



FY25 SBR Reporting Liaison Training

7/24/2025

FY25 SBR Reporting



Provide information/tips
regarding the SBR Report



Annual SBR Reports due soon
(9/30/2025)



Remember to contact our office for
one-on-one sessions as needed



WE ARE CONTINUING TO TRANSITION FROM STATING "SBR VENDORS" WHEN IDENTIFYING PARTICIPANTS WITHIN THE SBR PROGRAM.

THESE VENDORS SHOULD BE REFERRED TO AS CERTIFIED SMALL BUSINESS (CSB) VENDORS.



CERTIFIED SMALL BUSINESS (CSB) VENDORS CONSIST OF PARTICIPANTS IN BOTH THE SMALL BUSINESS RESERVE (SBR) & SMALL BUSINESS PREFERENCE (SBP) PROGRAMS.



IN THE EMMA PORTAL, IT STATES SBR PROGRAM/SBR CERTIFICATION #/SBR APPLICATION-- BUT REMEMBER THAT VENDORS WHO ARE ELIGIBLE FOR THIS CERTIFICATION ARE A PART OF BOTH PROGRAMS.

Certified Small Business (CSB)

SBR Program

Maryland's Prime Contracting Program for Certified Small Businesses

Provides small businesses the opportunity to participate as prime contractors by allowing small businesses to compete against other small businesses instead of larger companies

Under state procurement law, the SBR Program directs participating units to spend at least 20% of its fiscal year procurement expenditures with Certified Small Businesses

Over 20% of all open solicitations are designated to Certified Small Businesses

SBR Program

Md. Code Ann., State Fin. & Proc.
Art. §14-501- 14-505

Code of Maryland Regulations
21.11.01.06

SBR Program

[Md. Code Ann., State Fin. & Proc. Art. §14-501- 14-505](#)

State Finance and Procurement notes:

- The definition of a small business as it pertains to the SBR Program (eligibility criteria)
- Units shall structure procurement procedures to achieve minimum of 20% set-aside
- Other information pertaining to SBR Program

SBR Program

[Code of Maryland Regulations 21.11.01.06](#)

Notes the following:

Procurement between \$50,000 and \$500,000 shall be designated for the small business reserve.

There are specific exemptions, such as preference procurements made from a preference provider (Maryland Correctional Enterprises, community service providers, Blind Industries and Services of Maryland, individual-with-disability-owned businesses, and the Maryland Vending Facilities Program for the Blind).

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

FY25 SBR Report Format

Per Legislation (HB0962/SB0673):



20% of the unit's total dollar value of goods, supplies, services, maintenance, construction, construction-related services, and architectural and engineering service contracts to be made directly to small businesses



... Apply toward the unit's overall annual Small Business Reserve ACHIEVEMENT AWARDS MADE TO A SMALL BUSINESS UNDER DESIGNATED SMALL BUSINESS RESERVE CONTRACTS AS WELL AS AWARDS MADE TO A SMALL BUSINESS UNDER NONDESIGNATED SMALL BUSINESS RESERVE CONTRACTS



FY25 SBR Report

Note that although awards only count toward the
20% set-aside...

payments are still being recorded on the report

FY25 SBR Reporting

FY25 Format:

Small Business Reserve (SBR) Summary Statement							
Fiscal Year 2025 (July 1, 2024 -)							
Quarterly/Annual Report (check one) : <input type="checkbox"/> Quarter 1 <input type="checkbox"/> Quarters 1-2 <input type="checkbox"/> Quarters 1-3 <input type="checkbox"/> Quarters 1-4/ ANNUAL (see note below)							
(**Remember: SIGNATURES ARE ONLY REQUIRED ON THE ANNUAL REPORT)							
<p>Beginning in Fiscal Year 2025, the unit's overall annual SBR achievement is to include awards made to a certified small business under designated small business reserve contracts as well as awards made to a certified small business for contracts that are not designated as small business reserve. Firms must be certified in the SBR Program as a certified small business at the time of the award to count toward the unit's attainment of 20 % awards to certified small businesses</p> <p>INSTRUCTIONS: Complete all green cells. Automatic calculations will appear in peach cells. Do not edit this Report Summary template.</p>							
Agency Reporting:							
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	TY 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 from 717 REPORT	\$ from 717 REPORT			
P-card	QTY 721 REPORT	\$ from 721 REPORT	QTY from 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 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		

FY25 SBR Reporting

Find the SBR Report Template/Instructions in the [SBR Toolkit](#)

Enter search term

HOME MBE PROGRAM MBE OMBUDSMAN SBR PROGRAM VSBE PROGRAM RESOURCES FORECAST

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

GOVERNOR'S COORDINATING OFFICES HOME

Quick Links

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

Recent

SBR PROGRAM REPORTING TOOLKIT

MBE PROGRAM REPORTING TOOLKIT

VSBE PROGRAM REPORTING TOOLKIT

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

T.I.P.S.
**SMALL BUSINESS
WEBINAR SERIES**

TRAINING & INSIGHTS FOR
PROCUREMENT SUCCESS

REGISTER ONLINE
goMDsmallbiz.maryland.gov

Check out our free small business webinar series.

NEW Program Seals

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

MINORITY BUSINESS ENTERPRISE
MBE
PROGRAM

VETERAN-OWNED SMALL BUSINESS
VSBE
PROGRAM

SMALL BUSINESS RESERVE
SBR
PROGRAM

TOP WEBSITE PICKS

- State of Maryland Disparity Study

gomdsmallbiz.maryland.gov

FY25 SBR Reporting

Find the SBR Report Template/Instructions in the [SBR Toolkit](#)

FY2025 Small Business Reserve (SBR) Quarterly/Annual Report Due September 30, 2025

Per **COMAR 21.13.01.03 B**. The SBR Program Annual Report must be completed and submitted no later than September 30, 2025. The Annual Report will be cumulative with data from July 1, 2024, through June 30, 2025. Units should use the cumulative data from quarters 1 -3. Instead of submitting a 4th quarter Report, add the 4th quarter data to the previous three quarters.

Do not use templates from previous years. Annual Reports are required to be signed by units/agency head.

FY2025 SBR Quarterly/Annual Report Instructions
FY2025 SBR Quarterly/Annual Report Template

REPORTING RESOURCES

Socioeconomic Reporting Guidance - pdf
Socioeconomic Reporting Guidance - video

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

For questions, contact:

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

FY25 SBR Reporting

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:

- (i) State the total number and the dollar value of AWARDS the unit made to certified small businesses under designated small business reserve contracts;
- (ii) 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;

FY25 SBR Reporting

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:

- (i) State the total number and the dollar value of AWARDS the unit made to certified small businesses under designated small business reserve contracts;
- (ii) 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;

The SBR Report Instructions include:

- General Guidelines**
- GOSBA Report Review**
- Submission requirements**
- Line-by-line instructions**

FY25 SBR Reporting



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.

FY25 SBR Reporting



<https://www.youtube.com/watch?v=es1Bo3Y5tgM>

FY25 SBR Reporting

	A	B	C	D	E	F	G	H
2	Small Business Reserve (SBR) Summary Statement							
3	Fiscal Year 2025 (July 1, 2024 -)							
4	Quarterly/Annual Report (check one): <input type="checkbox"/> Quarter 1 <input type="checkbox"/> Quarters 1-2 <input type="checkbox"/> Quarters 1-3 <input type="checkbox"/> Quarters 1-4/ ANNUAL (see note below)							
5	(**Remember: SIGNATURES ARE ONLY REQUIRED ON THE ANNUAL REPORT)							
6								
7	<small>Beginning in Fiscal Year 2025, the unit's overall annual SBR achievement is to include awards made to a certified small business under designated small business reserve.</small>							
8	<small>contracts as well as awards made to a certified small business for contracts that are not designated as small business reserve.</small>							
9	<small>Firms must be certified in the SBR Program as a certified small business at the time of the award to count toward the unit's attainment of 20% awards to certified small businesses.</small>							
10	INSTRUCTIONS: Complete all green cells. Automatic calculations will appear in peach cells. Do not edit this Report Summary template.							
11	Agency Reporting:							
12								
13								
14								
15	Awards to Certified Small Businesses (CSBs)							
16		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
17	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	
18	DV Awards	QTY 717 REPORT	\$ from 717 REPORT	QTY from 717 REPORT	\$ from 717 REPORT			
19	P-card	QTY 721 REPORT	\$ from 721 REPORT	QTY from 721 REPORT	\$ from 721 REPORT			
20	Total	0	\$0	0	\$0	0	\$0	
21								
22	Payments to Certified Small Businesses (CSBs)							
23		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	
24	BPO/PO/DV	QTY 065/067 REPORT	\$ from 065/067 REPORT	\$ from 065/ 067 REPORT	\$ from 065/067 REPORT			
25	P-Card	QTY 721 REPORT	\$ from 721 REPORT		\$ from 721 REPORT			
26	Total	0	\$0	\$0	\$0	\$0		
27								
28	Notes:							
29								
30								
31	Signatures are not required for Quarterly Reports. Remember that Signatures are required during submission of the Annual Report (Combined 1-4 Qtrs):							
32								
33	Agency Head Name and Signature:							
34	Chief Financial Officer Name and Signature:							
35	Submitted By:							
36	Title:							
37	Telephone Number/Email Address:							
38	Submission Date:							
39								
40								
41								

SBR
Template

FY25 SBR Reporting

SBR Template

SBR Data Collection Instructions:

The SBR Report Summary Form is used to collect both award and payment data made to Certified Small Businesses (CSBs, previously referred to as SBRs). The form on the second tab (SBR Report Summary) is separated into 2 parts: Section 1- all award data and specific Certified Small Businesses (previously SBRs) award data & Section 2- all payment data and specific payments made to Certified Small Businesses (previously SBRs).

In order to complete these sections, you must have run all required reports outlined in the SBR Quarterly/Annual Report Instructions from the SBR Toolkit, and scrubbed the data accordingly.

Submission deadline: *NOVEMBER 13* (QTR 1); January 30 (QTRS 1 & 2); April 30 (QTRS 1, 2 & 3); September 30 (Annual Report)

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

Report Summary Form data should include ALL of the following as it pertains to Certified Small Businesses (CSBs, previously SBRs):

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	B17 (BPO/PO Awards)	B18 (DVs)	B19 (P-card)
Total Dollar Value (\$) All Procurement Contracts Awarded	C17 (BPO/PO Awards)	C18 (DVs)	C19 (P-card)
Total Number # Non-Designated Contracts Awarded to CSBs	D17 (BPO/PO Awards)	D18 (DVs)	D19 (P-card)
Total Dollar Value (\$) Non-Designated Contracts Awarded to CSBs	E17 (BPO/PO Awards)	E18 (DVs)	E19 (P-card)
Total Number (#) Designated Contracts Awarded to CSBs	F17 (BPO/PO Awards)		
Total Dollar Value (\$) Designated Contracts Awarded to CSBs	G17 (BPO/PO Awards)		

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	B25 (BPO/PO/DVs)	B26 (P-card)
Total Dollar Value (\$) Payments to All Prime Contractors	C25 (BPO/PO/DVs)	C26 (P-card)
Total Dollar Value (\$) Payments to CSBs under Non-Designated Contracts	D25 (BPO/PO/DVs)	
Total Dollar Value (\$) Payments to CSBs under SBR Designated Contracts	E25 (BPO/PO/DVs)	
Total Dollar Value (\$) P-Card Payments to CSBs	F26 (P-Card)	

Note:

The worksheet must contain tabs with report back up data (or as noted in the SBR Report Summary Instructions, the back up data can be forwarded as separate documents with this SBR Report Summary/Template included via email).

FY25 SBR Reporting

“Instructions” tab states:

Data would be entered on “SBR Report Summary” tab here:

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	B17 (BPO/PO Awards)	B18 (DVs)	B19 (P-card)
Total Dollar Value (\$) All Procurement Contracts Awarded	C17 (BPO/PO Awards)	C18 (DVs)	C19 (P-card)
Total Number # Non-Designated Contracts Awarded to CSBs	D17 (BPO/PO Awards)	D18 (DVs)	D19 (P-card)
Total Dollar Value (\$) Non-Designated Contracts Awarded to CSBs	E17 (BPO/PO Awards)	E18 (DVs)	E19 (P-card)
Total Number (#) Designated Contracts Awarded to CSBs	F17 (BPO/PO Awards)		
Total Dollar Value (\$) Designated Contracts Awarded to CSBs	G17 (BPO/PO Awards)		

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	B25 (BPO/PO/DVs)	B26 (P-card)
Total Dollar Value (\$) Payments to All Prime Contractors	C25 (BPO/PO/DVs)	C26 (P-card)
Total Dollar Value (\$) Payments to CSBs under Non-Designated Contracts	D25 (BPO/PO/DVs)	
Total Dollar Value (\$) Payments to CSBs under SBR Designated Contracts	E25 (BPO/PO/DVs)	
Total Dollar Value (\$) P-Card Payments to CSBs	F26 (P-Card)	

	A	B
3		
4	Quarterly/Ann	
5		
6		
7	made to a certified Firms	
8	INSTRUCTIONS: Complete all green cells.	
9		
10	Agency Reporting:	
11		
12		
13		
14		
15		
16	Total # All Procurement Contracts Awarded	
17	BPO/PO Awards	QTY 709 & 710 REPORTS
18	DV Awards	QTY 717 REPORT
19	P-card	QTY 721 REPORT
20	Total	

FY25 SBR Reporting

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	TY 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 from 717 REPORT	\$ from 717 REPORT			
P-card	QTY 721 REPORT	\$ from 721 REPORT	QTY from 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 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		

Refer to SBR Toolkit for additional steps/how to calculate data.

-Be certain to read the SBR Quarterly/Annual Report Instructions provided in the **SBR Toolkit**

-For the Awards section (Enter data for all fields, even if it is "0"):

>>"BPO/PO Awards", you can utilize the 709/710 Reports **OR** o68 Report

>>"DV Awards", you can utilize the 717 Report

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

Note non-FMIS users will utilize the reports from their specific database.

FY25 SBR Reporting

Examples:

710 Report-

SBR Type	SBR Procure Ind
SBR	

709 Report-

SBR
Y
Y
Y



717 Report-

Vendor Name	SBR Vend
Company A	Y
Company B	Y
Company C	Y
Company D	Y
Company D	Y
Company D	Y

CSB (SBR) Vendors

"SBR Type"
"SBR"
"SBR Vend"

068 Report-

SBR Ind	SBR Vend
	Y

FY25 SBR Reporting

710 Report

SBR Type	SBR Procure Ind
SBR	Y
SBR	Y

SBR Designated Procurement

"SBR Procure Ind"

"SBR Ind"

068 Report-

SBR Ind	SBR Vend
Y	Y
Y	Y
Y	Y

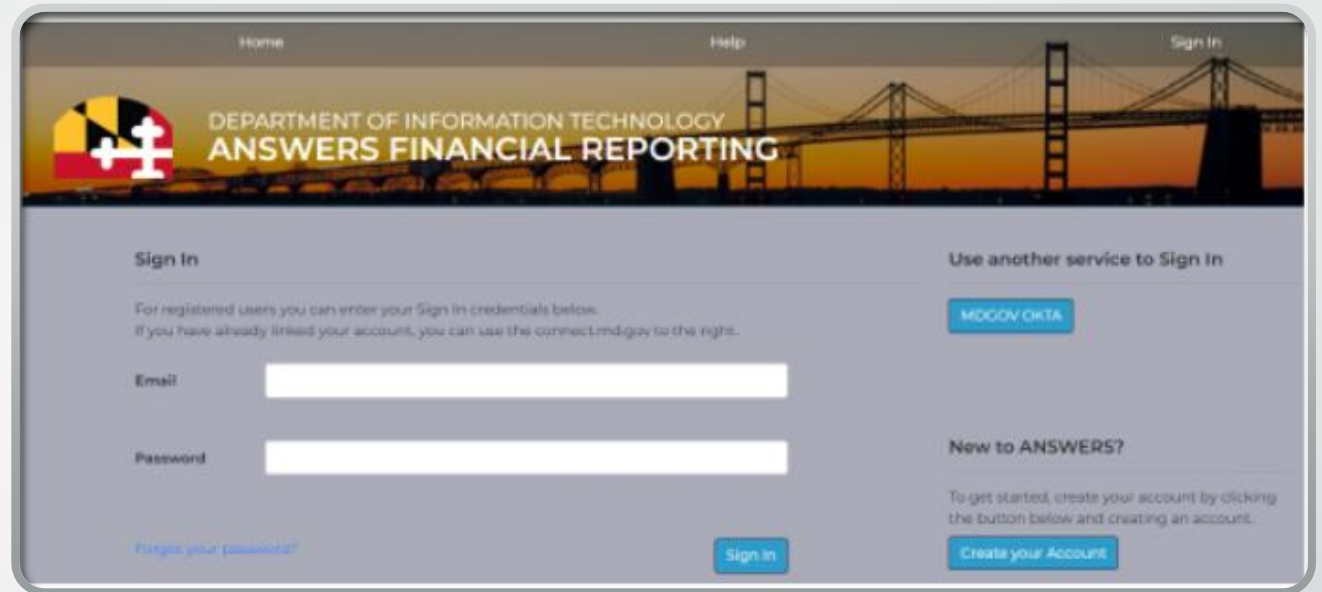
FY25 SBR Reporting

SBR Report Template Sample

			<u>Awards to Certified Small Businesses (CSBs)</u>				
	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	
DV Awards	10	\$17,500	7	\$14,500			
P-card	34	\$130,000	6	\$4,000			
Total	63	\$198,400	18	\$22,100	5	\$30,500	26.51%

FY25 SBR Reporting

SBR Report Template Example
Accessing ANSWERS



The screenshot shows the login interface for the 'ANSWERS FINANCIAL REPORTING' system. At the top, there are links for 'Home', 'Help', and 'Sign In'. The header features the Maryland state flag logo and the text 'DEPARTMENT OF INFORMATION TECHNOLOGY ANSWERS FINANCIAL REPORTING'. The main section is titled 'Sign In' and includes instructions for registered users. It contains input fields for 'Email' and 'Password', a 'Sign In' button, and a 'Forgot your password?' link. To the right, there is a section for 'Use another service to Sign In' with a 'MIDGON OKTA' button, and a 'New to ANSWERS?' section with instructions to create an account and a 'Create your Account' button.

Information listed within SBR
Toolkit

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

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

ANSWERS database for Statewide FMIS users:

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

DoIT Service Desk

100 Community Place

Crownsville, MD 21032

410-697-9700

Service.Desk@maryland.gov

FY25 SBR Reporting

SBR Report Template Sample

			<u>Awards to Certified Small Businesses (CSBs)</u>				
	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	
DV Awards	10	\$17,500	7	\$14,500			
P-card	34	\$130,000	6	\$4,000			
Total	63	\$198,400	18	\$22,100	5	\$30,500	26.51%

FY25 SBR Reporting

SBR Report Template Example

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	

Details of ANSWERS Reports as listed in the SBR Report Instructions:

The following checklist will assist you in your efforts to collect and compile all the data necessary to complete and submit an accurate summary of your procurement unit's procurement activity, including prime contract awards and payments to Certified Small Businesses.

- 1) PCH068- SBR Procurement- Optional
- 2) PCH709- BPO/PO Change Orders (this report has "SBR" identifier)
- 3) PCH710- Diagnostic by Work Category - Prime (Contract Awards Detail) run by award date (this report has "SBR" identifier)
- 4) PCH717- Non-BPO Direct Vouchers (MBE Prime Payments by Direct Voucher; no BPO/PO) Direct Vouchers Awards Reports - This report contains flags for SBR procurement and vendors
- 5) PCH065/067- SBR Expenditure Detail/Summary (SBR Payments Report)
- 6) A30USB12 SBR Purchasing Card (P-Card) Report – optional
- 7) PCH721- R*STARS Voucher Detail and P-Card Payments (includes MBE and SBR flags)

FY25 SBR Reporting

SBR Report Template Sample

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

Amount	Effective Date	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

o68 Report

FY25 SBR Reporting

SBR Report Template Sample

			<u>Awards to Certified Small Businesses (CSBs)</u>				
	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	
DV Awards	10	\$17,500	7	\$14,500			
P-card	34	\$130,000	6	\$4,000			
Total	63	\$198,400	18	\$22,100	5	\$30,500	26.51%

SBR Report Template Sample

SBR Report Template Sample

			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	
DV Awards	10	\$17,500	7	\$14,500			

FY25 SBR Reporting

SBR Report Template Sample

	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	
DV Awards	10	\$17,500	7	\$14,500			
P-card	34	\$130,000	6	\$4,000			
Total	63	\$198,400	18	\$22,100	5	\$30,500	26.51%

Vendor_Name	Effective_Date	Payment_Amt	Reportable_Amt	Reportable_MBE_Amt	vet_flag	SBR_Flag
ABC Company	8/8/2024	\$550				Y
ABC Company	9/18/2024	\$650				Y
ABC Company	10/1/2024	\$600				Y
ABC Company	11/8/2024	\$600				Y
ABC Company	1/8/2025	\$800				Y
ABC Company	3/19/2025	\$800				Y
XYZ Inc.	7/16/2024	\$4,450				
XYZ Inc.	8/16/2024	\$4,450				
XYZ Inc.	9/16/2024	\$4,450				
XYZ Inc.	10/16/2024	\$4,450				
XYZ Inc.	11/16/2024	\$4,450				
XYZ Inc.	12/16/2024	\$4,450				
XYZ Inc.	8/16/2024	\$4,450				
123 Corp.	9/1/2024	\$4,500				
123 Corp.	10/18/2024	\$4,500				
123 Corp.	10/30/2024	\$4,500				
123 Corp.	11/3/2024	\$4,500				
123 Corp.	1/16/2025	\$4,500				
123 Corp.	2/16/2025	\$4,500				
LMN Company	8/2/2024	\$4,500				
LMN Company	8/19/2024	\$4,500				
LMN Company	9/12/2024	\$4,500				
LMN Company	10/11/2024	\$4,500				
LMN Company	2/9/2025	\$4,500				
LMN Company	3/6/2025	\$4,500				
456 Inc.	9/6/2024	\$4,525				
456 Inc.	12/6/2024	\$4,525				
456 Inc.	1/6/2025	\$4,525				
456 Inc.	3/6/2025	\$4,525				
101 LLC	8/2/2024	\$4,550				
101 LLC	9/2/2024	\$4,550				
101 LLC	10/2/2024	\$4,550				
101 LLC	11/2/2024	\$4,550				
101 LLC	12/2/2024	\$4,550				
Professional License Inc	1/2/2025	\$2,500				
Professional License Inc	2/2/2025	\$2,500				
Professional License Inc	3/2/2025	\$2,500				
USPS	12/2/2024	\$4,800				
T&P Association	11/16/2024	\$3,800				
T&P Association	12/8/2024	\$3,800				
T&P Association	2/8/2025	\$3,800				
T&P Association	3/6/2025	\$3,800				
Hyatt	1/14/2025	\$4,000				
Hyatt	3/30/2025	\$4,000				
		\$130,000	Scrubbed/Reportable Amount- 721Report All Procurement Contracts Awarded			
		\$4,000	P-card purchases to SBR Vendors			
			Exclusions			

721 Report

FY25 SBR Reporting



-For the **Payments section** (Enter data for all fields, even if it is "0"):



>>"BPO/PO/DV Payments", you can utilize the 065/067 Report



>>"P-Card Payments", you can utilize the 721 Report

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	TY 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 from 717 REPORT	\$ from 717 REPORT			
P-card	QTY 721 REPORT	\$ from 721 REPORT	QTY from 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 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	

Note non-FMIS users will utilize the reports from their specific database.

FY25 SBR Reporting

Example: PCH065/067-

CSB (SBR) Vendors
"SBR Vend"

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

SBR Designated Procurement
"SBR Procure Ind"

FY25 SBR Reporting

Example: PCH721-

SBR_Flag
Y
Y
Y
Y
Y
Y
Y
Y

SBR (CSB) Vendor
"SBR_Flag"

FY25 SBR Reporting

SBR Report Template Sample

	Payments to Certified Small Businesses (CSBs)					
	Total # of <u>Unique</u> 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	3	\$39,100	\$3,000	\$20,000		

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														
UPS		2/5/2025		\$1,200	\$1,200														
USPS		9/2/2024		\$1,500	\$1,500														
USPS		10/20/2024		\$2,000	\$2,000														
BGE		1/5/2025		\$1,000	\$1,000														
BGE		11/23/2024		\$2,500	\$2,500														
State of MD Agency		11/24/2024		\$10,000	\$10,000														
					\$39,100	Scrubbed/Reportable Amount- 065/067 Report All Procurement Contracts Awarded													
						Exclusions													
					\$20,000	SBR Designated													
					\$3,000	SBR Non-Designated													
						3 Total # Unique CSBs (SBRs) to Receive Payments													

o65/o67 Report

FY25 SBR Reporting

SBR Report Template Sample

	Payments to Certified Small Businesses (CSBs)					
	Total # of <u>Unique</u> 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	3	\$39,100	\$3,000	\$20,000		
P-Card	1	\$130,000			\$4,000	
Total	4	\$169,100	\$3,000	\$20,000	\$4,000	15.97%

721 Report

Vendor_Name	Effective_Date	Payment_Amt	Reportable_Amt	Reportable_MBE	An vet_flag	SBR_Flag
ABC Company	8/8/2024	\$550				Y
ABC Company	9/18/2024	\$650				Y
ABC Company	10/1/2024	\$600				Y
ABC Company	11/8/2024	\$600				Y
ABC Company	1/8/2025	\$800				Y
ABC Company	3/19/2025	\$800				Y
XYZ Inc.	7/16/2024	\$4,450				
XYZ Inc.	8/16/2024	\$4,450				
XYZ Inc.	9/16/2024	\$4,450				
XYZ Inc.	10/16/2024	\$4,450				
XYZ Inc.	11/16/2024	\$4,450				
XYZ Inc.	12/16/2024	\$4,450				
XYZ Inc.	8/16/2024	\$4,450				
123 Corp.	9/1/2024	\$4,500				
123 Corp.	10/18/2024	\$4,500				
123 Corp.	10/30/2024	\$4,500				
123 Corp.	11/3/2024	\$4,500				
123 Corp.	1/16/2025	\$4,500				
123 Corp.	2/16/2025	\$4,500				
LMN Company	8/2/2024	\$4,500				
LMN Company	8/19/2024	\$4,500				
LMN Company	9/12/2024	\$4,500				
LMN Company	10/11/2024	\$4,500				
LMN Company	2/9/2025	\$4,500				
LMN Company	3/6/2025	\$4,500				
456 Inc.	9/6/2024	\$4,525				
456 Inc.	12/6/2024	\$4,525				
456 Inc.	1/6/2025	\$4,525				
456 Inc.	3/6/2025	\$4,525				
101 LLC	8/2/2024	\$4,550				
101 LLC	9/2/2024	\$4,550				
101 LLC	10/2/2024	\$4,550				
101 LLC	11/2/2024	\$4,550				
101 LLC	12/2/2024	\$4,550				
Professional Licen:	1/2/2025	\$2,500				
Professional Licen:	2/2/2025	\$2,500				
Professional Licen:	3/2/2025	\$2,500				
USPS	12/2/2024	\$4,800				
T&P Association	11/16/2024	\$3,800				
T&P Association	12/8/2024	\$3,800				
T&P Association	2/8/2025	\$3,800				
T&P Association	3/6/2025	\$3,800				
Hyatt	1/14/2025	\$4,000				
Hyatt	3/30/2025	\$4,000				
		\$130,000	Scrubbed/Reportable Amount- 721 Report- Total \$ Payments to All Contractors			
		\$4,000	P-card purchases to SBR Vendors			
			Exclusions			

FY25 SBR Reporting

Total # of <u>Unique</u> CSBs (SBRs) to Receive Payments	
BPO/PO/DV Payments	3
P-Card	1
Total	4

ANSWERS 065/067 Report

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	

ANSWERS 721 Report

Vendor_Name	Effective_Date	Payment_Amt	Reportable_Amt	Reportable_MBE_An	vet_flag	SBR_Flag
ABC Company	8/8/2024	\$550				Y
ABC Company	9/18/2024	\$650				Y
ABC Company	10/1/2024	\$600				Y
ABC Company	11/8/2024	\$600				Y
ABC Company	1/8/2025	\$800				Y
ABC Company	3/19/2025	\$800				Y

Include a "Unique CSB Vendors" tab

Combined/De-Duplicate "Unique CSBs" List from both ANSWERS 065/067 & 721 Reports
("Total # of Unique CSBs (SBRs) to Receive Payments")

Non-FMIS Users utilize reports from their specific database

FY25 SBR Reporting

“Best Practice” Items

- Place data within the correct corresponding fields in the Summary Statement
- Submit supporting data (you can attach it in additional tabs of the SBR Report or send the separate documents, along with your SBR Report)
- For the Awards section, “BPO/PO Awards”, utilize the ANSWERS 709/710 Reports; OR if you decide not to use those reports for the data, access the ANSWERS o68 Report; For Non-FMIS users, utilize your unit’s generalized reports that contain the data requested
- For “DV Awards”, utilize the ANSWERS 717 Report

FY25 SBR Reporting

“Best Practice” Items

P-Card data should be listed in both “Awards” & “Payments” section, as these items are counted as both regarding SBR (CSB) Vendors

Although designated & non-designated SBR awards are now counted, be sure to continue designating SBR opportunities/solicitations

Refer to the Socioeconomic Data Reporting Guidance when scrubbing data

Refer to the [SBR Toolkit](#) for additional information (SBR Quarterly/Annual Report Instructions & Report Template)

Contact information

Lisa Mitchell Sennaar
SBR Compliance Manager
lisa.sennaar@maryland.gov
(410) 697-9613 (O)

Tanita Johnson
SBR Compliance Manager
tanita.johnson1@maryland.gov
(410) 697-9619 (O)

Any Questions?



Maryland

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