

Welcome to GOSBA's Combined Liaison Training

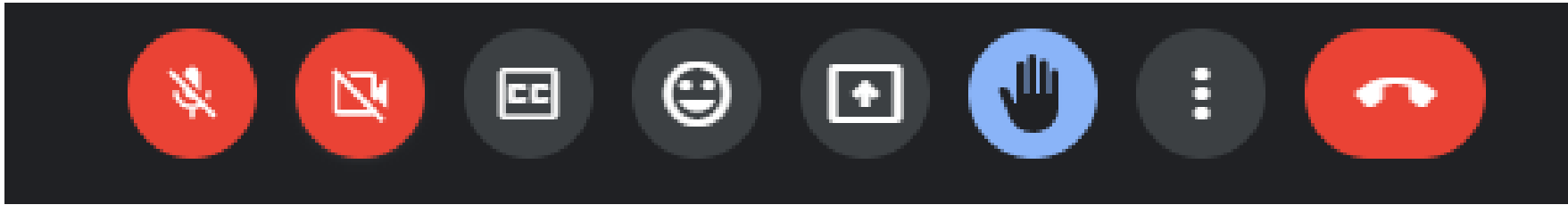
June 4, 2025



Housekeeping



- In person attendees, if you are in the Google meet, please **mute** your microphone and **turn off** video camera during the entire training. It will cause echoing



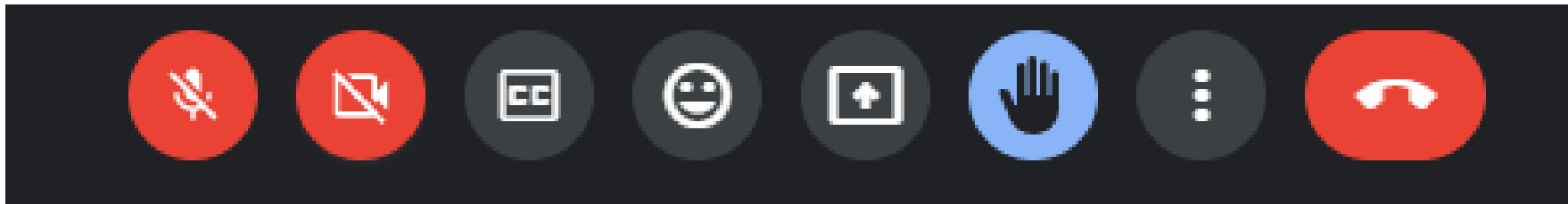
- You may ask questions after each presentation. Raise your hand and we will bring you a microphone to ensure our virtual attendees can hear your question



Housekeeping



- Virtual attendees, please keep your microphone **muted**. It's up to you if you want to keep your camera on or turn it off during training
- We will provide a time after each presentation for questions. You may also 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, we will ask you to 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

Agenda



- Welcome
- Legislative Updates/Procurement Reform Act (PRA)
- General Session
 - MBE Ombudsman Updates
 - Procurement Review Group (PRG)
 - Procurement Forecast
 - Executive Order (EO) 01.01.2024.38
 - Outreach
- Q&A
- Break
- Special Secretary Y. Maria Martinez
- Liaison Awards
- Icebreaker (In-person activity)
- MBE Program Updates
- SBR Program Updates
- VSBE Program Updates
- Q & A
- Lunch and networking



Contact Us

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



Legislative Updates



Davon Gardner

Director of Policy & Legislative Affairs

Legislative Update (Cont'd)

- Maryland General Assembly (MGA)

- The 447th MGA convened on January 8, 2025, and concluded on April 7, 2025 (Traditionally, the second Wednesday in January and the second Monday in April for “Sine Die”)
- The primary purpose of the Maryland General Assembly is to represent the electorate and enact laws that serve the state's citizens. It also plays a crucial role in raising revenue and appropriating funds for state government operations
- MGA's duration is 90 calendar days

Legislative Update (Cont'd)

- Members of the MGA
 - Maryland's legislature is comprised of 188 members
 - 47 State Senators (Maryland Senate)
 - Presiding Officer: President of the Senate
 - 141 State Delegates (House of Delegates)
 - Presiding Officer: Speaker of the House
- Senate Standing Committees
 - Senate Budget and Taxation*
 - Senate Education, Energy, and the Environment
 - Senate Finance
 - Senate Judicial Proceedings

Legislative Update (Cont'd)



• House Standing Committees

- House Appropriations*
- House Economic Matters
- House Environment & Transportation
- House and Government Operations*
- House Judiciary
- House Ways and Means



Legislative Update (Cont'd)

- **GOSBA's Small Business Advocacy Efforts**

- Total bills introduced: 3,281
- House Bills (HB) introduced: 1,901
- Senate Bills (SB) introduced: 1,380
- Enacted Bills 849
- GOSBA's total tracked bills: 107
- GOSBA's bill of interest: 50*



Legislative Update (Cont'd)

- **HB 500: Procurement Reform Act of 2025**

- Requires GOSBA and DGS to adopt regulations on Workforce Diversity Plans (\$500,000) and Supplier Diversity Plans (\$250,000)
- Adds the Special Secretary of GOSBA to the Pricing and Selection Committee for Preferred Providers.
- Requires GOSBA to specify the criteria that a business must meet to qualify as a small business.
- GOSBA shall adopt regulations to establish procedures for the Small Business Preference Program.
- Requires GOSBA and the Department of Commerce to collaborate to carry out the provisions of the Small Business Preference Program

Legislative Updates (Cont'd)

- Authorizes the Procurement Officer the discretion with the agreement of the contractor, MBE Liaison, and VSBE Liaison to modify MBE/VSBE participation goal at any time if a deficiency exists.
- Amends the SBR Program to be eligible for designation on a dollar amount of 1,000,000 or less.
- Changes the definition of a “veteran” to include member of the National Guard, Military Reservist, National Oceanic Atmospheric Administration, and the Commissioned corps of the public health service.
- Establishes the Veteran Owned Small Business Reserve Program limited to VSBE Enterprises to all procurements by the Department of Veterans and Military Families and the Military Department.

Legislative Updates (Cont'd)

- Requires SBR vendors to be paid within 15 days after the payment becomes due and the unit receives proper invoice.
- **HB 826: Repeal of the Interdepartmental Advisory Committee and Establishment of the Governor's Subcabinet on Socioeconomic Procurement Participation**
 - Codifies the Governor's Subcabinet on Socioeconomic Procurement Participation in Section 9.303.1 of the State Government Article.
- **HB 1253: Department of Social and Economic Mobility – Established**
 - HB 1253 consolidates GOSBA, the Office of Social Equity (OSE) within Maryland Cannabis Administration (MCA), and the Office of Minority Business Enterprise within the Maryland Department of Transportation to establish the Department of Social and Economic Mobility (DoSEM).

Legislative Updates (Cont'd)

- **HB 991/SB 829: Minority Enterprise Program – Extension and Reports**
 - Alters the termination date for certain provisions of law governing the Minority Business Enterprise Program and its application to public-private partnerships, offshore wind projects, and video lottery terminals; and altering the date by which certain reports, studies, and guidelines must be submitted
 - Extends the MBE Program and all pertinent reports including
 - Offshore Wind (Chapter 553, Acts of 2020)
 - Public-Private Partnership Agreements (Chapter 553, Acts of 2020)
 - Video Lottery Terminals/ Gaming (Chapter 553, Acts of 2020)
 - Cannabis (tentative) (Chapter 26, Acts of 2022);
 - Adds sports wagering to the application of MBE goals for procurement of goods.





General Session



MBE OMBUDSMAN UPDATES



THIRD TIER CONTRACTING POLICY

Third Tier Contracting



- In the May SPAG Meeting, the Third Tier Contracting Policy was released and reviewed.
- The Policy is available on the Office of State Procurements Website in the [Maryland Procurement Manual Section 9 – Policies, Procedures, and Best Practices](#)



Third Tier Contracting



The Policy

- Provides clear guidance on the processes for requesting approval of third-tier contracting arrangements
- Establishes when such contracting is necessary
- Outlines the role of the awarding State Unit in tracking and approving these arrangements



Third Tier Contracting



Highlights of the Policy include:

- Procurement Units can pre-determine that third-tier contracting is approved as a method for meeting MBE goals for a specific procurement.
 - The pre-approval of third-tier contracting must be noted within the solicitation and communicated during the pre-bid conference.
 - Example Language is included in the Policy.
 - If the Unit has already pre-approved the use of third-tier contracting, vendors may proceed to utilize third-tier subcontractors in preparing the MBE Participation Schedule. In this case, a written request for approval is not required.



Third Tier Contracting



Highlights of the Policy include:

- If the Unit has not already determined that third-tier contracting is approved as a method for meeting MBE goals for a specific procurement, a written request for approval is required. To ensure that third-tier contracting is appropriately used to meet MBE goals.
 - The instructions for doing this are outlined in the policy.
 - The awarding Unit must verify that third-tier contracting is the only viable option for meeting the goals.
 - Written approval will be provided by the unit (the process is outlined in the policy).



Third Tier Contracting



Compliance and Reporting

- The unit must review the MBE Utilization and Fair Solicitation Affidavit & Participation Schedule to ensure that all requirements are met per COMAR 21.11.03.09.
- If approved, the Unit will:
 - maintain a record of all approved third-tier contracting arrangements
 - Track the use of third-tier subcontractors
 - Ensure compliance with the MBE goal through monitoring efforts throughout the life of the contract, and
 - Verify payments to third-tier subcontractors just as they would regular MBE subcontractors






THE PRG REVIEW CHECKLIST

PRG Review Checklist

- Purpose of Checklist
 - Standardize and strengthen the review of PRG submittals valued at \$25 million or more for review by GOSBA
 - Ensure clarity, consistency, and alignment with current statutes, regulations, and policies.
- Feedback
 - Email: mbe.ombudsman@maryland.gov
 - Submit by: June 24, 2025



GOSBA PRG Review Referral Checklist

Use this checklist to prepare submittal of procurement contracts valued at \$25 million or more for review by GOSBA. Complete all fields below, indicating what documentation is contained in the referral package. Attach this checklist as the cover sheet to the PRG referral document package.

| | | | |
|------------------------------|--|------------------------------|---------------|
| Agency/Procurement Unit: | | | |
| Date Submitted: | Projected Solicitation Date: | | |
| Submitted by (name & title): | | | |
| Email: | Phone: | | |
| Contract # | Contract Value: | | |
| Contract Name/Title | | | |
| Contract Goals: | SBR <input type="checkbox"/> Yes <input type="checkbox"/> No | (Circle one) MBE/DBE _____ % | VSBE: _____ % |

REQUIRED DOCUMENTATION*

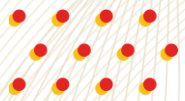
| ✓ Item | Explanation |
|--|---|
| <input type="checkbox"/> PRG Worksheet | Completed PRG worksheet that was approved by agency's PRG. <ul style="list-style-type: none">• Be sure all fields are completed or marked N/A. |
| <input type="checkbox"/> MBE Subgoal Worksheet | If applicable, completed MBE Subgoals worksheet. |
| <input type="checkbox"/> Statement of Work | Full statement of work that will be posted at solicitation (including all attachments). |
| <input type="checkbox"/> Research Results | Results of research to identify eligible firms: <ul style="list-style-type: none">• Certified MBE firms = MDOT MBE Directory results• Certified SBR & VSBE firms = eMMA results |
| <input type="checkbox"/> Cost Breakdown | Project's cost analysis reflecting the estimated type, amount, and value of work to be performed <ul style="list-style-type: none">• Engineer's Estimate, cost estimate, market analysis, etc. |
| <input type="checkbox"/> Written Determination | Brief written explanation of: <ul style="list-style-type: none">• How MBE/VSBE subcontracting categories listed on PRG worksheet were determined• How value/percentage of all identified subcontracting opportunities were calculated• What subcontracting opportunities were NOT included in the final goal and why? |
| <input type="checkbox"/> Comparable Contracts | If applicable, contract number, title, value, and details of prior contracts similar to this procurement <ul style="list-style-type: none">• If used as a model for cost estimation or to model goal-setting for this contract, attach relevant contract documents (PRG worksheet, cost breakdown, etc.) |
| <input type="checkbox"/> Other Documents | Include any other documentation that can help explain goal determination, such as market research results, explanation of contract vehicle choice, funding source requirements or restrictions, etc. |

COMMENTS *If any required documentation is not provided, explain why here.



COMPLIANCE ASSESSMENT

NEW REVIEW PROCESS



Compliance Assessment Review Process

- Compliance Assessments are submitted to the MBE Reports mailbox. (mbereports.gosba@maryland.gov)
- The MBE Ombudsman Unit will review all assessments to ensure compliance with reporting requirements and completeness.
- The Ombudsman Unit will follow up with any unit that has turned in a deficient Compliance Assessment to request updates and/or corrections.



Announcements

- By June 10, 2025, the MBE Ombudsman Compliance managers will be assigned to specific procurement units.
- Similar to the regular compliance managers, this will assist the Ombudsman unit in becoming more familiar with both the overall unit operations and staff.
- We are confident this will contribute to faster response times and resolution of issues, as well as help us identify trends, foster deeper trust, and open communication.





PRG PROCESS





Recent Changes to PRG Guidance

- The “Rule of 2”
 - Procurement Officers are directed to designate a procurement as SBR if market research indicates that two or more certified small businesses under the SBR program can perform the work or provide the desired goods or services.
- The “Rule of 1”
 - All Executive Branch units and agencies may designate procurements for the Small Business Preference Program, when not designated for the SBR Program, and at least one (1) certified small business has been identified.

Recent Changes to PRG Guidance



Procurement Review Group *Guidance & Worksheets*



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

- (1) Eligible for designation to the Small Business Reserve (SBR) Program when the total value is expected to exceed \$50,000 and at least two (2) certified small businesses have been identified,
- (2) Eligible for Small Business Preference (SBP) Designation when not designated for the SBR Program and at least one (1) certified small business has been identified, and



Recent Changes to PRG Guidance

- All SBR worksheets are now SBR/SBP Designation Worksheets

| | |
|--|-----------------------------|
| SBR / SBP Designation Worksheet (PART 1A) PRG Evaluation to Establish SBR / SBP Designation for | |
| Solicitation #: | Procurement Contract Title: |

- SBR/SBP, MBE, and VSBE Worksheets have been updated for clarity and to provide instructions

| | |
|--|--|
| The extent to which direct solicitation, subcontracting, race-neutral measures, or a combination will most likely result in maximum small business participation. [describe market research and outreach performed to increase small business participation] | |
| Are there at least two certified small businesses available to perform contracts at the prime contract level? (Rule of 2: SBR designation should be applied) [yes/no] | |
| Geographical proximity of certified small businesses to the work location. [list the jurisdiction where the work is to be performed and the surrounding jurisdictions that were included in the search for available certified small businesses] | |



Recent Changes to PRG Guidance

Additional Considerations

- Waivers are only required for SBR Program designations; waivers are not required for SBP Program designations
- If the solicitation is amended to remove the SBR designation, an SBP designation must be applied if the “Rule of 1” is met.



PRG Reminders

When setting MBE goals, ensure your agency

- Has at least one or more standing procurement review group(s) within your unit.
- Has a PRG 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 Reminders

When setting MBE goals, ensure your agency

- Thoroughly evaluates 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](#)
- Evaluates solicitations on a case-by-case basis
- Uses past similar contract compliance as a model
- Includes written justification in PRG Determination (for historical purposes and protest)





PRG Reminders

When setting MBE goals, ensure your agency considers

- Did the unit list all possible NAICS/UNSPSC Codes on the PRG Form for all identified categories of work?
- If small, minority, women, and veteran-owned businesses are available in the categories identified (After a search for State-certified MBE firms? for SBR firms? for VSBE firms?)
- Does it make sense geographically?
- The 60% Rule's impact on goalsetting and goal achievement?



PRG Reminders

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 firms identified, Engineers Estimate (if applicable), cost breakdown, and SOW



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



Other Reminders

- MBE goals/subgoals and MBE forms should be on the agenda for all Pre-bid Conferences
- Directly solicit certified MBE firms at every Opportunity
- Build up your pool of vendors via networking events





PROCUREMENT FORECAST

Procurement Forecast

The screenshot shows the 'Procurement Forecast Portal' website. At the top, a navigation bar includes a search bar and links for HOME, MBE PROGRAM, MBE OMBUDSMAN, SBR PROGRAM, VSBE PROGRAM, RESOURCES, and FORECAST (circled in red). Below the navigation bar is a banner for the 'GOVERNOR'S OFFICE OF Small, Minority & Women Business Affairs' with social media icons. A left sidebar contains 'Quick Links' (About Us, Legislation and Policy, Outreach, News, Reports, Contact Us) and 'Recent' items. The main content area is titled 'Procurement Forecast Portal' and includes a welcome message, a description of the database, and advice to connect with the buyer. Below this is a search section with a 'Search - Description' input field, a 'Search' button, and an 'Export To Excel' button. There are also dropdown menus for 'Search by Agency', 'Search by Procurement Categories', 'Search by Contract Value', 'Search by Region', and 'Search by Projected Advertisement Dates'. At the bottom, a table displays search results for 'Information Technology' services, including details on the procurement method and description.

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

Recent

Public Data Mining Strategies

- Procurement Forecast - VIDEO
- Procurement Forecast - SLIDE DECK
- Communicating with Confidence - VIDEO
- Communicating with Confidence - SLIDE DECK

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

Export To Excel

Reset All Filters

Search by Agency

Search by Procurement Categories

Search by Contract Value

Search by Region

Search by Projected Advertisement Dates

Agency Name: Information Technology
Procurement Category: Information Technology - Services
Procurement Method: To Be Determined
Description: GIS SOFTWARE AS A SERVICE MASTER CONTRACT

Procurement Forecast




SENATE BILL 1014 - Procurement Forecast and Outreach

On or before June 30 each year, each unit shall submit to the office a procurement forecast for all procurement contracts over \$100,000 for the upcoming fiscal year.

Each unit shall notify the office within 15 days of any updates to the existing forecast, including:

(i) additional procurements forecasted for the current fiscal year; and

 (ii) any previously forecasted procurements that are no longer anticipated to occur during the fiscal year.

Procurement Forecast Instructions



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

Instructions for Completing FY2026 Procurement Forecast Report

**Please read these instructions while completing
the Procurement Forecast Excel template.**

In support of the state's socioeconomic procurement programs, units participating in the Small Business Reserve (SBR), Minority Business Enterprise (MBE) and Veteran-Owned Small Business Enterprise (VSBE) programs are required to submit a completed FY2026 Procurement Forecast template with Attestation Signatures to the Governor's Office of Small, Minority & Women Business Affairs (GOSBA) annually. Submission of the Procurement Forecast satisfies GOSBA's request pursuant to COMAR 21.11.03.17, 21.11.01.06 and 21.11.14.06 (B)

The FY2026 Procurement Forecast report **must** include all current/existing and projected contracts (including sole source and task orders) \$100,000 or more **that are anticipated to be advertised in FY2026**. Units only need to submit one report with all projected procurements.

Please note that the data provided will be available to the public in a searchable format on GOSBA's website. The Procurement Forecast is one of the most active pages on our website and is used throughout the year by small, minority, women and veteran-owned businesses that are interested in state procurement opportunities.

All participating units are required to submit their FY2026 Procurement Forecast no later than June 30, 2025 via email to compliance.gosba@maryland.gov. The submission should include:

- The attestation signed electronically in pdf format.
- The FY2026 completed Procurement Forecast should be submitted in Excel format.

NOTE: Do not try to add columns or change the drop-down menus. This Excel spreadsheet will be uploaded to our Procurement Forecast database and it will not load if the spreadsheet has been

Procurement Forecast Instructions

TABS

FY2026 Procurement Forecast

All solicitations and contracts (both current/existing and new state- and federally funded) of \$100,000 or higher that **are projected to be advertised during FY2026** should be included in the report. The Forecast should also include task orders under master contracts and sole source contracts. Please **do not** include modifications, change orders, renewals, or options for current contracts. You are strongly encouraged to include contracts below the threshold whenever possible. **Small businesses are often looking for contracts below \$100,000.**

Attestation Signatures

Execute as requested.

COLUMNS

Column A – Unit Name *(required field)*: Select the unit's name from the drop-down menu. If your unit is not listed, contact GOSBA immediately at compliance.gosba@maryland.gov, so that we may add your unit. Do Not add it yourself.

CURRENT/EXISTING CONTRACTS THAT ARE PROJECTED TO BE RE-SOLICITED in FY2026 SHOULD COMPLETE COLUMNS B-E *(If there is no current/existing contract, leave Columns B-E blank)*

Column B – Contract Number: *(required field)* Provide the ADPICS contract number or, for non-FMIS agencies, another agency identifier for the most recent current/existing contract.

Column C – Current Base Contract Amount *(required field)*: Select the appropriate value range for the current/existing contract, excluding options and modifications, from the drop-down menu selections.

- USM Simplified \$5,000 to \$200,000
- \$15,000 to \$100,000
- \$100,001 to \$500,000
- \$500,001 to 1,000,000
- \$1,000,001 to \$5,000,000
- \$5,000,001 to \$10,000,000
- \$10,000,001 to \$20,000,000
- Over \$20,000,000



Procurement Forecast Reconciliation for Previous [SB1014](#)

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

- (i) the status of the forecasted procurements;
- (ii) the total number of forecasted contracts that have been awarded; and
- (iii) the total number of procurements that have been awarded but were unanticipated by the unit's prior fiscal year's procurement forecast.



Procurement Forecast Reconciliation for Previous FY2025



GOSBA will email Each Agency/Unit's previous FY Procurement Forecast (FY2025) on July 1, 2025, that will contain an additional tab with questions to reconcile that previous FY Forecast and submit on or before August 15, 2025.

Any questions about the Procurement Forecast should be submitted to:

Lisa Mitchell Sennaar
lisa.Sennaar@maryland.gov







Special Secretary Maria Martinez



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





Awards/Recognitions

Executive Order 01.01.2024.38

Delivering a More Efficient, Equitable, and Competitive
Procurement System for Maryland

Presented By: Tracie Bolden
MBE Ombudsman Compliance Manager

June 4, 2025





What is an Executive Order?

A directive with the force of law typically based on existing statutes.

How does EO 01.01.2024.38 impact Maryland?


Provides the framework for reforming policies and procurement practices while also increasing opportunities for state contract participation.

Why does the EO matter to Liasons?

The MBE liaison plays a critical role in implementing the vision of the EO. In addition to supporting COMAR 21.11.03.05 goals, it promotes diverse supplier engagement, aligns with social equity initiatives, and encourages interagency collaboration.



| Executive Order Section |
|---|
| Authorizing Comprehensive Contract Management Process & Technology Improvements |
| Expanding Participation for Small and Socially and Economically Disadvantaged-owned Business Programs in State Procurement |
| Strengthening Compliance with MBE and VSBE Contractual Goals |
| Increasing Accountability for Contractor Compliance with Socioeconomic Procurement Goals |
| Establishing Agency-Level Socioeconomic Procurement Goals |
| Governor's Subcabinet on Socioeconomic Procurement Participation |
| Increasing Competition in the Maryland Procurement Marketplace |
| Strengthening Maryland's Procurement Workforce |
| Utilization of Maryland's Historically Black Colleges and Universities (HBCUs) |



GOSBA leads and/or has a critical role in sections listed in **Bold**.

GOSBA Impacted Areas



Legislative Efforts

- Extension of certification expiration date(s) from one to three years (MDOT overseeing MBE and DBE)
- Finalization of persistent failure regulations

Training Efforts

- TIPS Webinars and Small Business Resource Connections (in progress)
- Targeted training for procurement officers and liaisons
- Creation of Mentor-Protege program for vendors

Compliance Efforts

- Unit level goal setting to accurately measure the contributions of participating agencies
- Updates to MBE Forms

Reporting Efforts

- Establishment of Socioeconomic Subcabinet to gather data/explore additional opportunities to grow state procurement.
- Updates to reporting templates and schedules

Research Efforts

- Conducting surveys to understand the impact of bonding requirements and the 60% rule.
- Streamlining certification among the programs
- Legislative policies for VSBE and SBR compliance



Opportunities Ahead for Liaisons

- Training and professional development for the MBE liaisons
- Collaboration across agencies to share best practices
- Use the EO as leverage to advocate for the programs
- Utilize technology and data tools to streamline outreach and compliance



Resources

[Executive Order](#)

[GOSBA Website](#)

[COMAR 21.11.03.05](#)

Outreach



Laura Gutierrez

Director of Communications and Outreach

Group Activity



The background of the slide is a light gray gradient. In the top-left and bottom-right corners, there are several realistic water droplets of various sizes, rendered with soft shadows and highlights to give them a three-dimensional appearance.

Let's play a game of

THIS
or
THAT?



Coffee

or



Tea



Work from home

or



Work in the office



Early bird

or



Night owl



Beach vacation

or



City adventure

 **Dad jokes or**  **Sarcasm**



Always be 10 minutes late

or



Always be 20 emails behind



Never attend another meeting

or



Never check your inbox again



Virtual Liaison Meetings

or

In-Person Liaison Meetings





Searching in eMMA Directory

or

Searching in MDOT Directory



Office Of Minority
Business Enterprise
Maryland's Official
Certification Agency



NAISC Codes

or

UNSPSC (Commodity) Codes



MBE Program Updates



- Annual Report Training Sessions
- Best Practices
- Form 3 Payment Portal Logins
- 4th QTR Reports Due October 15



Annual Report Training Sessions

- A google form survey will be sent to all MBE liaisons and Report Preparers on July 1, 2025 to sign up for dedicated training sessions for Annual Reporting
 - **Awards Training** will be broken down by the:
 - Annual Report Forms (Form 1-2)
 - Contracts Inventory
 - **Payments Training** will focus on the:
 - Form 3 Payment Portal (Manual & Template Upload Method)
 - **Compliance Training** will focus on the:
 - Compliance Assessment
 - **Backup Data** Training will focus on:
 - How to properly scrub and organize data for final submission

Annual Report Training Sessions (contd)

- These trainings will be offered **several times** throughout July 1, 2025- September 16, 2025
- If you are unable to attend live training sessions, be sure to:
 - Book a one-on-one session with your designated MBE Compliance Manager
 - Or view the pre-recorded trainings on the [MBE Reporting Toolkit](#)

Best Practices to prep for annual reporting

- Begin working on the annual report **as close to July 1** as possible to allow time for any data errors that may be revealed while scrubbing
- Set internal deadlines with your leadership to ensure they have ample amount of time for final review and signatures prior to submission to GOSBA on **September 30, 2025**
- Focus on scrubbing and organizing your backup data **first**, once the data is complete you will simply plug in your final numbers into the reporting templates
 - Be sure to have all the necessary data fields for each backup data report

Supplemental Reporting Guidance



- Utilize the Supplemental Reporting Guidance Found in the MBE Reporting Manual, when you are ready to enter final numbers in the reporting templates for exact cell references

Form 1 (Quarterly & Annual Template) Total All Awards Table

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 Subcontract & 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 | 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 | 0.00% |
| Direct Voucher | 0 | 717 | 0 | 711 | 0 | \$0 | | | 0 | \$0 | 0.00% |
| Totals | 0 | \$0 | 0 | \$0 | 0 | \$0 | 0 | \$0 | 0 | \$0 | 0.00% |

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

Reporting Template

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



Annual Report Submission Checklist



- Utilize the Annual Report Submission Checklist Found in the MBE Reporting Manual, prior to final submission to ensure your agency has a complete submission



Annual MBE Report Submission Checklist

Procurement units should utilize this checklist to ensure the final submission of the FY2024 MBE Annual Report is completed in its entirety.

- ☐ **Fiscal Year 2024 Consolidated Strategic Plan** (MS Word or PDF file), sent to GOSBA, due June 30, 2022
- ☐ GOSBA Procurement Awards and Outreach Data FY2024 **Annual Report Forms** 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)**



Form 3 Payment Portal Logins



- Contact your designated MBE Compliance Manager for your agency Form 3 login



Who to contact for technical assistance in Form 3 Portal

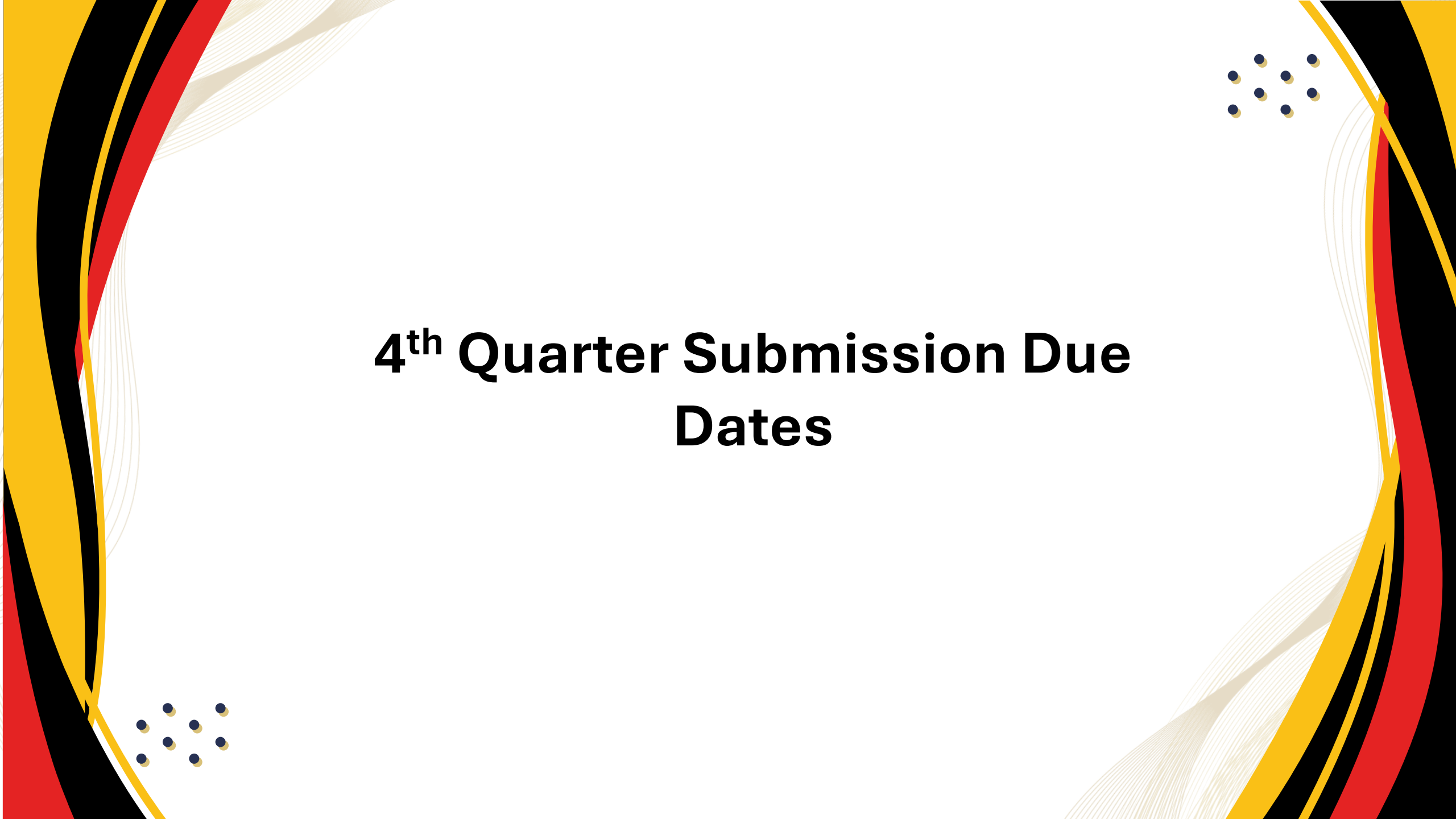
GOSBA

- Retrieving username and password
- Unlocking account after too many login attempts
- Re-opening submission for the FY after already submitting report
- Questions about importing

DoIT

- Non-responsive page/buttons
- Overall system errors not related to importing

Please note: It is important to notify GOSBA of any issues that may arise to ensure that it is not a global issue.



4th Quarter Submission Due Dates



- For the **MBE Reports Forms (Form 1-2)** there is **no 4th QTR due date**, since the Annual Report will become the final submission for the FY.
- For the **Compliance Check-in survey** and the **MBE Procurement Activity** excel **4th QTR will be due** on October 15th.

Submission Requirements

1. **MBE Compliance Check-In (Google Form Survey)**

Link to access the google form:

https://docs.google.com/forms/d/e/1FAIpQLSeV6MXo8asFVq4ur-lLio5aaf2MwQJdBhkaDzug_-uXls9sFg/viewform

2. **MBE Procurement Activity Report (Excel template)**

Includes template for direct vouchers, renewals, modifications and awards.

Download the excel template here: [MBE Procurement Activity Report](#)



**As always, if you have questions
after today's training, please
contact the MBE COMPLIANCE
MANAGERS:**

Karen Reyes
MBE Compliance Manager
karen.reyes@maryland.gov

Tiara Randolph
MBE Compliance Manager
tiara.randolph@maryland.gov



SMALL BUSINESS RESERVE (SBR) PROGRAM Updates



CSB Vendors

- Certified Small Business (CSB) Vendors - 5500+
- eMMA is the ONLY place to find certified **CSBs**.
- Remember to refer to vendors as CSBs (as opposed to SBRs)

These vendors include participants from both programs:

- Small Business Reserve (SBR) Program
- Small Business Preference (SBP) Program

COMAR [21.11.01.02](#)



SBR (CSB) Program Updates

-Per [Executive Order 01.01.2024.38](#):

“Effective immediately, all Procurement Officers are hereby directed to:

- a. Designate a procurement as SBR if market research indicates that two or more certified small businesses under the SBR program can perform the work or provide the desired goods or services”

-PRG Guidance & Worksheets Document has been updated (procurement.maryland.gov)

SBR Program Updates



PRG Guidance & Worksheets Document also updated to include SBP Program



Procurement Review Group *Guidance & Worksheets*



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

- (1) Eligible for designation to the Small Business Reserve (SBR) Program when the total value is expected to exceed \$50,000 and at least two (2) certified small businesses have been identified,
- (2) Eligible for Small Business Preference (SBP) Designation when not designated for the SBR Program and at least one (1) certified small business has been identified, and

SBR (CSB) Program Updates



Additional Considerations

- Waivers are only required for SBR Program designations; waivers are not required for SBP Program designations
- If the solicitation is amended to remove the SBR designation, an SBP designation must be applied if the “Rule of 1” is met.

SBR (CSB) 3rd Qtr Report Data



- Per FY25 3rd Quarter Reports received, the SBR (CSB) set-aside percentage is trending in the right direction
- According to the data submitted, from FY25- 2nd to 3rd Quarter performance, there was a 7% increase in the Overall CSB (SBR) Percentage
- This information includes Non-Designated and Designated Awards to CSBs
- Based upon this data and with units continuing to provide awards to CSBs, it is expected that the 20% set-aside will be reached



SBR (CSB) 3rd Qtr Report Data

Remember that:

- Reports (Quarterly and Annual) are mandatory
 - However, for the 3rd Quarter, there was a submission rate of 89%
- Units that do not submit the Reports are identified as such on the Statewide Report that we are required to forward to the Governor, Lieutenant Governor, the Board of Public Works, and the Governor's Cabinet



SBR Program Best Practices

-Vendor Outreach/Interactions

- Encourage Vendors to become certified small businesses
- Host/Attend Vendor Outreach Events
- Suggest vendors attend our monthly VSBE/SBR Certification Workshops
- Reach out to our office (Mr. Eduardo Hayden) to obtain a table to network with vendors at one (or more) of our events, including RSG

**Many Thanks to those of you who are encouraging vendors to become
certified small businesses!**

(Companies are sharing when they are notified by units to join)

SBR (CSB) Best Practices

SBR Program Reporting- Remember:

- Signatures are only required for the Annual Report
- Make certain all fields have data entered (even if zero)
- Provide information in the “Notes” section, as necessary



| Awards to Certified Small Businesses (CSBs) | | | | | | | |
|---|---|--|---|---|---|--|--|
| | Total # All Procurement Contracts Awarded | Total \$ All Procurement Contracts Awarded | Total # Non-Designated Contracts Awarded to CSBs | Total \$ Non-Designated Contracts Awarded to CSBs | Total # Designated Contracts Awarded to CSBs (SBRs) | Total \$ Designated Contracts Awarded to CSBs (SBRs) | Percentage of CSB (SBRs) Participation |
| BPO/PO Awards | QTY 709 & 710 REPORTS | \$ from 709 & 710 REPORTS | QTY 709 & 710 REPORTS | \$ from 709 & 710 REPORTS | QTY 709 & 710 REPORTS | \$ from 709 & 710 REPORTS | |
| DV Awards | QTY 717 REPORT | \$ from 717 REPORT | QTY 717 REPORT | \$ from 717 REPORT | | | |
| P-card | QTY 721 REPORT | \$ from 721 REPORT | QTY 721 REPORT | \$ from 721 REPORT | | | |
| Total | 0 | \$0 | 0 | \$0 | 0 | \$0 | |
| Payments to Certified Small Businesses (CSBs) | | | | | | | |
| | Total # of Unique CSBs (SBRs) to Receive Payments | Total \$ Payments to All Contractors | Total \$ Payments to CSBs (SBRs) under Non-Designated | Total \$ Payments to CSBs (SBRs) under SBR Designated | Total \$ P-Card Payments to CSBs (SBRs) | Percentage of CSB (SBR) Payments | |
| BPO/PO/DV | QTY 065/067 REPORT | \$ from 065/067 REPORT | \$ from 065/ 067 REPORT | \$ from 065/067 REPORT | | | |
| P-Card | QTY 721 REPORT | \$ from 721 REPORT | | | \$ from 721 REPORT | | |
| Total | 0 | \$0 | \$0 | \$0 | \$0 | | |
| Notes: | | | | | | | |
| Signatures <u>are not</u> required for Quarterly Reports. Remember that Signatures <u>are</u> required during submission of the Annual Report (Combined 1-4 Qtrs). | | | | | | | |
| Agency Head Name and Signature: | | | | | | | |
| Chief Financial Officer Name and Signature: | | | | | | | |
| Submitted By: | | | | | | | |
| Title: | | | | | | | |
| Telephone Number/Email Address: | | | | | | | |
| Submission Date: | | | | | | | |

<

>

Instructions

SBR Report Summary

Sheet3

+

SBR (CSB) Best Practices

SBR Program Reporting- Remember to:

Utilize the Socioeconomic Reporting Guidance for scrubbing (very crucial)



Socioeconomic Data Reporting Guidance

This Socioeconomic Data Reporting Guidance is a reporting tool to assist state procurement units in properly identifying reporting exclusions for Small Business Reserve (SBR), Minority Business Enterprise (MBE), and Veteran-Owned Small Business Enterprise (VSBE) participation data reports.

State procurement units are required to submit quarterly and annual participation attainment data to the Governor's Office of Small, Minority & Women Business Affairs (GOSBA). Not all awards and payments can be counted towards the State's socioeconomic procurement programs participation. This guidance was prepared by GOSBA in collaboration with:

- Department of General Services (DGS)
- Office of the Comptroller (COM)
- Department of Budget and Management (DBM)
- GAD List Workgroup members

It is important for report preparers to have a general understanding of the SBR, MBE, and VSBE programs and procurement processes. This guidance is not an absolute list of inclusions and/or exclusions. Report preparers are expected to confer with their unit's procurement team for contract specific details.



Object 06- Fuel and Utilities DO NOT REPORT

- Some subobject codes in Comptroller Object Code 06 apply to specific circumstances. See below for guidance on how to properly classify line items.

Fuel and Utilities: The subobject codes in Object 06 that apply to Fuel and Utilities do not fall under procurement practices and are considered expenditures. This **should not be confused** with contracts awarded to vendors to provide plumbing services, electricians, HVAC or fuel contracts.

Subobject Codes that are exempt per COMAR 21.01.03.01:

| Code | Definition | Notes |
|--|---|---|
| 0697- Maryland Environmental Service (MES) Charges | To record payment to the Maryland Environmental Service for operation of facilities | This code is exempt under COMAR 21.01.03.01A(4) Contracts or like business agreements between a State agency and: |
| 0698- Loan Repayment- Energy Conservation Fund | Any loan repayments made to the Energy Conservation Loan Fund. | This code is exempt under COMAR 21.01.03.01A(4) Contracts or like business agreements between a State agency and: |

Object 07- Motor Vehicle Operations and Maintenance REPORT

- Some subobject codes in Comptroller Object Code 07 apply to specific circumstances as noted below.

Guidance for Vehicle Maintenance, Repair, Fuel, Oil, Gas, and Parts:

| | |
|--|--|
| Statewide Contract for Vehicle Maintenance and Repair: | DGS currently has a statewide vehicle maintenance and repair contract with Element Vehicle Management Services, LLC . Awards are reported by DGS and payments made towards the statewide are reported by the procurement unit. |
| Statewide Contract for Fuel Supply and Maintenance Services: | DGS currently has a statewide contract for Oil, Gas, Fuel, and Utilities with Carroll Independent Fuel Co Inc . Awards on this statewide contract are reported by DGS and payments made towards this statewide contract are reported by the procurement unit. |
| Credit Card Transactions for Parts: | There are times procurement units may note transactions on their credit card reports to Autozone or Advanced Auto Parts, or independent auto shops for example. These transactions can be included in your agencies awards and payments. |

Subobject Codes that should not be reported (continued on next page):

| Code | Notes |
|--|--|
| 0704- Insurance 0713- Insurance 0723- Insurance 0733- Insurance | Insurance is considered an expenditure through the Self Insured Fund and is exempt from procurement practices. |

SBR (CSB) Best Practices

SBR Program Reporting- Remember to:

Refer to the SBR Template Instructions &
SBR Quarterly/Annual Report Instructions

SECTION 1 (AWARDS)

Certified Small Business (previously SBRs) Awards data should include:

| Awards Data | Add in Cell(s) on Report Summary | | |
|--|----------------------------------|------------------|---------------------|
| Total Number (#) All Procurement Contracts Awarded | <i>B17 (BPO/PO Awards)</i> | <i>B18 (DVs)</i> | <i>B19 (P-card)</i> |
| Total Dollar Value (\$) All Procurement Contracts Awarded | <i>C17 (BPO/PO Awards)</i> | <i>C18 (DVs)</i> | <i>C19 (P-card)</i> |
| Total Number # Non-Designated Contracts Awarded to CSBs | <i>D17 (BPO/PO Awards)</i> | <i>D18 (DVs)</i> | <i>D19 (P-card)</i> |
| Total Dollar Value (\$) Non-Designated Contracts Awarded to CSBs | <i>E17 (BPO/PO Awards)</i> | <i>E18 (DVs)</i> | <i>E19 (P-card)</i> |
| Total Number (#) Designated Contracts Awarded to CSBs | <i>F17 (BPO/PO Awards)</i> | | |
| Total Dollar Value (\$) Designated Contracts Awarded to CSBs | <i>G17 (BPO/PO Awards)</i> | | |

SECTION 2 (PAYMENTS)

Certified Small Business (previously SBRs) Payment data should include:

| Payments Data | Add in Cell(s) on Report Summary | |
|---|----------------------------------|---------------------|
| Total Number (#) of Unique CSBs to Receive Payments | <i>B25 (BPO/PO/DVs)</i> | <i>B26 (P-card)</i> |
| Total Dollar Value (\$) Payments to All Prime Contractors | <i>C25 (BPO/PO/DVs)</i> | <i>C26 (P-card)</i> |
| Total Dollar Value (\$) Payments to CSBs under Non-Designated Contracts | <i>D25 (BPO/PO/DVs)</i> | |
| Total Dollar Value (\$) Payments to CSBs under SBR Designated Contracts | <i>E25 (BPO/PO/DVs)</i> | |
| Total Dollar Value (\$) P-Card Payments to CSBs | <i>F26 (P-Card)</i> | |

10.2024



SMALL BUSINESS RESERVE (SBR) FY2025 QUARTERLY/ANNUAL REPORT INSTRUCTIONS

GENERAL GUIDELINES:

Per Senate Bill 673/House Bill 962 (State Procurement - Small Business Reserve Program - Goals and Outreach Program):

To the extent practicable, a unit shall structure its procurement procedures to achieve a minimum of 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 certified small businesses.

A unit may apply toward the unit's overall annual Small Business Reserve achievement awards made to a certified small business under designated Small Business Reserve contracts as well as awards made to a certified small business under contracts that are not designated for the Small Business Reserve.

Reports shall:

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

SBR (CSB) Best Practices

SBR Program Reporting

For the AWARDS section (SBR Report)

- FMIS Units can retrieve Data Reports from ANSWERS- 709/710, 068, 717 & 721

>>“BPO/PO Awards”, you can utilize the 709/710 Reports OR 068 Report

>>“DV Awards”, you can utilize the 717 Report

>>“P-Card Awards”, you can utilize the 721 Report

- NON-FMIS Units (or those units that do not use the ANSWERS Database) should utilize their specific databases, in which the Awards/Payments data is collected

SBR (CSB) Best Practices

SBR Program Reporting

For the AWARDS section (SBR Report), remember that:

- For the BPO/PO Awards data, decide whether you will use the 709 & 710 Reports combined. OR only the 068 Report (option, but not recommended)

| | Awards to Certified Small Businesses (CSBs) | | | | | | Percentage of CSB (SBR) Participation |
|---------------|---|--|---|--|---|--|---------------------------------------|
| | Total # All Procurement Contracts Awarded | Total \$ All Procurement Contracts Awarded | Total # Non-Designated Contracts Awarded to CSBs (SBRs) | Total \$ Non-Designated Contracts Awarded to CSBs (SBRs) | Total # Designated Contracts Awarded to CSBs (SBRs) | Total \$ Designated Contracts Awarded to CSBs (SBRs) | |
| BPO/PO Awards | 19 | \$50,900 | 5 | \$3,600 | 5 | \$30,500 | |

- Note; 376 Report provides the Prime Contract Awards (and includes an identifier for awards pertaining to the SBR data); If using 376 Report? also add any applicable data from the 365 Report (or BPO-PO Change Order Report); Including 365 Report will add adjustments-changes that were made to BPO-POs;*

SBR (CSB) Best Practices

Example of Utilizing 709/710 Reports

| Awards to Certified Small Businesses (CSBs) | | | | | | |
|---|---|--|---|--|---|--|
| | Total # All Procurement Contracts Awarded | Total \$ All Procurement Contracts Awarded | Total # Non-Designated Contracts Awarded to CSBs (SBRs) | Total \$ Non-Designated Contracts Awarded to CSBs (SBRs) | Total # Designated Contracts Awarded to CSBs (SBRs) | Total \$ Designated Contracts Awarded to CSBs (SBRs) |
| BPO/PO Awards | 19 | \$50,900 | 5 | \$3,600 | 5 | \$30,500 |

| Contract Amount | Vendor Number | Vendor Name | Fiscal Effective Date | Effective Date | SBR Type | SBR Procure Ind |
|-----------------|---------------|--------------------|-----------------------|----------------|----------|-----------------|
| \$2,500 | | ABC Cleaning | 12/20/2024 | 12/20/2024 | SBR | Y |
| \$8,000 | | ABC Cleaning | 11/7/2024 | 11/7/2024 | SBR | Y |
| \$10,000 | | ABC Cleaning | 3/2/2025 | 3/2/2025 | SBR | Y |
| \$5,000 | | A Plus Catering | 2/15/2025 | 2/15/2025 | SBR | Y |
| \$5,000 | | A Plus Catering | 7/24/2024 | 7/24/2024 | SBR | Y |
| \$1,200 | | Sunflower Inc. | 3/25/2025 | 3/25/2025 | SBR | |
| \$1,000 | | Sunflower Inc. | 2/8/2025 | 2/8/2025 | SBR | |
| \$550 | | Sunflower Inc. | 12/8/2024 | 12/8/2024 | SBR | |
| \$250 | | Sunflower Inc. | 1/5/2025 | 1/5/2025 | SBR | |
| \$550 | | Pens & Things | 9/27/2024 | 9/27/2024 | | |
| \$1,000 | | Pens & Things | 8/7/2024 | 8/7/2024 | | |
| \$850 | | Pens & Things | 1/9/2025 | 1/9/2025 | | |
| \$4,000 | | FedEx | 3/6/2025 | 3/6/2025 | | |
| \$8,000 | | UPS | 3/9/2025 | 3/9/2025 | | |
| \$1,200 | | UPS | 2/5/2025 | 2/5/2025 | | |
| \$500 | | UPS | 2/6/2025 | 2/6/2025 | | |
| \$1,500 | | USPS | 9/2/2024 | 9/2/2024 | | |
| \$2,000 | | USPS | 10/20/2024 | 10/20/2024 | | |
| \$4,000 | | USPS | 2/13/2025 | 2/13/2025 | | |
| \$2,500 | | USPS | 3/16/2025 | 3/16/2025 | | |
| \$1,000 | | BGE | 1/5/2025 | 1/5/2025 | | |
| \$2,500 | | BGE | 11/23/2024 | 11/23/2024 | | |
| \$10,000 | | State of MD Agency | 11/24/2024 | 11/24/2024 | | |
| \$5,000 | | State of MD Agency | 11/25/2024 | 11/25/2024 | | |



| 709 Report | | | | |
|---------------|--------------|--------------------------|-----------|---|
| Vendor Name | CO Effective | Original Contract Amount | CO Amount | SBR |
| Prints Inc. | 9/21/2024 | \$5,000 | \$600 | Y |
| Pens & Things | 1/25/2025 | \$850 | \$200 | |
| FedEx | 3/20/2025 | \$1,000 | \$500 | |
| USPS | 11/20/2024 | \$2,000 | \$800 | |
| | | | | \$1,300 Scrubbed/Reportable Change Orders- 709 Report |
| | | | | \$600 SBR Non-Designated- Change Order |
| | | | | Exemptions |
| | | | | 3 Scrubbed/Reportable Change Orders- 709 Report |

| | |
|----------|--|
| \$49,600 | Scrubbed/Reportable Amount- 710 Report All Procurement Contracts Awarded |
| \$28,500 | Exclusions |
| \$30,500 | SBR Designated |
| \$3,000 | SBR Non-Designated |
| \$16,100 | Other reportable items |
| 16 | Scrubbed/Reportable # of Procurement Contracts Awarded- 710 Report |

710 Report

SBR (CSB) Best Practices

| Awards to Certified Small Businesses (CSBs) | | | | | | | |
|---|---|--|---|--|---|--|--|
| | Total # All Procurement Contracts Awarded | Total \$ All Procurement Contracts Awarded | Total # Non-Designated Contracts Awarded to CSBs (SBRs) | Total \$ Non-Designated Contracts Awarded to CSBs (SBRs) | Total # Designated Contracts Awarded to CSBs (SBRs) | Total \$ Designated Contracts Awarded to CSBs (SBRs) | Percentage of CSB (SBRs) Participation |
| BPO/PO Awards | 19 | \$50,900 | 5 | \$3,600 | 5 | \$30,500 | |

OR if you decide to utilize Only 068 Report (709/710 Reports would not be needed)

| Amount | Effective Date | Vendor No Masked | Vendor Name | SBR Ind | SBR Vend |
|---|----------------|------------------|--------------------|---------|----------|
| \$2,500 | 12/20/2024 | | ABC Cleaning | Y | Y |
| \$8,000 | 11/7/2024 | | ABC Cleaning | Y | Y |
| \$10,000 | 3/2/2025 | | ABC Cleaning | Y | Y |
| \$5,000 | 2/15/2025 | | A Plus Catering | Y | Y |
| \$5,000 | 7/24/2024 | | A Plus Catering | Y | Y |
| \$600 | 9/21/2024 | | Prints Inc. | | Y |
| \$1,200 | 3/25/2025 | | Sunflower Inc. | | Y |
| \$1,000 | 2/8/2025 | | Sunflower Inc. | | Y |
| \$550 | 12/8/2024 | | Sunflower Inc. | | Y |
| \$250 | 1/5/2025 | | Sunflower Inc. | | Y |
| \$550 | 9/27/2024 | | Pens & Things | | |
| \$1,000 | 8/7/2024 | | Pens & Things | | |
| \$850 | 1/9/2025 | | Pens & Things | | |
| \$200 | 1/25/2025 | | Pens & Things | | |
| \$4,000 | 3/6/2025 | | FedEx | | |
| \$500 | 3/20/2025 | | FedEx | | |
| \$8,000 | 3/9/2025 | | UPS | | |
| \$1,200 | 2/5/2025 | | UPS | | |
| \$500 | 2/6/2025 | | UPS | | |
| \$1,500 | 9/2/2024 | | USPS | | |
| \$2,000 | 10/20/2024 | | USPS | | |
| \$4,000 | 2/13/2025 | | USPS | | |
| \$2,500 | 3/16/2025 | | USPS | | |
| \$800 | 11/20/2024 | | USPS | | |
| \$1,000 | 1/5/2025 | | BGE | | |
| \$2,500 | 11/23/2024 | | BGE | | |
| \$10,000 | 2/20/2025 | | State of MD Agency | | |
| \$5,000 | 8/6/2024 | | State of MD Agency | | |
| \$50,900 Scrubbed/Reportable Amount- 068 Report All Procurement Contracts Awarded | | | | | |
| Exclusions | | | | | |
| \$30,500 SBR Designated | | | | | |
| \$3,600 SBR Non-Designated | | | | | |
| \$16,800 Other reportable items | | | | | |
| 19 Scrubbed/Reportable # of Procurement Contracts Awarded-068 Report | | | | | |

068 Report

SBR Program Best Practices

SBR (CSB) Reporting

| | Payments to Certified Small Businesses (CSBs) | | | | | |
|--------------------|---|--------------------------------------|---|---|---|----------------------------------|
| | Total # of Unique CSBs (SBRs) to Receive Payments | Total \$ Payments to All Contractors | Total \$ Payments to CSBs (SBRs) under Non-Designated Contracts | Total \$ Payments to CSBs (SBRs) under SBR Designated Contracts | Total \$ P-Card Payments to CSBs (SBRs) | Percentage of CSB (SBR) Payments |
| BPO/PO/DV Payments | QTY 065/067 REPORT | \$ from 065/067 REPORT | \$ from 065/ 067 REPORT | \$ from 065/067 REPORT | | |
| P-Card | QTY 721 REPORT | \$ from 721 REPORT | | | \$ from 721 REPORT | |
| Total | 0 | \$0 | \$0 | \$0 | \$0 | |

For the PAYMENTS section (SBR Report):

- “Total # of Unique CSBs (SBRs) to Receive Payments” is obtained by counting the number of the unique individual firms from your support data (*i.e. 065/067- for BPO/PO/DVs and 721- for P-Cards -FMIS Users*)
 - Begin with the vendors that have “Y” listed for the “SBR Vend” column, as these are CSB vendors that have received payments.
 - From that list, count the number of unique CSB (SBR) vendors that received payments.

Non-FMIS Users- Utilize Payment Reports from your financial system

SBR Program Best Practices

SBR (CSB) Reporting (con't)

For the PAYMENTS section (SBR Report):

Therefore, if a CSB vendor has received multiple payments, that CSB vendor would only be counted once as a Unique vendor.

| Vendor Name | Po Bpo Id | Effective Date | Contract Title | Voucher Amount | Reportable Amount | SBR Vend | SBR Procure Ind | | | | |
|-----------------|-----------|----------------|----------------|----------------|-------------------|----------|-----------------|--|--|--|--|
| ABC Cleaning | | 12/20/2024 | | \$2,500 | \$2,500 | Y | Y | | | | |
| ABC Cleaning | | 11/7/2024 | | \$8,000 | \$8,000 | Y | Y | | | | |
| A Plus Catering | | 7/24/2024 | | \$5,000 | \$5,000 | Y | Y | | | | |
| A Plus Catering | | 2/7/2025 | | \$1,000 | \$1,000 | Y | Y | | | | |
| A Plus Catering | | 8/7/2024 | | \$2,500 | \$2,500 | Y | Y | | | | |
| A Plus Catering | | 3/2/2025 | | \$1,000 | \$1,000 | Y | Y | | | | |
| Sunflower Inc. | | 2/8/2025 | | \$1,000 | \$1,000 | Y | | | | | |
| Sunflower Inc. | | 12/8/2024 | | \$550 | \$550 | Y | | | | | |
| Sunflower Inc. | | 1/5/2025 | | \$250 | \$250 | Y | | | | | |
| Sunflower Inc. | | 2/5/2025 | | \$500 | \$500 | Y | | | | | |
| Sunflower Inc. | | 3/8/2025 | | \$700 | \$700 | Y | | | | | |
| Pens & Things | | 8/7/2024 | | \$1,000 | \$1,000 | | | | | | |
| Pens & Things | | 1/9/2025 | | \$600 | \$600 | | | | | | |
| Pens & Things | | 2/15/2025 | | \$1,300 | \$1,300 | | | | | | |
| FedEx | | 3/6/2025 | | \$4,000 | \$4,000 | | | | | | |
| UPS | | 3/9/2025 | | \$8,000 | \$8,000 | | | | | | |
| IIPS | | 2/5/2025 | | \$1,200 | \$1,200 | | | | | | |


For this data set, we want to know the number of individual/unique CSB vendors that have been paid not the number of transactions/payments that those vendors have received.

SBR Program Best Practices

SBR Program Reporting

Remember to:

- Submit supporting data (attach it in additional tabs of the SBR Report or send the separate documents via email, along with your SBR Report)
- P-Card data should be listed in both “Awards” & “Payments” section, as these items are counted as both in SBR Program Reports
- Although designated & non-designated awards to certified small businesses are now counted, be sure to continue designating SBR opportunities/ solicitations
- Refer to the [SBR Toolkit](#) for additional information (SBR Quarterly/Annual Report Instructions & Report Template)



3rd Quarter SBR (CSB) Report Data Recognition

Top 3 Units with Highest Dollar Amounts Awarded to CSBs

- General Services
- Housing & Community Development
- Public Safety & Correctional Services

3rd Quarter SBR (CSB) Report

Data Recognition

Highest Increase in Percentage of SBR Program Participation
(From 2nd Qtr to 3rd Qtr)

- Housing & Community Development
- Human Services
- Insurance Administration
- Planning
- State Board of Elections
- Transit Administration
- Workers' Compensation Commission



SBR Program Specific Training

- SBR Annual Reports Training dates for July will be posted in the SBR Toolkit as well as the June Procurement Compliance Bulletin
- Reach out to schedule 1-on-1 meeting to discuss SBR Program Reports
- Remember that we are all in this together and seeking to reach the same goal– contact us as needed



Contact Information

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Small Business Reserve (SBR) Program Reporting Toolkit

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



VSBE Program





VSBE Program Updates Today on:

VSBE Program Updates

VSBE Quarterly Reporting

VSBE Annual Reporting

Outreach

What's Coming for FY2026



VSBE Vendors

As a reminder, eMMA is the ONLY place to find certified VSBEs.

Every participating unit needs to develop their own strategy/procedures on how to procure to certified VSBEs per [COMAR 21.11.14.01](#)

Processing Highlights:

336 new and expired VSBE has been processed from Jan 1- June 1, 2025

FY2025 Quarter 3 Overview

July 1, 2024- March 30, 2025

- 48 units reported on time
- 17 units reported \$0 spent thus far to VSBES
- 7 units have achieved VSBES participation 3% already
- Currently combined with the 48 unit's unverified data:
 - 0.88% of 3% of statewide VSBES goal
 - \$70.4 million spend in awards to VSBES in FY2025 thus far

Direct Solicitations Data Highlights:

164 VSBES were direct solicited thus far in FY205

Quarterly Deadlines

Submission deadlines:

Reports are required to be submitted via email to: **vsbreports.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 |

As a reminder, you will still have to complete a Q4 Procurement Activity Report on October 15th
IN ADDITION TO YOUR ANNUAL reporting items

VSBE Waivers



As a reminder, per our VSBE Waiver Guidance and COMAR 21.11.14.09 (D), if your unit has granted **ANY** VSBE Waiver in FY2025, you are to report a copy of the waiver determination and the reasons for the determination shall be kept by the VSBE Liaison with another copy forwarded to GOSBA (Danielle to the vsbereports.gosba@maryland.gov mailbox)

FY2025 Annual Reporting

VSBE DEADLINE FOR ANNUAL REPORTING SUBMISSION:

October 1st, 2025

ALL OF THE FOLLOWING MUST BE SUBMITTED:

1. VSBE Annual Form Completed Template w/both payment tabs completed
2. All scrubbed backup data in excel format
3. VSBE Outreach Report (Fillable Google Link Form)

FY2025 VSBE Outreach Report

Changes

Additions being requested from your unit:

- Pictures of outreach your unit has done in FY2025
- Zip Codes of Outreach events were located in
- Industry specific needs

VSBE Outreach



VSBE Outreach





Join Us!

Starting in 2025, we began a State Certification Tour helping our small and/or veteran-owned small businesses get certified and connecting

them to resources!

January- Charles County

February- Montgomery County

March- Anne Arundel County

April- Frederick County

May- Baltimore City

June- Prince George's County



Join the Governor's Office of Small, Minority & Women Business Affairs Monthly 2025 Certification Workshop!

This June workshop will be hosted in Prince George's County. Join us for an informative Certification Workshop hosted in collaboration with Prince George's County Economic Development Corporation & Innovation Station Business Incubator. This workshop is designed to assist vendors seeking a Certified Small Business (CSB) certification or re-certification for the Small Business Reserve (SBR) Program and the Veteran-Owned Small Business Enterprise (VSBE) Program. the process for certification. Program to promptly start at 9:45 A.M.

You must bring:

- Own Laptop (required to complete the certification process)
- Google Chrome browser
- Tax ID Number (EIN)
- For VSBE Certification: Electronic copy of your DD214
- For SBR Certification: Electronic access to the last 3 years of your business' gross sales (2024, 2023, and 2022 tax returns) and number of employees

Registration Required



Workshop Details:

June 6, 2025
9:30 A.M. - 12:30 P.M.
1801 McCormick Drive, 3rd Floor
Largo MD 20774



Upcoming FY26 VSBE Outreach



October

2/3- Veteran-Owned Small Business Conference w/DOL

17- Maryland Judiciary MBE & VSBE Outreach Event 2025

November

National Veteran Small Business Week Celebration w/UMD

20- VSBE Appreciation Breakfast @ Live Casino

Goal is to complete more Industry matchmaking with Primes/Subs

What's Coming FY26

- Increased VSBE compliance
- Increased Training
- More outreach opportunities
- More vendors after October 1st



**If you would like to set-up a one on one about your unit's VSBE performance or VSBE assistance, email our VSBE Compliance Manager/VSBE Queen-
Danielle.Davis2@maryland.gov**

