NEW** Report for FY2023

• MBE Compliance Assessment Report

- Will only report information about contracts that closed (expired) during the fiscal year and contained MBE goals/subgoals.
- Aggregate results will be published in the Governor's Office of Small, Minority & Women Business Affairs Annual Report.
- Let's take a look...

Upcoming Dates

Check your calendar

- FY23 Event Invites will be sent out closer to the event date.
- Upcoming Events are listed at the bottom of each monthly Procurement Compliance Bulletin.
- If you need to be added to our calendar invites or bulletin mailing list, please email:
nichelle.johnson1@maryland.gov and
lisa.sennaar@maryland.gov



Upcoming Dates

- The Agency MBE Participation Attainment Survey is due by October 31, 2022, with no extensions granted.
- Surveys were sent to Procurement Directors; MBE Liaisons were cc'd.
- Liaisons will need to collaborate with procurement directors to provide accurate and scrubbed FY22 MBE Annual procurement data for the survey.



Upcoming Dates

- Submission of this survey is required and agencies who fail to submit the requested data by the due date will be reported as non-responsive to the Committee.
- If you have any questions or concerns about the survey, please reach out to Nichelle Johnson, nichelle.johnson1@maryland.gov



STAY CONNECTED

- Are you maximizing your agency's Small Business Reserve (SBR), Minority Business Enterprise (MBE) and Veteran-Owned Small Business Enterprise (VSBE) participation?
- Do you know who on your team is responsible for compliance and administration of the SBR, MBE and VSBE Programs and if they are receiving this Procurement Compliance Bulletin?
- Do you attend our training regularly?

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

For Internal Training Purposes Only

STAY CONNECTED

- Are you participating in our Compliance Conference Call?
- Are you attending the monthly Senior Procurement Advisory Group (SPAG) monthly meetings?

Note: If no one at your agency is receiving SPAG meeting invitations, email Jamie Tomaszewski, Chief Administrative Officer, Office of State Procurement (OSP), Maryland Department of General Services (DGS), at jamie.tomaszewski@maryland.gov and ask to be added to the invite list.

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

For Internal Training Purposes Only

Resources For You

- Our MBE Reporting Toolkit
- Video Training Series on Website
- Review the New *Searching Databases* slide deck available in each toolkit
- Compliance Library
- Compliance Managers

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

For Internal Training Purposes Only



As always, if you have questions after today's training, please contact us:

Nichelle Johnson

nichelle.johnson1@Maryland.gov

410-697-9605

667-232-1369

Karen Reyes

karen.reyes@maryland.gov

410-697-9608

443-346-0630

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

For Internal Training Purposes Only



Maryland
OPEN FOR BUSINESS

Veteran- Owned Small Business Enterprise (VSBE) Program

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


Internal Purposes Only

Let's start with a Poll!





VSBE Poll Question #1



1. Where does one look to find veteran-owned businesses?


- A. Google
- B. eMMA
- C. VetBiz
- D. All of the Above

Answer: D- All the above





VSBE Poll Question #2



2. What platform houses the VSBE Program certified vendors?

A. Google

B. eMMA

C. VetBiz

D. All of the Above

Answer: B- eMMA





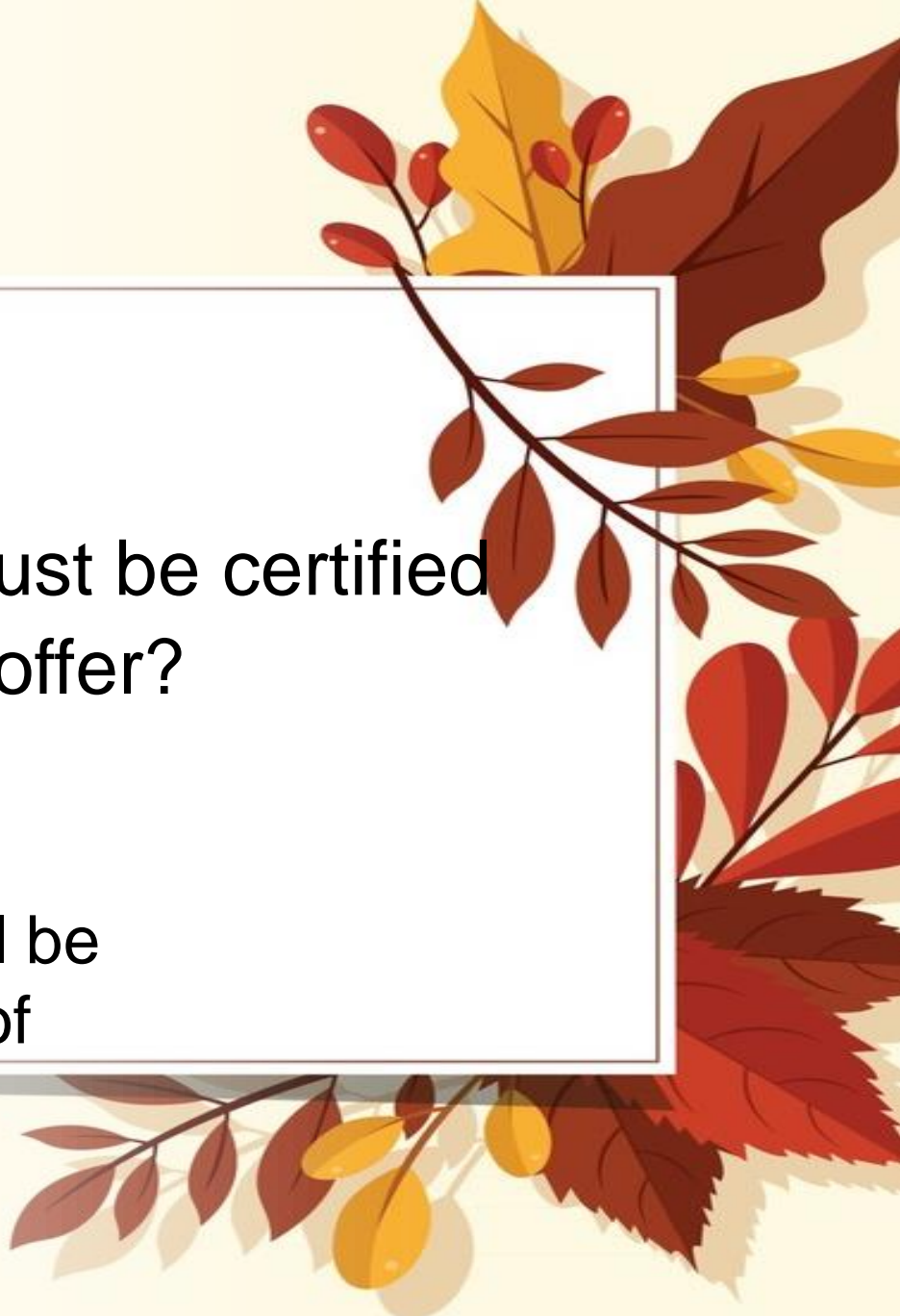
VSBE Poll Question #3



True or False

3. A VSBE vendor must be certified at the time of award/offer?

Answer: True- The veteran-owned firm shall be a certified VSBE at the time of submission of the bid or proposal. COMAR 21.11.14.07(C)





VSBE Poll Question #4



True or False

4. VSBE Annual Reports are due
September 30th?

Answer: False- October 1st each year





VSBE Poll Question #5



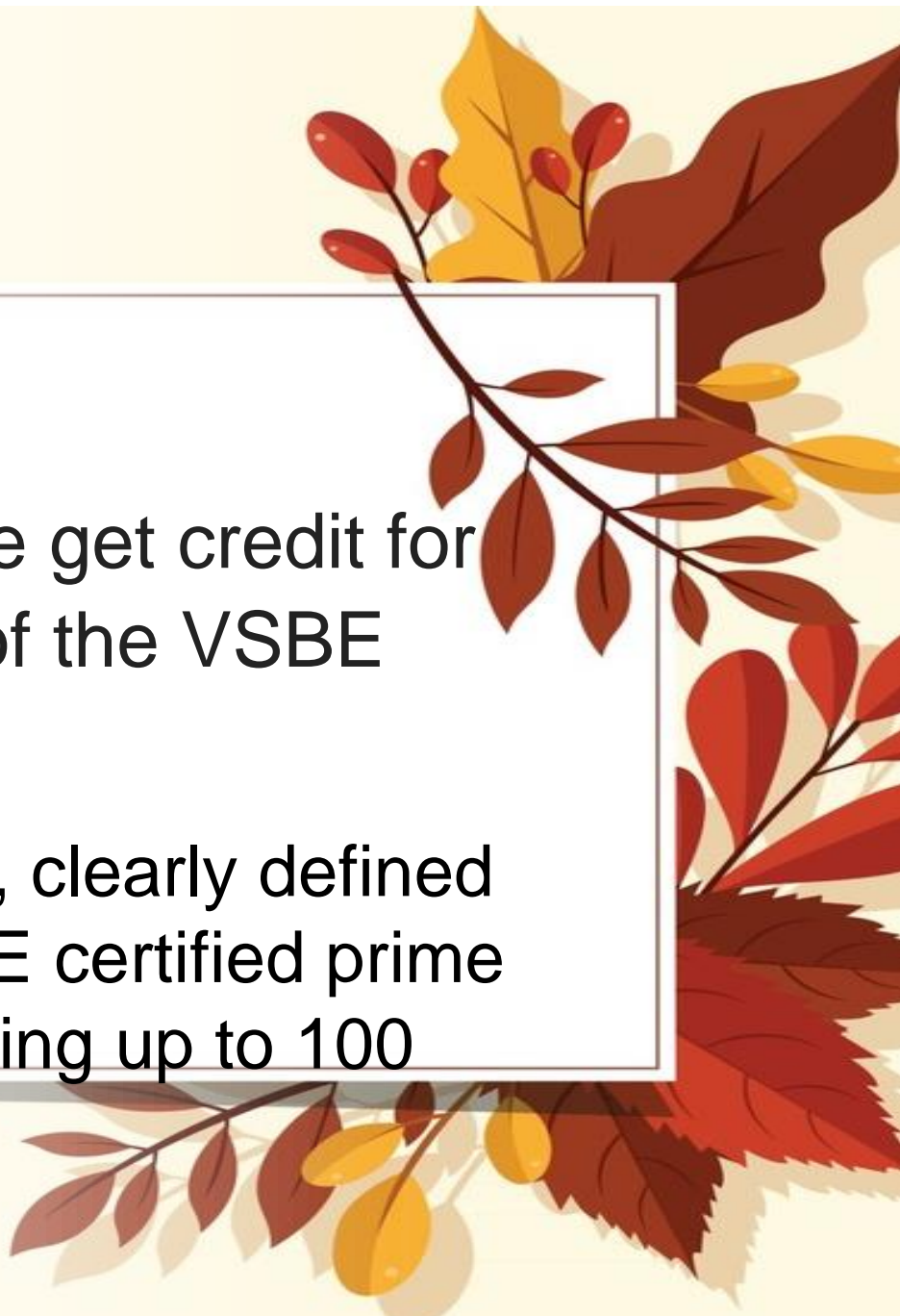
Yes or No

5. Can a VSBE Prime get credit for self-performing any of the VSBE goal?

Answer: Yes-

A procurement agency may count the distinct, clearly defined portion of the work of the contract that a VSBE certified prime performs with its own work force toward meeting up to 100 percent of the contract's VSBE goal.

COMAR 21.11.14.07(D)2



VSBE PROGRAM OVERVIEW



VSBE Program

- Provides contracting opportunities on state-funded procurements for certified **veteran-owned small businesses**
- Only the work of a certified VSBE firm, performing either directly (prime contractors) or indirectly (subcontractors), can be counted toward the achievement of an established contract goal
- As of October 1, 2022, there are over 550 active and certified VSBE vendors in the eMMA database and growing daily
- eMMA is the only platform to verify vendors in the VSBE Program database

VSBE Program Statutes

**STATE FINANCE AND PROCUREMENT
ARTICLES § 14-601—14-606**



VSBE Participation

- § 14-601. Definitions
- § 14-602. Procurement procedures
- § 14-603. Awarding of contract
- § 14-604. Regulations, procedures and report
- § 14-604.1. Advisory Committee
- § 14-605. Prohibited acts and Penalties
- § 14-606. Penalties Amendment

VSBE Program Regulations

COMAR 21.11.14 UPDATED



VSBE Policies

- 01 General — Purpose
- 02 Definitions
- 03 Scope
- 04 Procurement Agency Responsibility
- 05 VSBE Liaison
- 06 Reporting
- 07 Procurement Solicitations
- 08 Contract Award
- 09 Waiver
- 10 Amendment of VSBE Participation Schedule
- 11 Compliance
- 12 Verification

Legislative Update 2022

1. VSBE Liaisons named from each participating agency
2. Added For-Profit businesses only question for VSBE Program
3. Clarification of definition of veteran
4. Updated reporting- which will affect goal setting, training, and future changes VSBE Program
5. Updated Waiver process
6. Updated VSBE Forms



VSBE CERTIFICATION IN EMMA





VSBE Certified Vendors-



The VSBE Program participation requires:

1. Vendor registers in eMaryland Marketplace Advantage (eMMA)
2. GOSBA awards VSBE Certification to qualified vendors with VSBE Application Process

VSBE Vendors



eMaryland Marketplace Advantage (eMMA) is the only platform to verify vendors in the VSBE Program.

YOU MAY NOT USE VETBIZ TO VERIFY VSBE Vendors

If the vendor is not in eMMA, their award/payment will not count!



eMMA- External Vendor Search

<http://emma.maryland.gov>

Welcome to eMaryland Marketplace Advantage (eMMA)



eMMA is Maryland's new online procurement platform used to connect the vendor community with contracting opportunities from state, county, and local government entities. Registered vendors will receive notices of bid opportunities, can submit bid responses online, and may obtain bid results online.

Qualified vendors may also complete the self-certification process for the Small Business Reserve (SBR) Program and Veteran-owned Small Business Enterprise (VSBE) Program.

eMMA facilitates an open, transparent, and efficient procurement process. We look forward to doing business with you!

Additional information can be found in the [Frequently Asked Questions](#) and [Quick Reference Guides](#). Any questions please contact the eMMA Help Desk at eMMA.helpdesk@maryland.gov.

LOGIN

Login*

Password*

Login

State SSO
Login(SecureAuth)

MDoT SSO
Login(MSAzure)

[Lost your password?](#)



New Vendor? Register Now



Public Solicitations



Public Contracts



Vendor Search

VSBE Vendor Certified vs Not Certified



Vendor Search

Keywords Commodities Areas Served

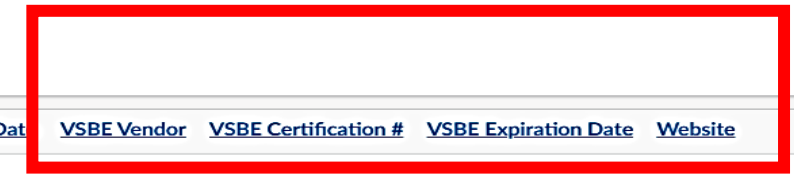
Company Name eMMA Vendor ID

Country State Levels related with the supplier

VSBE Vendor SBR Vendor

Filters Country: UNITED STATES x Levels related with the supplier: Group Entity VSBE Vendor: x

eMMA Vendor ID	Company Name	City	State	Postal Code	Vendor Contact	SBR Vendor	SBR Certification #	SBR Expiration Date	VSBE Vendor	VSBE Certification #	VSBE Expiration Date	Website
SUP783556	1351 Investigations LLC	Hanover	MD	21076	Jefferson Golas	<input checked="" type="checkbox"/>	SB21-015593	6/26/2023	<input checked="" type="checkbox"/>	VB22-022505	6/1/2023	
SUP790859	2250 Financial Services, Inc.	Millersville	MD	21108	John Olson	<input type="checkbox"/>			<input checked="" type="checkbox"/>	VB22-017545	11/16/2022	www.2250financial.com
SUP005990	2-CM Technologies, LLC	Annapolis	MD	21403	Cortez Duncan Jr.	<input type="checkbox"/>			<input checked="" type="checkbox"/>	VB22-021726	4/19/2023	www.2cmtechnologies.com
SUP025253	3rd Aspect	Silver Spring	MD	20904	Paul Sivacek	<input type="checkbox"/>			<input checked="" type="checkbox"/>	VB22-021905	4/27/2023	3RD Aspect
SUP026138	4th Revolution Technologies	Bowie	MD	20770	Rudy Anthony	<input checked="" type="checkbox"/>	SB22-025651	9/26/2023	<input checked="" type="checkbox"/>	VB22-025649	9/26/2023	
SUP832854	510 Enterprises, LLC	Gaithersburg	MD	20878	James Rascoe	<input checked="" type="checkbox"/>	SB22-018572	1/7/2023	<input checked="" type="checkbox"/>	VB22-019895	1/21/2023	
SUP845399	916 Confections, LLC	Middle River	MD	21220	Michele Reedy	<input type="checkbox"/>			<input checked="" type="checkbox"/>	VB22-020912	3/8/2023	



VSBE Vendor Certified vs Not Certified

A Certified VSBE Vendor will have the 3 components from the eMMA External Public Database Search.

- ✓ Checked VSBE Vendor Box
- ✓ VB Certification Number
- ✓ Valid Date, is not Expired Date

Code	Company Name	Legal Name	Parent Company	Web site	ERP Vendor ID	Mail Code	Status	SBR Certification #	SBR Expiration Date	VSBE Certification #	VSBE Expiration Date
☆ SUP022993	Epic Consulting	Epic Consulting		http://www.epicconsultingfirm.com			Active	SB22-021686	4/15/2023		7/6/2022

Result(s)

Verification of Certified VSBE Vendors


Please note the following when you are verifying the certification status of a VSBE vendor in eMMA:

- Be certain to carefully review the information to make certain that the vendor meets the requirements (i.e. VSBE Application has an approved “Status”, a valid “Expiration Date” (i.e. date has not exceeded/certification not expired with a one-year certification) and green dot (Valid) listed)
- If you are unable to determine the VSBE certification status, please contact Danielle Davis for assistance

eMMA- Internal Vendor Search

<http://emma.maryland.gov>

Welcome to eMaryland Marketplace Advantage (eMMA)



emma SM
eMaryland Marketplace Advantage

eMMA is Maryland's new online procurement platform used to connect the vendor community with contracting opportunities from state, county, and local government entities. Registered vendors will receive notices of bid opportunities, can submit bid responses online, and may obtain bid results online.

Qualified vendors may also complete the self-certification process for the Small Business Reserve (SBR) Program and Veteran-owned Small Business Enterprise (VSBE) Program.

eMMA facilitates an open, transparent, and efficient procurement process. We look forward to doing business with you!


Additional information can be found in the [Frequently Asked Questions](#) and [Quick Reference Guides](#). Any questions please contact the eMMA Help Desk at eMMA.helpdesk@maryland.gov.

LOGIN


Login*

Password*


[Lost your password?](#)




New Vendor? Register Now



Public Solicitations



Public Contracts



Vendor Search

eMMA- Internal Vendor Search



Vendors Sourcing Contracts Analytics Admin



Browse Vendors

Search

Reset

Status

Ownership Type

Vendor Type

Tax ID Type

- Is Remit-To Address?
- Pending Change Requests
- Grouped orders

Procurement Programs

- SBR Vendor
- ACDBE Vendor
- VSBE Vendor
- SBE Vendor
- MBE Vendor
- DBE Vendor

Commodities

My Commodities

Search

Reset

Filter: ✓ x

RFI Merge Vendors Create a Vendor

Company Name	Legal Name	Parent Company	Web site	ERP Vendor ID	Mail Code	Stat
	delle,					Regi
Affirmed Healthy	Skycore LLC		www.affirmedhealthy.com			Regi
Arthur W Burger	Arthur W Burger					Regi
Bellman & Symfon North America	Bellman & Symfon North America		https://bellman.com/			Regi
Brand Solutions LLC	Brand Solutions LLC		www.brandsolutionsinc.com			Regi
Exclerate	Exclerate					
DATA DOC, MD LLC	DATA DOC, MD LLC					
DRIVANIA	DRIVANIA					

Keywords

Alerts

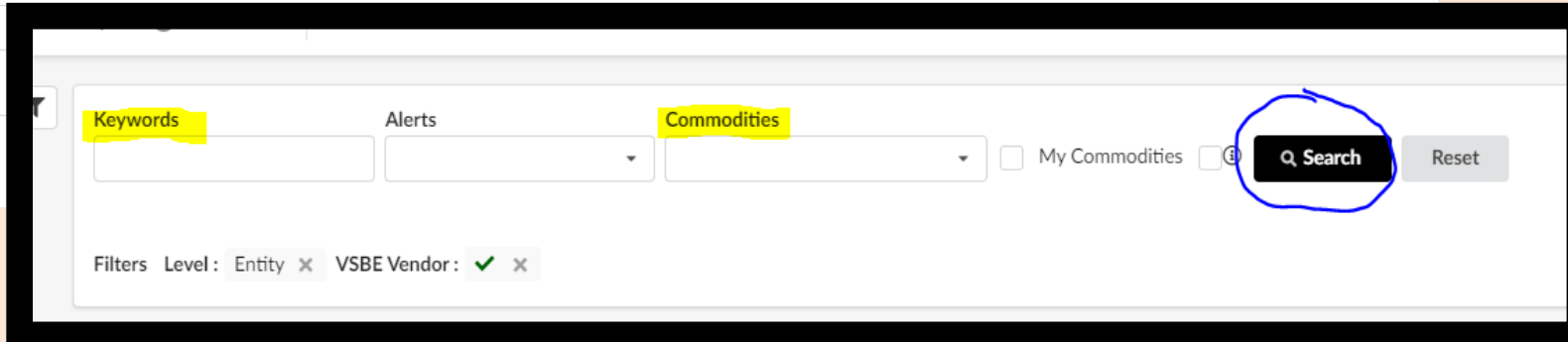
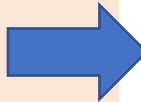
Commodities

My Commodities

Search

Reset

Filters Level: Entity x VSBE Vendor: ✓ x



VSBE Vendor Approval-Internal

Procurement Programs

State Programs

Existing SBR Vendor?	Apply for the SBR Program?	SBR Certification #	SBR Effective Date	SBR Expiration Date
No	Yes	SB22-022632	6/7/2022	6/7/2023
<input checked="" type="checkbox"/> SBR Vendor	SBR Application Status			
	Approved			

Apply for the VSBE Program?	Existing VSBE Vendor?	VSBE Effective Date	VSBE Certification #	VSBE Expiration Date
Yes	No	6/9/2022	VB22-022665	6/9/2023
<input checked="" type="checkbox"/> VSBE Vendor	VSBE Application Status	Veteran Verification #		
	Approved	MDVA2022-089		

Navigation for this information in under the Vendor's Company Profile and Procurement Programs.

Verification of Certified VSBE Vendors-Internal

The screenshot shows a web interface for a vendor's account. On the left is a sidebar with navigation options: Documents, Relish Data Assure, Payment Info, Workflow, Interface Status, Activity, and Change Requests. The 'Documents' section is active. At the top, there are search filters for Keywords, Status, and State to date (7/7/2022), along with an 'Archived Documents' checkbox and 'Search' and 'Reset' buttons. Below this are sections for 'Legal Documents' (showing 0 results) and 'Attestations & General Documents'. A table in the 'Attestations & General Documents' section is highlighted with a red border. The table has columns for Attach, Type, Status, Document Date, Expiration Date, and Valid. One row is visible: VSBE Application, VSBE Application, ✓, 7/6/2022, 7/6/2023, and a green dot.

Attach	Type	Status	Document Date	Expiration Date	Valid
VSBE Veteran Verification Form.pdf	VSBE Application	✓	7/6/2022	7/6/2023	●

To determine the VSBE certification status, click into the “Documents” section of the vendor’s account. Under “Attestations & General Documents” section, there will be a VSBE Application with an approved “Status,” a valid “Expiration Date” (i.e. date has not exceeded/certification not expired with a one-year certification) and green dot (Valid) listed, the vendor is certified within the VSBE Program. The only time there should be 2 VSBE applications is during the annual recertification process.

VSBE Vendor No Longer Active

The image shows a screenshot of a web form for VSBE Vendor registration. The form is divided into two rows of input fields. The first row contains 'Existing VSBE Vendor?' with a dropdown menu set to 'Yes' and 'VSBE Certification #' with an empty text box. The second row contains 'VSBE Vendor' with an unchecked checkbox, 'VSBE Application Status' with a dropdown menu set to 'Expired', and 'Veteran Verification #' with an empty text box. A blue arrow points from the 'VSBE Vendor' checkbox to the 'Expired' status dropdown. Another blue arrow points from the 'Expired' status dropdown to the right.

Existing VSBE Vendor?	VSBE Certification #
<input type="text" value="Yes"/>	<input type="text"/>
<input type="checkbox"/> VSBE Vendor	VSBE Application Status ⓘ
	<input type="text" value="Expired"/>
	Veteran Verification #
	<input type="text"/>

If you see **Expired**, that means the vendor was formally in the VSBE Program. The language then to the firm, is that they need to get certified back into the program.

VSBE LIAISONS
NEED TO KNOW

Best
Practices

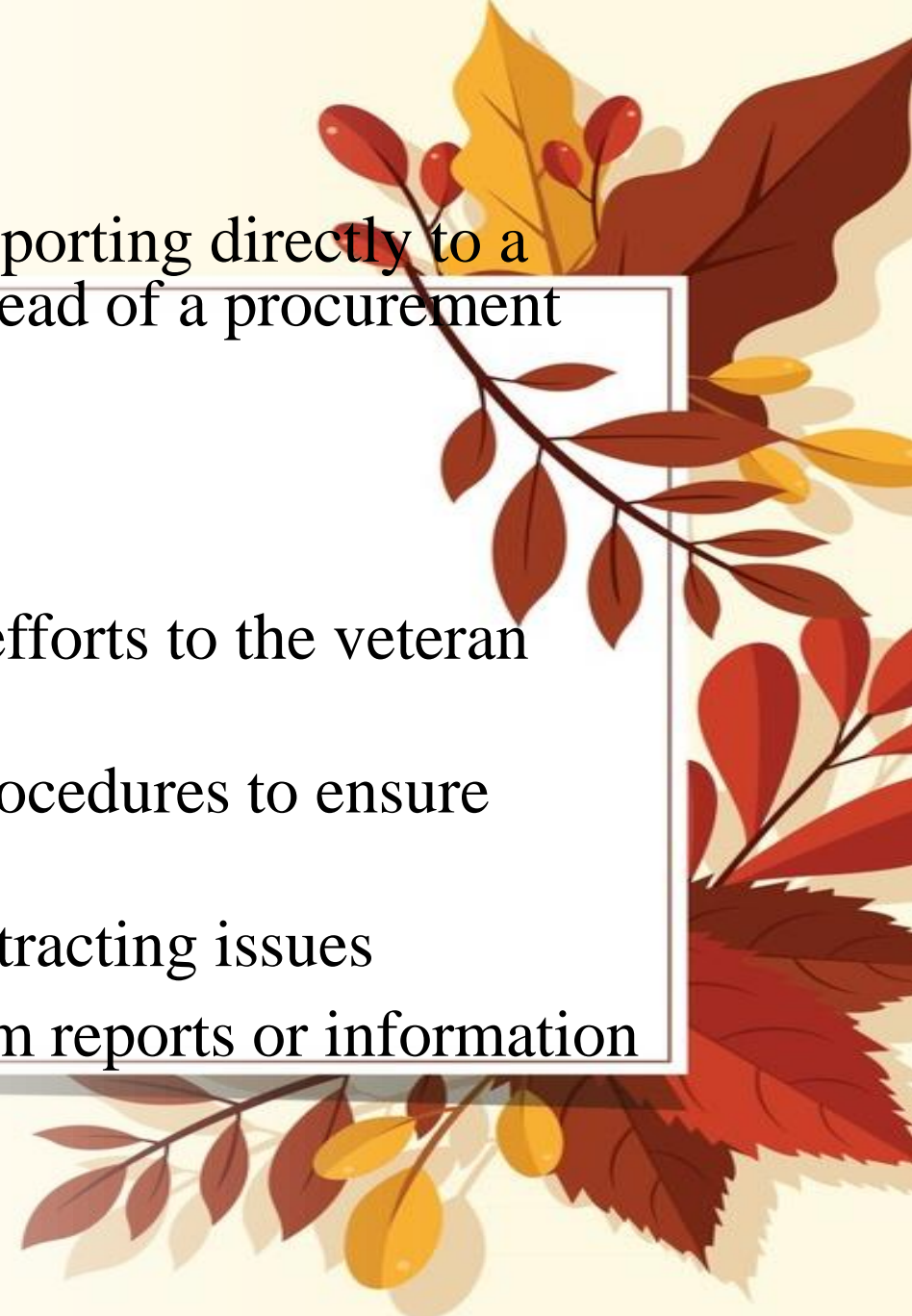


VSBE Liaisons

You are a high-level employee reporting directly to a Secretary, Deputy Secretary, or head of a procurement agency.

COMAR 21.11.14.05

Responsible for:

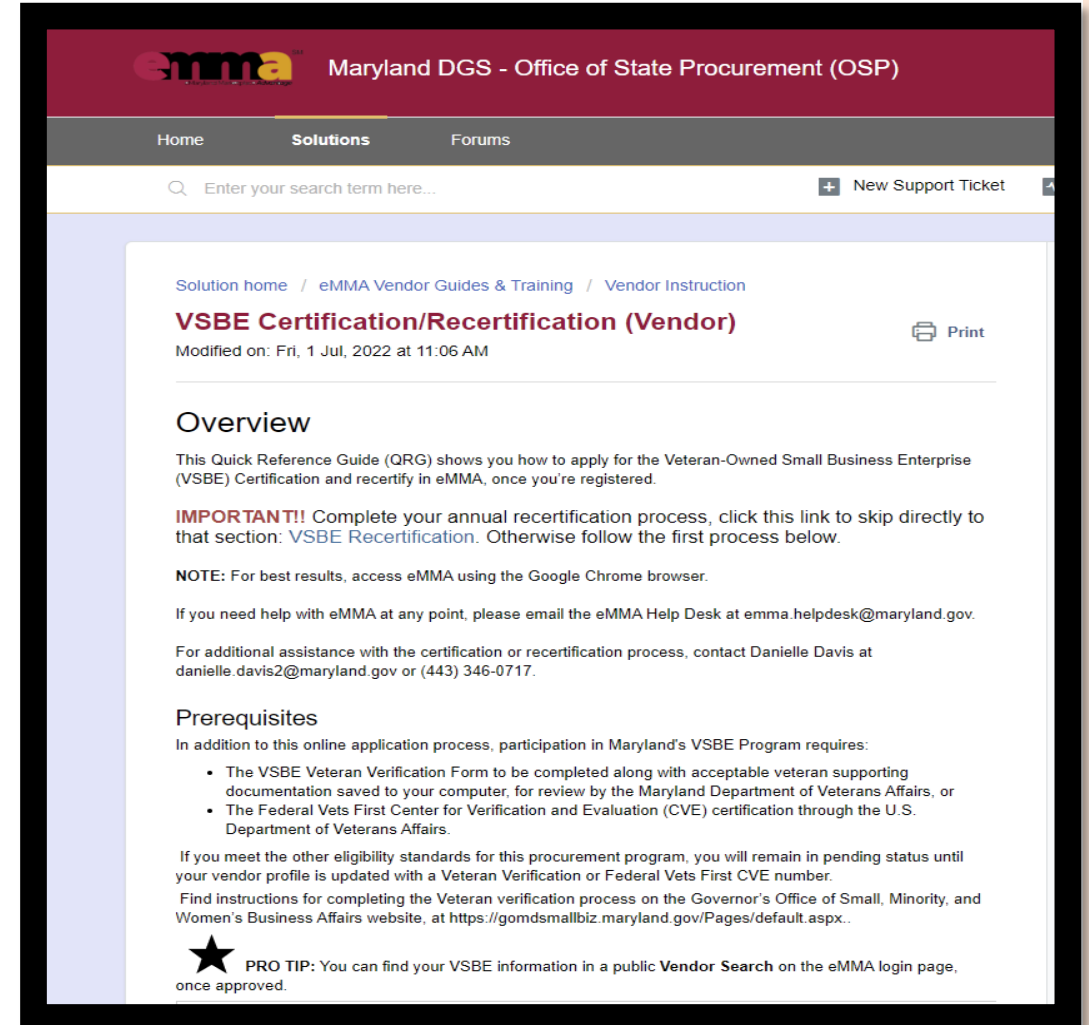
- Coordinates agency outreach efforts to the veteran business community
 - Reviews agency contracting procedures to ensure compliance
 - Assists in the resolution of contracting issues
 - Submit required VSBE Program reports or information
- 

Best Practices

1. Document and discuss any issues that arise during the bidding and award process.
2. Include your legal counsel.
3. Search as many Veteran business databases as possible to **identify potential vendors when considering the application of a VSBE participation goal**, however, remember they must then get certified into the VSBE Program.

VSBE Program Invitation

Once potential veteran-owned small businesses are identified, feel free to invite them to get **CERTIFIED** with the VSBE Program. If you do not feel comfortable with providing those steps or this guide, please refer them to Danielle Davis, and I will reach out.



The screenshot shows a web page from the eMMA system. The header includes the eMMA logo and "Maryland DGS - Office of State Procurement (OSP)". Navigation links for "Home", "Solutions", and "Forums" are visible. A search bar and a "New Support Ticket" button are also present. The main content area is titled "VSBE Certification/Recertification (Vendor)" and includes a "Print" icon. The page is dated "Modified on: Fri, 1 Jul, 2022 at 11:06 AM". The "Overview" section explains that the Quick Reference Guide (QRG) shows how to apply for VSBE Certification and recertify in eMMA. It includes an "IMPORTANT!!" note about the annual recertification process and a "NOTE" about using Google Chrome. Contact information for Danielle Davis is provided. The "Prerequisites" section lists requirements for participation in Maryland's VSBE Program, including completing the VSBE Veteran Verification Form and obtaining CVE certification. A "PRO TIP" at the bottom suggests finding VSBE information in a public Vendor Search on the eMMA login page.

<https://mdprocurement.freshdesk.com/support/solutions/articles/70000584604>

Outreach

- If you have ideas, lets brainstorm together!
- Utilize the National Military Holiday Calendar
- Team up with other agencies
- VSBE Appreciation Luncheon- November 9th, 2022

If you have any veteran-owned small businesses, you would like to nominate for recognition please email me those business names.



Communications

Our office sends out many trainings and communications:

- Quarterly Compliance Calls
- Monthly Compliance Bulletins
 - One on One Meetings
 - SPAG
 - Liaison Trainings



FORMS



**The VSBE Program
participation forms:**

The NEW VSBE Participation
Forms became in effective as of
September 1,2022.





Solicitation Attachments and Appendices

Home » Solicitation Attachments and Appendices

- Attachment C – Bid Proposal Affidavit
- Attachment D – Minority Business Enterprise (MBE) Forms
- Attachment E – Veteran-Owned Small Business Enterprise (VSBE)
- Attachment F – Living Wage Affidavit
- Attachment G – Federal Funds Attachment
- Attachment H – Conflict of Interest Affidavit
- Attachment I – Non-Disclosure Agreement (Contractor)
- Attachment J – HIPAA Business Associate Agreement
- Attachment K – Mercury Affidavit
- Attachment L – Performance of Services Disclosure
- Attachment N – Contract Affidavit
- Attachment O – DHS Hiring Agreement

- Appendix 2 – Bidder/Offeror Information Sheet
- Appendix 3 – Non Disclosure Agreement
- Appendix x – Labor Categories
- Appendix xx – Labor Resume Form
- Appendix y – Bid Proposal Bond
- Appendix yy – Payment Bond
- Appendix z – Performance Bond



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 21.11.13.08), 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.

I understand that if I fail to return each completed document within the required time, the Procurement Officer may determine that I am not responsible and therefore not eligible for contract award. If the contract has already been awarded, the award is voidable.

Information Provided to VSBE firms

In the solicitation of subcontract quotations or offers, VSBE subcontractors were provided not less than the same information and amount of time to respond as were non-VSBE subcontractors.



**LET'S TAKE A CLOSER LOOK
PLEASE ALSO UPDATE YOUR
AGENCY COMPLIANCE OFFICIERS!**

VSBE Participation Form Index

- E-1 - VSBE Utilizations Affidavit and Prime/Subcontractor Participation Schedule
 - E-1A – VSBE Subcontractor Participation Schedule
 - E-1B- Signature Page
 - E-1C- VSBE Waiver Guidance
 - E-1D - VSBE Subcontractor Unavailability Certificate
 - E-1E - VSBE Waiver Affirmation and Good Faith Efforts Documentation to Support Waiver Request
 - Part 1- Identified Items of Work Bidder/Offeror Made Available to VSBE Firms
 - Part 2- Identified VSBE Firms and Record of Solicitation
 - Part 3- Additional Information Regarding Rejected VSBE Quotes
- E-2 - VSBE Outreach Efforts Compliance Statement
- E-3 – VSBE Subcontractor Participation Statement
- E-4 – VSBE Participation, VSBE Prime Contractor Paid/Unpaid Invoice Report
- E-5 – VSBE Participation, VSBE Subcontractor Paid/Unpaid Invoice Report

Form Updates

1. VSBE Certification Number replaced DUNS Number
This is the VB# found in eMMA on the certified VSBE Vendor.

2. Definitions Added

3. Waiver



List information for each certified VSBE Prime Contractor or Subcontractor on this project.

Name of VSBE Prime Contractor:	VSBE Certification #:
Percentage of Total Contract:	Description of work to be performed:
Name of VSBE Subcontractor:	VSBE Certification #:
Percentage of Total Contract:	Description of work to be performed:
Name of VSBE Subcontractor:	VSBE Certification #:
Percentage of Total Contract:	Description of work to be performed:
Name of VSBE Subcontractor:	VSBE Certification #:
Percentage of Total Contract:	Description of work to be performed:

Please check if additional sheets are attached.

SUMMARY

Total VSBE Participation: _____ %

E-1C
WAIVER GUIDANCE
*Guidance for Documenting Good Faith Efforts to Meet VSBE
Participation Goal*



**THESE DEFINITIONS
WILL HELP IN YOUR
VSBE PROCESSES**

In order to show that it has made good faith efforts to meet the established VSBE participation goal on a contract, the Bidder/Offeror must either (1) meet the VSBE Goal and document its commitments for participation of VSBE Firms, or (2) when it does not meet the VSBE Goal, document its Good Faith Efforts to meet the goal.

I. Definitions

Electronic Means – “Electronic Means” includes, for example, information provided via a website or file transfer protocol (FTP) site containing the plans, specifications, and other requirements of the contract. If an interested VSBE cannot access the information provided by electronic means, the Bidder/Offeror must make the information available in a manner that is accessible to the interested VSBE Firm.

Good Faith Efforts - The “Good Faith Efforts” requirement means that when requesting a waiver, the Bidder/Offeror must demonstrate that it took all necessary and reasonable steps to achieve the VSBE Goal, which, by their scope, intensity, and appropriateness to the objective, could reasonably be expected to obtain sufficient VSBE participation, even if those steps were not fully successful. Whether the Bidder/Offeror that requests a waiver made adequate good faith efforts will be determined by considering the quality, quantity, and intensity of the different kinds of efforts that the Bidder/Offeror has made. The efforts employed by the Bidder/Offeror should be those that one could reasonably expect the Bidder/Offeror to take if the Bidder/Offeror were actively and aggressively trying to obtain VSBE participation sufficient to meet the VSBE contract goal and subgoals. Mere pro forma efforts are not good faith efforts to meet the VSBE contract requirements. The determination concerning the sufficiency of the Bidder/Offeror's good faith efforts is a judgment call; meeting quantitative formulas is not required.

Identified Firms – “Identified Firms” means a list of the VSBEs identified by the procuring agency during the goal setting process as available to perform the Identified Items of Work. It also may include additional VSBEs identified by the Bidder/Offeror as available to perform the Identified Items of Work.

Identified Items of Work – “Identified Items of Work” means the items identified by the procuring agency during the goal setting process and listed in the procurement as possible items of work for performance by VSBE Firms. It may also include additional portions of items of work the Bidder/Offer identified by performance by VSBE Firms to increase the likelihood that the VSBE Goal will be achieved. If the procurement does not include a list of Identified Items of Work, this term refers to all the items of work the Bidder/Offeror has identified as possible items of work for performance by VSBE Firms and should include all reasonably identifiable work opportunities.

VSBE Certification Number – The “VSBE Certification Number” is found in the eMaryland Marketplace Advantage (eMMA) vendor portal and must include an approved “VSBE Application Status” and a valid “VSBE Expiration Date.”

VSBE Firm – “VSBE Firm” refers to veteran-owned firms that are verified through the process under 21.11.14.02 and certified to participate in Maryland’s VSBE Program. Only the work of certified VSBEs can be counted toward an established VSBE contract goal.

VSBE Goal – “VSBE Goal” refers to the established VSBE contract participation goal.

VSBE Waiver



**E-1E
VSBE WAIVER REQUEST AFFIRMATION AND GOOD FAITH EFFORTS
DOCUMENTATION TO SUPPORT WAIVER REQUEST**

PAGE _____ OF _____

Prime Contractor:	Project Description:	Project/Contract
Bidder/Offeror Company Name, Address, Phone, and Email		Solicitation #:

Parts 1, 2, and 3 must be included with this affirmation along with all documents supporting the waiver request.

I affirm that I have reviewed Waiver Guidance (E-1C).

I further affirm, under penalties of perjury, that the contents of Good Faith Efforts Documentation to Support Waiver Request (E-1E, Part 1, 2 & 3) are true to the best of my knowledge, information, and belief.

- Per COMAR 21.11.14.09 (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.
- **All granted VSBE waivers need to be emailed, to vsbe.gosba@maryland.gov**

PRG Guidance

The PRG Process includes VSBE Program.

Process for reviewing any:

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

Contracts expected to exceed **\$100,000** in value evaluate for MBE and VSBE participation.

There should be at least one or more standing procurement review group(s) process documented.



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.

Steps for All New Solicitations/Secondary Competition

- Complete PRG Evaluation - SBR Program Designation Worksheet (PART 1A)
MANDATORY: All solicitations, including those over \$500,000, shall continue to be evaluated for SBR Program Designation. (SBR Program Designation is automatic for procurements greater than \$50,000 and up to/including \$500,000, unless certain conditions apply.)
- Complete PRG Evaluation - MBE Participation Worksheet (PART 1B)
- Complete PRG Evaluation - VSBE Participation Worksheet (PART 1C)
- Complete PRG Evaluation - SBR Program Designation Worksheet (PART 2)
CONDITIONAL: Submit only if the procurement is determined to be exempt or warrants a waiver based upon the results in PART 1A
- Complete PRG Evaluation - SBR Program Designation Worksheet (PART 3)
CONDITIONAL: Submit only if during the procurement, the mandatory SBR Program Designation is removed via an amendment

PRG Guidance

There should be at least one or more standing procurement review group(s) and each agency's process documented.

The group shall be comprised of:

- **Agency's chief procurement official** or senior-level procurement official designated to act in his/her place
- **VSBE Liaison Officer** or senior level alternate

VSBE Participation Worksheet (PART 1C)

PRG Evaluation to Establish VSBE Participation and Potential Subcontracting Opportunities for Solicitation #: _____ Procurement Contract Title: _____

As provided by Title 21.11.14 and BPW Advisory 2012-1, the Veteran-Owned Small business Enterprise (VSBE) Subcontracting Documentation will establish a process and structure for reviewing contract solicitations, proposed sole-source contracts, and contract renewal options to maximize opportunities for VSBEs to participate in State Procurement Contracts.

Opportunity Review or Analysis Question Area	Determination
The extent to which direct solicitation, subcontracting, or a combination will determined most likely to result in maximum VSBE participation in contract.	
Are VSBEs available to directly perform contract at the prime contract level?	
Does the number of verified VSBEs listed in the directory or otherwise identified for a particular service, supply or maintenance activity reasonably assure maximum opportunities for VSBEs to obtain contracts at that level?	
Does the number of verified VSBEs potentially-available for the work components of the contract make the VSBE subcontract goals attainable?	
Is geographical proximity of verified VSBEs to the work location a factor?	
Identify the specific work categories within the scope of the procurement appropriate for subcontracting and number of verified VSBE providers for each work component?	
Are verified VSBE subcontracting opportunities feasible?	
Are the structure, specifications, and requirements of the solicitation designed to ensure that they do not unreasonably limit or inhibit participation by verified VSBEs? <i>Inhibiting factors may include unnecessary or prohibitive bonding requirements, restrictive specifications, unnecessary or unreasonable performance parameters, and unnecessary or unreasonable experience requirements. General policies for developing specifications are set forth in COMAR 21.04.01.</i>	
Is it feasible to divide a complex procurement into separate	

VSBE Research for Project No. _____

Results of Search by UNSPSC, NAICS, NIGP or other Product/Commodity Codes

Product Code	Description	# of VSBEs in eMMA Directory or other Database/Resource

REPORTING



VSBE Reports Due Date

- **All participating agencies are required to submit their individual VSBE Reports to GOSBA on or before the close of business on October 1 of each year (COMAR 21.13.01.15).**
- GOSBA will submit a compiled VSBE Annual Report for publication to the Governor and the Legislative Policy Committee. **If your agency does not comply, it is reported as “non-responsive”.**



VSBE Tools

- The VSBE Toolkit has all information needed to complete the reporting process. Each year the toolkit is updated by July 1st for the fiscal year documents.

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

- The VSBE toolkit includes the **VSBE Reporting Manual, Annual Reporting template** and prior trainings so you know how to complete the reports.

- All reports and supporting backup data should be emailed to vsbereports.gosba@maryland.gov.

Quick Links

[About Us](#)

[FAQs](#)

[Legislation and Policy](#)

[Outreach](#)

[News](#)

[Reports](#)

[Contact Us](#)

Procurement Compliance Bulletins

[8.24.2022](#)

[7.19.2022](#)

[6.15.2022](#)

Liaison Training

[2022 Searching Databases for VSBE Program.pdf](#)

[VSBE Liaison Training- 7-14-22 FINAL.pdf](#)

[Searching Databases for the MBE, VSBE, and the SBR
Program Training Slide Deck
Compliance Call
September 8, 2022](#)

VSBE Reporting Toolkit

This toolkit contains valuable information to assist State agencies/departments with the management and compliance of the Veteran-Owned Small Business Enterprise (VSBE) Program.

eMaryland Marketplace Advantage (eMMA) is the only platform to verify vendors in the VSBE Program.

FY2022 VSBE Annual Report

The VSBE Annual Report must be completed and submitted on or before October 1, 2022. The Annual Report covers the period July 1, 2021 - June 30, 2022.

Submit the latest VSBE Utilization Data Template by the due date.

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

VSBE Report Instructions and Template:

- [FY2022 VSBE REPORTING MANUAL.docx](#)
- [VSBE Annual Report Template FY22.xlsx](#)

Call 410-697-9605 if you have any questions.

A working knowledge of EXCEL is required to prepare the VSBE report. 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 following link to 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 to create a new login and password. Read the [Announcement about the new and enhanced ANSWERS \(May 2022\)](#) for more information.

ANSWERS database for Statewide FMIS users: <https://net.md.gov/apps/answers/>

DoIT Service Desk
100 Community Place
Crownsville, MD 21032
410-697-9700
Service.Desk@maryland.gov



Resource Links

- [eMaryland Marketplace Advantage](#)
- [FY2018 Report on VSBE Participation](#)

VSBE Annual Report Template

VSBE Program utilization data is being collected by the Governor's Office of Small, Minority & Women Business Affairs for publication to the Governor, the Legislative Policy Committee, and the public.

Veteran-Owned Small Business Enterprise (VSBE) Annual Report

Fiscal Year 2022

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

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

Agency Reporting:

Individual Completing Report:

Awards to VSBEs

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

Payments to VSBEs

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

To avoid double counting, for contracts awarded to VSBE prime contractors that also have a VSBE goal, report ONLY the VSBE prime contract award, award amount, and payments above; do NOT report the VSBE subcontractor awards and payments on these contracts.

Notes:

VSBE Annual Report Data

DEPARTMENT OF INFORMATION TECHNOLOGY
ANSWERS FINANCIAL REPORTING

REPORTS

Contracts Management (PCH355)

Commodities on PO/Contract
(A315DB2)

Procurement Award Dollars
(PCH062)

SBR Expenditure Detail/Summary
(PCH065/067)

SBR Procurement (PCH068)

BPO Detail

MBE Procurement
(PCH709-716)

MBE Payment
(PCH717-722)

YEC
(PCH210,212-213)

FOCUS
(Various)

ANSWERS News and Updates

6/28/2022

NOTICE: ANSWERS Data is refreshed/loaded each weekend from ADPICS.

6/17/2022

We have introduced a new feature to let you know when the data for each report was last generated. As well as a text blurb below the Run Report Button, here is a list:

Weekly - Prior Saturday:

- PCH355
- PCH062
- PCH065/067
- PCH068
- PCH709-713
- PCH717-722
- PAAR
- PCH210
- PCH212-213

Daily - Close of Prior Business Day:

- DAFR6000
- DB2T100
- DB2T200
- DB2VenPmtHist
- DB2AgyBudget
- DB2G230
- DB2Invs
- DB2R9760
- DB2SpecFund
- FSP6162R (G230)

Real Time:

- A315DB2
- BPO Detail
- DB2VehDisp
- DB2VNameSrch
- DB2MDOTVenPmtHist
- DB2R6320
- DB2R9060
- DB2R9070

<https://net.md.gov/apps/answers/>

VSBE Annual Report Data

REPORTS

- Contracts Management (PCH355)
- Commodities on PO/Contract (A315DB2)
- Procurement Award Dollars (PCH062)
- SBR Expenditure Detail/Summary (PCH065/067)
- SBR Procurement (PCH068)
- BPO Detail
- MBE Procurement (PCH709-716)**
- PCH709 - BPO/PO Change Orders
- PCH710 - Diagnostic by Work Category - Prime**
- PCH711 - Annual Procurement

PCH710 - Diagnostic by Work Category - Prime

Agency:
(Select multiple agencies by checking the checkbox to the left of the Agency.)

Search Agencies...

- University of MD Baltimore County (R41)
- University of MD University College (R40)
- University System of Maryland (R30)
- University System of Maryland (R46)
- Workers Compensation Commission (C98)
- Workers Compensation Commission (WCC)

Begin Date: 07/01/2021

End Date: 06/30/2022 (Calculated from Begin Date.)

Date Presets: (Calculated from today.)

Date Type: Fiscal Effective Date Award Date

Report Type: VET

Optional Selections:
Amount Threshold: \$0.00 - \$999,999,999,999,999.99

VSBE Recommended Reporting Steps



Step 1- Use the [Annual Utilization Form](#) only. Found in the VSBE Reporting toolkit with the VSBE Manual.

Step 2- Use data from the 700 series reports from ANSWERS or internal databases to capture VSBE payments and awards (will have to change the Report type to VET in answers , where appropriate.

Step 3- At this time credit card payments cannot be tracked in ANSWERS, therefore, agencies will have to track these payments manually.

VSBE Recommended Reporting Steps

- **Step 4-** Total All Procurements column on the Annual Report Template should be identical to the Total All Procurements total for MBE Reporting.
- **Step 5-** Scrub the data for VSBE discrepancies.
- **Step 6-**As with MBE reporting, if a contract has a VSBE Prime and Sub, do not double count. The Prime Contractor and Subcontractor *awards* should be listed separately.



VSBE Annual Report Cheat Sheet for ANSWERS Agencies

<u>Awards to VSBEs</u>							
	Total # All Procurement Contracts Awarded	Total \$ All Procurement Contracts Awarded	Total # Contracts Awarded to VSBEs as Prime Contractors	Total \$ Contracts Awarded to VSBEs as Prime Contractors	Total # VSBE Subcontracts Awarded	Total \$ VSBE Subcontracts Awarded	Percentage of VSBE Participation
Procurement Contracts 709 & 710 Rpts					720 Rpt	720 Rpt	
Corporate Credit Card Internal Report							
Direct Voucher 717 Rpt							
Total		\$0					
Should match MBE Rpt total agency awards							
<u>Payments to VSBEs</u>							
			Total \$ Payments to All Prime Contractors <small>(Total of ALL Payments)</small>	Total \$ Payments to VSBEs as Prime and Subcontractors	VSBE Payments as % of All Payments		
		718,717, Credit Card Report (Internal) Subcontractors only (719 Rpt)					

Coming FY23

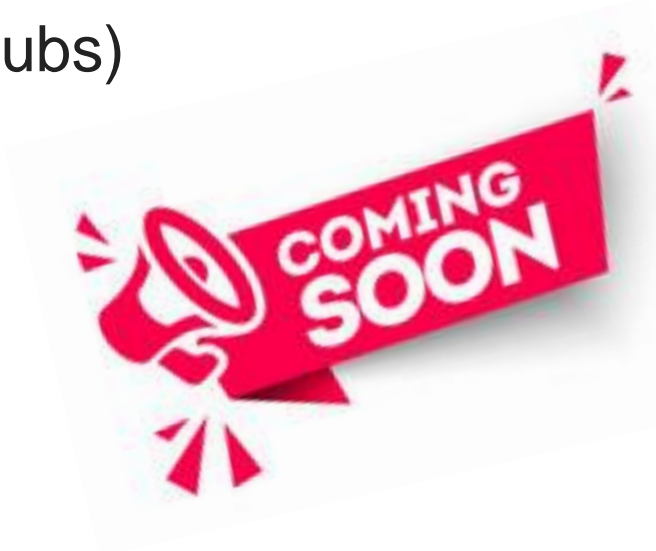
NEW OUTREACH FORM FY23

Per COMAR 21.11.14.06A(3), each participating shall provide the following:

An evaluation (brief description) of the success of your VSBE Program and

Outreach efforts to VSBE vendors (both primes and subs)

- Event date
- Location
- Total attendance
- Host
- Feedback from VSBE vendors



FREQUENTLY ASKER QUESTIONS



DID YOU KNOW ?

Per COMAR 21.11.14.07C(2),

If a solicitation contains an MBE goal and a VSBE goal, participation by a subcontractor dually-certified as an MBE and a VSBE may be counted toward meeting both the MBE and VSBE contract goals to the extent its participation meets the cumulative but distinct MBE and VSBE contract goals, or portions thereof that it is committed to perform. Example: If the solicitation contains a 25 percent MBE goal and a 5 percent VSBE goal, the dually certified subcontractor shall perform 30 percent of the contract to obtain both goals.

DID YOU KNOW ?

Per COMAR 21.11.14.07D

Counting Prime Participation Toward Overall and Contract Goals.

- (1) A procurement agency may count a prime contractor dually-certified as an MBE and a VSBE toward the agency's overall VSBE and MBE goals.

- (2) A procurement agency may count the distinct, clearly defined portion of the work of the contract that a VSBE certified prime performs with its own work force toward meeting up to 100 percent of the contract's VSBE goal.

DID YOU KNOW ?

If a VSBE loses certification during a contract can their participation still be counted throughout the life of the contract?

Per COMAR 21.11.14.12 Verification

If a VSBE no longer has verified status, the VSBE is no longer eligible to participate in a procurement as a verified VSBE. The VSBE is still eligible for credit towards a VSBE goal under a contract entered into when the VSBE was verified. Ineligibility of a VSBE to participate in the VSBE 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 Solicitations



YOU ARE
AWESOME

THANK YOU!

Filters VSBE Goal: x Status: Open x

ID	Title	Status	Due / Close Date	Publish Date UTC-4	Main Category
BPM031667	Cabling & Wiring Assessment & Design	Open	10/7/2022	9/30/2022 3:40:14 PM	Telecommunicatio
BPM031546	Sykesville New Veterans Home	Open	10/13/2022	9/30/2022 2:21:33 PM	Professional engin
BPM030902	MDTA 2021-02 B Comprehensive Environmental Compliance and Engineering Services	Open	10/12/2022	9/30/2022 1:29:01 PM	Professional engin
BPM030908	Noise Wall Along Southbound I-95 South of Calvary Road	Open	10/5/2022	9/28/2022 5:05:09 PM	Building and Faciliti
BPM031900	PV-975-200-001 (Re-Bid) Construction of Berlin Barrack V at The Maryland State Police - Berlin	Open	10/26/2022	9/28/2022 2:31:05 PM	Nonresidential bui
BPM031348	521105 Pier 4 Replacement @ FMT	Open	1/6/2023	9/28/2022 11:31:18 AM	Marine constructio
BPM031385	MAXWELL DATABASE SYSTEM	Open	10/25/2022	9/28/2022 9:35:35 AM	Data management
BPM031745	SNOW REMOVAL CONTRACT	Open	10/18/2022	9/27/2022 8:00:15 AM	Snow removal services
BPM031579	BC-500-190-001 - Construction of the New Baltimore City District Court, Maryland Courts	Open	10/12/2022	9/26/2022 11:24:03 AM	Building and Facility Construction and Maintenance Services
BPM031839	THE MARYLAND TOBACCO QUITLINE	Open	11/14/2022	9/26/2022 9:37:24 AM	Healthcare Services
BPM031746	XY2505L77 Thermoplastic Thinline Striping in Montgomery and Prince George's Counties - Areawide	Open	10/27/2022	9/20/2022 1:48:44 PM	Highway and road construction service
BPM031686	Snow Removal Contract	Open	10/17/2022	9/16/2022 2:46:25 PM	Snow removal services
BPM031659	BARRACK L - FORESTVILLE: NEW BARRACK AND GARAGE	Open	10/13/2022	9/15/2022 11:37:01 AM	Architectural engineering
BPM031470	MD/ OCMP 22 -00008 Statewide Administration of Non-Emergency Medical Transportation for the Maryland Medicaid Program	Open	11/1/2022	9/13/2022 5:17:26 PM	Commercial and Military and Private Vehicles and their Accessories and Components
BPM022560	Vehicle Emissions Inspection Program (VEIP) Management and Operations	Open	10/31/2022	9/6/2022 11:23:45 AM	Vehicle inspection service
BPM031416	Maryland Medicaid Dental Benefits Administrator Solicitation No: MDH/OCMP 23-19707	Open	11/22/2022	9/6/2022 5:07:38 PM	Healthcare Services
BPM021523	Laboratory Services for the Maryland Racing Commission	Open		12/28/2020 11:41:24 AM	Environmental Services

17 Result(s)





Maryland
OPEN FOR BUSINESS

If you have any questions, after today's training please contact the VSBE Compliance Manager.

VSBE Compliance Manager:

Danielle N. Davis

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