



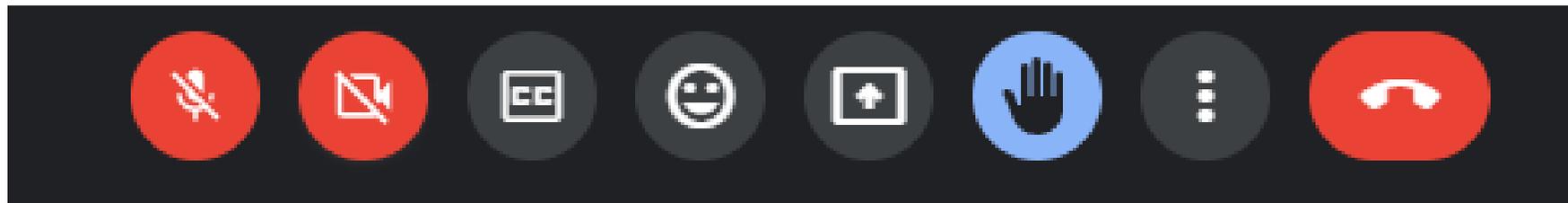
BUSINESS AFFAIRS
OF SMALL, MINORITY & WOMEN

Combined Liaison Training

May 9, 2024

Virtual Training Housekeeping

- Please mute your microphone and turn off video camera during training
- Use the chat bar on the right side of your screen or click the raise hand button on the bottom of your screen to make the speaker aware that you would like to ask a question
 - If follow up questions are requested by the speaker you may unmute and clarify your question at that time



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

Special Secretary Maria Martinez



Maryland

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



Today's Agenda



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



Legislative Updates

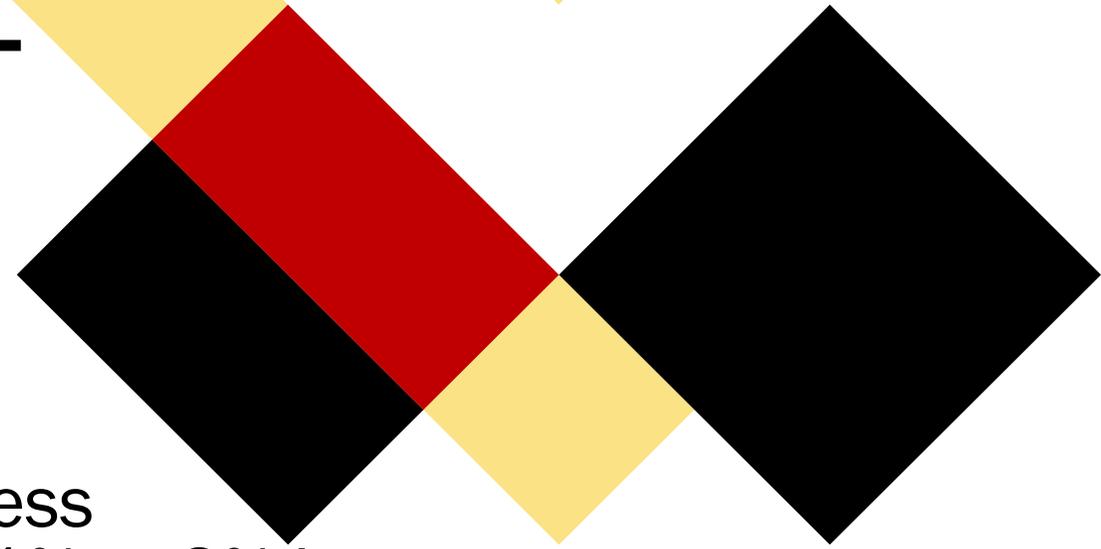
Presented by Davon K. Gardner
Director of Policy & Legislative Affairs

HB 850 State Procurement - Small Business Preference Procurement

- Expands the Small Business Preference (SBP) Program to include all units or agencies in the executive branch of state government (Previously, DGS, MDOT, USM, Morgan State, DPSCS; construction only)
- Designates the Board of Public Works (BPW) as the regulatory authority for the SBP Program
- **Establishes a price preference not to exceed 8%**
 - 5% for certified Small businesses
 - 2% for veteran-Owned small businesses
 - 3% for Disabled veteran-owned small businesses
- Unit may designate SBP Program procurements of supplies, services and construction related services with the approval of the head of the unit

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

- Increases the Veteran-owned Small Business Enterprise (VSBE) participation goal from 1% to 3% in the Maryland Annotated Code (State Statute)
- Removes GOSBA's authority to promulgate regulation that establish the overall percentage goal in the Code of Maryland Regulations (COMAR)
- GOSBA met with the bill sponsor, Delegate Nick Allen, to withdraw the legislation



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

- Adds the definition of “Certification Agency” and “Economically Disadvantaged Individual” to § 14-501 State Finance & Procurement Article (Consistent with MBE § 14-301)
- Increases the Small Business Reserve (SBR) Program designation from 15% to 20%
- Includes “Designated” and “Nondesignated” SBR achievements
- Amends “Payments” to “Awards” (Consistent with MBE and VSBE Program)
- MDOT & GOSBA shall develop an outreach program to increase the participation of economically disadvantaged individuals participating the SBR Program

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

- Expands the current list of procurement categories to include real property title insurance services and commercial real property title insurance services in SFP § 14-301
- Exempts the Special Secretary of GOSBA from waiving the requirement for a unit to report MBE participation by industry type if the spending threshold for the industry type is too low for the unit to provide sufficient data

SB 1014 State Procurement - Procurement Forecast and Outreach

- Creates entirely new sections (§§ 9-304.1 & 9-308) within the Maryland Annotated Code's State Government Article
- § 9-304.1 State Government Article
 - Requires GOSBA to consult with each primary procurement unit to identify potential contracting opportunities and outreach
 - Identify and increase awareness of procurement opportunities for small businesses including services and supplies
 - Assist small business with procedures for bidding and responding to a request for proposal

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

- § 9-308 State Government Article
 - On or before June 30 of each year, each unit shall submit to GOSBA a procurement forecast for all procurement contracts over \$100,000 for the upcoming fiscal year (**Codified from COMAR**)
 - On or before August 15 of each year, each unit shall submit annually the unit's reconciliation of the prior year's procurement forecast
 - Each unit should notify GOSBA within 15 days of any updates to the existing forecast
 - GOSBA Shall publish the information provided by each unit on its website



General Liaison Training

Presented by:

Karen Reyes & Lisa Mitchell Sennaar

General Training Agenda



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

LIAISON ROLE PER REGULATION

COMAR

SBR- 21.11.01.06
MBE- 21.11.03.05
VSBE- 21.11.14.05

LIAISON RESPONSIBILITIES

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



National Small Business Month

Liaison Onboarding Training

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

GOVERNOR'S OFFICE OF
Small, Minority &
Women Business Affairs

GOVERNOR'S COORDINATING OFFICES HOME

Quick Links

- About Us
- Legislation and Policy
- Outreach
- News
- Reports
- Contact Us

SBR PROGRAM REPORTING TOOLKIT

MBE PROGRAM REPORTING TOOLKIT

VSBE PROGRAM REPORTING TOOLKIT

State of Maryland
DISPARITY STUDY

stateofmddisparitystudy.com

NEW Program Seals

Program seals are now available to certified vendors. Certification status will be verified during the procurement process.

MINORITY BUSINESS ENTERPRISE PROGRAM
MBE PROGRAM

VETERAN-OWNED SMALL BUSINESS PROGRAM
VSBE PROGRAM

SMALL BUSINESS RESERVE PROGRAM
SBR PROGRAM

State of Maryland Disparity Study is Underway

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

Liaison Onboarding Training

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

MBE Liaison Training



**New Liaison Onboarding
Training Slide Deck**
July 18, 2023

**New Liaison Onboarding
Training Video**
July 18, 2023

Welcome New MBE Liaisons

Have you recently been named an MBE Liaison and need to know your **Next Steps**?

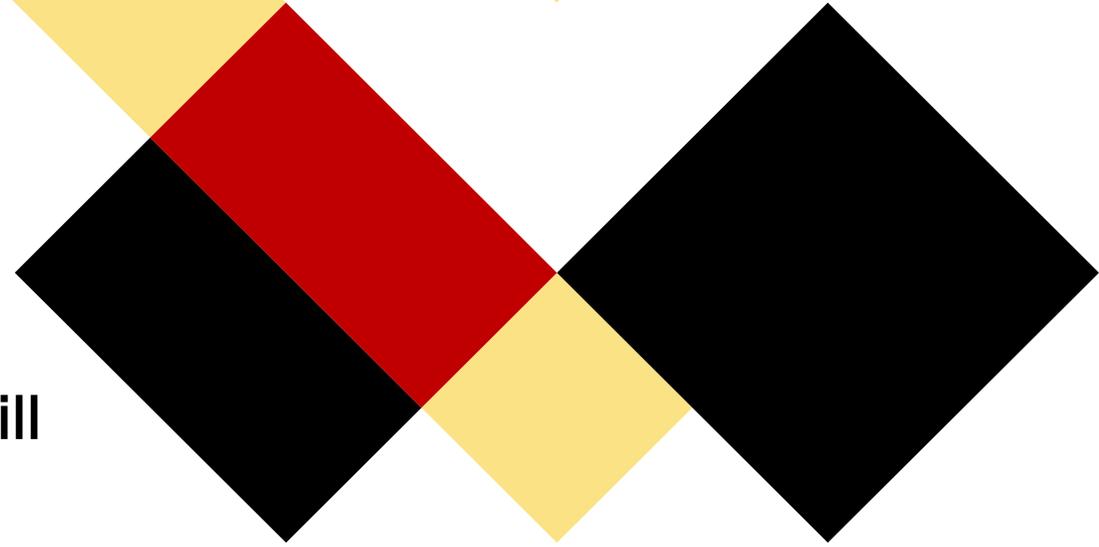
1. Contact one of the MBE Compliance Managers at **410-697-9600** to:
 - Make sure you are listed as the point of contact in our MBE Liaison Directory
 - Register for our next New Liaison Onboarding session
2. Download your **New MBE Liaison Welcome Packet**

Due Date	Report
June 30, 2024	Strategic Plan
June 30, 2024	Procurement Forecast
September 30, 2024	SBR & MBE Annual Report
October 1, 2024	VSBE Annual & Outreach Report
October 30, 2024	SBR, MBE, & VSBE QTR1 Reports

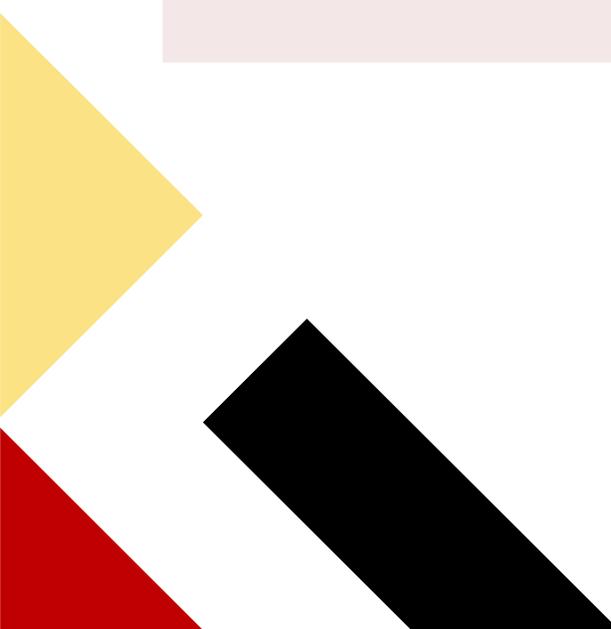
Reporting Deadlines

Updated Reporting Templates & Documents

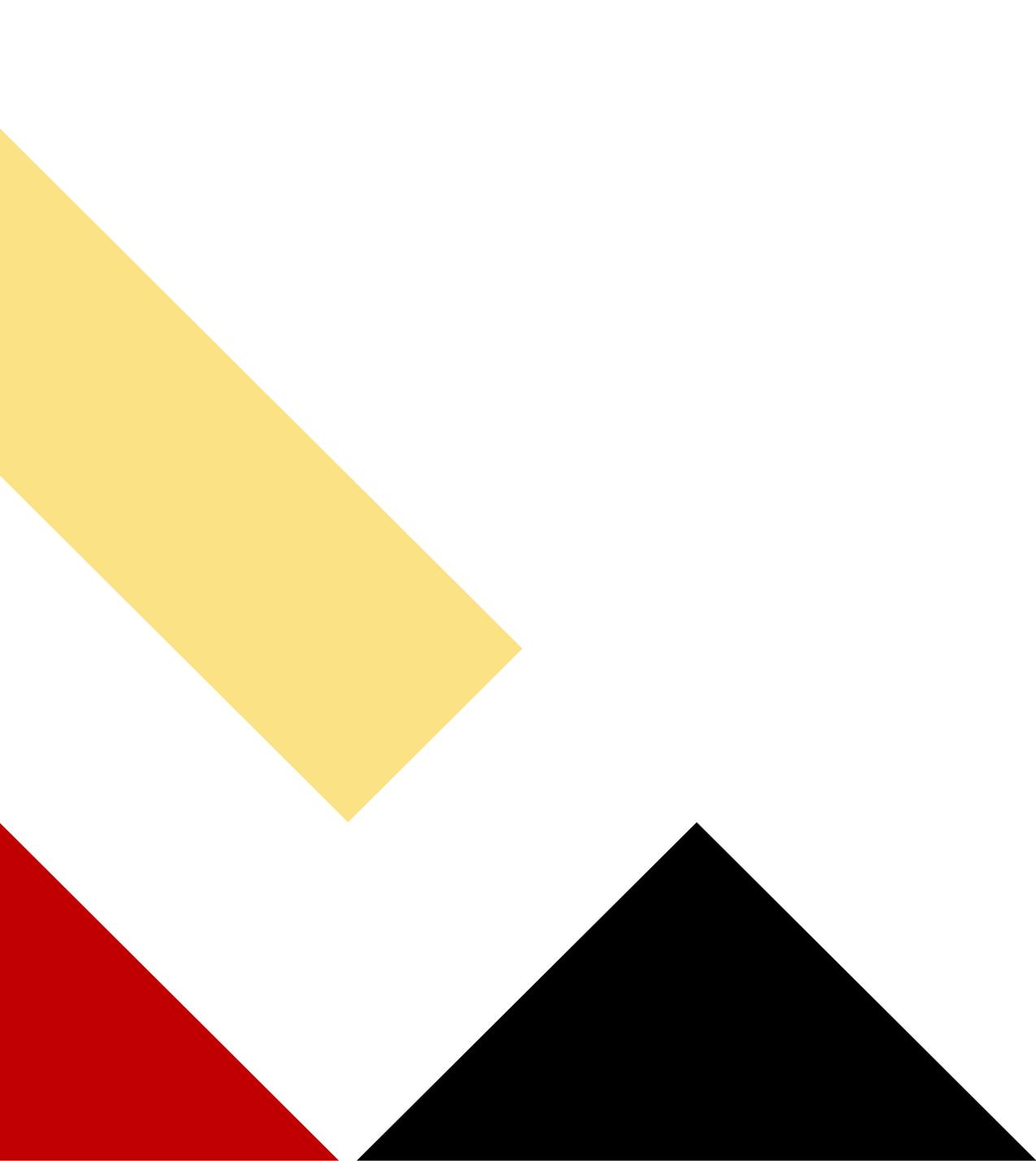
- Updated reporting documents and templates will be made available for all programs on July 1, 2024
 - FY24 Annual Report Templates
 - FY25 Quarterly Report Templates
 - Program Specific Reporting Manuals & Resources
- Can be found on the MBE, SBR, and VSBE Toolkits



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



Upcoming Meeting Dates



GAD LIST WORKGROUP

General Updates

Next Steps

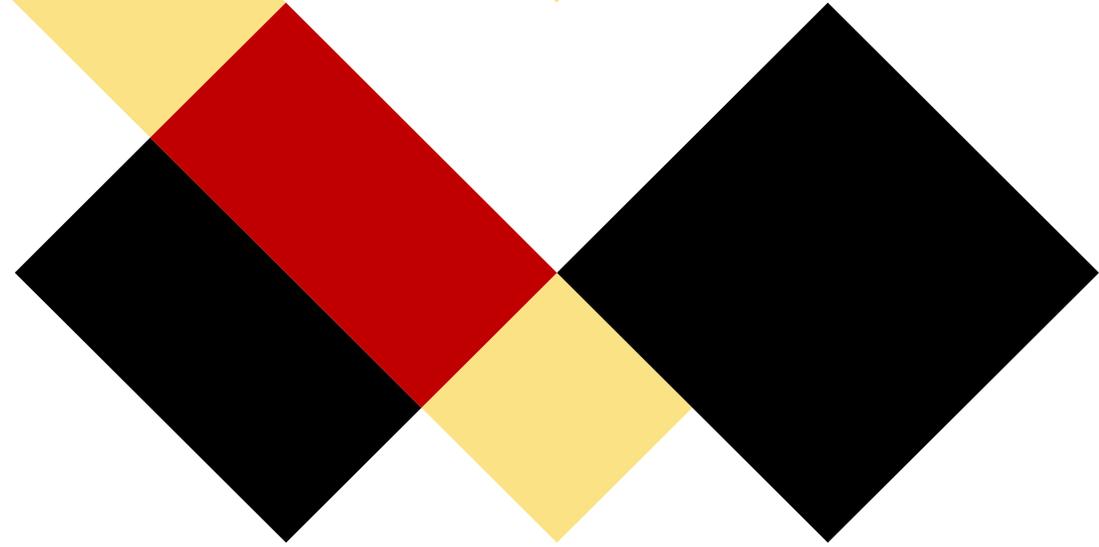
- **Re-naming Resource**
 - Socioeconomic Programs Reporting Guidance
- **New Rationale**
 - Resource will address reporting exclusions and inclusions by:
 - COMAR 21.01.03.01: Purchases exempt from the procurement regulations
 - ADPICS Additional Elements: Contract Type Field, Procurement Method Fields, and Category of Work Fields
 - Comptroller Object Codes



FY25 Socioeconomic Program Strategic Plan

Consolidated Strategic Plan

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



Submission Requirements

- Submitted via google form with distinct MBE, SBR, and VSBE sections
- Agencies that participate in all three programs:
 - a PDF version is provided on all reporting toolkits to coordinate answers across multiple contributors
- Mandatory report due by June 30, 2024



MBE Ombudsman

Compliance Considerations

Presented by Nichelle Johnson

May 9, 2024

Appointment of the MBE Ombudsman

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

The Ombudsman has been directed by legislation to:

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

Appointment of the MBE Ombudsman

The Ombudsman will:

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

The MBE Ombudsman Unit is Already Growing

Welcome Tracie Bolden!

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



MBE Program Compliance

- As a part of the compliance process for the MBE program, you are to monitor, facilitate, promote and ensure compliance to MBE Program Laws, Regulations, Guidelines, Policies, and Objectives at both the state and agency levels.
- You should be both effective and just in advocating for the proper treatment of Small, Minority & Women business owners. Specifically, to State certified MBE businesses.
- This includes a commitment to identifying and acting on both compliance lapses and fraud.

MBE Program Compliance

- Who is put in place to carry out compliance?
 - Contract Monitors
 - Contract Managers
 - Compliance Officers
 - Project Managers
 - Procurement Officers
 - Fair Practice Office
 - MBE Liaison Officers
 - DEI Offices

Frequent Partners in Compliance include:

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

MBE Liaison

COMAR 21.11.03.05



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

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

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

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

Resources

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

MBE Program Compliance Components



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





Program Implementation & Compliance

Compliance Regulations



[COMAR 21.11.03.13](#) – General Compliance Requirements



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



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

Program Implementation and Compliance

Review agency contracting procedures to ensure compliance

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

Know the rules; Make sure your Agency follows the rules

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

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

Successful Implementation of the MBE Program



At the input phase:

- When setting MBE goals, ensure your agency is evaluating solicitations on a case-by-case basis; use past similar contract compliance as a model and be sure to include written justification in PRG documents
- MBE goals/subgoals and MBE forms should be on the agenda at all Pre-bid Conferences
- Directly solicit certified MBE firms at every opportunity – build up your pool of vendors



Procurement Review Group (PRG)



- There should be at least one or more standing procurement review group(s) within your unit.
- The PRG shall be comprised of:
 - Agency's chief procurement official or senior-level procurement official designated to act in his/her place
 - SBR, MBE & even VSBE Liaison Officers or senior level alternates
 - Your unit's legal counsel to provide support and advice, as necessary

PRG (cont.)

Need to ensure the agency is doing an:

- Thorough evaluation of procurements expected to exceed \$100,000 in value for MBE and VSBE participation, including evaluation for MBE Subgoals as directed in the [MBE Program Subgoal Guidance](#)
- Resource: [BPW Advisory 2001-1](#)
- PRG Guidance and Worksheets are on OSP's website: <https://procurement.maryland.gov/procurement-review-group-prg/>

PRG (cont.)

Did your Agency Consider:

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



Are Subgoals applied correctly?

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

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

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

TABLE 2 – RECOMMENDED SUBGOALS

Combined Industry Category (Check appropriate column per Step 5.)		Cons	AE-CRS	Main	IT	Serv	CSE	
		<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%.								
<input checked="" type="checkbox"/> Refer to Table 2 above. If there are 3 or more certified firms in a Subgroup for the work of the procurement (indicated by a "Y" in Column 10), the Recommended Subgoal for the Combined Industry Category in Table 2 should be set for that Subgroup unless an explanation is provided in Step 11.								
<input checked="" type="checkbox"/> A subgoal may not be set if the number of certified firms in that Subgroup is less than 3 (indicated by an "N" in Column 10).								
11. The following Recommended Subgoals have not been set because:								



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PRG (cont.)

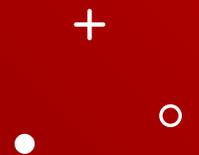
Best practices:

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



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

- +
 - • Compliance and MBE Forms



MBE Program Compliance

COMAR 21.11.03.09 - 10 and 21.11.03.11



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

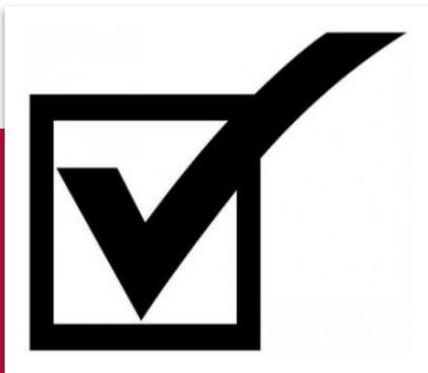
MBE Participation Forms

- Thoroughly review MBE forms to ensure they are correct and complete, including the application of the 60% rule (COMAR 21.11.03.12-1).
 - D-1A - MBE Utilization and Fair Solicitation Affidavit and MBE Participation Schedule
 - D-3A - MBE Subcontractor Project Participation Certification
 - Along with this document, you would also be requesting copies of MBE subcontract agreements per COMAR 21.11.03.10
 - D-3B - MBE Prime Contractor Participation Certification
- Procurement staff are directed to contact the agency MBE Liaison if there are issues or if additional guidance is needed.
- Sample Forms are provided on our website, as well as a Forms training in the MBE toolkit:
<https://gomdsmallbiz.maryland.gov/Pages/Reporting-Tool-MBE.aspx>

MBE Program Vendor Verification – Ask Karen



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



MBE Program Compliance – Ask Karen

COMAR 21.11.03.11



Waiver Documentation

- Carefully review any waiver documentation to make sure it fits the “good faith efforts” requirement.
 - D-1B - Exhibit A: MBE Subcontractor Unavailability Certificate
 - D-1C - Good Faith Efforts Documentation (as defined in COMAR 21.11.03.11)
 - D-2 - MBE Outreach Efforts Compliance Statements
- Procurement Officers should follow the guidance and best practices found in the **MBE & VSBE Goal Waiver Guidance: Good Faith Efforts Review & Documentation**

MBE Program Compliance

- Contract Compliance should be reviewed by the contract monitor or other assigned staff using the MBE reports (Attachment D) regularly received from Primes/Subcontractors
 - D-4A - Prime Contractor Paid/Unpaid Invoice Report
 - D-4B - MBE Prime Contractor Report
 - D-5 - MBE Subcontractor Paid/Unpaid Invoice Report
- Agency contract compliance reports should be regularly generated by liaisons, contract monitors, or other assigned staff which utilized this data.
- This data is essential when performing contract close out.

MBE COMPLIANCE ASSESSMENT *Data Tracking*

Annual Agency MBE Compliance Assessment Report

In the 2022 Legislative Session, HB589, Chapter 115 was passed, putting into place new Compliance Assessment Report requirements for procurement units participating in the MBE Program. Effective July 1, 2022 (FY2023) agencies are responsible for reporting, annually, their compliance data on contracts that were completed during the fiscal year to the Governor's Office of Small, Minority & Women Business Affairs.

AGENCY: _____ FY: 2023 DATE: _____

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

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

Contract #	Waiver % (Hover over this cell for dataset explanation)	MBE Goal	Award Date	Award Amount	Expiration Date	Prime Contractor Name	Prime MBE Designation (Select from dropdown)	Total Sub Payments (non-MBE)	Total MBE Sub Payments	Total Prime Payments	MBE Participat %	Full Contract Complian Rate	Compliance Rate (No m than 100%)	Procurement Category	Description of Work	Description of Factors Leading to Compliance below 100%
A555105	5.00%	10.00%	9/1/2019	\$10,000,000.00	8/31/2022	Feleton Construction Company	Non-Minority	\$50,000.00	\$52,000.00	\$10,778,000.00	0.48%	4.82%	4.82%	Construction	Retaining Wall and Storage facility construction	After the commencement of this project, the agency determined that the square footage of the storage facility had to be reduced in size, which reduced the scope of work initially awarded to MBE
											#DIV/0!	#DIV/0!	#DIV/0!			
											#DIV/0!	#DIV/0!	#DIV/0!			
											#DIV/0!	#DIV/0!	#DIV/0!			

Contract Number (Hover over this cell for dataset explanation)	Award Date	Award Amount	Expiration Date	Subcontractor Name	MBE Designation (Select from dropdown)	Total Subcontractor Payments	Description of Work (Relevant to this subcontractor only)
A555105	9/1/2019	\$10,500.00	8/31/2022	Applied Brick and Mortar	African American	\$7,500.00	Retaining wall, masonry (i.e., block, brick, stone), construction

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

MBE Program Compliance



- Procurement staff should collaborate with the Prime, the MBE liaison and legal counsel to quickly resolve issues with MBE subcontractors.
- Only after these steps should procurement staff reach out to the MBE Ombudsman Unit for assistance.
- Procurement staff, compliance staff, and the MBE liaison should ensure that issues are handled in accordance with COMAR, procurement guidelines, and best practices

MBE Form Reminders

- Primes experiencing issues must work with procurement staff and the MBE liaison and cannot make *unilateral* decisions concerning named MBEs on contracts
- Primes who wish to amend MBE participation schedules must work with procurement staff and the MBE liaison to act according to [COMAR 21.11.03.12](#)
- Involves consideration of the 72-hour rule *before* contract execution and amendment of participation schedule *after* contract execution



Contract Monitoring

Compliance Regulations

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

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

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

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

Compliance Regulations - Payment

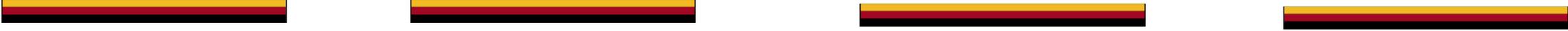
COMAR 21.11.03.13 [Collection & Review of payment reports]

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

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

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

Compliance vs Fraud



☐ Compliance requirements:

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

Compliance vs Fraud



•**Fraud:** “deceit, trickery, or breach of confidence for profit or to gain some unfair or dishonest advantage.”

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

**Alleged Fraud is handled by the Attorney General’s Office
and can also be reported to the Ombudsman Unit at
mbe.ombudsman@maryland.gov**

Compliance Regulations

- 
- [COMAR 21.11.03.13](#) [Carry out remedies to non-compliance]

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

- (1) Termination of the contract;
- (2) Referral to the Office of the Attorney General for appropriate action; or
- (3) Initiation of any other specific remedy identified by contract.

Remedies to Non-Compliance

COMAR 21.07.01 & 21.10.08



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

- ✓ Letter of non-performance
- ✓ Corrective Action Plans
- ✓ Withholding Payment
- ✓ Liquidated Damages
- ✓ Contract Termination for Cause or Convenience



Vendor Relations



Vendor Relations

Assisting vendors and educating them on MBE Program Requirements

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

Vendor Relations

Assisting in resolution/prevention of contracting issues

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

Coordinating agency outreach efforts

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



Without change there is no
innovation, creativity, or
incentive for improvement.
Those who initiate change
will have a better opportunity
to manage the change that is
inevitable.

WILLIAM POLLARD

MBE Ombudsman Unit

Nichelle Johnson
MBE Ombudsman

Nichelle.johnson1@maryland.gov

410-697-9605

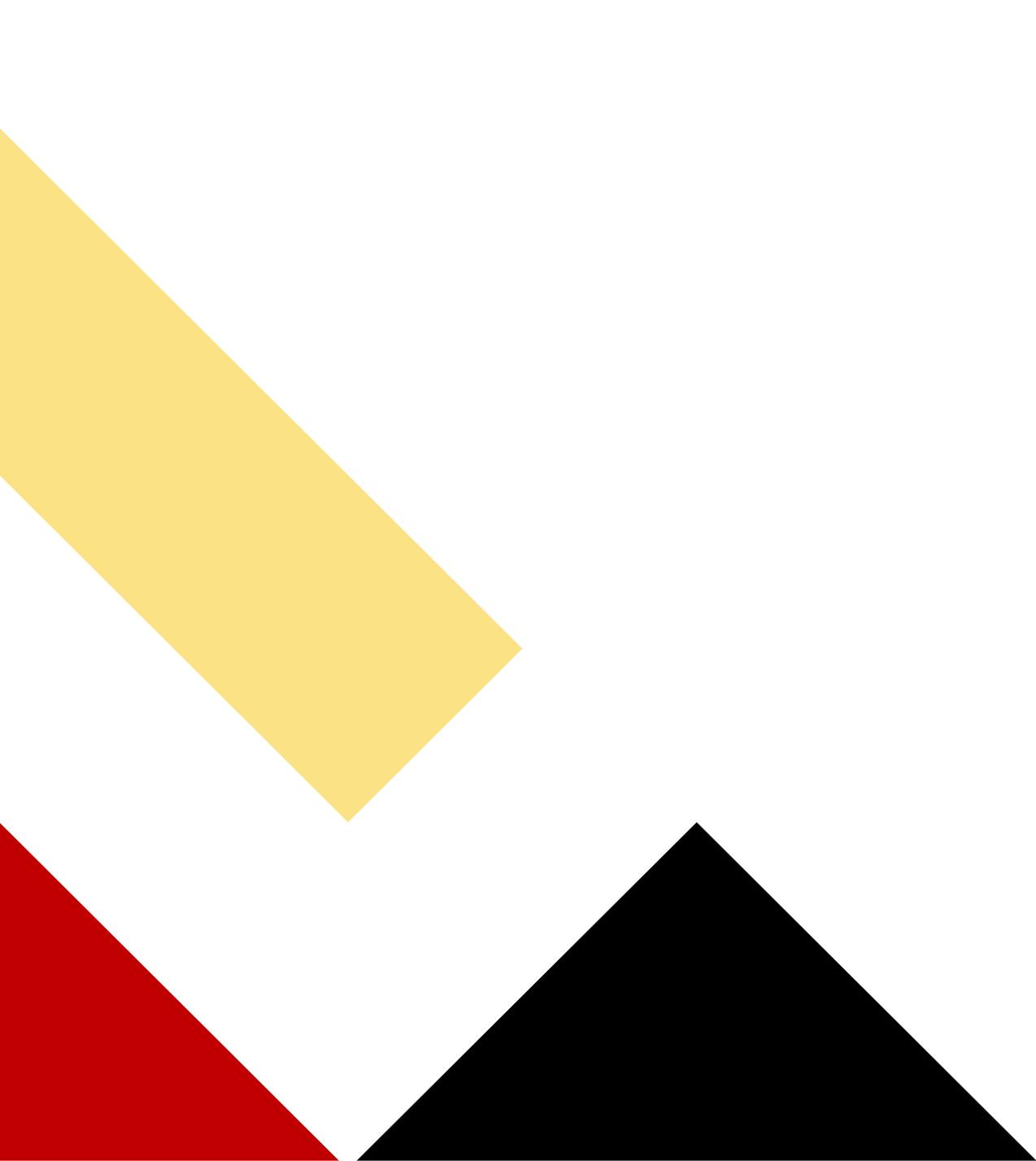
667-232-1369

Tracie Bolden
MBE Ombudsman Compliance Manager

tracie.bolden@maryland.gov

410-697-9726

667-644-8476



FY2025 Procurement Forecast

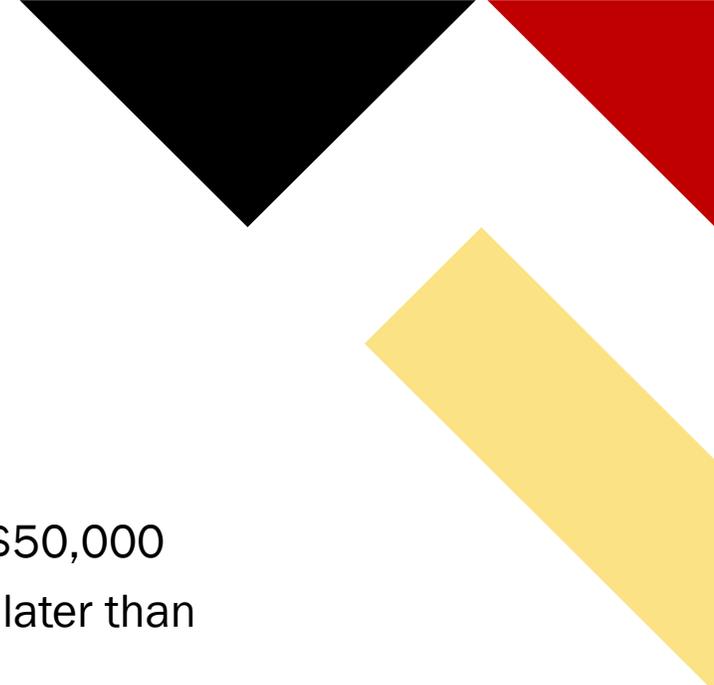
Procurement Forecast



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

- 21.11.03.17
- 21.11.01.06
- 21.11.14.06(B)

Procurement Forecast



- All agencies are required to submit one report with all projected purchases over \$50,000 including SBR designated procurements and those with MBE and VSBE goals no later than June 30, 2024
- Do not use previous templates and instructions
 - Retrieve the updated instructions and the template for FY2025
From either the [SBR](#), [MBE](#), or [VSBE](#) Toolkits
- The submission should include:
 - Detailed FY2025 Procurement Forecast excel spreadsheet
 - Signed attestation in PDF format
 - Submissions should be sent via email to: compliance.gosba@maryland.gov

SBR, MBE and VSBE Toolkits

The image is a screenshot of the Maryland.gov website, specifically the page for the Governor's Office of Small, Minority & Women Business Affairs. The browser's address bar shows the URL `gomdsmallbiz.maryland.gov/Pages/default.aspx`. The website's navigation menu includes links for Home, MBE PROGRAM, SBR PROGRAM, VSBE Program, RESOURCES, and PROCUREMENT FORECAST. The main content area features a large banner for a newsletter, a sidebar with quick links, and a section for reporting toolkits. Three red arrows point to the SBR, MBE, and VSBE Reporting Toolkit icons in the sidebar. Another red arrow points to the 'Home' link in the navigation menu. A third red arrow points to the address bar. The bottom of the page has a dark banner with the text 'Give the latest edition of our Small Biz Bulletin a quick read.'

gomdsmallbiz.maryland.gov/Pages/default.aspx

Maryland.gov

State Directory State Agencies

Enter search term

Home MBE PROGRAM SBR PROGRAM VSBE Program RESOURCES PROCUREMENT FORECAST

GOVERNOR'S OFFICE OF
Small, Minority &
Women Business Affairs

GOVERNOR'S COORDINATING OFFICES HOME

Quick Links

- About Us
- Legislation and Policy
- Outreach
- News
- Reports
- Contact Us

SBR PROGRAM REPORTING TOOLKIT

MBE PROGRAM REPORTING TOOLKIT

VSBE PROGRAM REPORTING TOOLKIT

Attention SBR & VSBE Vendors

If you are experiencing problems with certification or recertification in eMMA, call us for assistance at 410-697-9600.

TOP WEBSITE PICKS

- Expanding Opportunities Magazine
- eMaryland Marketplace Advantage (eMMA)
- Maryland Financial Incentives for Businesses
- Maryland Business Express
- Maryland Entrepreneur Hub
- SBR Liaisons
- MBE Liaisons
- VSBE Liaisons
- MBE Rights & Responsibilities
- FY2021 Customer Service Annual Report

PUBLIC DATA MINING STRATEGIES

eMaryland Marketplace Advantage (eMMA)

- Video
- Slide Deck

Procurement Forecast

- Video
- Slide Deck

Board of Public Works

- Video
- Slide Deck

Give the latest edition of our Small Biz Bulletin a quick read.

Quick Links

About Us

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NEW SBR LIAISONS

[New Liaison Welcome Packet.pdf](#)

Resources

[SBR Program Overview](#)

[BPW Advisory 2005-1 Small Business Reserve Program](#)

[GAD List](#)

[SBR Liaison Directory](#)

[eMaryland Marketplace Advantage \(eMMA\)](#)

[eMMA QRC - SBR Certification and Recertification](#)

Policies and Procedures

[Maryland-Procurement-Manual](#)

[PRC Guidance and Worksheets
\(located on the Office of State Procurement's
\(OSP\)website\)](#)

[SBR Designation for Statewide Contracts with
Multiple Contract Awards](#)

**Procurement
Compliance
Bulletins**

[4.25.2024](#)

[3.27.2024](#)

[2.22.2024](#)

[1.25.2024](#)

[12.22.2023](#)

Small Business Reserve (SBR) Program Reporting Toolkit

This toolkit contains valuable information to assist State agencies/departments with the management and compliance of the Small Business Reserve (SBR) Program. (This page is intended for internal state users only. **Vendors do not submit these reports.**)

FY2024 Small Business Reserve (SBR) Annual Report **New** Template, Instructions, and Example...coming soon

The SBR Annual Report must be completed and submitted by September 30, 2024. The Annual Report covers the period from July 1, 2023 to June 30, 2024.

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](#)

[SBR Annual Report Agency Example](#)

[BPW Advisory 2005-1 Small Business Reserve Program](#)

[GAD List](#)

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

For questions, contact:

SBR Compliance Managers Lisa Mitchell Sennaar or Tanita Johnson

lisa.sennaar@maryland.gov or tanita.johnson1@maryland.gov

FY2025 Procurement Forecast

Due June 30, 2024

Procurement Forecast Instructions Procurement Forecast Template

If you have any questions, you may contact
Lisa Mitchell Sennaar at lisa.sennaar@maryland.gov

FY2025 Socioeconomic Program Strategic Plan

All participating units shall submit a Strategic Plan to GOSBA each fiscal year. This mandatory report is submitted as a Google Form in a consolidated format with distinct MBE, SBR, and VSBE sections. The form uses logic to navigate you through the process. For those agencies that participate in all three programs, a PDF version of the form is provided below so you can coordinate your response across

Procurement Forecast Template

AutoSave Off Final.FY2025 - Procurement+Forecast+Templat... Search Lisa Sennaar LS

File Home Insert Page Layout Formulas Data Review View Automate Help

Clipboard Font Alignment Number Styles Cells Editing Add-ins

B6

	A	B	C	D	E	F
1	Yellow Highlighting - (data required if applicable)	CURRENT/EXISTING CONTRACTS- COMPLETE COLUMNS B-E (LEAVE COLUMNS B-E BLANK IF THIS IS NOT A CURRENT/EXISTING CONTRACT)				
2	Agency Name (required on every row with data)	Contract Number	Current Base Contract Amount (No Options)	Incumbent Name	Currently Designated Small Business Reserve, and/or contains MBE, DBE, or VSBE Participation Goals	Procurement Categories
3						
4						
5						
6	Aging					
7	Agriculture					
8	Archives					
9	Assessments and Taxation					
10	Attorney Generals Office					
11	Automobile Insurance Fund					
12	Baltimore City Community College					
13	Board of Contract Appeals					
14	Bowie State University					
15	Budget and Management					
16	Canal place Preservation					
17	College Savings Plan					
18						
19						
20						
21						
22						
23						
24						
25						
26						
27						

FY2025 Procurement Forecast Attestation Signatures

Procurement Forecast Template

Yellow Highlighting - (data required if applicable)

1 **CURRENT/EXISTING CONTRACTS- COMPLETE COLUMNS B-E**
(LEAVE COLUMNS B-E BLANK IF THIS IS NOT A CURRENT/EXISTING CONTRACT)

2	Agency Name (required on every row with data)	Contract Number	Current Base Contract Amount (No Options)	Incumbent Name	Currently Designated Small Business Reserve, and/or contains MBE, DBE, or VSBE Participation Goals	Procurement Categories
3						
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FY2025 Procurement Forecast | Attestation Signatures

Procurement Forecast Template

Final.FY2025--Procurement+Forecast+Templat... Search Lisa

Insert Page Layout Formulas Data Review View Automate Help

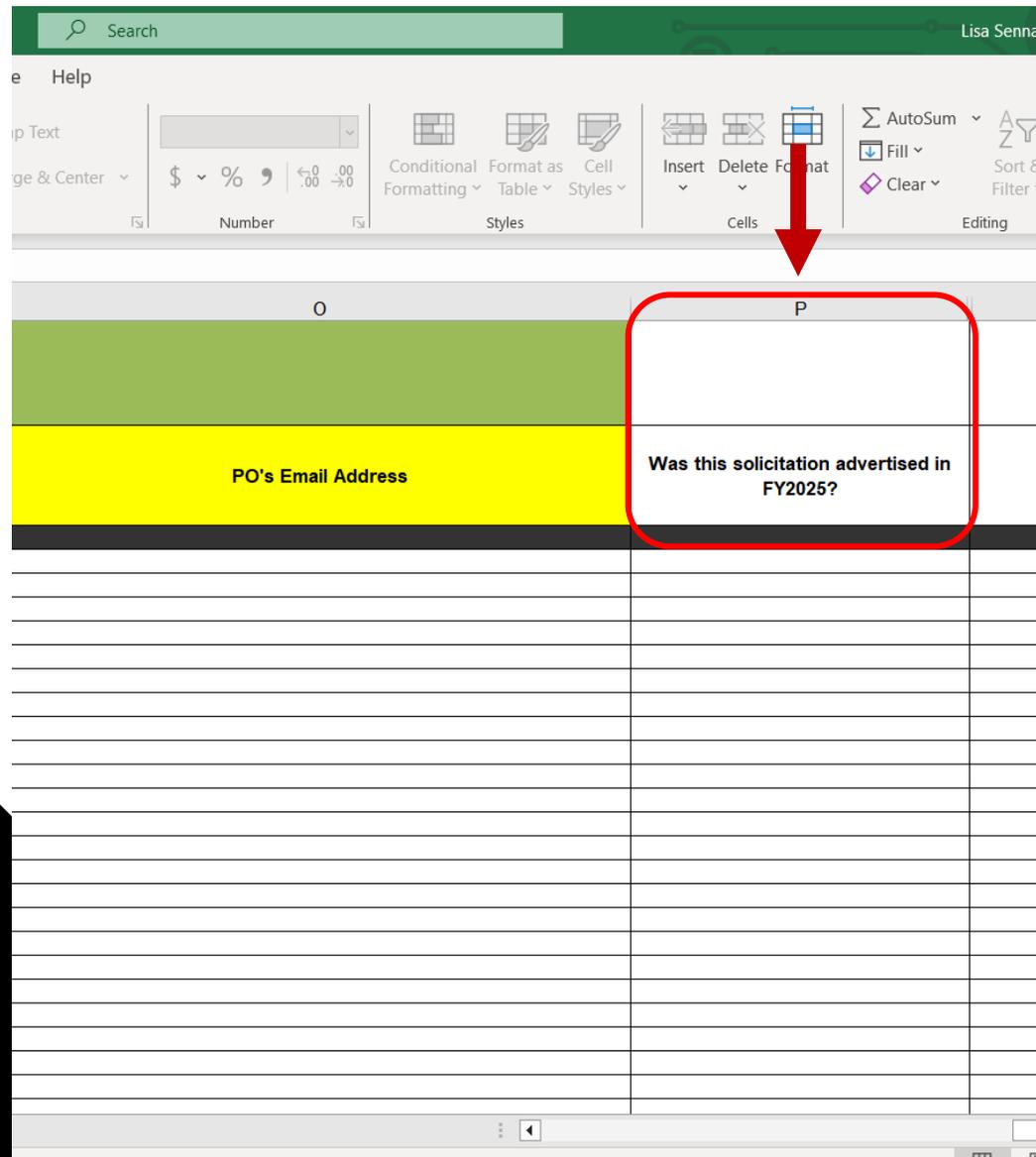
Font Alignment Number Styles Cells

ESTIMATIONS - COMPLETE COLUMNS F-O

Estimated Contract Value (no options)	Term of Contract	Name of Procurement Officer	PO's Telephone Number*	PO's Email Address
USM Simplified \$5,000 to \$200,000	Less than 1 year			
\$15,000 to \$99,000	1-2 years			
\$100,000 to \$500,000	2-3 years			
\$500,001 to \$1,000,000	3-4 years			
\$1,000,001 to \$5,000,000	5 years or more			
\$5,000,001 to \$10,000,000	To Be Determined			
\$10,000,001 to \$20,000,000				
Over \$20,000,000				
To Be Determined				

2025 Procurement Forecast | Attestation Signatures

Procurement Forecast Template



Procurement Forecast Template

The screenshot displays a Microsoft Excel spreadsheet titled "Final.FY2025- +Procurement+Forecast+Templat...". The spreadsheet is a procurement forecast template with the following sections:

- Unit Name:** Rows 1-4.
- Unit Representative who Prepared the Report:** Rows 5-13. This section includes a statement: "I hereby attest that I reviewed the FY2025 Procurement Forecast and any attachments and the information therein is true and correct to the best of my knowledge, information and belief." Below this are fields for "Print Name:", "Title:", and "Signature and Date:".
- Reviewed and Approved by Unit Head or Designee:** Rows 16-25. This section includes a statement: "I hereby attest that I reviewed the FY2025 Procurement Forecast and any attachments and the information therein is true and correct to the best of my knowledge, information and belief." Below this are fields for "Print Name:", "Title:", "Signature:", and "Date:". A red arrow points to a red-bordered box labeled "Attestation Signatures" at the bottom of the spreadsheet.

The Excel ribbon shows the "Home" tab with various formatting and editing options. The Windows taskbar at the bottom shows the time as 3:43 AM on 5/9/2024.

Procurement Forecast Portal

Only 80% of units submitted Forecasts in 2024

nd.gov/Pages/Forecasting.aspx

Enter search term

HOME MBE PROGRAM MBE OMBUDSMAN SBR PROGRAM VSBE PROGRAM RESOURCES **FORECAST**

GOVERNOR'S OFFICE OF Small, Minority & Women Business Affairs

Quick Links

- About Us
- Legislation and Policy
- Outreach
- News
- Reports
- Contact Us

Procurement Forecast Portal

Welcome to Maryland's Procurement Forecast Portal.

This database is populated with *projected* purchases of \$100,000 and above for the current fiscal year. Not all projected purchases will be made as indicated in the Procurement Forecast.

We strongly advise you to connect with the buyer directly for details and updates.

To obtain the contact information of the buyer, download your search results by clicking on "EXPORT TO EXCEL" below.

Search - Description

Search by Agency

Search by Procurement Categories

Search by Contract Value

Search by Region

Search by Projected Advertisement Dates

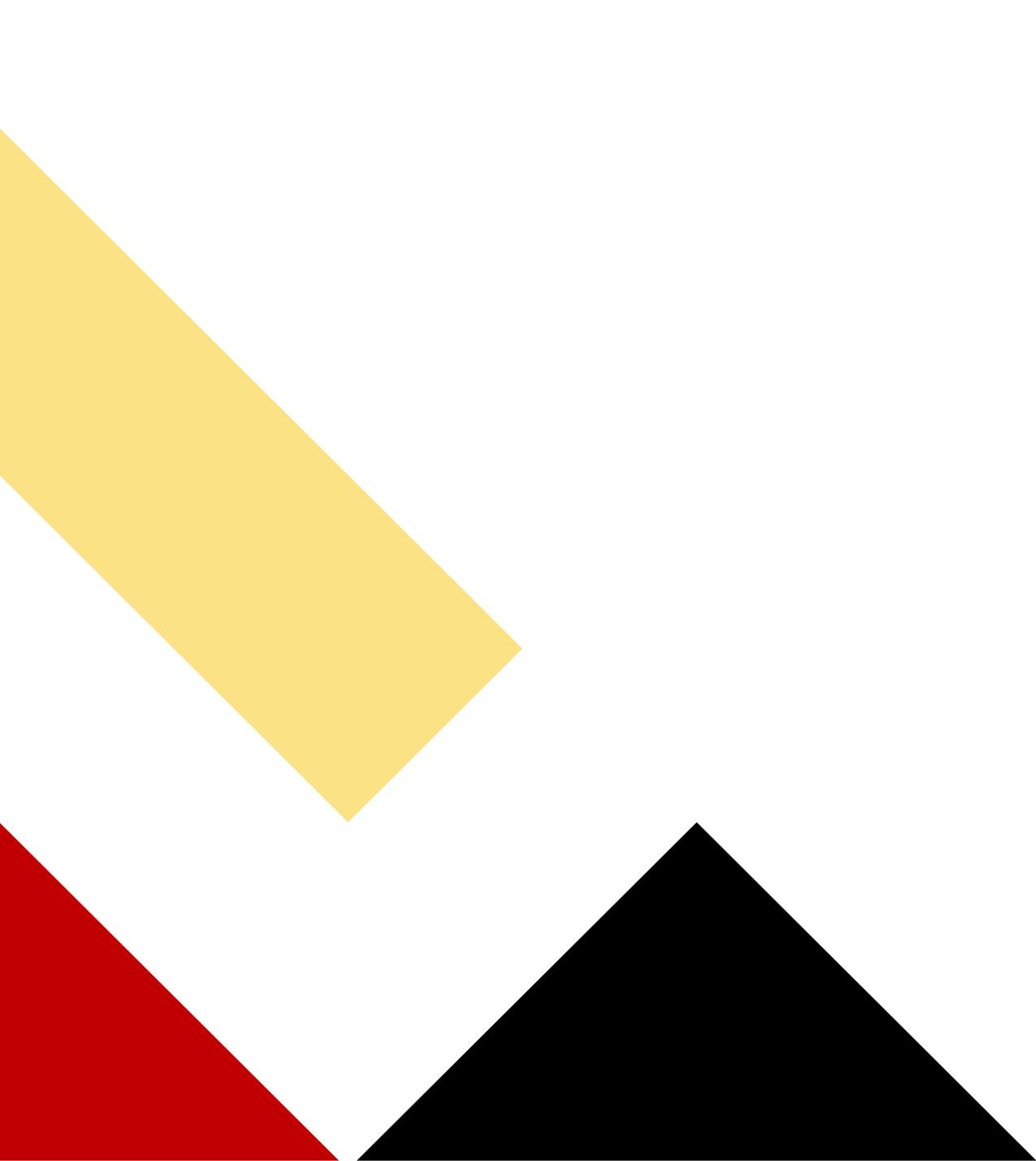
Agency Name: University of Maryland Global Campus
Procurement Category: Information Technology - Services
Procurement Method: USM Simplified \$5k to \$200k
Description: Google analytics and consulting support
Location/Delivery: SOUTHERN MARYLAND
Estimated Advertisement Date: Q4 (April-June 2024)
Estimated Total Contract Award (no options): USM Simplified \$5,000 to \$200,000
Term of Contract: 1-2 years

Agency Name: University of Maryland Global Campus
Procurement Category: Information Technology - Services
Procurement Method: USM Simplified \$5k to \$200k
Description: Software that supports centralized authentication and management of the cloud infrastructure
Location/Delivery: SOUTHERN MARYLAND
Estimated Advertisement Date: Q2 (Oct.-Dec. 2023)
Estimated Total Contract Award (no options): USM Simplified \$5,000 to \$200,000
Term of Contract: 1-2 years

Agency Name: University of Maryland Global Campus
Procurement Category: Information Technology - Services



Any Questions?



MBE Program

Presented by Karen Reyes
MBE Compliance Manager

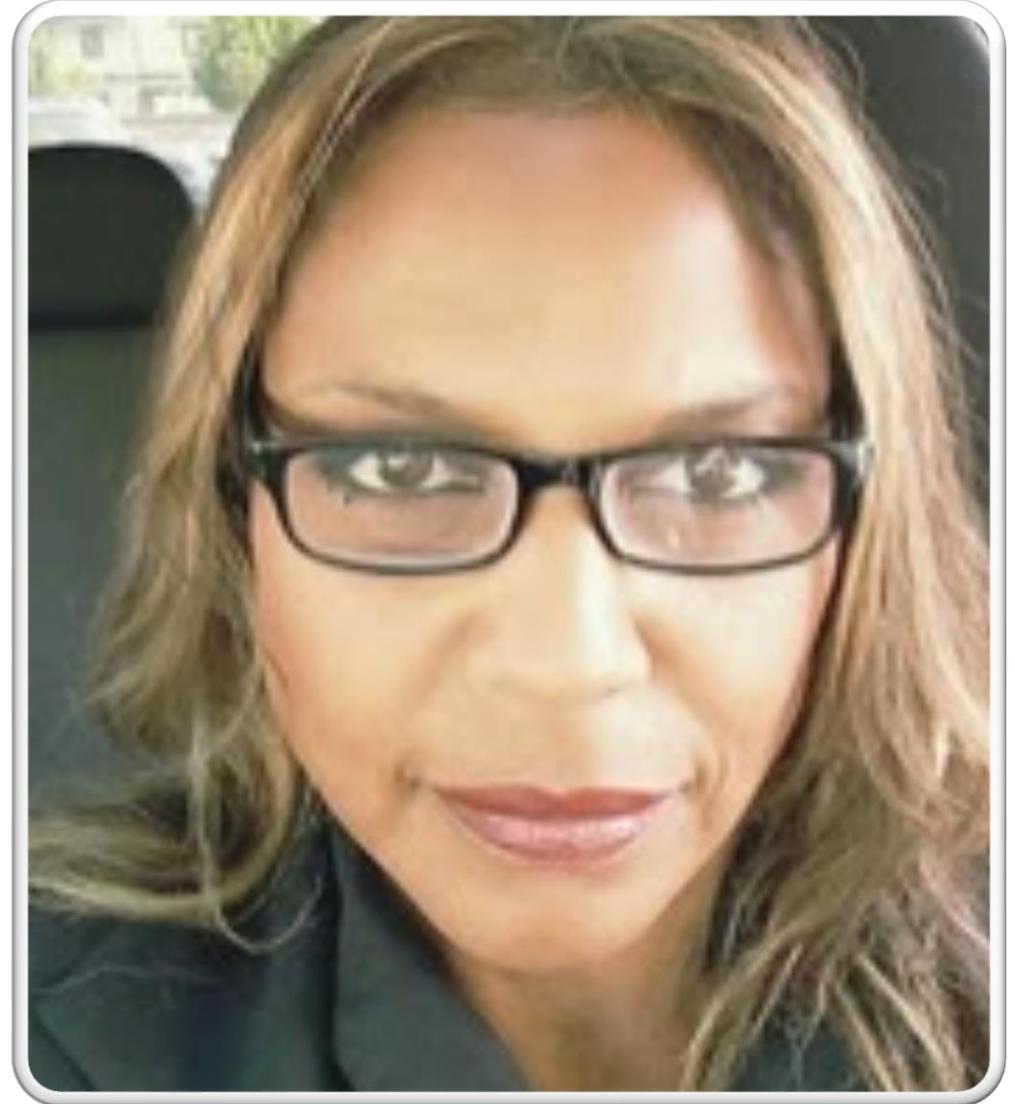
MBE Program Agenda



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

New Addition to the GOSBA Team!

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





MBE Reporting Requirements

MBE Reporting Requirements

Let's review the reporting requirements for our office:
Found in **COMAR 21.11.03.17. *Reporting***

- Our office must receive both Quarterly and Annual MBE Procurement Reports (backup data should be included).
 - Always send to the mbereports.gosba@maryland.gov email box.

MBE Reporting Requirements

Other Reporting Requirements:

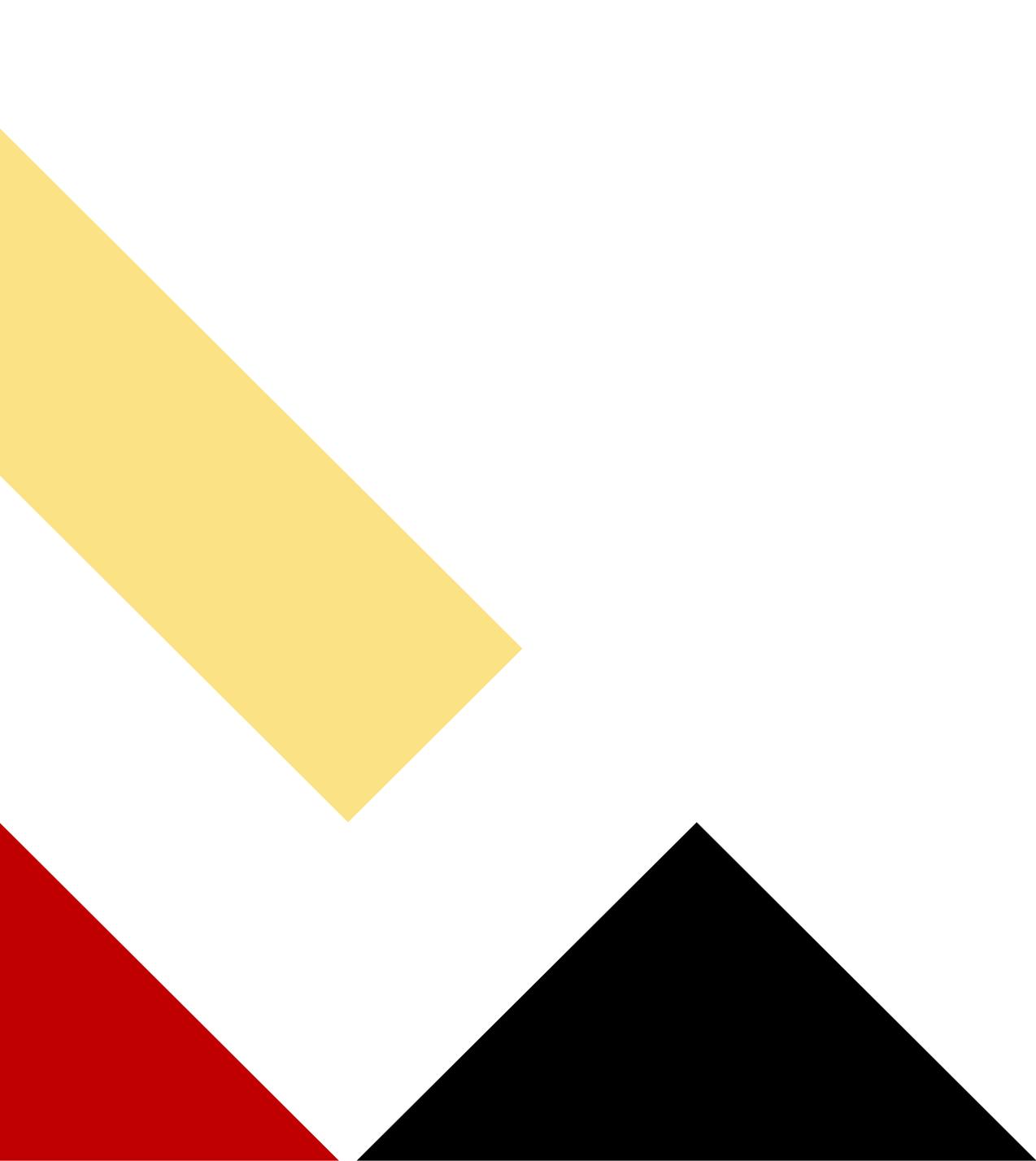
Submit to the compliance.gosba@maryland.gov email box

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

Note:

COMAR 21.11.03.17 C.

Each procurement agency shall furnish any other information or periodic reports requested by the Governor's Office of Small, Minority & Women Business Affairs or the Department of Transportation in connection with MBE certification and procurement, or any other matters related to the administration, effectiveness, or continuation of the Minority Business Enterprise Program.



Backup Data

Creating an ANSWERS Account

- To access the ANSWERS website (<https://net.md.gov/apps/answers/>) VPN connection is required
- On the homepage follow the prompt to create your account

Home Help Sign In

DEPARTMENT OF INFORMATION TECHNOLOGY
ANSWERS FINANCIAL REPORTING

Sign In

Use another service to Sign In

For registered users you can enter your Sign In credentials below.
If you have already linked your account, you can use the connect.md.gov to the right.

Email
The email field is required.

Password
The password field is required.

[Forgot your password?](#)

New to ANSWERS?

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

Reporting – source documents for data reports

- **Generate the following FMIS/ANSWERS Reports:**
 - **PCHL709** (BPO/PO Change Orders from contracts awarded in prior fiscal years)
 - **PCHL710** (Contract Awards Detail) run by award date
 - **PCHL711** (Contract Awards Summary) **Use Waiver Data Only**
 - **PCHL717** (Prime Payments by Direct Voucher; no BPO/PO)
 - **PCHL718** (Prime Voucher Payments made from BPO/PO)
 - **PCHL719** (Subcontractor Payments)
 - **PCHL 720** (Subcontract Awards) run by award date
 - **PCHL 721** or VIEWDIRECT A30USB11(P-Card Total/Detail)

IFMIS and other reporting systems

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

MBE AWARDS/PAYMENTS REPORTING

FMIS CHEAT SHEET

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

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

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

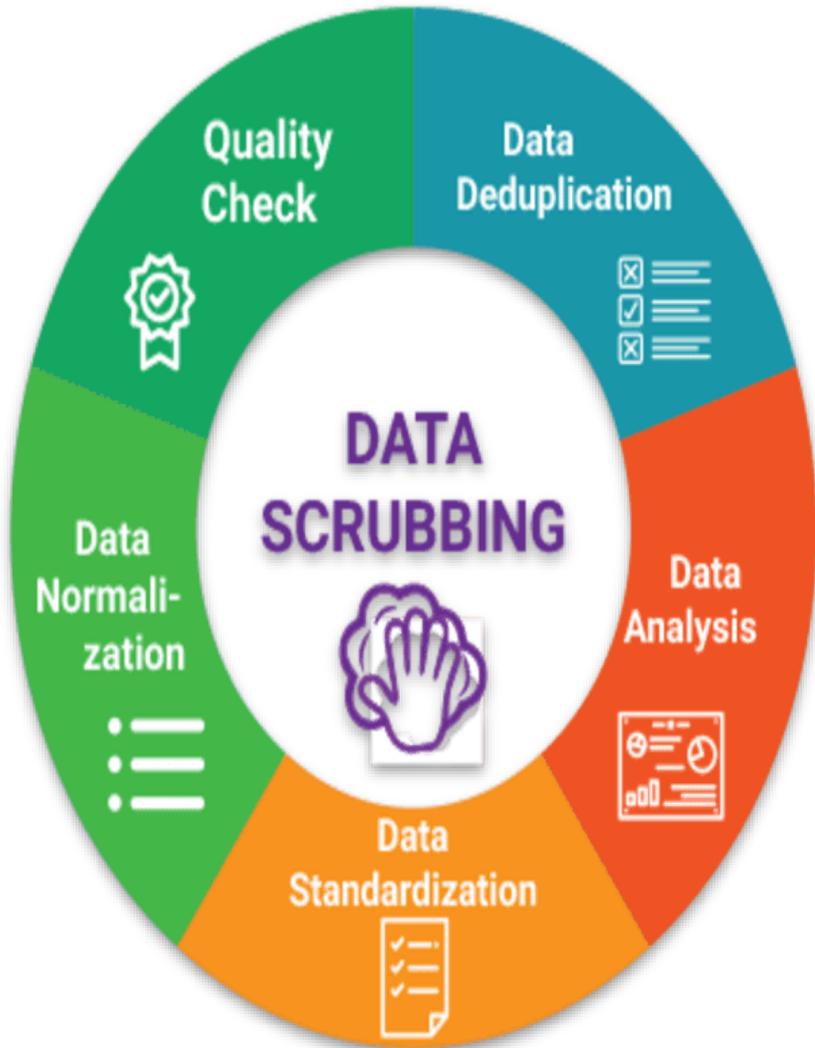
****With the exception of control agency/department statewide contracts***

Compiling your data

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

- Once you have completed the scrubbing of your data, you will consolidate and save your data reports with a name that describes the dataset, your agency/department, and the FY, as discussed earlier.
- You will enter data into the correct cells of the fields in the Form 1 / 2, Form 3, and Contracts Inventory
- Perform Checks and Balances to ensure your data is accurate

What to look out for when data sorting/scrubbing



- **Ensure Data is complete for the timeframe it is being pulled**
 - *Ex. If you are pulling QTR 1 report be sure that you are pulling the correct months (July 1-September 31)*
- **Ensure data is clean and all data errors are solved**
 - *Ex. If your agency is reporting negative numbers on their credit card report be sure to reconcile any returns that were made and only report the final total that was spent*
- **Ensure data is consistent with socioeconomic reporting requirements**
 - *Ex. Scrubbing out preferred providers*
- **Ensure data is in the proper format**
 - *Ex. Making sure the backup data that was collected provides all the necessary data fields*

Data Scrubbing Example

- When submitting backup data it is crucial for the data to be easily understood
 - Utilizing color coding or pivot tables aids in clear understanding of the data being provided
- Sample Data Templates are available per request, contact your designated MBE Compliance Manager to obtain the sample data for reference

Dep	MBE Cod	MBE Descriptio	Vendor N	Vendor Name	SBR Ver	MBE Cer	Due Date	Voucher No	Voucher Amou	Reportable Amou	Line No / Commodity Id / Commodity Name
S33			****842146	SIGN LANGUAGE LLC			12/3/2021	S33PB3300089	\$153.60	\$153.60	"001", "96167", "SIGN LANGUAGE SERVICES FOR THE HEARING IMPAIRED."
S33			****189892	PRODUCTION TEAM			12/18/2021	S33PB3300090	\$275.00	\$275.00	"001", "91581", "TELEVISION COMMERCIAL PRODUCTION"
S33			****508591	321 SUPPORT			8/28/2021	S33PB3300091	\$1,225.00	\$1,225.00	"001", "95285", "SUPPORT SERVICES"
S33			****586710	LANGUAGE PROS			5/25/2022	S33PB3300092	\$147.32	\$147.32	"001", "96175", "TRANSLATION SERVICES"
S33			****982511	QUICK REPAIRS LLC			3/29/2022	S33PB3300093	\$31,085.52	\$31,085.52	"001", "93625000000", "REPAIR ON EQUIPMENT OR REPLACE"
S33			****143563	MOBILE SOFTWARE INC			1/16/2022	S33PB3300095	\$2,040.83	\$2,040.83	"001", "20556GIS012", "MOBILE SOFTWARE, GIS SOFTWARE MASTER CONTRACT"
S33			****968872	ELECTRONICS CORP			5/25/2022	S33PB3300096	\$273.47	\$273.47	"001", "01621DCNW06", "NETWORK DIGITAL COPIER AND MULTIFUNCTION DEVICES, CLASS VI"
									Total DV	\$35,200.74	
									Total DV Count	7	
EXCLUDE FROM AWARDS INCLUSION FOR PAYMENTS											
S33	STATEWIDE		****027237	RUDOLPHS OFFICE SUPPLY		94-126	8/20/2021	S33PB3300094	\$167.08	\$167.08	"001", "98528", "COOLERS, DRINKING WATER"
Exclusions											
S33			****942913	ELITE CONSULTING INC			7/30/2021	S33PB3300077	\$5,500.00	\$0.00	"001", "94821", "FEES, CONSULTING"
S33			****924710	CELLPHONE CORP			7/13/2021	S33PB3300078	\$0.29	\$0.00	"001", "91577", "TELEPHONE SERVICES, LONG DISTANCE/LOCAL, 800 SERVICE, CALLING CARD, WATS SVCS"
S33			****499170	BOOKS & COMPANY INC			2/26/2022	S33PB3300079	\$249.25	\$0.00	"001", "71510", "BOOKS, MAGAZINES, PAMPHLETS, REPRINTS, ETC.(PUBLICATIONS)"
S33			****681569	SERVICE PROS			5/20/2022	S33PB3300080	\$35,886.11	\$0.00	"001", "96141", "SERVICE AGREEMENT"
S33			****333555	MARKETING ASSOCIATION			3/18/2022	S33PB3300081	\$500.00	\$0.00	"001", "95640000002", "DUES"
S33			****095459	NATIONAL ACCOUNTING ASSOCIATION			8/18/2021	S33PB3300082	\$18,486.00	\$0.00	"001", "99560", "MEMBERSHIP FEES"
S33			****988723	QUICK STORE			7/28/2021	S33PB3300083	\$142.27	\$0.00	"001", "99580", "REIMBURSEMENT"
S33			****457454	ELEMENTARY SCHOOL FOUNDATION			7/30/2021	S33PB3300084	\$16,440.67	\$0.00	"001", "94631", "GRANT PAYMENTS"
S33			****592177	COMMUNITY HOSPITAL			4/19/2022	S33PB3300085	\$3,987.06	\$0.00	"001", "96154", "MEDICAL AND HOSPITAL SERVICES (INCLUDING BLOOD TESTING & REPORTS) ETC."
S33			****221660	MECHANICS ON THE GO			9/9/2021	S33PB3300086	\$115.85	\$115.85	"001", "92847", "VEHICLE MAINTENANCE SERVICE"
S33			****091383	GOOD FUEL COMPANY			12/3/2021	S33PB3300087	\$50.74	\$50.74	"001", "40515", "GASOLINE, AUTOMOTIVE"
S33			****074733	DONATIONS CENTER			5/27/2022	S33PB3300088	\$9,748.00	\$9,748.00	"001", "944531", "GRANT PAYMENTS"

Data Processing for MBE Reporting

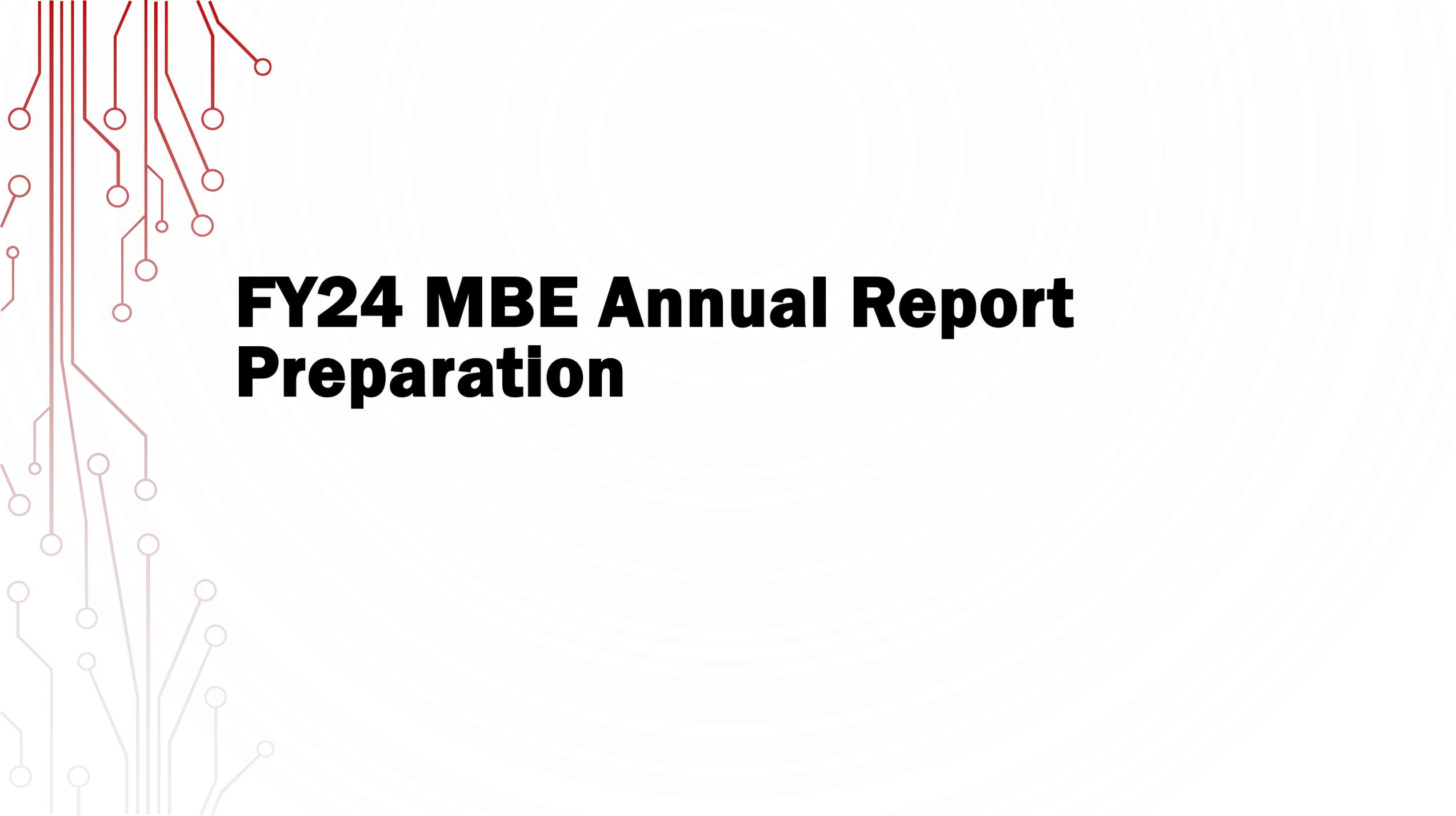
- Your agency is responsible for downloading the most up to date MBE Reporting templates provided in the MBE programs reporting toolkit
 - These templates are already equip with the necessary formulas to calculate your agencies participation percentages for every FY
- Many of these templates are being uploaded into a database which makes it crucial for the processing step to be done accurately to produce the annual report you see at the end of the year

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

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

Data Analysis

- Data analysis is the process of inspecting, cleansing, transforming, and modeling data with the goal of discovering useful information, informing conclusions, and supporting decision-making.
- Annual reporting templates provided by GOSBA have a designated 'NOTES' section
 - This is where your agency can list out what conclusions were made or important data related notes that are necessary to have a full understanding of the data being provided



FY24 MBE Annual Report Preparation

Award reports

- This part of the process will include the preparation of the :
 - ✓ Form 1 / 2 Annual Report
 - ✓ Contracts Inventory Sheet

Payment reports

- This part of the process will include the preparation of the :
 - ✓ Form 3 Payment Portal
 - ✓ Manual entry and deletion method **OR**
 - ✓ Import Method (Form 3 Data Template)

Compliance report

- This part of the process will include the preparation of the :
 - ✓ Compliance Assessment



REPORTING MBE AWARDS

Form 1

Form 2

Contracts Inventory

Form 2- Subcontract awards Table

Total MBE Subcontract Awards by MBE Classifications and Procurement Categories																					
Procurement Category		African American	Asian	Hispanic	Native American	Women	African American Women	Asian Women	Hispanic Women	Native American Women	Disabled	Non-Profit (Certified)	Community Service Provider	Disadvantaged	Total						
Architectural	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0						
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0						
Engineering	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0						
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0						
Construction	Total Dollars	\$0	\$0	\$0	720-MBE Subcontractor Awards						\$0	\$0	\$0	\$0							
	# of Contracts	0	0	0							0	0	0	0	0	0	0				
Construction Related Services	Total Dollars	\$0	\$0	\$0							\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0
	# of Contracts	0	0	0							0	0	0	0	0	0	0			0	0
Maintenance	Total Dollars	\$0	\$0	\$0							0	0	0	0	0	0	\$0			\$0	\$0
	# of Contracts	0	0	0							0	0	0	0	0	0	0			0	0
Services	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0						
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0						
Supplies & Equipment	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0						
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0						
IT Services	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0						
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0						
IT Supplies & Equipment	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0						
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0						
Human, Cultural, Social & Educational Services	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0						
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0						
Totals	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0						
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0						

Form 1- total contract awards table

Minority Business Enterprise Annual Procurement Report											Reporting Form #1
Reporting Department/Agency:		0									
Fiscal Year 2022		July 1, 2021 - June 30, 2022									
Total Contract Awards by Procurement Categories											
Procurement Category	Total # All Prime Contracts (Including	Total All Prime Contracts Dollar Value Awarded (Including MBE)	Total # of Prime Contract Waivers	Total Dollar Value of Prime Contract Waivers	Total # MBE Prime Contracts Awarded	Total MBE Prime Contract Dollar Value Awarded	Total # MBE Subcontracts Awarded	Total MBE Subcontract Dollar Value Awarded	Total # of MBE Contracts Awarded-	Total \$ of MBE Contracts Awarded- Prime & Sub	Total MBE Participation Percentage
Architectural	0	709/710	0	711	0	\$0	0	\$0	0	\$0	
Engineering	0	709/710	0	711	0	\$0	0	\$0	0	\$0	
Construction	0	709/710	0	711	0	\$0	0	\$0	0	\$0	
Construction Related Services	0	709/710	0	711	0	\$0	0	\$0	0	\$0	
Maintenance	0	709/710	0	711	0	\$0	0	\$0	0	\$0	
Services	0	709/710	0	711	0	\$0	0	\$0	0	\$0	
Supplies & Equipment	0	709/710	0	711	0	\$0	0	\$0	0	\$0	
IT Services	0	709/710	0	711	0	\$0	0	\$0	0	\$0	
IT Supplies & Equipment	0	709/710	0	711	0	\$0	0	\$0	0	\$0	
Human, Cultural, Social & Educational Services	0	709/710	0	711	0	\$0	0	\$0	0	\$0	
Corporate Credit Card	0	721	0	711	0	\$0			0	\$0	0.00%
Direct Voucher		717		711	0	\$0			0	\$0	0.00%
Totals	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0.00%

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

Outreach Data & Evaluation Tab ****NEW**

Found in Form 1 & 2 Excel Template

Outreach Data							
# and type of organized outreach events your unit conducted (live or virtual)				# and type of organized outreach events your unit participated (live or virtual)			
Type of Event	Live	Virtual	Total	Type of Event	Live	Virtual	Total
Networking			0	Networking			0
Workshop			0	Workshop			0
Webinar			0	Webinar			0
Exhibitor			0	Exhibitor			0
Conference			0	Conference			0
Panelist			0	Panelist			0
Other			0	Other			0
Total	0	0	0	Total	0	0	0

Agency Resources Available to MBE Vendors

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

Evaluation By Procurement Agency of the Success of its MBE Program

COMAR 21.11.03.17

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

Contracts Inventory- MBE Prime contractors

Minority Business Enterprise MBE Prime Contract Awards Report								
For Fiscal Year 2022								
Date Submitted:								
(List all MBE prime contracts awarded.)								
#	Agency Name	MBE Prime Contractor Name	Prime Contractor MBE Cert. #	Prime Contractor MBE Classification (Select from Dropdown)	Credit Card / Direct Voucher (Select ONLY from the Dropdown)	Contract Description (Procurement Category) (Select from Dropdown)	Award Amount	Contract # ONLY (Please list the contract #, do NOT include Credit Card or Direct Voucher on this line)
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								

Awards that should be included in the MBE Prime Contractors Tab:
 709- Change Orders
 710- Contract Awards
 717- Direct Vouchers
 721- Credit Cards

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

Contracts Inventory- MBE Sub contractors

Minority Business Enterprise MBE Subcontract Awards Report

For Fiscal Year 2022

Date submitted:

(List all MBE subcontracts awarded.)

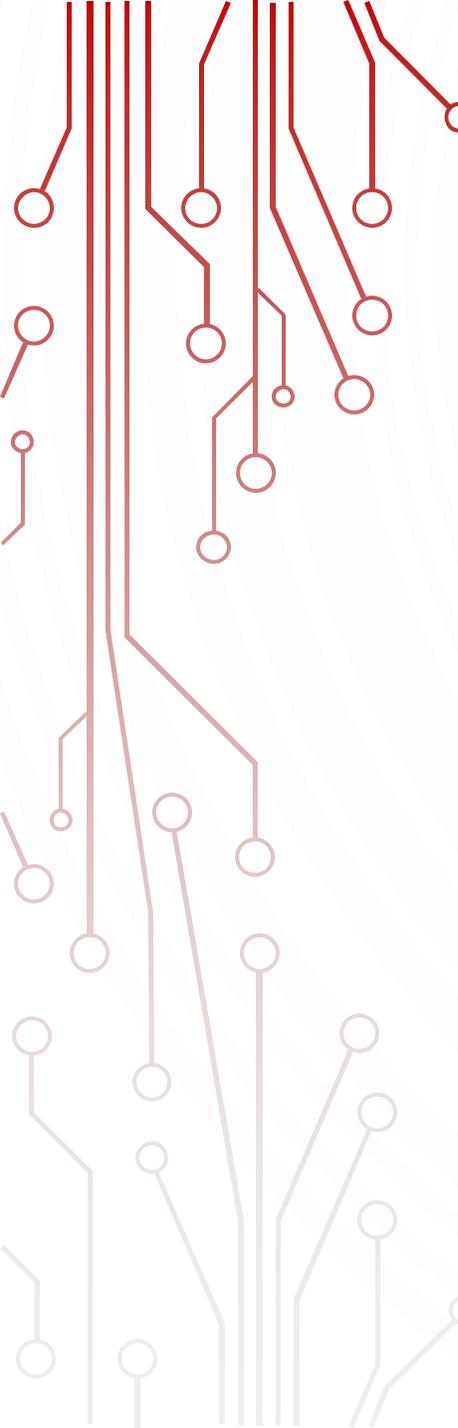
#	Agency Name	MBE Subcontractor Name	Subcontractor MBE Cert. #	Subcontractor MBE Classification (Select from Dropdown)	Agency Prime Contract #	Prime Contract Description (Procurement Category) (Select from Dropdown)	Award Amount
---	-------------	------------------------	---------------------------	---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

1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							

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

Reminder:

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



REPORTING MBE PAYMENTS

FORM 3 Template & Portal

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 Method
- Be mindful, if you are using the import method, it will overwrite everything currently in working data.
- No matter what method you choose, you must still submit for the reporting year.
- Problems with submitting, contact Governor's Office of Small, Minority & Women Business Affairs:

Form 3 - import method

MBE Prime Contractor Payments

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

Payments that should be included in PRIMES TAB:

- MBE Direct Voucher Payments (717)
- MBE Credit Card Payments (721)
- MBE Voucher Payments (718)
- Non-Minority Voucher Payments (718)

Only if the Non-Minority is attached to a MBE Subcontractor

Reminder:

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

Instructions | PRIMES | SUBS | +

Form 3 - import method

MBE Subcontractor Payments

Prime ID	Contractor Name	MDOT Cert#	MBE Designation	Award Amount	Payments FY	Payments CTD
A005	CHARDONNAY INC	00-000	Women	\$9,496,151.73	\$918,054.00	\$1,800,005.00

Payments that should be included in SUBS Tab:
-MBE Subcontractor Payments (719)

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

Instructions | PRIMES | SUBS | +

Form 3 Portal – Import Method

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

- Once you arrive on the import page you will:



- Select the Agency/Department from the dropdown list (if not already selected).
- Click on the “Select a File To Upload” button. A dialog box will pop up for you to select which Excel file you want to upload. Only one file can be uploaded at a time.
- Once a file has been selected and completely uploaded, click on the “Import Excel” button.
- A “wait” icon will display while the file is being processed. If everything goes well, you will be greeted with the following message:

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.

Click on contract number and revise data as necessary

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

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

- Working Data
- View All Data
- Proceed to Edit Data

The screenshot shows the 'Form 3 Payment Portal' for the 'DEPARTMENT OF AGRICULTURE'. The interface includes a navigation bar with 'HOME' and 'AGENCY' links. Below the navigation bar, there is a section for 'View Working Data for' with a dropdown menu set to 'DEPARTMENT OF AGRICULTURE'. A blue arrow labeled 'SEARCH' points to the 'Contract#' column in a table. The table has columns for 'Contract#', 'Awards CTD', 'Payments FY', 'Payments CTD', 'Start Date', 'End Date', and 'MBE Goal'. The first row shows '717-718-cpc' circled in red. A blue arrow labeled 'DROPDOWN BOX' points to a dropdown menu that is open, showing filter options: 'NoFilter', 'Contains', 'StartsWith', 'EndsWith', 'EqualTo', 'GreaterThan', 'LessThan', 'GreaterThanOrEqualTo', and 'LessThanOrEqualTo'. The 'AGENCY' link in the navigation bar is also circled in red.

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	6/30/2016	00%
> 717	\$0.00	\$0.00	\$0.00		6/30/2016	00%
> 717	\$0.00	\$0.00	\$0.00		6/30/2016	00%

Form 3 Portal - Manual Entry

Form 3 Portal - Manual Entry



Prime Data:

The * denotes a required field.

Save Changes New View All Records Delete Record

Name of Prime Contractor: *	Prime Contractor Classification: *	MDOT Certification Number:	
<input type="text" value="Allegiance Software, Inc"/>	<input type="text" value="Non-Minority"/>	<input type="text" value=""/>	
Contract / ID Number: *	Contract Start Date: *	Contract Expiration Date: *	Agency: *
<input type="text" value="R95P6400857"/>	<input type="text" value="4/12/2016"/>	<input type="text" value="4/11/2020"/>	<input type="text" value="BALTIMORE CITY COMMUNITY CC"/>
Prime Contractor Awards CTD: *	Prime Contractor Payments FY: *	Prime Contractor Payments CTD: *	MBE Goal %: *
<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/> %
Project Title:			
<input type="text" value="On-Premise Fundraising System for the Radio Station"/>			

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

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

Form 3 Portal - Manual Entry

Input prime contractor data:

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

NOTE: Dollar amounts CAN be input with commas. ALWAYS, ALWAYS SAVE YOUR WORK

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

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

The * denotes a required field.

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

Note: For direct voucher (DV) or credit card (CC) payments, consolidate multiple amounts for individual vendors (i.e. Rudolph Office Supplies) and indicate in the contract id the type of payment, DV or CC. Use FY dates for Start and Expiration Dates.

Prime Data:

Name of Prime Contractor: *

Contract / ID Number: *

Contract Start Date: *

Contract Expiration Date: *

Agency: *

Prime Contractor Awards CTD: *

Prime Contractor Payments FY: *

Prime Contractor Payments CTD: *

MBE Subcontract Information:

Please save the Contract details to allow add

Save New View All Records

MDOT Certification Number:

MBE Goal: *

DEPARTMENT OF AGRICULTURE

100 Community Place
Crownsville, MD 21032

Form 3 Portal - Manual Entry

Form 3 Portal - Manual Entry

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

Note: If you can't find an MBE in the drop down, search vendor in the MDOT Database

<https://mbe.mdot.maryland.gov/directory/>

by certification number and confirm Vendor's legal name.

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:

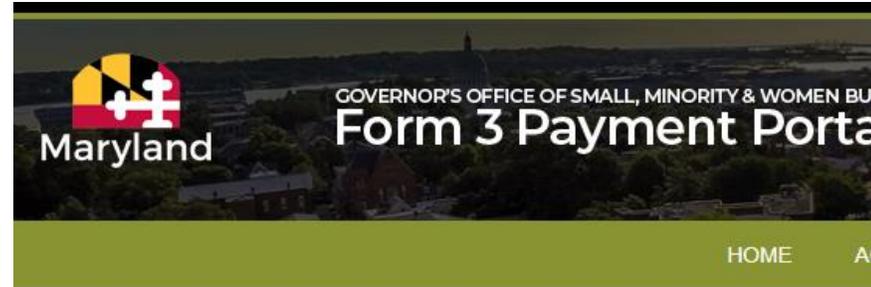
+ Add New MBE Subcontract

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)

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 Affairs MBE Form

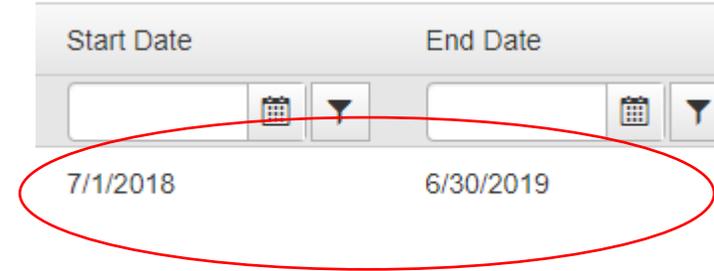
Welcome to the Governor's Office of Small

Now that you are logged in, you can use
data, or you can select from the submer

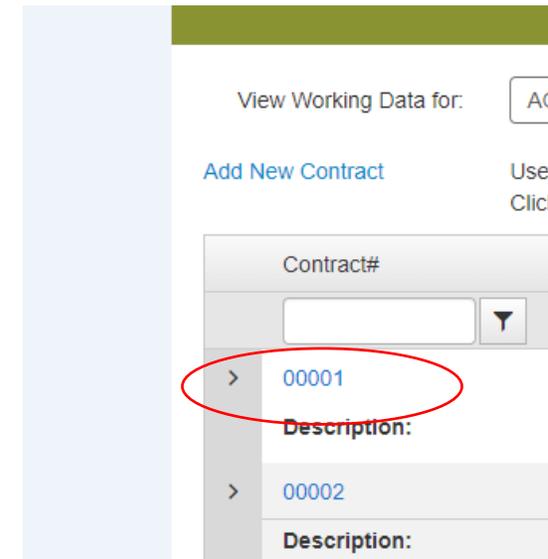
Form 3 Portal – Manual Removal of Prior Year/Expired Data

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

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



A screenshot of a date selection interface. It features two input fields labeled "Start Date" and "End Date". Each field has a calendar icon and a dropdown arrow. Below the "Start Date" field, the date "7/1/2018" is displayed. Below the "End Date" field, the date "6/30/2019" is displayed. A red oval highlights both the date fields and their respective values.



A screenshot of a contract selection interface. At the top, it says "View Working Data for:" followed by a dropdown menu showing "AGI". Below this, there are two buttons: "Add New Contract" and "Use til Click". A "Contract#" field with a dropdown arrow is shown. Below it, a list of contract numbers is displayed: "00001" and "00002". The number "00001" is circled in red. Below each contract number is a "Description:" label.

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

Click to delete the record,

Prime Data:

The * denotes a required field.

Name of Prime Contractor: *

RGH ENTERPRISES, INC.

Save Changes

New

View All Records

Delete Record

Prime Contractor Classification: *

African American

MDOT Certification Number:

97-360

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

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.

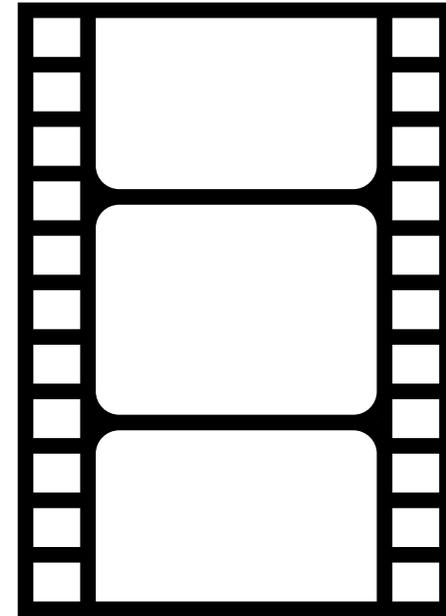


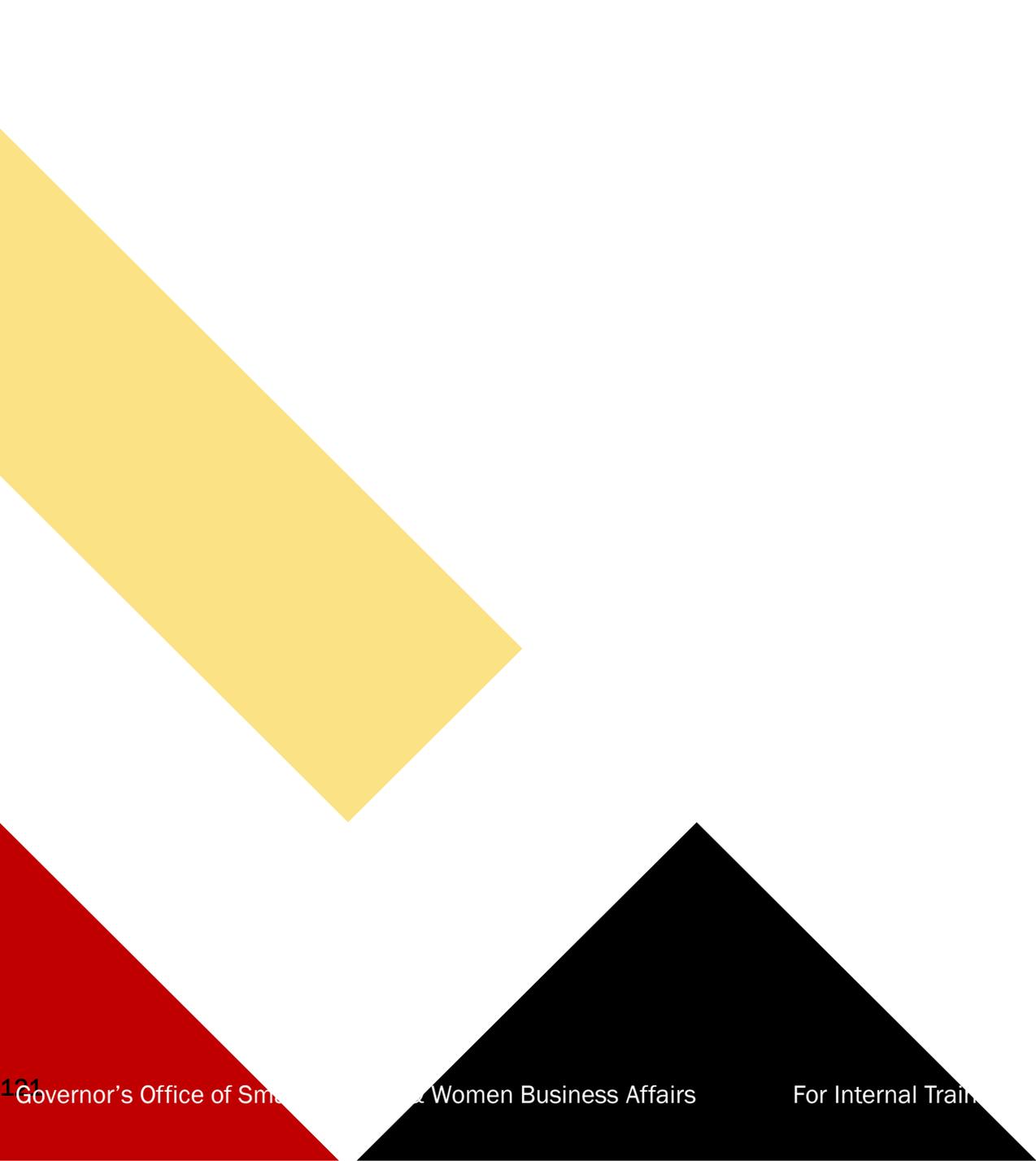
Remember this

- The Form 3 Errors and Resolutions section of the reporting manual will help you work through any errors.
- Call us for assistance if you are unable to resolve an error.
- Once the manual entry or data import has been completed, you can review and export the summary data.
- The PRIME and Subcontractor summaries should be submitted with your final report.

Remember our Training Video

- The Form 3 Portal in-depth training video is available on our website in the [MBE Reporting Toolkit](#).
- A slide deck is also provided for your review.
- Call us if you still have questions after watching the video.





Checks and Balances

FMIS/ANSWERS Data Collection Checklist

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

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

Cut along dotted line and post in visible spot

FMIS CHEAT SHEET

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

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

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

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

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

REPORTING CHECKS AND BALANCES

Supplemental Reporting Guidance Includes:

- Each report requirement will have a guide, which will list which backup reports will be required to fill in the specific report as well as general reminders for each report.
 - Annual Reporting Templates
 - Form 1 & 2
 - Form 3
 - Contracts Inventory
- Checks and Balances include:
 - Reporting Checklist
 - Submission Checklist



Checks and balances

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

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

Total Contract Awards by Procurement Categories

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

Supplemental Reporting Guidance Example

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

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

Checks and balances

- Based on FINAL scrubbed backup data reports which include or identify data that was used to produce the values entered in the Annual Form 1 / 2, Form 3, and Contract Inventory Sheet.
- **AWARDS - ANSWERS REPORTS – MBE PRIME CONTRACTOR DATA**
 - ✓ Form 2 tab - Primes table, should be consistent with the Contract Inventory – Primes tab **AND** the reportable MBE totals on your 709 / 710, 717, and 721 reports **MINUS** Statewide Contracts
 - ✓ Cross-reference the Supplemental Reporting Guidance to view Form 2 Prime Contractor data table checks and balances per cell

Checks and balances

- Based on FINAL scrubbed backup data reports which include or identify data that was used to produce the values entered in the Annual Form 1 / 2, Form 3, and Contract Inventory Sheet.
- **AWARDS - ANSWERS REPORTS – MBE SUBCONTRACTOR DATA**
 - ✓ Form 2 – Subs table, should be consistent with the Contract Inventory – Subs tab **AND** the reportable contracts on your scrubbed 720 report.
 - ✓ Cross-reference the Supplemental Reporting Guidance to view Form 2 Subcontractor data table checks and balances per cell

Checks and balances- Form 2

✓ CAVEATS:

- If you have an MBE Prime with MBE Subcontractors, you will need to take in consideration the amount self-performed and **whether you choose to split the contract award between the Prime and MBE Subs or report the full total under the Prime.**
- Consider contractors who were subject to the 60% percent rule.

Checks and balances- Form 3

- **PAYMENTS - ANSWERS REPORTERS**

- ✓ Form 3 Prime contractor data should be consistent with MBE reportable payment amounts on the scrubbed 718, 717, and 721 reports.
 - ✓ Keep in mind that non-minority contractor data should only be added if it matches MBE subcontractors listed on the subs tab.
- ✓ Form 3 Subcontractor data should be consistent with the MBE payments on your 719 report.
- ✓ Cross-reference the Supplemental Reporting Guidance to view Form 3 Prime & Subcontractor data table checks and balances per cell

Common Errors and Omissions in Reporting

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

- **ANSWERS Reports:**

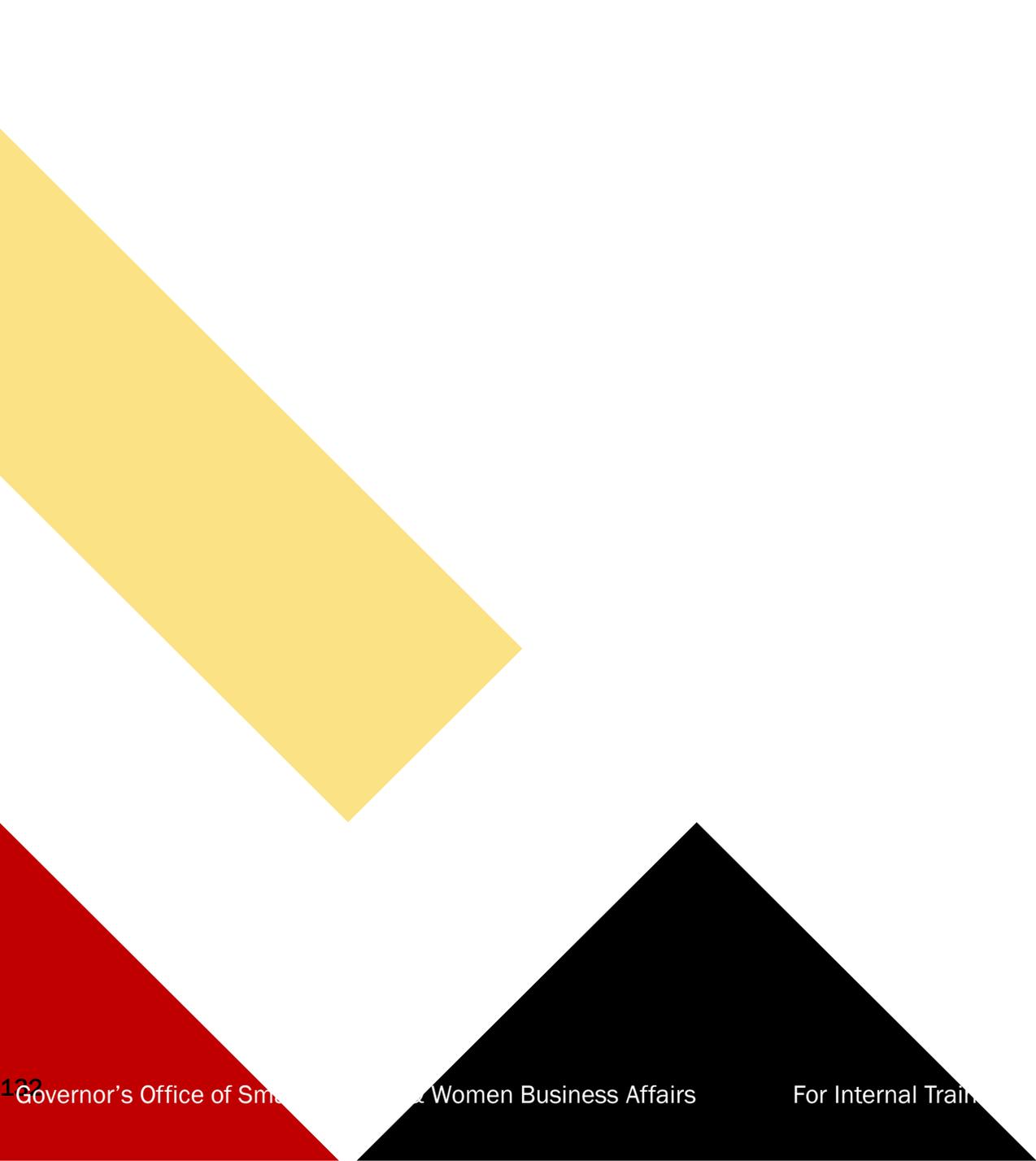
- ✓ Do not use the 718 Report for reporting Awards on Form 1 [This is a payments report]
- ✓ The 711 and 713 Reports are for your reference only
- ✓ Submitting PDF formatted backup hinders the verification process and is not accepted
- ✓ Remember to submit all relevant 700 series or internal reports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

Common Errors and Omissions in Reporting

- **Form 1 & 2, Form 3 and, Contracts Inventory:**
 - ✓ Use the correct & current Template as things change from year to year
 - ✓ Statewide Contracts should not appear in your awards data (Note: DGS Statewide Contracts and other contracts can be searched via links from our MBE Toolkit)
 - ✓ **Negative Numbers and totals should not be included**
 - ✓ Contracts Inventory totals should match Form 2
 - ✓ Know what is an Awards vs. Payments
 - ✓ **Please do not change/add to templates**
 - ✓ MBE goals are only on contracts with subs, everything else should be 0% (PRIMES) in Form 3.
 - ✓ **MBE Designations for Form 3 must match those listed in the Manual, p. 35, including using Non-minority for primes with no MBE designation.**

REPORT CORRECTIONS

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

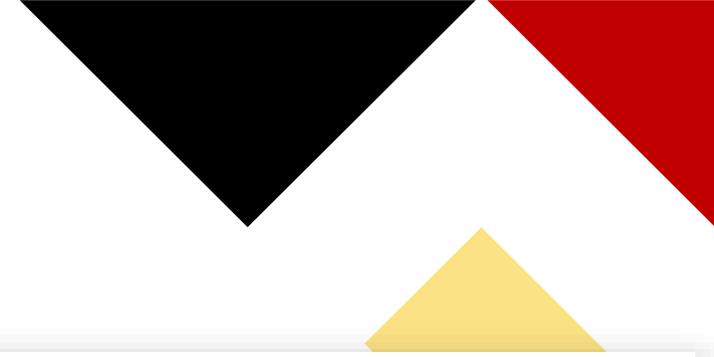


COMPLIANCE ASSESSMENT REPORT

Procurement Activity Data Requirements



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



Requirements for submission:

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

The worksheet must have all fields filled in.

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

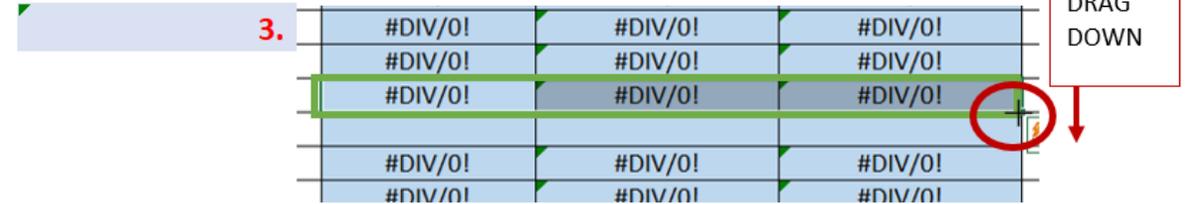
The worksheet must include all 3 sheets: Primes, Subs, Compliance Report

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

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

How to add extra data rows

**** You may insert fields into both tables in the PRIMES and SUBS tab. DO NOT insert rows on row 7 or underneath of the table. This ensures that formulas remain static. Insert rows by clicking on the row number (1) and then click the insert icon in the cells group on the ribbon (2). If insert is greyed out, the row you have clicked on does not allow you to insert rows. For the Primes tab, you will have to click and drag the formulas used in columns L, M & N to copy to any inserted cells (3).**



SUBS TAB

Annual Agency MBE Compliance Assessment Report

In the 2022 Legislative Session, HB389, Chapter 115 was passed, putting into place new Compliance Assessment Report requirements for procurement units participating in the MBE Program. Effective July 1, 2022 (FY2023) agencies are responsible for reporting, annually, their compliance data on contracts that were completed during the fiscal year.

AGENCY: 0

FY: 2024

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

The completed compliance assessment report must be submitted to the Governor's Office of Small, Minority & Women Business Affairs by September 30th annually.

Submit reports to: mbereports.gosba@maryland.gov.

Contract Number (Hover over this cell for dataset explanation)	Award Date	Award Amount	Expiration Date	Subcontractor Name	MBE Designation (Select from dropdown)	Total Subcontractor Payments	Description of Work (Relevant to this subcontractor only)	Third Tier Subcontractor (Select from dropdown)
A555105	9/1/2019	\$10,500.00	8/31/2022	Applied Brick and Mortar	Afr		Retaining wall masonry/...	

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

COMPLIANCE REPORT TAB

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

Annual MBE Compliance Report

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

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

Date: January 0, 1900

FY: 2024 Agency: 0

Overall Agency Compliance Rate: _____	Number of Completed Contracts: _____ 0	Contracts (%) that Met MBE _____
Average Award to Subcontractors: _____	Total Number of MBE Subcontractors: _____ 0	that Met MBE Goal: _____ 0

Signature of Approver: _____ Date: _____
Printed Name of Approver: _____ Printed Name of Preparer: _____

Notes:
None

SUMMARY STATEMENT



Annual Minority Business Enterprise (MBE)

Procurement Report

FY2024 Summary Statement

Reporting Department/Agency:
Fiscal Year:

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

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

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

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

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

- ✓ Review
- ✓ Confirm
- ✓ Secure signatures
- ✓ Submit back to GOSBA mbereports.gosba@maryland.gov mailbox

Annual MBE Report Submission Checklist **(MANDATORY SUBMISSION)**

(For Agency/Department Use)

- Fiscal Year 2024 Consolidated Strategic Plan** (MS Word or PDF file), sent to GOSBA, due June 30, 2022
- GOSBA Procurement Awards **Annual Reporting Forms 1 and 2** Excel spreadsheets – 1 file (*please note that the ANNUAL Report Excel file is slightly different from the quarterly version*), send this document to GOSBA in Excel format.
 - Include Awards Delegated from DGS
 - Include Awards that may not have been posted in timely manner from June BPW Agendas
- GOSBA “**MBE CONTRACTS INVENTORY**”– 1 file, send to GOSBA
- GOSBA Form #3 data entry OR import into web portal.
- Download and send the **GOSBA Form #3 Reports Prime and Subcontractor payment reports** from the portal to GOSBA.
- Backup Documentation supporting the annual report awards and payments** submitted to GOSBA. (FMIS using agencies should include **RECONCILED*** electronic copies of the reports used to generate award and payment data and any other relevant supporting documentation. Non-FMIS using agencies should include reports from their systems that validate the figures being reported.) This documentation should be submitted **via e-mail**, by **September 30, 2023**.
- A Completed **Annual Agency MBE Compliance Assessment Report** in Excel format. **(E-mailed to GOSBA)**
- A completed Annual MBE Compliance Report (pdf version) signed by Procurement Unit Head or designee **(Emailed to GOSBA)**
- Reviewed and obtained signatures for the finalized Summary Statement sent by GOSBA. Must be **signed by three representatives** and submitted to GOSBA within 5 days of receipt, so please plan accordingly. In order to facilitate a timely submission, make an educated estimate of the time needed to obtain all three signatures after the report is completed **(E-mailed to GOSBA)**



SUBMISSION CHECKS AND BALANCES

**Use Your
Checklist Located
in the MBE
Reporting Manual**



FY25 Quarterly Data Preparation

Quarterly Report Requirements

Quarterly/Monthly MBE Procurement Reporting

 [MBE Quarterly/Monthly Procurement Report](#)

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

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

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

- Next Quarterly Report will be due in FY25 October 30, 2024
- MBE Quarterly Reports now require **2** submissions:
 - MBE Procurement Report
 - MBE Program Procurement Activity Report
- Template and instructions will be made available on the **MBE Reporting Toolkit by July 1, 2024**

Quarterly MBE Procurement Report (Form 1 and 2 Template)

Deadlines:

Submission requirement and deadlines:

Reports are required to be submitted via email to:

mbereports.gosba@maryland.gov

QTR Reporting For:

Due Date:

Quarter 1 (July 1, 2024-September 31, 2024)

Wednesday, October 30, 2024

Quarter 2 (July 1, 2024- December 31, 2024)

Thursday, January 30, 2025

Quarter 3 (July 1, 2024- March 31, 2025)

Wednesday, April 30, 2025

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

QTR 4 Submission is not required agencies will begin working on Annual Report data.

Quarterly Reporting Data Requirements

- The MBE Quarter Report request similar data to the annual report. Your agency is responsible to submit:
 - Award Data
 - Payment Data
 - Waiver Data
 - Outreach Data
 - Procurement Contract Activity ****NEW**

MBE Quarterly Procurement Report

(Form 1 and 2 Template)

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

Form 2 Tab

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

Minority Business Enterprise Quarterly/Monthly Procurement Report														
Reporting Department/Agency:					DO NOT MODIFY ANY OF THE EXISTING DATA									
Fiscal Year 2025 Reporting Period:					July 1, 2024 - insert date (cumulative to date)					Data can only be entered in the Yellow Cells				

Total MBE Subcontract Awards by MBE Classifications and Procurement Categories

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

- MBE Prime and MBE Subcontractor
 - Awards & Payment Data Entry Only

Total MBE Subcontract Payments

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

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

Form 1 Tab

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

Minority Business Enterprise Quarterly Report				Reporting Form #1			
Reporting Department/Agency:				EXISTING FIELDS OR MOVE ANY TABS IN THIS TEMPLATE.			
Fiscal Year 2025 Reporting Period:		July 1, 2024 - insert date (cumulative to date)		Data can only be entered in the Yellow Cells		Data in the Blue Cells auto-populate from Form 2	

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

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

Note(s):

Total Contract Payments		
MBE Prime Contracts \$ Paid	MBE Subcontracts \$ Paid	Total \$ Paid - MBE Prime & MBE Subcontracts
\$0	\$0	\$0

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

Outreach Data Tab



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

Outreach Data

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

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

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

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

Agency Resources Available to MBE Vendors

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

****NEW****

**FY25 Quarterly
MBE Program Procurement
Activity Report**

Procurement Activity Data Requirements



-
- **The Moore-Miller Administration has required for procurement activity data be reported on a Quarterly basis**
 - MBE Agencies collected this type of data for **Executive Order 01.01.2023.03**
 - **Your agency is responsible to submit:**
 - Procurement Solicitation Data
 - Contract Award Data
 - Contract Modification Data
 - Contract Renewal Data

Submission deadlines:

Reports are required to be submitted via email to:

mbereports.gosba@maryland.gov

QTR Reporting For:

Due Date:

Quarter 1 (July 1, 2024-September 31, 2024)

Wednesday, October 30, 2024

Quarter 2 (July 1, 2024- December 31, 2024)

Thursday, January 30, 2025

Quarter 3 (July 1, 2024- March 31, 2025)

Wednesday, April 30, 2025

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

Wednesday, October 15, 2025

Submission Requirements

- The Procurement Activity Report is collected quarterly and is cumulative
- Only include reportable data consistent with how procurement data is reported for the quarterly and annual MBE reports
- Do not include credit card or direct voucher transactions (i.e. purchases that did not require a formal solicitation)
- Report all solicitations and resulting awards subject to the PRG process, regardless of the dollar value
 - Even if no MBE goal was placed on the solicitation

Submission Requirements (continued)

- Canceled solicitations should not be reported
- Preferred providers are not reported with MBE data and should not be reported in response to this data request
- Your unit will retain and utilize the same template that is submitted for QTR 1 for the remaining submissions for FY25.
 - This is to ensure that the data is being collected cumulatively

Data Field Requirements

- **Identification #**
 - Is synonymous with the Contract #
 - Enter the number that your agency utilizes to identify solicitations, awards, modifications, and renewals
- **MBE Goal (%)**
 - If the item had no MBE Goal (%) leave the field blank
- **MBE Prime Contractor**
 - Select 'yes or no' to identify if the contract is being performed by an MBE Prime Contractor

Summary Tab ***Data Entry Is Not Required***

MBE Program Procurement Activity Report

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

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

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

Agency Name:

Data from the detail tab automatically populates the table below. ONLY complete the certification section below the table with your units Quarter 4 submission on October 15, 2025.

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

2024 MBE & LIAISON SURVEYS

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

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

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

KAREN REYES

KAREN.REYES@MARYLAND.GOV

410-697-9608

443-346-0630

CARYN BRANDON

CARYN.BRANDON2@MARYLAND.GOV

410-697-9596

667-644-8478



Thank YOU!



SBR Program

Presented by Lisa Mitchell Sennaar & Tanita Johnson

FY24 SBR Annual Reporting & FY25 SBR Quarterly Reporting

- ▶ SBR Reporting Requirements
 - **New** Reporting Requirements for FY25 Quarterly Reporting
- ▶ Resources available in SBR Toolkit
- ▶ Submission of FY24 SBR Annual Report
- ▶ Importance of referring to the BPW Advisory 2005-1 and New Socio-Economic Programs Reporting Guidance Document when reporting (scrubbing)
- ▶ Certified small business vendor verification of certification as it pertains to reporting

SBR Program Requirements

COMAR 21.13.01.03 Reporting

- Units must submit both Quarterly and Annual SBR Reports (backup data should be included).
- Email completed reports in EXCEL FORMAT to: sbrreports.gosba@maryland.gov



SBR Reporting

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

Remember:

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



Resources

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

SBR Toolkit

SBR Toolkit

The screenshot shows the homepage of the Governor's Office of Small, Minority & Women Business Affairs. The browser address bar displays `gomdsmallbiz.maryland.gov/Pages/default.aspx`. The navigation menu includes [Home](#), [MBE PROGRAM](#), [SBR PROGRAM](#), [VSBE Program](#), [RESOURCES](#), and [PROCUREMENT FORECAST](#). The [Home](#) link is highlighted with a blue box. The main header features the organization's logo and name, along with social media icons for Facebook, YouTube, and Twitter. A search bar is located in the top left. On the left sidebar, a "Quick Links" menu lists various sections, with the "SBR PROGRAM REPORTING TOOLKIT" link highlighted by a red box. A red arrow points from this link to a larger, detailed view of the toolkit, which features a blue envelope icon and the text "Newsletter" and "SBR PROGRAM REPORTING TOOLKIT". Below this view, a black banner reads "Give the latest edition of our Small Biz Bulletin a quick read." On the right side of the page, there are sections for "Attention SBR & VSBE Vendors", "TOP WEBSITE PICKS", "PUBLIC DATA MINING STRATEGIES", and "Procurement Forecast".

gomsdsmallbiz.maryland.gov/Pages/default.aspx

Maryland.gov

State Directory State Agencies

Enter search term

Home MBE PROGRAM SBR PROGRAM VSBE Program RESOURCES PROCUREMENT FORECAST

GOVERNOR'S OFFICE OF Small, Minority & Women Business Affairs

GOVERNOR'S COORDINATING OFFICES HOME

Quick Links

- About Us
- Legislation and Policy
- Outreach
- News
- Reports
- Contact Us

SBR PROGRAM REPORTING TOOLKIT

MBE PROGRAM REPORTING TOOLKIT

VSBE PROGRAM REPORTING TOOLKIT

Attention SBR & VSBE Vendors

If you are experiencing problems with certification or recertification in eMMA, call us for assistance at 410-697-9600.

TOP WEBSITE PICKS

- Expanding Opportunities Magazine
- eMaryland Marketplace Advantage (eMMA)
- Maryland Financial Incentives for Businesses
- Maryland Business Express
- Maryland Entrepreneur Hub
- SBR Liaisons
- MBE Liaisons
- VSBE Liaisons
- MBE Rights & Responsibilities
- FY2021 Customer Service Annual Report

PUBLIC DATA MINING STRATEGIES

eMaryland Marketplace Advantage (eMMA)

- Video
- Slide Deck

Procurement Forecast

- Video
- Slide Deck

Board of Public Works

- Video
- Slide Deck

Give the latest edition of our Small Biz Bulletin a quick read.

SBR Toolkit

Quick Links ^

About Us

Legislation and Policy

Outreach

News

Reports

Contact Us

NEW SBR LIAISONS

[New Liaison Welcome Packet.pdf](#)

Resources

[SBR Program Overview](#)

[BPW Advisory 2005-1 Small Business Reserve Program](#)

[GAD List](#)

Small Business Reserve (SBR) Program Reporting Toolkit

This toolkit contains valuable information to assist State agencies/departments with the management and compliance of the Small Business Reserve (SBR) Program. (This page is intended for internal state users only. **Vendors do not submit these reports.**)

FY2024 Small Business Reserve (SBR) Annual Report **New** Template, Instructions, and Example...coming soon

The SBR Annual Report must be completed and submitted by September 30, 2024. The Annual Report covers the period from July 1, 2023 to June 30, 2024.

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](#)

[SBR Annual Report Agency Example](#)

[BPW Advisory 2005-1 Small Business Reserve Program
GAD List](#)

SBR Annual Report Instructions

- The SBR Annual Report Instructions are provided as a guideline to completing this report. If you follow the step-by-step instructions, you should be able to effectively prepare the report.
-
- Be certain to read through the instructions in its entirety.
 - Remember that you can contact us (SBR Compliance Managers) with any questions that you may have in regards to the SBR Annual Report.

SBR Annual Report Instructions

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

GENERAL GUIDELINES:

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

A. FMIS Using Agencies

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

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

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

ANSWERS Database

Sign In

For registered users you can enter your Sign In credentials below.
If you have already linked your account, you can use the connect.md.gov to the right.

Email

Password

[Forgot your password?](#)

Sign In

Use another service to Sign In

MDGOV OKTA

New to ANSWERS?

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

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Vendor
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(PCH300)

Contracts
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(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)

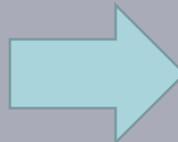
YEC ∨
(PCH210,212-213)

RSTARS ∨
(Various)

PCH065/067 - SBR Expenditure Detail/Summary

Agency:

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



Search Agencies...

Reset Search

Clear Checkboxes

- 605 - Department of Natural Resources - Capital Projects (605)
- 606 - Dhcd - Community Development Admin - Capital Projects (606)
- 608 - Department of the Environment - Capital Projects (608)
- 609 - Maryland Environmental Service - Capital Projects (609)
- 610 - Maryland Department of Health, Mdh - Capital Projects (610)
- 611 - Maryland Department of Aging - Capital Projects (611)

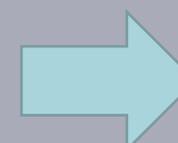
Department:

From: D80110 ∨

To: D80800 ∨

Begin Date:

01/01/2024 📅



End Date:

03/31/2024 📅

+30 +60 +90 (Calculated from Begin Date.)

Date Presets:

(Calculated from today.)

PPFY PFY CFY FYTD PPY PY CY PM CM YTD

Clear All Selections

Run Report

* Report Data is updated weekly and current as of COB on 5/3/2024.

Optional Selections:

Detail Level:

ALL SBR Only MBE Only

Amount Threshold:

\$0.00 - \$999,999,999,999,999.99

ANSWERS Database

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

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

SBR Annual Report Template



- The SBR Annual Report Template is to be submitted, which requires signatures from the Agency Head and Chief Financial Officer. (Quarterly Reports do not require signatures currently.)
- The template should only be altered if adding tabs to provide extra back-up data.
- Please make sure that you are using the SBR Annual Report Template and Instructions for the most recent fiscal year that are located in the SBR Toolkit.

FY 2024 Annual Small Business Reserve Summary Statement

July 1, 2023- June 30, 2024

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

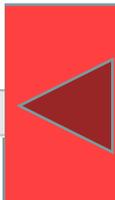
1. Total All Procurement Purchasing Card (P-Card) Payments	link to support
2. Total Procurement Purchasing Card (P-Card) Payments to SBR Vendors	link to support
3. Total All Procurement Dollar Payments (not including P- Card Payments)	link to support
4. Total Procurement Dollar Payments to SBR Vendors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

Agency Name:	
Agency Head Signature:	
Chief Financial Officer Signature:	
Submitted By:	
Title:	
Telephone Number:	
Submission Date:	

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

NOTES:

SBR Annual Report Template



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

SBR Annual Report Template

FY 2024 Annual Small Business Reserve Summary Statement	
July 1, 2023- June 30, 2024	
(Enter data in yellow boxes numbered 1-6 ONLY. Do Not enter data in peach boxes numbered 7-11. Those boxes autopopulate.)	
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5. Total Procurement Dollar Payments to SBR Vendors Under a Non-Designated Procurement Payments (not including P-Card Payments)	link to support
6. Total Number of SBR Vendors receiving awards or payments (number not dollar amount)	link to support
7. Total SBR Designated Procurement Payments to SBR Vendors (Line 2 and Line 4)	#VALUE!
8. Total Procurement Payments to SBR Vendors- Includes SBR Designated and Non-Designated (Lines 2, 4 & 5)	#VALUE!
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11. Percentage All SBR Procurement Payments divided by All Procurement Payments (Line 8/Line 9)	#VALUE!
Agency Name:	
Agency Head Signature:	
Chief Financial Officer Signature:	
Submitted By:	
Title:	
Telephone Number:	
Submission Date:	
Did the unit attain the 15% SBR Designated Procurement payments? Yes or No. If the unit did not attain 15 % SBR Designated spend, use the "Notes section" to explain the lack of 15 % SBR Designated attainment.	NOTES:

Annual Report Template

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

FY 2024 Annual Small Business Reserve Summary Statement	
July 1, 2023- June 30, 2024	
(Enter data in yellow boxes numbered 1-6 ONLY. Do Not enter data in peach boxes numbered 7-11. Those boxes autopopulate.)	
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7. Total SBR Designated Procurement Payments to SBR Vendors (Line 2 and Line 4)	#VALUE!
8. Total Procurement Payments to SBR Vendors- Includes SBR Designated and Non-Designated (Lines 2, 4 & 5)	#VALUE!
9. Total All Procurement Payments (Lines 1 and Line 3)	#VALUE!
10. Percentage All SBR Designated Procurement Payments divided by All Procurement Payments (Line 7/Line 9)	#VALUE!
11. Percentage All SBR Procurement Payments divided by All Procurement Payments (Line 8/Line 9)	#VALUE!
Agency Name:	
Agency Head Signature:	
Chief Financial Officer Signature:	
Submitted By:	
Title:	
Telephone Number:	
Submission Date:	
Did the unit attain the 15% SBR Designated Procurement payments? Yes or No. If the unit did not attain 15 % SBR Designated spend, use the "Notes section" to explain the lack of 15 % SBR Designated attainment.	NOTES:

Annual Report Template

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

FY 2024 Annual Small Business Reserve Summary Statement	
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9. Total All Procurement Payments (Lines 1 and Line 3)	#VALUE!
10. Percentage All SBR Designated Procurement Payments divided by All Procurement Payments (Line 7/Line 9)	#VALUE!
11. Percentage All SBR Procurement Payments divided by All Procurement Payments (Line 8/Line 9)	#VALUE!
Agency Name:	
Agency Head Signature:	 Signatures Required
Chief Financial Officer Signature:	
Submitted By:	
Title:	
Telephone Number:	
Submission Date:	
Did the unit attain the 15% SBR Designated Procurement payments? Yes or No. If the unit did not attain 15 % SBR Designated spend, use the "Notes section" to explain the lack of 15 % SBR Designated attainment.	NOTES:

Annual Report Template

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

FY 2024 Annual Small Business Reserve Summary Statement	
July 1, 2023- June 30, 2024	
(Enter data in yellow boxes numbered 1-6 ONLY. Do Not enter data in peach boxes numbered 7-11. Those boxes autopopulate.)	
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Annual Report Template

FY 2024 Annual Small Business Reserve Summary Statement

July 1, 2023- June 30, 2024

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

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

Agency Name:

Agency Head Signature:

Chief Financial Officer Signature:

Submitted By:

Title:

Telephone Number:

Submission Date:

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

NOTES:

USE THIS AREA

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

Annual Report Template

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

FY 2024 Annual Small Business Reserve Summary Statement	
July 1, 2023- June 30, 2024	
(Enter data in yellow boxes numbered 1-6 ONLY. Do Not enter data in peach boxes numbered 7-11. Those boxes autopopulate.)	
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6. Total Number of SBR Vendors receiving awards or payments (number not dollar amount)	link to support
7. Total SBR Designated Procurement Payments to SBR Vendors (Line 2 and Line 4)	#VALUE!
8. Total Procurement Payments to SBR Vendors- Includes SBR Designated and Non-Designated (Lines 2, 4 & 5)	#VALUE!
9. Total All Procurement Payments (Lines 1 and Line 3)	#VALUE!
10. Percentage All SBR Designated Procurement Payments divided by All Procurement Payments (Line 7/Line 9)	#VALUE!
11. Percentage All SBR Procurement Payments divided by All Procurement Payments (Line 8/Line 9)	#VALUE!
Agency Name:	
Agency Head Signature:	
Chief Financial Officer Signature:	
Submitted By:	
Title:	
Telephone Number:	
Submission Date:	
Did the unit attain the 15% SBR Designated Procurement payments? Yes or No. If the unit did not attain 15 % SBR Designated spend, use the "Notes section" to explain the lack of 15 % SBR Designated attainment.	NOTES:

Annual Report Template

Example #1

If Summary Statement, Line 1 (Total Credit Card Payments) is “\$6,000” and Line 2 (Total Credit Card Payments to SBR Vendors) is “\$3,400”...



Governor's Office of Small, Minority & Women Business Affairs	
FY 2024 Annual Small Business Reserve Summary Statement	
July 1, 2023- June 30, 2024	
(Enter data in yellow boxes numbered 1-6 ONLY. Do Not enter data in peach boxes numbered 7-11. Those boxes autopopulate.)	
1. Total All Procurement Purchasing Card (P-Card) Payments	\$6,000
2. Total Procurement Purchasing Card (P-Card) Payments to SBR Vendors	\$3,400



Annual Report Template

Example #1 (cont'd)

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

Batch_Agency	MBE_Type	MBE_Description	Vendor_No_Masked	Vendor_Name	MBE_Certification	MBE_Exclude	Effective_Date	Cur_Doc_No	Cur_Doc_Sfx	Number_Tran	Payment_Amt	Reportable_Amt	Reportable_MBE_Amt	Vet_Flag	SBR_Flag	ref_Provider
ABC			****	HILTON		N	7/1/2021	CC			\$137.00					
ABC			****	HILTON		N	11/1/2021	CC			\$252.00					
ABC			****	HAMPTON INN		N	10/1/2021	CC			\$340.00					
ABC			****	HAMPTON INN		N	6/1/2022	CC			\$2,975.00					
ABC			****	SURVEYMONKEY.COM		N	3/1/2022	CC			\$407.00					
ABC			****	USPS		N	11/1/2021	CC			\$10.00					
ABC			****	ROCKY GAP CASINO RESORT		N	8/1/2021	CC			\$136.00					
ABC			****	COMFORT INN		N	10/1/2021	CC			\$162.00					
ABC			****	BEST WESTERN		N	11/1/2021	CC			\$129.00					
ABC			****	SHERATON		N	5/1/2022	CC			\$807.00					
ABC			****	HAMPTON INN		N	6/1/2022	CC			\$352.00					
ABC			****	STATE USE INDUSTRIES		N	8/1/2021	CC			\$287.00					
ABC			****	STATE USE INDUSTRIES		N	9/1/2021	CC			\$529.00					
ABC			****	STATE USE INDUSTRIES		N	12/1/2021	CC			\$191.00					
ABC			****	HOLIDAY INN		N	12/1/2021	CC			\$196.00					
ABC			****	BRIDGETOWER SUBSCRIPTION		N	8/1/2021	CC			\$195.00					
ABC			****	RAMADA INN		N	8/1/2021	CC			\$196.00					
ABC			****	QUALITY INN		N	6/1/2022	CC			\$145.00					
ABC			****	SURVEYMONKEY.COM		N	10/1/2021	CC			\$2,054.00					
ABC			****	J.K CO		N	7/1/2021	CC			\$599.00				Y	
ABC			****	W.E BUSINESS		N	7/1/2021	CC			\$498.00				Y	
ABC			****	AMAZON.COM		N	4/1/2022	CC			\$219.00					
ABC			****	AMAZON.COM		N	5/1/2022	CC			\$300.00					
ABC			****	AMAZON.COM		N	6/1/2022	CC			\$194.00					
ABC			****	S.H INTERNATIONAL		N	1/1/2022	CC			\$224.00					
ABC			****	RITE AID		N	11/1/2021	CC			\$31.00					
ABC			****	C. PROMOTIONS		N	5/1/2022	CC			\$285.00					
ABC			****	A.R. COMPANY		N	3/1/2022	CC			\$215.00					
ABC			****	C. INTELLIGENT		N	9/1/2021	CC			\$594.00				Y	
ABC			****	C. INTELLIGENT		N	3/1/2022	CC			\$784.00				Y	
ABC			****	AMAZON.COM		N	10/1/2021	CC			\$180.00					
ABC			****	AMAZON.COM		N	11/1/2021	CC			\$277.00					
ABC			****	AMAZON.COM		N	12/1/2021	CC			\$239.00					
ABC			****	AMAZON.COM		N	7/1/2021	CC			\$184.00					
ABC			****	AMAZON.COM		N	8/1/2021	CC			\$252.00					
ABC			****	A.S. AGING		N	11/1/2021	CC			\$925.00				Y	
											\$15,500.00	Total All P-card Payments (RAW DATA)				
											\$9,500.00	Total Exclusions (This amount is subtracted from Raw Data)				
											\$6,000.00	Total P-Card Payments- enter on Line 1 (SCRUBBED DATA)				

(Note: Highlighting data to clearly define specific grouping of information is highly encouraged.)

Annual Report Template

Example #1 (cont'd)

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

Batch_Agency	MBE_Type	MBE_Description	Vendor_No_Masked	Vendor_Name	MBE_Certification	MBE_Exclude	Effective_Date	Cur_Doc_No	Cur_Doc_Sfx	Number_Tran	Payment_Amt	Reportable_Amt	Reportable_MBE_Amt	Vet_Flag	SBR_Flag	Pref_Provider
ABC			****	J.K CO		N	7/1/2021	CC			\$599.00				Y	
ABC			****	W.E BUSINESS		N	7/1/2021	CC			\$498.00				Y	
ABC			****	C. INTELLIGENT		N	9/1/2021	CC			\$594.00				Y	
ABC			****	C. INTELLIGENT		N	3/1/2022	CC			\$784.00				Y	
ABC			****	A.S. AGING		N	11/1/2021	CC			\$925.00				Y	
											\$3,400.00	Total P-Card Payments to SBRs- enter on Line 2				

Navigation: SBR Annual Summary | P-CARD LINE1 | **P-CARD-SBR-LINE2** | 067-SCRUBBED-LINE 3 | 067-SBR LINE 4-5 | 067-F ...

-This “P-CARD-SBR-LINE2” tab includes the total of all SBR P-Card/Credit Card spend (you know that these are the SBR Vendor credit card payments because “Y” is listed in the “SBR Flag” column).

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

Annual Report Template

Example #2

If Summary Statement, as it pertains to other payments (i.e. DV, BPO/PO),
Line 3 (Total Procurement Payments), has \$754,163

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

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

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

Annual Report Template

Example #2 (cont'd)

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

Vendor No	Mask	Vendor Name	Po Bpo Id	Effective Dst	Contract Title	Voucher Amount	Reportable Amount	SBR Designated	SBR Non-Designated	SBR Venc	SBR Procure Inc	MBE Statu
		PRO SYST		11/15/2012	HARDWARE CONTRACT	\$35,373.75	\$35,373.75					
		K. TECHNOLOGY SOLUTIONS		11/15/2012	HARDWARE CONTRACT	\$14,645.00	\$14,645.00	\$14,645.00		Y	Y	Y
		C. SEVERN		11/15/2012	HARDWARE CONTRACT	\$458,821.28	\$458,821.28	\$458,821.28		Y	Y	
		E.N. SERVICES		11/15/2012	HARDWARE CONTRACT	\$2,424.32	\$2,424.32	\$2,424.32		Y	Y	
		C. SEVERN		11/15/2012	HARDWARE CONTRACT	\$23,965.00	\$23,965.00	\$23,965.00		Y	Y	
		C. SEVERN		11/15/2012	HARDWARE CONTRACT	\$40,934.91	\$40,934.91	\$40,934.91		Y	Y	
		A. TECHNOLOGY SERVICES		11/15/2012	HARDWARE CONTRACT	\$6,563.00	\$6,563.00	\$6,563.00		Y	Y	Y
		SHI INTERNAL CORP		10/1/2012	SOFTWARE	\$32,628.00	\$32,628.00					
		E.N. SERVICES		10/1/2012	SOFTWARE	\$50,643.54	\$50,643.54	\$50,643.54		Y	Y	
		UNICO GOVERNMENT INC		10/1/2012	SOFTWARE	\$4,725.00	\$4,725.00					
		K. TECHNOLOGY SOLUTIONS		10/1/2012	SOFTWARE	\$2,318.75	\$2,318.75	\$2,318.75		Y	Y	Y
		E. SALES & ENGINEERING		7/23/2021	SERVICES	\$364.50	\$364.50	\$364.50		Y	Y	
		SHELF		3/16/2021	GRANT	\$40.00	\$40.00					
		A. POSTAGE		6/6/2022	POSTAGE	\$11,333.00	\$11,333.00					
		H. MOVING SERVICES LLC		6/21/2022	MOVING SERVICES	\$2,639.00	\$2,639.00	\$2,639.00		Y	Y	Y
		NEWS		6/21/2022	SUBSCRIPTION	\$173.00	\$173.00					
		S. SYSTEMS & TECHNOLOGY		8/31/2021	SCANNER AND SOFTWARE	\$8,070.17	\$8,070.17					
		SCANWID		12/3/2021	SCANNER	\$19,308.00	\$19,308.00					
		USP		6/2/2021	POSTAGE	\$30,217.26	\$30,217.26					
		A. B. MAINTENANCE CO INC		3/1/2020	JANITORIAL SERVICES	\$797.64	\$797.64					
		P. PEST SOLUTIONS		5/4/2020	PEST CONTROL SERVICES	\$153.75	\$153.75					
		E. SALES & ENGINEERING		5/12/2021	LIGHTING INSTALLATION	\$2,750.00	\$2,750.00	\$2,750.00		Y	Y	
		D T FIELD		6/8/2021	JANITORIAL SERVICES	\$560.00	\$560.00					
		A. B. MAINTENANCE CO INC		3/1/2020	JANITORIAL SERVICES	\$797.64	\$797.64					
		S. ENVIRONMENT		5/25/2021	GRANT	\$29,378.70	\$29,378.70					
		D T FIELD		6/8/2021	JANITORIAL SERVICES	\$560.00	\$560.00					
		H. MOVING SERVICES LLC		7/15/2021	MOVING RECORDS	\$2,400.00	\$2,400.00	\$2,400.00		Y	Y	Y
		AT&T		7/14/2021	PHONE SERVICE	\$5,708.00	\$5,708.00					
		P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	\$158.00	\$158.00					
		LT.S. ELECTRIC		8/25/2021	UTILITY	\$1,400.00	\$1,400.00					
		D T FIELD		6/8/2021	JANITORIAL SERVICES	\$560.00	\$560.00					
		A. B. MAINTENANCE CO INC		3/1/2020	JANITORIAL SERVICES	\$797.64	\$797.64					
		VERIZON		6/30/2021	PHONE SERVICE	\$2,300.00	\$2,300.00					Y
		VERIZON		12/30/2019	PHONE SERVICE	\$5,000.00	\$5,000.00					
		E. SALES & ENGINEERING		6/1/2021	REPLACE AND INSTALL LIGHTING	\$20,540.75	\$20,540.75	\$20,540.75		Y	Y	
		F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	\$3,075.00	\$3,075.00		\$3,075.00	Y		
		F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	\$3,075.00	\$3,075.00		\$3,075.00	Y		
		F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	\$3,075.00	\$3,075.00		\$3,075.00	Y		
		F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	\$3,075.00	\$3,075.00		\$3,075.00	Y		
		P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	\$158.00	\$158.00					
		A. B. MAINTENANCE CO INC		3/3/2022	JANITORIAL SERVICES	\$828.17	\$828.17					
		A. B. MAINTENANCE CO INC		3/3/2022	JANITORIAL SERVICES	\$828.17	\$828.17					
		A. B. MAINTENANCE CO INC		3/3/2022	JANITORIAL SERVICES	\$828.17	\$828.17					
		A. B. MAINTENANCE CO INC		3/3/2022	JANITORIAL SERVICES	\$828.17	\$828.17					
		A. B. MAINTENANCE CO INC		3/3/2022	JANITORIAL SERVICES	\$828.17	\$828.17					
		A. B. MAINTENANCE CO INC		3/3/2022	JANITORIAL SERVICES	\$828.17	\$828.17					
		P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	\$158.00	\$158.00					
		P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	\$158.00	\$158.00					
		P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	\$158.00	\$158.00					
		P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	\$158.00	\$158.00					
		P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	\$158.00	\$158.00					
		A. B. MAINTENANCE CO INC		3/3/2022	JANITORIAL SERVICES	\$828.17	\$828.17					
		P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	\$158.00	\$158.00					
						\$838,918.79	\$838,918.79	[RAW DATA]				
							\$84,755.96	[Total Exclusions - subtracted from Raw Data]				
							\$754,162.83	[Total Procurement Payments- enter on Line 3]				

067-SCRUBBED-LINE 3

067-SBR LINE 4-5

067-RAWDAT ...

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

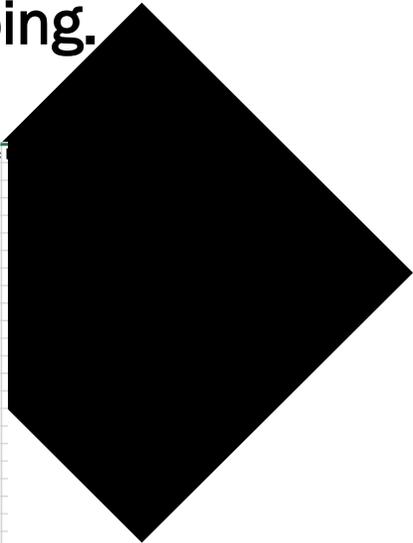
Vendor No Masked	Vendor Name	Po Bpo Id	Effective Date	Contract Title	Voucher Amount	Reportable Amount	SBR Designated	SBR Non-Designated	SBR Vend	SBR Procure Ind	MBE Status
	K. TECHNOLOGY SOLUTIONS		11/15/2012	HARDWARE CONTRACT	\$14,645.00	\$14,645.00	\$14,645.00		Y	Y	
	C. SEVERN		11/15/2012	HARDWARE CONTRACT	\$458,821.28	\$458,821.28	\$458,821.28		Y	Y	
	E.N. SERVICES		11/15/2012	HARDWARE CONTRACT	\$2,424.32	\$2,424.32	\$2,424.32		Y	Y	
	C. SEVERN		11/15/2012	HARDWARE CONTRACT	\$23,965.00	\$23,965.00	\$23,965.00		Y	Y	
	C. SEVERN		11/15/2012	HARDWARE CONTRACT	\$40,934.91	\$40,934.91	\$40,934.91		Y	Y	
	A. TECHNOLOGY SERVICES		11/15/2012	HARDWARE CONTRACT	\$6,563.00	\$6,563.00	\$6,563.00		Y	Y	Y
	E.N. SERVICES		10/1/2012	SOFTWARE	\$50,643.54	\$50,643.54	\$50,643.54		Y	Y	
	K. TECHNOLOGY SOLUTIONS		10/1/2012	SOFTWARE	\$2,318.75	\$2,318.75	\$2,318.75		Y	Y	Y
	E. SALES & ENGINEERING		7/29/2021	ENGINEERING SERVICES	\$364.50	\$364.50	\$364.50		Y	Y	
	H. MOVING SERVICES LLC		6/21/2022	MOVING SERVICES	\$2,699.00	\$2,699.00	\$2,699.00		Y	Y	Y
	E. SALES & ENGINEERING		5/12/2021	LIGHTING INSTALLATION	\$2,750.00	\$2,750.00	\$2,750.00		Y	Y	
	H. MOVING SERVICES LLC		7/15/2021	MOVING RECORDS	\$2,400.00	\$2,400.00	\$2,400.00		Y	Y	Y
	E. SALES & ENGINEERING		6/1/2021	REPLACE AND INSTALL LIGHTING	\$20,540.75	\$20,540.75	\$20,540.75		Y	Y	
	F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	\$3,075.00	\$3,075.00		\$3,075.00	Y		
	F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	\$3,075.00	\$3,075.00		\$3,075.00	Y		
	F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	\$3,075.00	\$3,075.00		\$3,075.00	Y		
	F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	\$3,075.00	\$3,075.00		\$3,075.00	Y		
									\$629,070.05 Total Payments to SBR Contractors on Designated SBR Procurements		
									\$12,300.00 Total Payments to SBR Contractors on Non-Designated SBR Procurements		

Annual Report Template Example #2 (cont'd)

Summary Statement/Reporting

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

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



067-RAWDATA

Summary Statement/Reporting



If Summary Statement, Line 6 (Total Number of SBR Vendors receiving award and payments) states 57...

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

Summary Statement/Reporting

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



Note

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

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

BPW Advisory 2005-1 Small Business Reserve Program

- **Qualified Expenditures.**

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



BPW Advisory 2005-1 Small Business Reserve Program

Exclusions:

- Where governing federal law or federal grant provisions conflict with this Small Business Reserve Program, the procurement is excluded from these requirements.
- Procurements from Maryland Correctional Enterprises, Blind Industries and Services of Maryland, and the Employment Works Program ([COMAR 21.11.05](#)) and from Maryland Vending Facilities Program for the Blind ([COMAR 21.11.09](#)) are excluded from these requirements.
- The value of excluded procurements is not included in the procurement dollar base from which the 15% reserve is calculated. (the denominator)

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

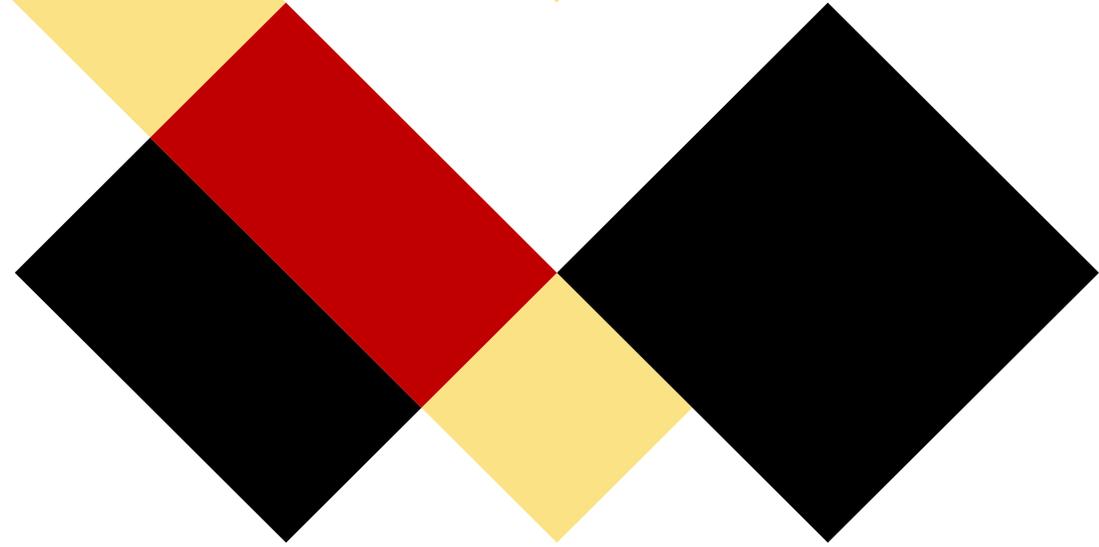
•Grant expenditures as defined in [COMAR 21.01.02.01\(B\)\(46\)](#).

•Pass-through payments (e.g., employee health benefits, employee retirement contributions, employee travel payments), although the administrative and management fees expended to process such payments are included.

•Expenditures excluded under §11-203 of the State Finance and Procurement Article (see COMAR 21.01.03.01).

SBR report preparers may request an “SBR All Active Report” from eMaryland Marketplace Advantage (eMMA) by emailing the emma.helpdesk@maryland.gov. This report can help to verify whether a firm was certified in the SBR Program at the time of payment.

Verification of SBR Vendors





Any Questions?

FY25 SBR Quarterly Reporting

New Reporting Requirements

SBR Program Changes Effective October 1, 2024

[HB0962/SB 673](#)

State Procurement - Small Business Reserve (SBR) Program –
Goals and Outreach Program



SBR Program Changes Effective October 1, 2024

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

SBR Program Changes Effective October 1, 2024

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

FY25 NEW SBR Quarterly Reporting Requirements

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

FY25 NEW SBR Quarterly Reporting Requirements

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

FY25 NEW SBR Quarterly Reporting Requirements

FMIS CHEAT SHEET

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

FY25 NEW SBR Quarterly

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 FORM #1A (Summary)

PCH712 - Annual MBE Procurement FORM #1B

600 - Office of the Comptroller - Capital Projects (600)

Begin Date: 07/01/2023

End Date: 03/31/2024 +30 +60 +90 (Calculated from Begin Date)

Date Presets: (Calculated from today)

PPFY PFY CFY FYTD PPY PY CY PM CM YTD

Clear All Selections

Run Report

* Report Data is updated weekly and current as of COB on 5/3/2024.

MBE BPO/PO CHANGE ORDERS REPORT - Provides contract management data for agency procurement officers to verify change order documents that have a net amount increase for MBE reporting outside the fiscal report period against the associated blanket purchase orders and purchase orders.

Selections:

\$0.00 - \$999,999,999,999,999.99

Architecture and Engineering:

- AE

Architecture:

- AR

Engineering:

- EG

Construction:

- C

Construction and Related Services:

- CRS EP

Human, Cultural, Social, and Education Services:

- HCS

Maintenance:

FY25 NEW SBR Quarterly Reporting Requirements

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 FORM #1A (Summary)

PCH712 - Annual MBE Procurement FORM #1B

PCH713 - Contracts by Classification

Statewide Doit (060)

600 - Office of the Comptroller - Capital Projects (600)

Department: From: 00100 To: 0510

Begin Date: 07/01/2023

End Date: 03/31/2024 +30 +60 +90 (Calculated from Begin Date.)

Date Presets: PPFY PFY CFY FYTD PPY PY CY PM CM YTD

MBE

Run Report

* Report Data is updated weekly and current as of COB on 5/3/2024.

Amounts: \$0.00 - \$999,999,999,999,999.99

MBE, FEDERAL VETERAN (VET/VSBE) or PREFERRED PROVIDER DIAGNOSTIC BY WORK CATEGORY - PRIME REPORT -
Provides details about the blanket purchase orders and purchase orders accepted or rejected from the corresponding ADPICs 711 by Annual Minority Business Enterprise (MBE) Procurement Report Form #1A, Federal Veteran or the annual Board of Public Works Veteran-Owned Small Business Participation (VSBE/VET) Report, or Preferred Provider Annual Preferred Provider Procurement Report Form #1A. Agency procurement officers are able to view the contract management data to verify the actual documents that are accepted or rejected. (Updated Weekly)

FY25 NEW SBR Quarterly Reporting Requirements

Home Help Repository Hello, lisa.sennaar@maryland.gov! Log off

DEPARTMENT OF INFORMATION TECHNOLOGY
ANSWERS FINANCIAL REPORTING

Reports / PCH721

REPORTS

- Vendor POs/Contracts (PCH300)
- Contracts Management (PCH355)
- Commodities on PO/Contract (A315DB2)
- Procurement Award Dollars (PCH062)
- SBR Expenditure Detail/Summary (PCH065/067)
- SBR Procurement (PCH06B)
- BPO Detail
- MBE Procurement (PCH709-716)
- MBE Payment (PCH717-722)
- PCH717 - Non-BPO Direct Vouchers
- PCH718 - Vouchers & BPO Direct Vouchers
- PCH719 - Subcontractors
- PCH720 - Subcontractors Projected
- PCH721 - R*Stars Voucher Detail**
- PCH722 - Contract Compliance To Date Summary Report
- YEC (PCH210,212-213)

PCH721 - R*Stars Voucher Detail

Agency:

- Maryland Food Center Authority (D30)
- Maryland Health Benefit Exchange (D78)
- Maryland Health Insurance Plan (D79)
- Maryland Higher Education Commission (R62)
- Maryland Institute of Emergency Medical Service Systems (D53)
- Maryland Insurance Administration (D80)

Begin Date:

End Date: (Calculated from Begin Date.)

Date Presets: (Calculated from today.)

* Report Data is updated weekly and current as of COB on 03/20/24.

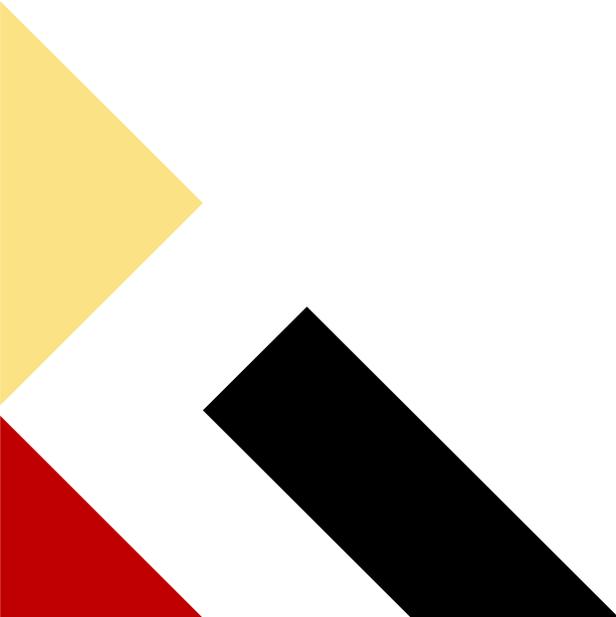
Optional Selections:

Amount Threshold:

CPC Only:

FY25 NEW SBR Quarterly Reporting Instructions and Templates

New Instructions and Template will be posted in the SBR Toolkit by July 1, 2024.



Reminder

SBR Liaison Directory

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

SBR Liaison Directory

Enter search term

Home MBE PROGRAM SBR PROGRAM VSBE Program RESOURCES PROCUREMENT FORECAST

GOVERNOR'S OFFICE OF
Small, Minority & Women Business Affairs

Quick Links

- About Us
- Legislation and Policy
- Outreach
- News
- Reports
- Contact Us

SBR Liaison Directory

For information regarding the Small Business Reserve (SBR) Program's certification please email lisa.sennaar@maryland.gov or call 410-697-9600.

Reporting Agency	SBR Liaison Name/Contact Info	Address
Aging	Valarie Tisdale valarieb.tisdale@maryland.gov 410-767-2157	301 W. Preston Street, Suite #1007 Baltimore, MD 21201
Agriculture	Lynn McNally lynn.mcnally@maryland.gov 410-841-5902	50 Harry S. Truman Parkway Annapolis, MD 21401
Archives	Teresa Fawley teresa.fawley@maryland.gov 410-260-6405	350 Rowe Blvd. Annapolis, MD 21401
Assessments & Taxation	Tara L. Gray tara.gray@maryland.gov 410-767-1194	300 West Preston St., Room 605 Baltimore, MD 21201
Attorney General's Office	Janice Clark jclark@oag.state.md.us 410-575-7033	200 St. Paul Place Baltimore, MD 21202

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

Any questions after today's training, please contact us:

Lisa Mitchell Sennaar

lisa.sennaar@maryland.gov

410-697-9613

410-508-8089

Tanita Johnson

tanita.johnson1@maryland.gov

410-697-9619

667-232-1368

CONTACT INFO



Any Questions?

VSBE Program



Presented by Danielle N. Davis

— ★ ★ ★ —

NATIONAL
MILITARY
APPRECIATION MONTH



VSBE Agenda

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



VSBE Program Updates



VSBE PROGRAM GUIDE FOR LIAISON AND PROCUREMENT OFFICERS

VSBE Vendor Verification

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

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

Counting VSBE Vendor Participation

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

Vendor Certification

Veteran-owned businesses that want to participate in the VSBE Program must complete the 3-step certification process.

First - Register as a vendor in eMMA

Second - Submit veteran verification

Third - Complete the VSBE Application within eMMA

Are you working with veteran small businesses? Refer them to our website for complete information.

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

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



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

VSBE Goalsetting

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

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

Primary resources include, but are not limited to:

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

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

VSBE Outreach

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

VSBE Outreach Updates

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



VSBE Outreach Upcoming

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

VSBE Certification



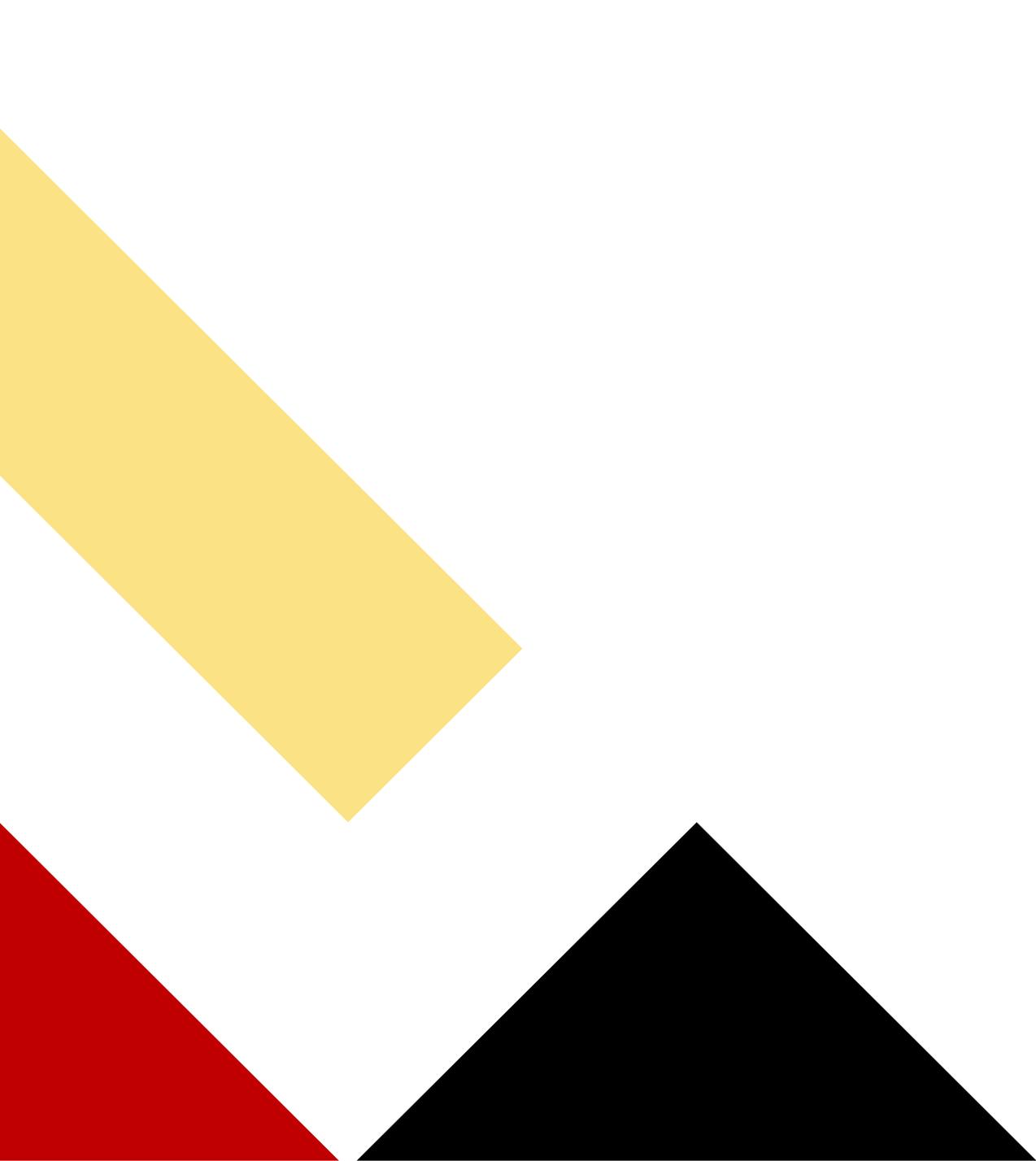
VSBE Waivers

<https://dsd.maryland.gov/regulations/Pages/21.11.14.09.aspx>

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

Granted VSBE Waivers need to be emailed to:

VSBE.GOSBA@maryland.gov



VSBE Regulation Updates

21.11.14.02 Definitions

<https://dsd.maryland.gov/regulations/Pages/21.11.14.02.aspx>

.02 Definitions.

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

B. Terms Defined.

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

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

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

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

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

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

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

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

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

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

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

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

(i) Are veterans; and

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

21.11.14.12 Certification Procedures

<https://dsd.maryland.gov/regulations/Pages/21.11.14.12.aspx>

.12 Certification Procedures.

A. General.

- (1) The certification agency is designated to certify, recertify, and decertify VSBEs.
- (2) A procurement agency may not permit a vendor to participate in a procurement as a veteran-owned vendor unless it is identified as a certified VSBE in the Database.

B. Vendor Registration.

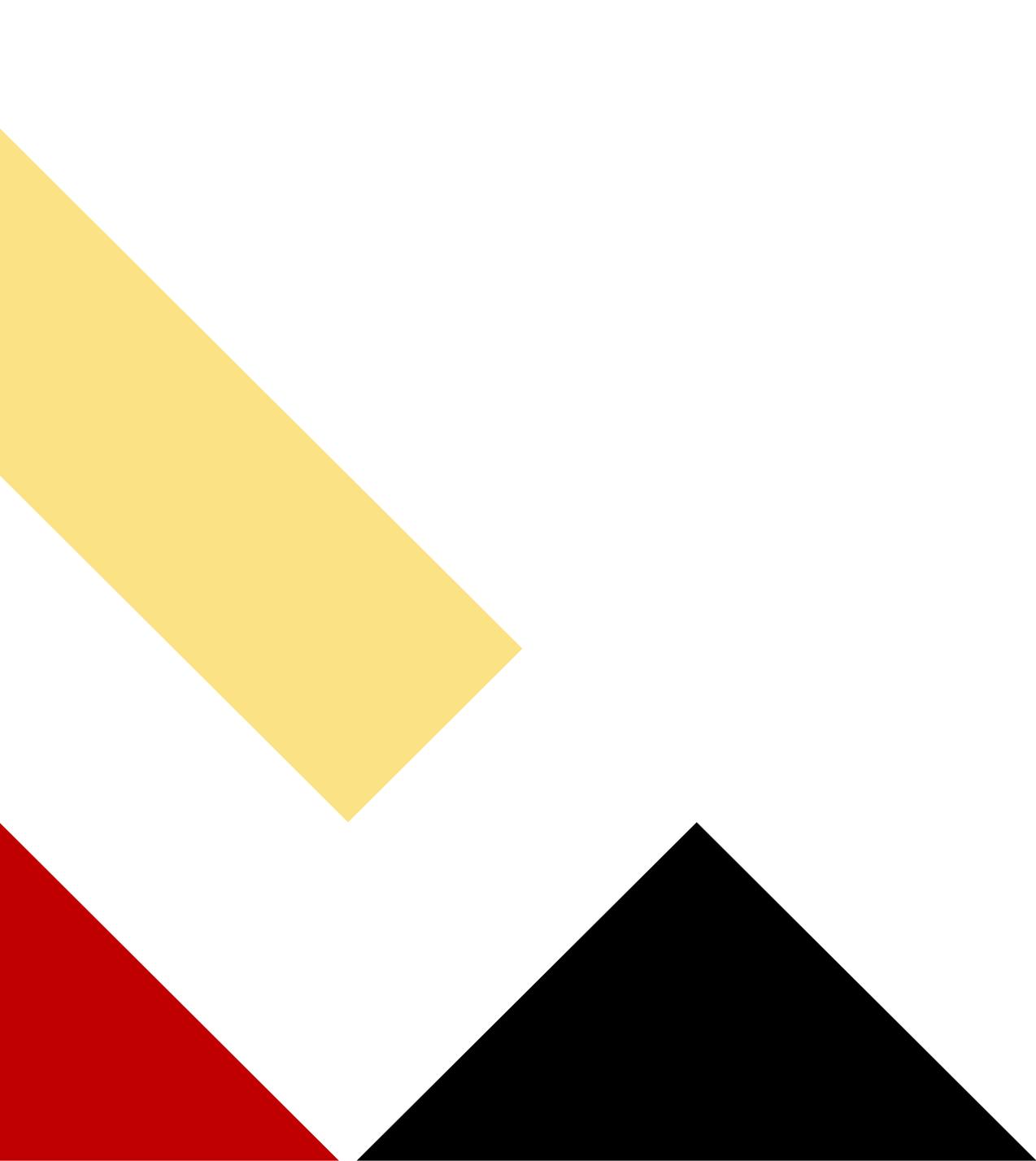
- (1) A veteran vendor seeking to be recognized as a certified VSBE shall register as a vendor in the State's Internet-based electronic procurement system.
- (2) A registered vendor shall submit veteran verification and complete the VSBE Program application in the State's Internet-based electronic procurement system.

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

- (1) Copies of articles of incorporation, bylaws, minutes, shareholder agreements, stock certificates, stock transfer ledgers, any additional profit-sharing agreements or buyout rights, or in the case of a partnership, the partnership agreement;
- (2) Current financial statements, business licenses, federal personal income tax returns for the most current 2 years, including all schedules, federal business tax returns for the past 3 years, including all schedules, cancelled checks, resumes of principal parties, and any relevant personal and third-party agreements, such as rental and management agreements; and
- (3) Copies of supporting veteran-related documents issued by the federal government.

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

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



VSBE FY24 Reporting Updates

VSBE Toolkit-

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

GOVERNOR'S OFFICE OF
Small, Minority &
Women Business Affairs



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.

New Source For Federal Veteran Certification Searching

The federal Vets First CVE Verification Program known as VetBiz is no longer in operation. Responsibility for verifying the veteran status of small business owners at the federal level has been transferred to the U.S. Small Business Administration and is now called Veteran Small Business Certification (VetCert).

Effective immediately, the new site to search for federally certified veteran-owned small businesses is now <https://veterans.certify.sba.gov/#home>.



Resource Links

- eMaryland Marketplace Advantage
- FY2018 Report on VSBE Participation

NEW VSBE LIAISONS

VSBE Welcome Packet Documents.pdf

VSBE Toolkit Reporting Section



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

***Updated Templates for FY24 Coming Soon**

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

VSBE Report Instructions and Template:

-  [FY2023 VSBE REPORTING MANUAL.docx](#)
 - [FY23 Outreach Form-NEW!!](#)
- 

VSBE Additional Reporting Document Tools:

- [GAD List](#)
 - [Annual ANSWERS Cheat Sheet](#)
 - [Annual Non-Answers Cheat Sheet](#)
 -  [VSBE Program Guide.png](#)
- 

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

OCTOBER 1ST



VSBE Deadlines

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

This year October 1st falls on a Tuesday!

FY2024 VSBE REPORTING REQUIREMENTS



1. Updated VSBE Annual Template



2. VSBE Outreach Google Form Submission



3. ALL REQUIRED Supporting Backup Data



UPDATED FY2024 VSBE Annual Form

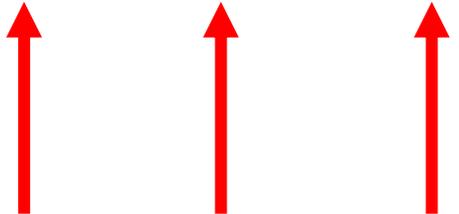
ate

ce

Amount

to FY

Instructions | Annual | PRIMES | SUBS



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

UPDATED FY2024 VSBE Annual Form ANNUAL TAB



SECTION 1- AWARDS DATA ONLY

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

Veteran-Owned Small Business Enterprise (VSBE) Annual Report

Fiscal Year 2024

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

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

Agency Reporting:

Individual Completing Report:

Awards to VSBEs

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

Payments to VSBEs

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

SECTION 2- PAYMENT DATA ONLY

FY2024 VSBE Annual Form- PRIME TAB

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

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

G	H	I
Award Amount	Payments FY	Payments CTD
	\$0.00	\$0.00

- Such data would come from:
- VSBE Direct Vouchers Payments (717)
 - VSBE Prime Voucher Payments (718)
 - VSBE Credit Cards Payments (721)

UPDATED FY2024 Outreach Form



2024 VSBE Annual Outreach Form

B *I* U  

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

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

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

Email *

Valid email

Now a Fillable Google Document

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

3. Individual Completing Form/Title *

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

Mark only one oval.

Yes

No, not yet

Working on it

Need help to define one

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

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

Mark only one oval.

Yes

No

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

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

Check all that apply:

Mark only one oval.

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

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

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

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

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

**Please make sure
to read each
question thoroughly**

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

Mark only one oval.

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

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

FY24 SUPPORTING BACKUP DATA- ANSWER USERS

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

ANSWERS REPORTS

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

ANSWERS FINANCIAL REPORTING

PCH710 - Diagnostic by Work Category - Prime

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

Search Agencies...

- Bowie State University (R23)
- Canal Place Preservation Authority (D90)
- Center for Environmental Science (R44)
- College Savings Plans of Maryland (R60)
- Commission on Civil Rights (D27)
- Comptroller of Maryland (E00)

Department: From: R62 To: R62

Begin Date: 07/01/2023

End Date: 06/30/2024 (Calculated from Begin Date.)

Date Presets: (Calculated from today.)

Date Type: Fiscal Effective Date Award Date

Report Type: VET

* Report Data is updated weekly and current as of COB on 5/3/2024.

REPORTS

- Vendor POs/Contracts (PCH300)
- 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

FY24 SUPPORTING BACKUP DATA- NON-ANSWERS USERS

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

VSBE SUPPORTING BACKUP DATA SUBMISSION

Scenario #1

(1) Excel Spreadsheet containing:

- VSBE Annual Template
- Raw and Separate Scrubbed Data with VSBE Totals

(1) Completed Google Form Outreach Submission

Scenario #2

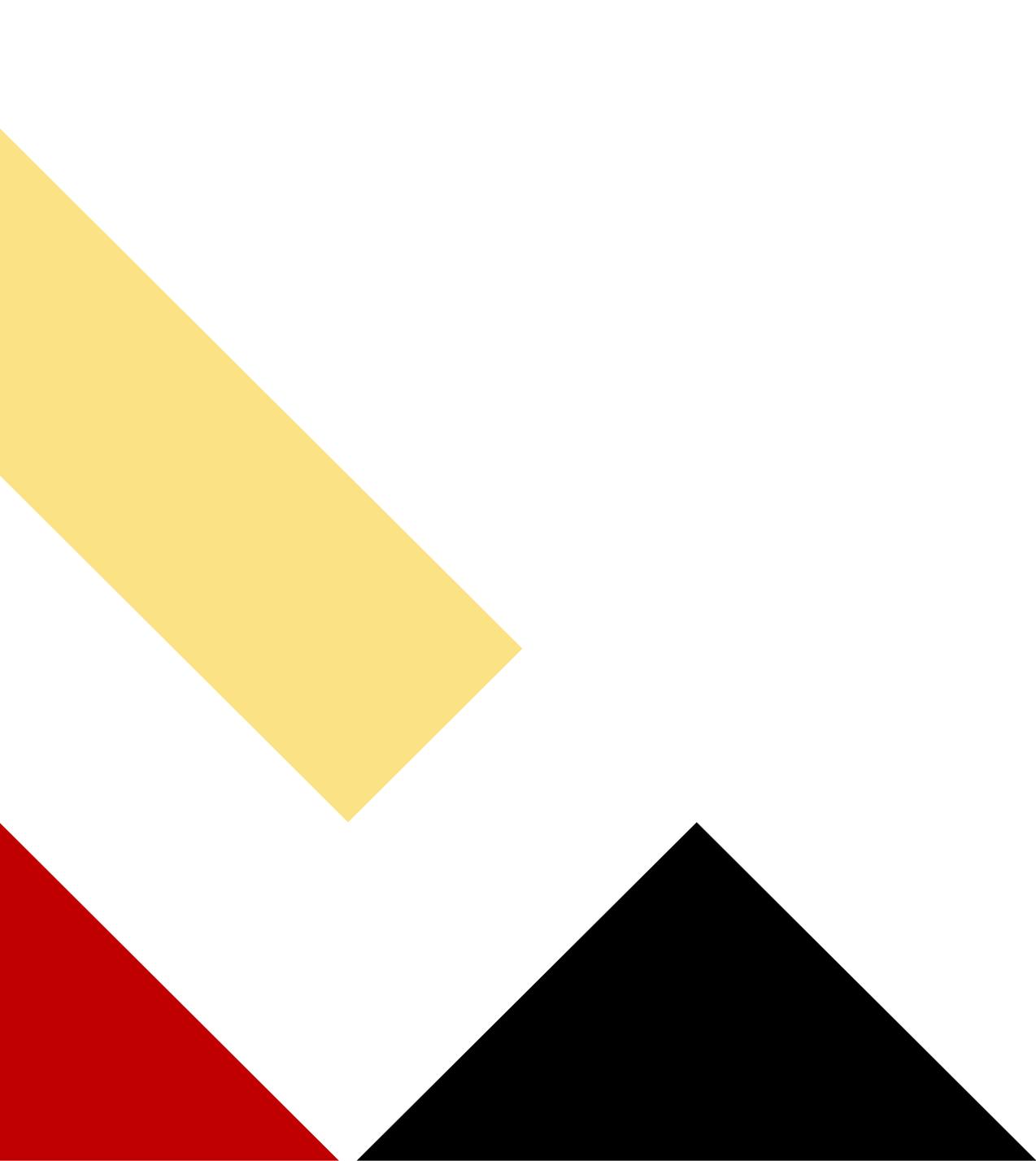
(2) Separate Excel Spreadsheets containing:

- VSBE Annual Template
- Raw and Separate Scrubbed Data with VSBE Totals

(1) Completed Google Form Outreach Submission

TIP- BUILD YOUR VSBE TEAM

- Make sure if the VSBE Liaison is not doing the reports, then the report preparer needs to be included on the submission emails
- Many of the Total ALL data is similar to the MBE data, it is advised to have a working relationship with the MBE Liaison/MBE report preparer, as some of the totals should be concise with the information being reported
- Outreach Data may also be handled with another individual/department, please make sure to be in communication with them as well!



WHAT'S COMING FOR FY2025

FY25 VSBE Changes

- PROGRAM CHANGES
- REPORTING CHANGES
- DATA POINTS

NEW

Change

VSBE Regulation Changes COMING FY25

1% to 3%

COMAR 21.11.14.01-

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



VSBE Reporting Changes COMING

VSBE QUARTERLY REPORTING

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

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

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

VSBE DATA POINTS COMING

VSBE FY25 REPORTING

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

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

FY25 NEW QUARTERLY DATA COLLECTION

FY25 Quarterly VSBE Procurement Activity Report Instructions

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

Submission deadlines:

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

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

Requirements for submission:

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

Template require

****NEW****

FY25 Quarterly VSBE Program Procurement Activity Report

Instructions

Contract Awards

Contract Modifications

Contract Renewals

Summary

Submission Requirements

- The Procurement Activity Report is collected quarterly and is cumulative
- Only include reportable data consistent with how procurement data is reported for the quarterly and annual VSBE reports
- Do not include credit card or direct voucher transactions (i.e. purchases that did not require a formal solicitation)
- Report all VSBE resulting awards subject to the PRG process, regardless of the dollar value



» SUBMIT

Submission Requirements (continued)

- Canceled solicitations should not be reported
- Preferred providers are not reported with VSBE data and should not be reported in response to this data request
- Your unit will retain and utilize the same template that is submitted for QTR 1 for the remaining submissions for FY25.
- This is to ensure that the data is being collected cumulatively

Data Field Requirements

Identification

- Is synonymous with the Contract #
- Enter the number that your agency utilizes to identify solicitations, awards, modifications, and renewals

VSBE Goal (%)

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

VSBE Prime Contractor

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

Contracts Awards Tab

VSBE Program Procurement Activity Report

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

Agency Name:

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

Contracts Modifications Tab

VSBE Program Procurement Activity Report						
<i>Cumulative Data Collection: Procurement Activity Detail for July 1, 2024 through June 30, 2025</i>						
Agency Name: _____						
VSBE Contract Modifications Issued	Identification Number	Value (\$)	VSBE Goal (%)	VSBE Goal Met at Time of Modification	VSBE Goal Not Met at Time of Modification	VSBE Prime Contractor (Select from Dropdown)

Contracts Renewals Tab

VSBE Program Procurement Activity Report						
<i>Cumulative Data Collection: Procurement Activity Detail for July 1, 2024 through June 30, 2025</i>						
Agency Name: _____						
VSBE Contract Renewal Options Exercised	Identification Number	Value (\$)	VSBE Goal (%)	VSBE Goal Met at Time of Renewal	VSBE Goal Not Met at Time of Renewal	VSBE Prime Contractor (Select from Dropdown)

Summary Tab ***Data Entry Is Not Required***

VSBE Program Procurement Activity Report				
<p><i>The Moore-Miller Administration has requested VSBE Procurement Activity Reports on a quarterly basis.</i></p> <p><i>Pursuant to COMAR 21.11.14.06 (B) Each procurement agency shall furnish any other information or periodic reports requested by the Governor's Office of Small, Minority & Women Business Affairs in connection with its VSBE procurements, or any other matters related to the administration, effectiveness, or continuation of the VSBE Program.</i></p>				
<p>As outlined in the Instructions tab, the data requested is collected cumulatively and the final submission for FY25 must be reported by VSBE Participating Agencies on or before October 15, 2025.</p>				
<p>Completed Reports should be submitted electronically by email to vsbereports.gosba@maryland.gov</p>				
<p>Agency Name: <input type="text"/></p>				
<p><i>Data from the detail tab automatically populates the table below. ONLY complete the certification section below the table with your units Quarter 4 submission on October 15, 2025.</i></p>				
Procurement Activity July 1, 2024 - June 30, 2025	Total Quantity (#)	Total Cumulative Value (\$)	Total Quantity (#) VSBE Goal Met at Time of Action (Modification or Renewal)	Total Quantity (#) VSBE Goal Not Met at Time of Action (Modification or Renewal)
All contract awards with VSBE goals	0			
All contract modifications with VSBE goals	0	\$0		
All contracts modified that had VSBE goals	0		0	0
All contract renewal options exercised	0	\$0		
All contracts whose renewal options were exercised that had VSBE goals	0		0	0

Questions?

Danielle Davis

VSBE Program Compliance Manager

Danielle.Davis2@maryland.gov

443-346-0717

Thank you