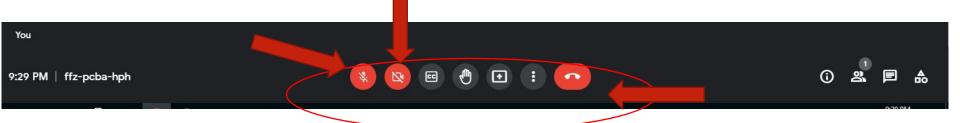
## WELCOME

to the Small Business Reserve (SBR)
Liaison Training
9:00 am – 12:00 pm



### Logistics and Housekeeping

Please MUTE your microphone and TURN OFF video camera during the webinar!! Confirm you are MUTED, and the camera is TURNED OFF by hovering your mouse at the bottom of your screen in Google Meet to see the icons - RED means you are MUTED, and your camera is off. (The circle with the phone icon is the "hang up" button; if you click that one, you'll have to log back in!)



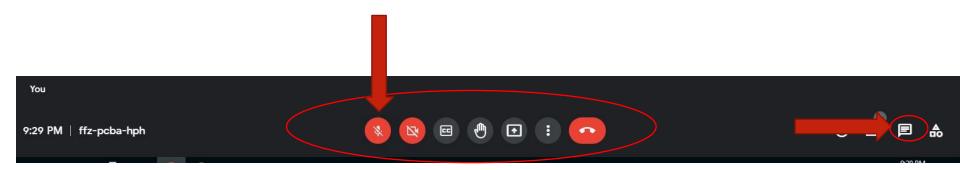
Please refrain from pressing any of the options on this bar in error such as record, captions or Present Now as this will disturb the webinar.

During breaktime, please do not hang-up, this would cause a disruption when we resume.

## Logistics and Housekeeping

Please use the CHAT bar to ask questions or make comments during the training

If you need to speak, unmute your microphone and introduce yourself by name and agency prior to speaking



### Logistics

If you are joining us by phone:

You must press \*6 to mute and unmute your phone

## Small Business Reserve (SBR) Program Liaison Training

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

Lisa Mitchell Sennaar, SBR Program Compliance Manager October 13, 2021



### **AGENDA**

- 1. Welcome
- 2. SBR Program Overview
- 3. Review of SBR EO 01.01.2021.01 Implementation and Guidelines
- 4. SBR Program Certification
- 5. SBR Liaison Officer: Responsibilities as Described in Statute
- 6. The SBR Reporting Toolkit
- 7. Compliance Considerations
- 8. Reporting Best Practices
- 9. VSBE Updates
- 10. Announcements/Important Upcoming Dates
- 11. Survey Reminder

### **WELCOME**



Jimmy Rhee - Special Secretary
Pamela Gregory — Chief of Staff
Alison Tavik — Director of Communications & Outreach
Eduardo Hayden — Small Business Outreach Manager
Chantal Kai-Lewis — Director of Policy & Legislative Affairs
Lisa Mitchell Sennaar — SBR Compliance Manager
Tanita Johnson — SBR Compliance Manager
Nichelle Johnson — MBE Compliance Manager
Gerald Stinnett — MBE Compliance Manager — VLT Operations

**Contact Us** 

https://gomdsmallbiz.maryland.gov/Pages/Contact-Us.aspx

## SBR Program Overview

COMAR 21.11.01.06

- Created in 2004
- Provides small businesses with the opportunity to participate as prime contractors on state contracts

### **SBR Program Overview**

The SBR Program directs participating agencies/departments to the extent practicable to spend at least 15% of its fiscal year procurement expenditures with certified small businesses

## **SBR Program Annual Reports**

https://gomdsmallbiz.maryland.gov/Pages/reports.aspx

### **SBR Program Overview**

Only those payments resulting from a procurement <u>designated</u> as a small business reserve procurement may be applied towards the procurement unit's overall small business reserve payment achievement

### SBR Program Overview

Once a solicitation has been <u>designated</u> as "SBR," an award can only be made to a small business certified in the SBR Program

## SBR Program and Executive Order 01.01.2021.01

- Issued January 6, 2021; implementation became effective February 1, 2021
- Engages the State contracting marketplace to support small businesses during this critical economic recovery period from the COVID-19 pandemic.
- Enhances the Small Business Reserve (SBR)
  Program by designating all procurements between \$50,000 and \$500,000 to the SBR Program, unless the procurement meets defined exemptions.

## SBR Program and Executive Order 01.01.2021.01

#### Existing Law

 Pursuant to SFP § 14-301.1(9), race-neutral measures shall be employed to the maximum extent practicable to drive inclusion prior to the employment of raceconscious measures

#### Executive Order Changes

- Automatic designation category between \$50,000-\$500,000
- Previously, there was no formal approval process through GOSBA regarding a unit's determination on whether or not to designate a procurement as a SBR
- SBR Liaison mandatory member of the PRG

## SBR Program and Executive Order 01.01.2021.01

 To facilitate this new expanded PRG evaluation process, DGS & GOBA created several key documents, which are available on the OSP website:

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

- The \*NEW\* documents include:
  - PROCUREMENT REVIEW GROUP: Guidance and Worksheets
  - **BEST PRACTICES:** Small Business Reserve (SBR) Executive Order 01.01.2021.01 Implementation Guidelines
  - SBR Executive Order FAQs

### SBR Program Certification

Certification is an online process through the vendor registration process on the state's eProcurement platform eMaryland Marketplace Advantage (eMMA)

https://emma.maryland.gov/page.aspx/en/usr/login?ReturnUrl=%2fpage.aspx%2fen%2fb uy%2fhomepage

### SBR Liaison Officer

COMAR 21.11.01.06

The head of each procurement unit shall designate an employee to be the SBR liaison officer in the administration of that unit's small business reserve program

The SBR liaison officer shall be a high-level employee reporting directly to the agency head or head of the procurement unit

For Internal Training Purposes Only

# SBR Liaison Officer Responsibilities

### COMAR 21.11.01.06

- Coordinating the procurement unit's outreach efforts to the small business community
- Reviewing the unit's contracting procedures to ensure compliance with small business reserve requirements
- The Liaison should be a part of the Procurement Review Group (PRG)

# SBR Liaison Officer Responsibilities

COMAR 21.11.01.06

- Submitting required small business reserve program reports or information
- Assisting in the resolution of small business reserve contracting issues

#### **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 50 Harry S. Truman Parkwa lynn.mcnally@maryland.gov Annapolis, MD 21401 410-841-5902	
Archives	Nassir Rezvan 350 Rowe Blvd. nassir.rezvan@maryland.gov Annapolis, MD 21401 410-260-6481	
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	Patrick Tormey 200 St. Paul Place petormey@oag.state.md.us Baltimore, MD 21202	
Baltimore City Community College	Corelethia Braxton CBraxton@bccc.edu	2901 Liberty Heights Avenue Baltimore, MD 21215

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

### **SBR Compliance Considerations**

- Basic Contract Compliance tasks should include review and tracking of the following items:
- Pre-Contract tasks (Reviewing Agency Contracting Procedures)
  - Participation in Procurement Review Group
  - Participate in Pre-bid Conferences
  - Bid paperwork review
- Post Contract Tasks
  - ensure compliance with small business reserve requirements- ensuring vendors remain certified in the SBR Program during the contract
  - Participate in discussions on contract performance issues Depending the liaisons position, they may or may not be involved in other contract and monitoring tasks.



# SHORT BREAK

Please stay tuned, we will return shortly from our break.

Get in a quick stretch, get some coffee or cola, or rest your eyes.

Please Do Not hang up. If you hang up, we will have to readmit you. Just keep your microphone muted

## What's in the SBR Program Reporting Toolkit?

Valuable information, instructions and templates to assist state agencies/departments with the management and compliance of the SBR Program

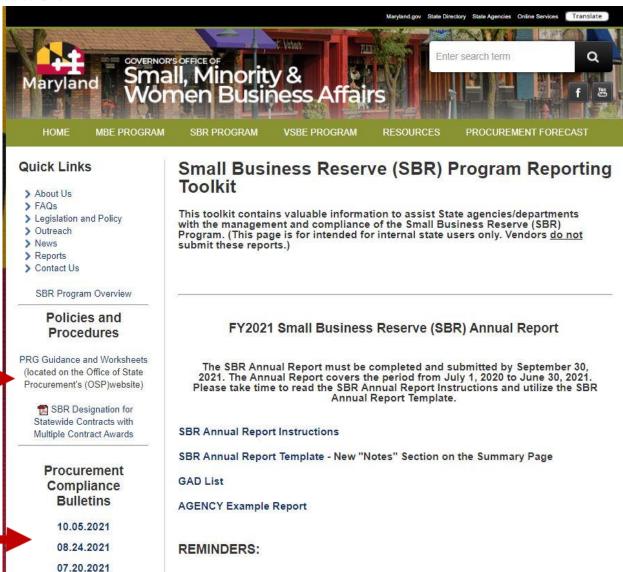
### Utilize our website and especially the SBR Toolkit



In the SBR Toolkit:

1. Resources

2. Bulletins



#### In the SBR Toolkit:

3. Compliance Library

4. Report Instructions and Templates

SBR Liaison Training Sessions

SBR Liaison Training Slide Deck June 10, 2021

SBR Liaison Training Slide Deck February 16, 2021

SBR Liaison Training Slide Deck October 28, 2020

Using eMMA to Search for and Verify Certification Status for SBRs and VSBEs







 In order to comply with COMAR 21.13.01.03B and BPW Advisory 2005-1, units must also submit a copy of the SBR Annual Report to the Board of Public Works. Please send an electronic copy to BPW c/o

Lisa Johnson Board of Public Works 80 Calvert Street, Room 117 Annapolis, MD 21401 lisa.johnson1@maryland.gov

Contact Lisa Mitchell Sennaar, SBR Compliance Manager with questions at lisa.sennaar@maryland.gov.

#### FY2022 Small Business Reserve (SBR) Quarterly Report

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

SBR Quarterly Report Instructions



SBR Quarterly Report Template

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

Contact Lisa Mitchell Sennaar, SBR Compliance Manager with questions at lisa.sennaar@maryland.gov.

### Reporting Best Practices

- Annual And Quarterly Reports need to be submitted in Excel Why?
  - Measures our success
  - Allows us to see trends (positive or negative)
- Timely data submissions. Why?
  - Allows Governor's Office of Small, Minority & Women Business Affairs time to review data for errors
  - Allows timely publication of the legislatively mandated annual report

### Reporting Best Practices

- Review the latest FY Reporting Manual to refresh your memory and make note of any changes before completing your reports
- Prepare your report as soon as possible in case some corrections are required
- Use only the latest templates posted in the SBR Toolkit for your reports: Provided backup data with your report submissions

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

 Contact Lisa Mitchell Sennaar with questions about the SBR Reports

### **SBR Annual Reporting**

The Annual Report is due within 90 days after the end of each fiscal year, in a format determined by the Governor's Office of Small, Minority & Women Business Affairs

Signatures <u>are</u> required on the Annual Report

### SBR Quarterly Reporting

The Quarterly Report is due no later than 30 days following the quarter being reported and should contain data from the start of the fiscal year

SBR FY 2022 First Quarter Report is **due on October 30**<sup>th</sup>

**SBR Reporting Toolkit** 

### **Procurement Forecast**

Each procurement unit shall, based upon the approved budget and other applicable factors, annually prepare a fiscal year procurement expenditure forecast within 60 days after enactment of the annual budget bill by the General Assembly

### **Procurement Forecast**

This data, which includes all projected purchases of \$100,000 and above for the fiscal year, connects with the Hogan Administration's theme that "Maryland is Open for Business." Keep in mind the forecast is provided to the public and serves as an important tool for the small, minority, women, and veteran business community

### **Procurement Forecast**

An agency only needs to turn in one Procurement Forecast that includes all projected purchases inclusive of SBR Designated procurements, and contracts that may contain MBE and VSBE goals

## Procurement Forecast Portal

https://gomdsmallbiz.maryland.gov/Page s/Forecasting.aspx



#### Links

ut Us is islation and Policy reach is orts tact Us

#### **Procurement Forecast Portal**

Welcome to Maryland's Procurement Forecast Portal for Fiscal Year 2021.

This database is populated with <u>projected</u> purchases of \$100,000 and above for the cryear. Not all projected purchases will be made as indicated in the Procurement Forec

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 click on "EXPORT TO EXCEL" below.

Search - Description	Search		
All items checked	•		
Search by Procurement Categories	-	Search by Region	
Search by Contract Value	•	Q3 (JanMarch 2021)	
Agency Name:			
Procurement Category: Supplies and		######################################	
	Intergovernmental Cooperative Purchasing Agreeme		
	3/4 ton 4X4 crew cab Pickup		
	CENTRAL MARYLAND		
Estimated Advertisement Date:	(%)	2021)	
Estimated Total Contract Award	\$15,000 to \$99,000		
(no options):			
Term of Contract:			
Agency Name:	Environmental Services		
Procurement Category:	Supplies and Equipment		
Procurement Method:	Intergovernmental Cooperative Purchasing Agreeme		
Description:	J D 844K Front End Loader		
	CENTRAL MARYLAND		
Estimated Advertisement Date:	Q3 (JanMarch	1 2021)	
Estimated Total Contract Award (no options): Term of Contract:	\$100,000 to \$5	00,000	
Agency Name:	Environmental:	Services	
Procurement Category:	Supplies and Equipment		
Procurement Method:	Internovernmental Connerative Purchasing Agreeme		

#### The SBR Strategic Plan

The focus and objective of the SBR Program is to have units works toward designating the maximum number of SBR "Only" prime contracting opportunities

#### The SBR Strategic Plan

The SBR Strategic Plan helps to map out how your agency will get to at least 15% of its eligible spend designated as SBR "Only"

The SBR Strategic Plan is due on or before June 30, each year.

**SBR Reporting Toolkit** 

For Internal Training Purposes Only

#### **GOSBA MAILBOXES For SBR Submissions**

#### sbrwaiver.gosba@maryland.gov

Submit all SBR exemptions and waivers covered under SBR Executive Order 01.01.2021.01

#### sbrreports.gosba@maryland.gov

Submit all SBR Program reports here (SBR Quarterly and Annual Reports)

#### compliance.gosba@maryland.gov

Submit all other required Reports here (Procurement Forecasts, SBR and Strategic Plans, Bi-Monthly Compliance Call questions)



#### https://gomdsmallbiz.maryland.gov/Pages/default.aspx

If you have any SBR Program questions, please contact me:

Lisa Mitchell Sennaar

lisa.sennaar@maryland.gov

410-697-9613



## Veteran-Owned Small Business Enterprise (VSBE) Program

- Provides contracting opportunities on state-funded procurements for certified veteran-owned small businesses.
- Specific agencies spend at least 1% of the total dollar value of their procurement contracts either directly (prime contractors) or indirectly (subcontractors) with certified VSBE firms.

#### **VSBE Program**

# Veteran-owned businesses must meet the following eligibility standards:

- Be a small business as defined by the <u>United States</u> <u>Small Business Administration</u> in 13 C.F.R. 121.201 and any subsequent revision of that regulation
- Be at least 51% owned and controlled by one or more individuals who are veterans

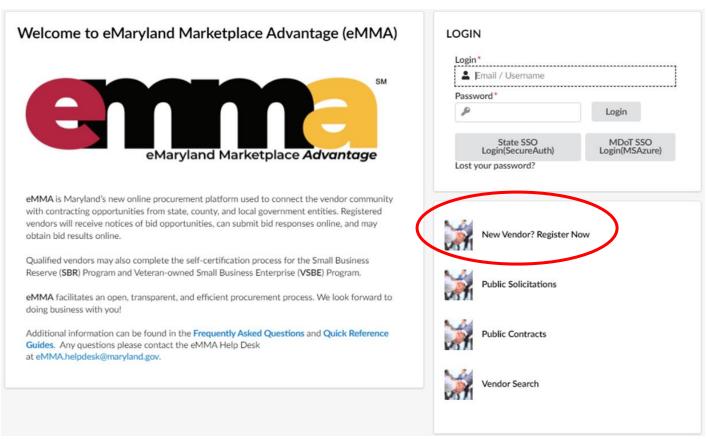
### The VSBE certification process entails:

- Vendor registration in eMaryland Marketplace Advantage (eMMA)
- 2. Veteran verification from one of the following:
  - Maryland Department of Veterans Affairs
  - Federal Vets First Verification Program
- 3. VSBE Program application submitted and approved in eMMA

#### **Vendor Registration**



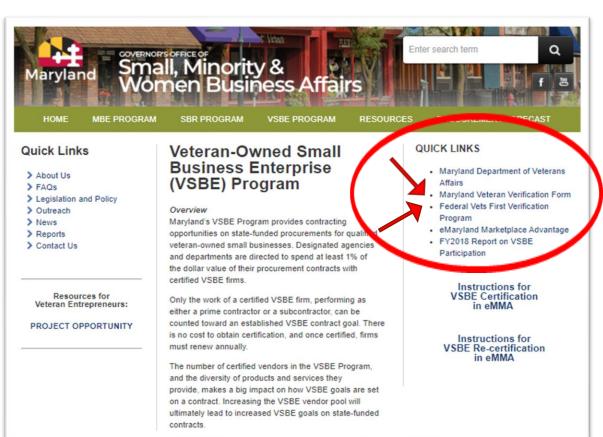
emma.maryland.gov



#### **Veteran Verification**

goMDsmallbiz.maryland.gov





Obtain veteran verification from one of two sources:

- Maryland Department of Veterans Affairs, or
- Federal Vets First Verification Program (Vetbiz)

#### **Maryland Veteran Verification Process**

	Maryland Department of Veterans A VERIFICATION OF VETERAN STA	
Veteran-Owned Small Busines	ll business owner seeking veteran verification for parti ss Enterprise (VSBE) Program shall complete SECTION locumentation (copy only), to the address noted at th	IS A, B & C. Mail the completed
SECTION A - Veteran Info	rmation	
NAME:		
ADDRESS:		
PHONE: ()	EMAIL:	
SECTION B- Veteran Statu	<u>ıs</u>	
ı,	certify the following (check the	box that applies):
Meet the federal active	duty requirement to be a veteran.	
	eased from active duty in the US Armed Forces of the	Heitad States and have a
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service-connected disability.		
	vorn Statement	
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Vendors seeking verification through the Maryland Department of Veterans Affairs (MDVA), download this form, fill it in, and mail it with the acceptable documentation.

Upon review, eligible firms are assigned a number by MDVA (i.e. MDVA2021-099).

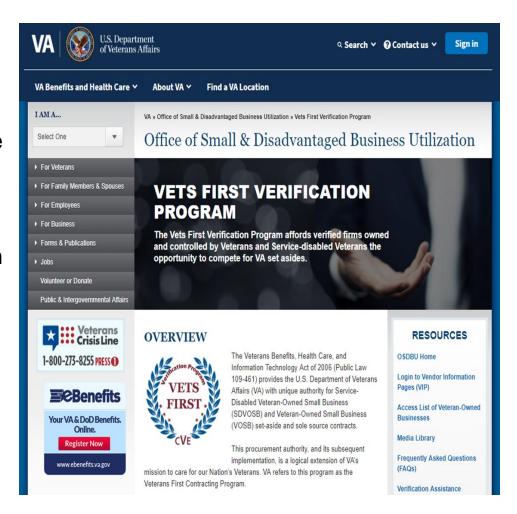
This number becomes the VSBE Certification # in the vendor's profile.

#### **Federal Veteran Verification Process**

Vendors seeking verification through the federal Vets First Verification Program would visit the website and complete the verification process.

Upon verification, firms are listed in the national VetBiz directory using the company's DUNS number.

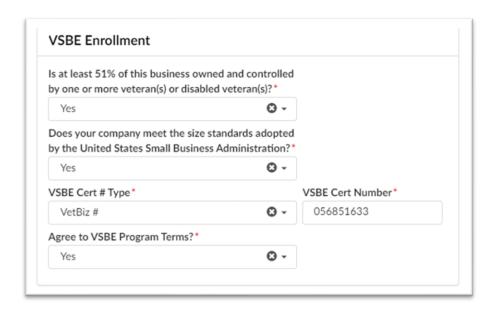
This becomes the VSBE Certification # in the vendor's profile.



#### **VSBE Application**



Vendor must submit the VSBE Application in eMMA.



Once the vendor has completed these 3 steps, the information will be reviewed by the VSBE Program Compliance Manager.

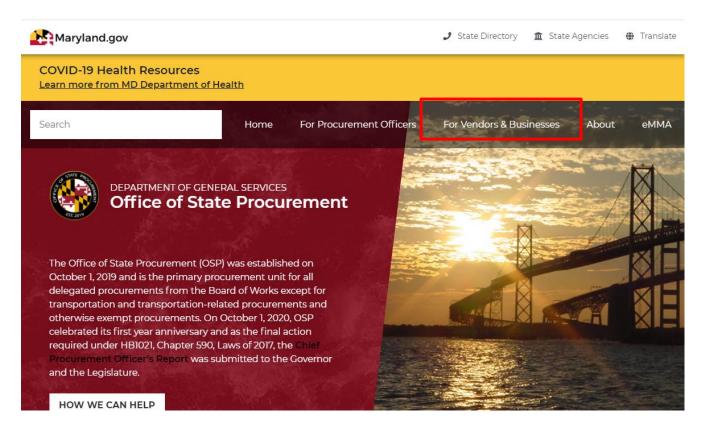
Only vendors with an "Approved" VSBE Vendor Status and an active expiration date approved are certified.

## VSBE Vendor Search For Procurement Officers/Buyers

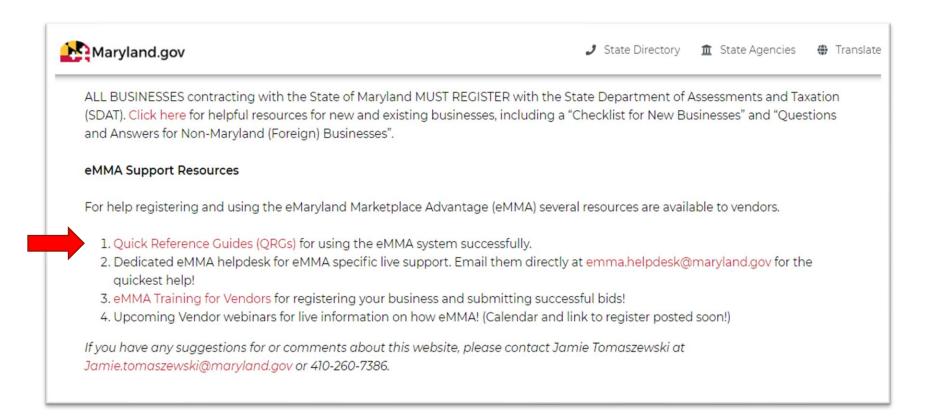
Use the Vendor Search option in eMMA to identify potential VSBE vendors. This method will yield both certified and non-certified VSBE vendors.

- 1) Visit the <a href="https://procurement.maryland.gov/">https://procurement.maryland.gov/</a> website.
- 2) Click on tab "For Vendors & Businesses".
- 3) Select the "Quick Reference Guides (QRGs)" link.
- 4) Select the Buyer QRG- "Public Search for Vendors" for a guide to locate potential VSBE vendors.

- 1) Visit the <a href="https://procurement.maryland.gov/">https://procurement.maryland.gov/</a> website.
- 2) Click on tab "For Vendors & Businesses."



#### 3) Select the "Quick Reference Guides (QRGs)" link.

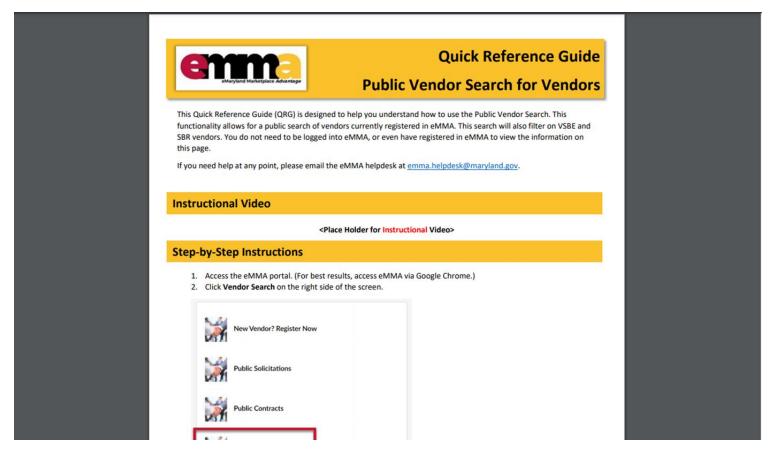


4) Select the Buyer QRG- "Public Search for Vendors" for a guide to locate potential VSBE vendors.

**Buyer QRGs** 

17 - eMMA QRG Public Search for Vendors

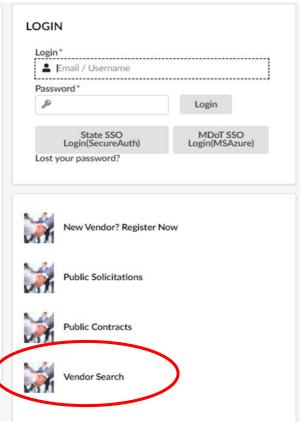
#### 17 - eMMA QRG Public Search for Vendors



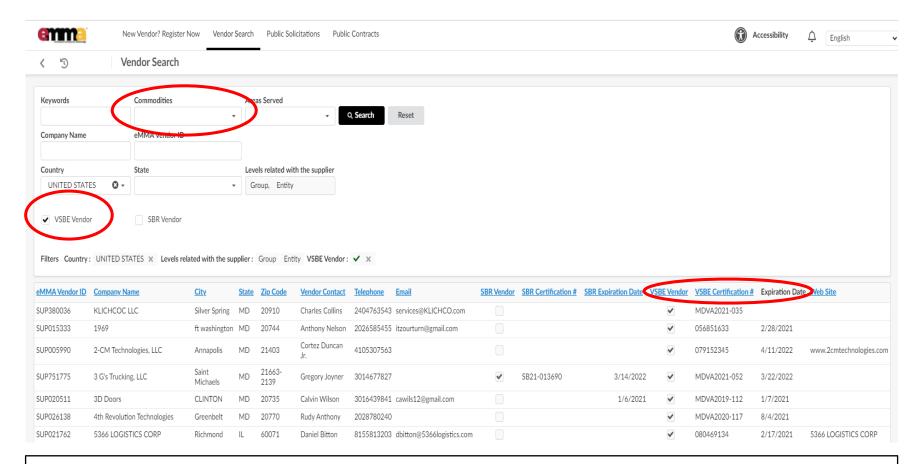
#### **VSBE Vendor Search**

#### emma.maryland.gov





#### **VSBE Vendor Search**

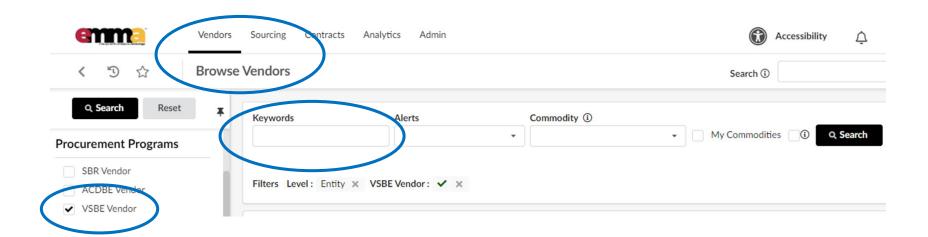


Remember, this is a public search tool to help identify potential VSBE vendors. The search will yield both certified and non-certified vendors.

#### **VSBE Vendor Search**

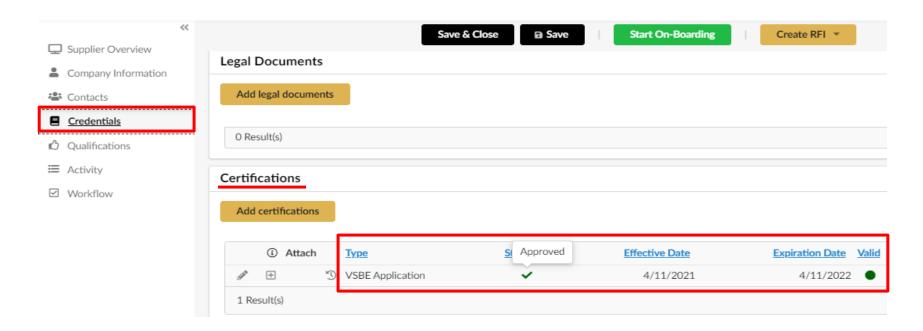
Please note the following when conducting an eMMA Vendor Search:

- It can be used to seek potential VSBE vendors for solicitations.
- This public search function should not be used to verify the VSBE certification status of a vendor when preparing to make an award.
- You are unable to download a spreadsheet of vendors when conducting this search. However, you can "cut and paste" the information in an Excel Spreadsheet.

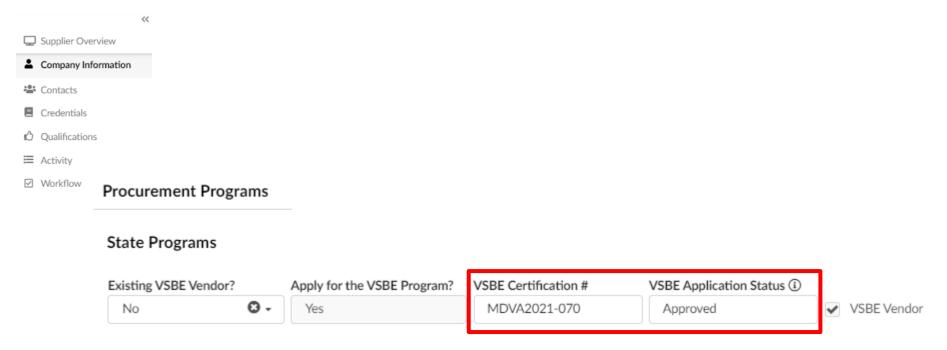


eMMA should be used to verify the certification status of VSBE vendors prior to award of solicitations, as the vendor account has the most accurate information.

Sign into eMMA to perform this verification.



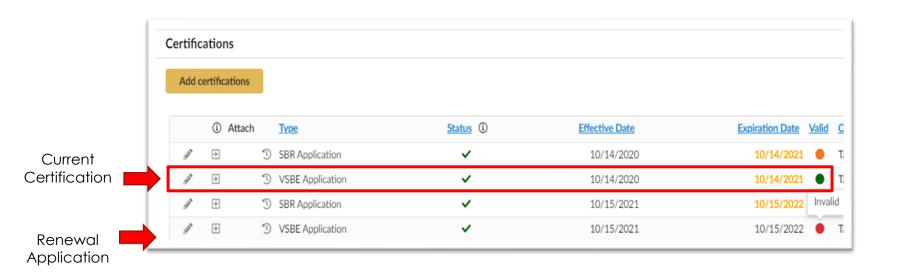
To determine the VSBE certification status, click into the "Credentials" section of the vendor's account. If the "Certifications" section has a VSBE Application with an approved "Status," a valid "Expiration Date" (i.e. date has not exceeded/certification not expired with a one-year certification) and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



Upon verifying that the VSBE Application information is listed correctly within the "Credentials" section, you can locate the "VSBE Certification #" and approval status in the "Company Information" section.

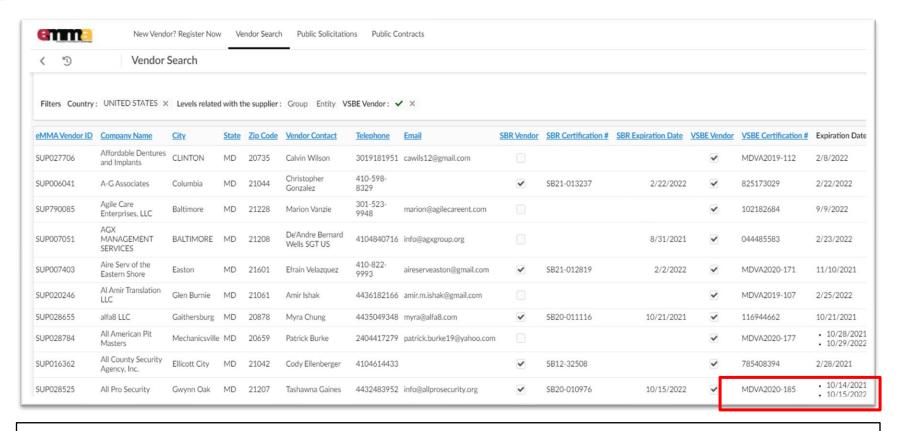
Please note the following when you are attempting to verify the certification status of a VSBE vendor:

- You may find multiple VSBE Applications listed in the "Certifications" section.
- Be certain to carefully review the information to make certain that the vendor meets the requirements (i.e. VSBE Application has an approved "Status", a valid "Expiration Date" (i.e. date has not exceeded/certification not expired with a one-year certification) and green dot (Valid) listed).
- If you are unable to determine the VSBE certification status, please contact our office for assistance.

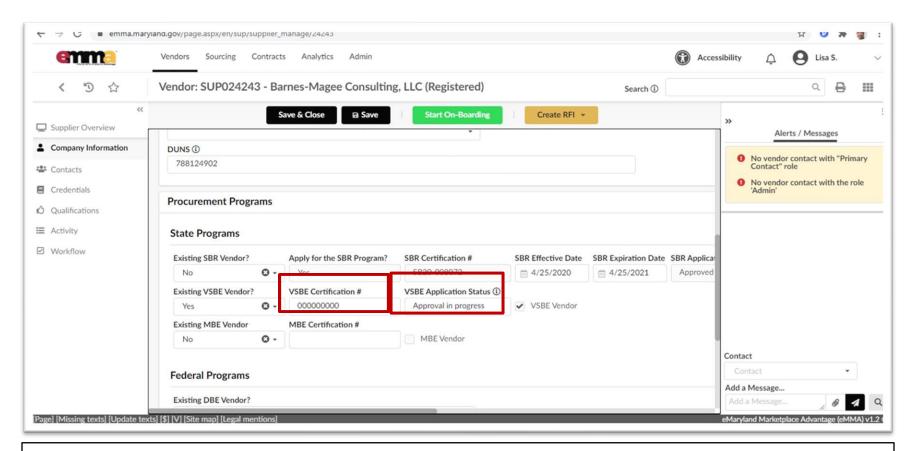


In this example, a current VSBE Application is valid and a renewal application has been approved.

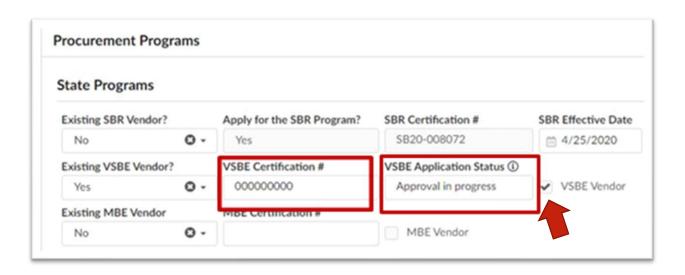
The renewal application (red dot shown) will not become effective until the current certification expires.



As per the prior example, when the current VSBE certification and approved renewal applications are listed within the vendor's eMMA account, two expiration dates (one for each application) will be provided on the public/external "Vendor Search."



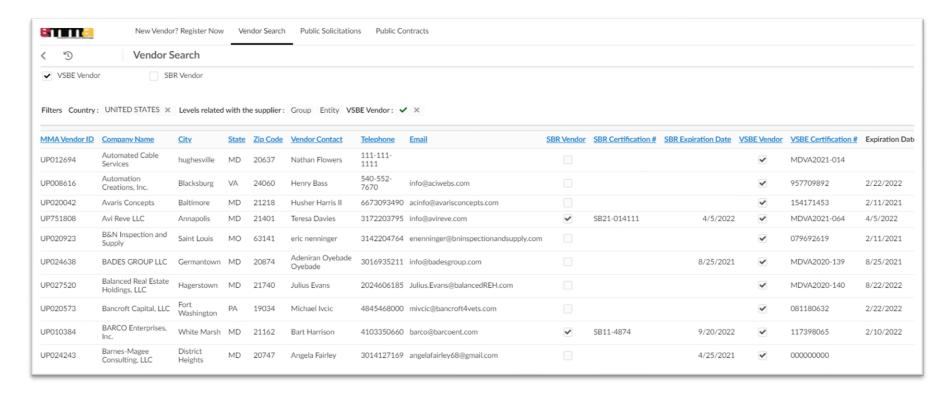
In this example, the "VSBE Application Status" states *Approval in progress* and "VSBE Certification #" is not valid. This vendor is not certified.



As mentioned on the prior slide, this vendor is not certified. However, note that the "VSBE Vendor" box is checked.

This automatically happens when any "VSBE Certification #" is entered/saved in the system, regardless of VSBE certification status.

This is a flaw in the system that we are working to correct.

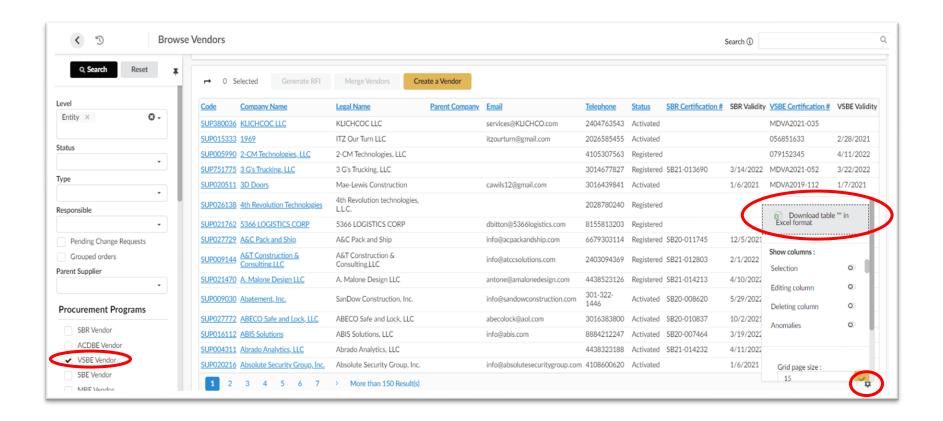


This results in the non-certified (and certified) vendors being listed on the public/external "Vendor Search" results.

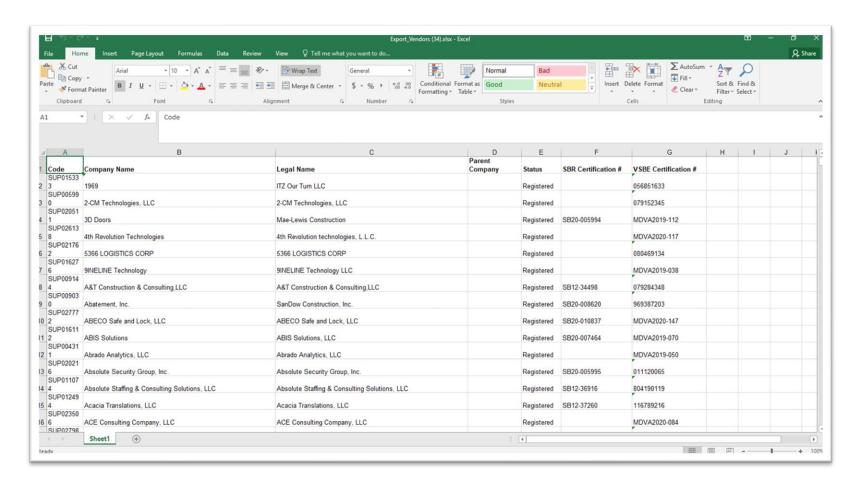
Please note the following when conducting an eMMA Vendor Search after logging into eMMA:

- Be certain to review the information thoroughly (i.e. check that the "Credentials" section has a VSBE Application with an approved "Status", valid "Expiration Date" (i.e. date has not exceeded/certification not expired with a one-year certification) and green dot (Valid) listed).
- You are able to download an excel spreadsheet for these vendors.
   However, you will need to check the vendor accounts to verify their VSBE certification.
- We are continuing to enhance the VSBE Vendor Database, if you have any questions, please contact our office, 410-697-9600, to speak with Tanita Johnson.

#### **Internal Vendor Search- Excel Spreadsheet**



#### **Internal Vendor Search- Excel Spreadsheet**



### **Any Questions?**

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### **Upcoming Events**

- October 21<sup>st</sup> Senior Procurement Advisory Group (SPAG) Contact the Department of General Services Office of State Procurement (OSP) to get added to the list
- October 28th MBE Liaison Training
- December 9th Quarterly Compliance Call

## THANK YOU

Please complete our survey using the link below.

We need your feedback!

https://www.surveymonkey.com/r/DMWTRZ5

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