

ANNUAL REPORT FORMS

IN-DEPTH VIDEO TRAINING



Maryland

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

AGENDA

- General Overview & Legislation
- Detailed Backup Data
- Entering data into the Form 2 spreadsheet
- Entering data into the Form 1 spreadsheet
- Entering data into the Outreach spreadsheet
- Review and Submission



GENERAL OVERVIEW & LEGISLATION



WHAT IS THE ANNUAL REPORT FORMS?

The Annual Report Forms excel template captures the following MBE data:

- MBE Prime & Sub Awards
- Total All Awards
- MBE Waivers
- Outreach data

Most up to date template is available in the MBE Reporting Toolkit!

Reporting Form #1

Reporting Department/Agency: 0

Fiscal Year 2024: July 1, 2023 - June 30, 2024

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

Data can only be entered in the Yellow Cells | Data in the Blue Cells auto-populate from Form 2

Total Contract Awards by Procurement Categories

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

Note: GOSBA reporting templates should not be modified or changed to avoid disrupting the functionality of the template

WHERE TO LOCATE THE DATA?

- Detailed backup data is required to complete the annual report
- Visit the MBE Reporting Toolkit, for guidance on how to locate, compile and prepare the necessary backup data



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

REPORTING LEGISLATION:

COMAR 21.11.03.17 A(1)(2)(3)(6) AND (7)

A. Each procurement agency shall make a report annually within 90 days following the close of the fiscal year to the Governor's Office of Small, Minority & Women Business Affairs, the Department of Transportation, and, subject to State Government Article, §2-1257, Annotated Code of Maryland, to the Joint Committee on Fair Practices and State Personnel Oversight that includes for the preceding fiscal year :

(1) The total number and value of procurement contracts between the procurement agency and certified MBEs, by specific MBE category and by industry type, including whether the MBE participated as a prime contractor or as a subcontractor;

(2) The percentage that those procurement contracts represent, by specific MBE category and by industry type, of the total number and value of procurement contracts;

(3) The total number and the names of certified MBEs that participated as prime contractors or as subcontractors on procurement contracts awarded by a unit;







(6) The number of waivers granted pursuant to Regulation .11 of this chapter; and

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

SUPPLEMENTAL REPORTING GUIDANCE

- Download the supplemental reporting guidance from the MBE Reporting Toolkit for:
 - Direct excel cell references for each reporting template
 - Data cheat sheet
 - Common errors and omissions
 - Annual MBE Report Submission Checklist

All documentation above is mandatory and must be submitted to the MBEreports.gosba@maryland.gov email box. The 2024 report templates and the 2024 reporting instruction manual are *below*:

-  FY2024 MBE Reporting Manual 7.1.2024.pdf
-  FY2024 AnnualReportFormsrev7.2024.xls
-  FY2024 MBE CONTRACTS INVENTORY Macro - 7.2024.xlsm
-  FY2024 Compliance Assessment Requirement 7.2024 .xlsx
-  Form 3 Data Template as of 7.2024.xlsx
- Form 3 Web Portal: <https://www.doit.state.md.us/MBEForm3/>
-  FY2024 SUPPLEMENTAL REPORTING GUIDANCE 7.1.2024.pdf



ENTERING DATA INTO THE FORM 2 SPREADSHEET

For Internal Training Purposes Only

8

FORM 2- REPORTING AGENCY

- Enter the reporting department/agency name on the top of Form 2

Minority Business Enterprise Annual Procurement Report										Reporting Form #2					
Reporting Department/Agency:										DO NOT MODIFY ANY OF THE EXISTING FIELDS OR MOVE ANY TABS IN THIS TEMPLATE.					
Fiscal Year 2024										July 1, 2023 - June 30, 2024		Data can only be entered in the Yellow Cells		Data in the Blue Cells will auto-populate into Form 1	

Total MBE Subcontract Awards by MBE Classifications and Procurement Categories

Procurement Category		African American	Asian	Hispanic	Native American	Women	African American Women	Asian Women	Hispanic Women	Native American Women	Disabled	Non-Profit (Certified)	Community Service Provider	Disadvantaged	Total
Architectural	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0
Engineering	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0
Construction	Total Dollars	\$0	\$0	\$0	\$0	\$0	0	\$0	\$0	\$0	\$0			\$0	\$0
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0
Construction Related	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0

REPORTING MBE PRIME AND SUB AWARDS

Avoid Double Counting AWARDS!

BEWARE OF DOUBLE COUNTING AWARD TO MBE PRIME WITH MBE SUBCONTRACTOR:



1. Count as follows:

x%	MBE Prime Award
<u>Y%</u>	MBE Subcontractor Award
100%	

Our office requires that your procurement unit report MBE Prime awards and MBE Subcontractor awards separately as the example shows above. This is because our office calculates and publicly reports the total percentage of MBE awards that are awarded to subcontractors.

AVOID DOUBLE COUNTING- EXAMPLE 1

- For example:
 - An MBE Prime wins a contract award for \$100,000 with an MBE goal of 10%
 - To avoid double counting, the report preparer will need to report the MBE primes \$90,000 award in the Form 2 Primes table and the \$10,000 MBE subcontractor award in the Form 2 Subcontractors table

Form 2 Reporting

MBE PRIME Table: \$90,000 (90% of the contract)

(+)

MBE SUB Table: \$10,000 (10% of the contract)

Full Contract Total=\$100,000 (100% of the contract reported within Form 2)

AVOID DOUBLE COUNTING-EXAMPLE 2

- For example:
 - An MBE Prime wins a contract award for \$200,000 with an MBE goal of 20% and is choosing to Self perform 50% of the MBE goal
 - To avoid double counting, the report preparer will need to report the MBE primes \$180,000 award (includes \$20k being self performed) in the Form 2 Primes table and the \$20,000 MBE subcontractor award in the Form 2 Subcontractors table

Form 2 Reporting

MBE PRIME Table: \$180,000 (90%= 80% contract award + 10% Self performance of MBE goal)


(+)

MBE SUB Table: \$20,000 (10% of the contract)

Full Contract Total= \$200,000 (100% of the contract reported within Form 2)

FORM 2- MBE SUBCONTRACT AWARDS

- Enter the **SCRUBBED** MBE Subcontract awards data from the PCHL720 report by MBE Classification and Procurement Category
- Enter **both** the dollar value (\$) and the # of contracts within each category

Total MBE Subcontract Awards by MBE Classifications and Procurement Categories 

Procurement Category	African American	Asian	Hispanic	Native American	Women	African American Women	Asian Women	Hispanic Women	Native American Women	Disabled	Non-Profit (Certified)	Community Service Provider	Disadvantaged	Total	
Architectural	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0	
	# of Contracts	0	0	0	0	0	0	0	0	0			0	0	
Engineering	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0	
	# of Contracts	0	0	0	0	0	0	0	0	0			0	0	
Construction	Total Dollars	\$0	\$0	\$0	720-MBE Subcontractor Awards & any change order activity associated with an MBE Subcontractor					\$0	\$0			\$0	\$0
	# of Contracts	0	0	0						0	0	0	0	0	0
Construction Related Services	Total Dollars	\$0	\$0	\$0	720-MBE Subcontractor Awards & any change order activity associated with an MBE Subcontractor					\$0	\$0			\$0	\$0
	# of Contracts	0	0	0						0	0	0	0	0	0
Maintenance	Total Dollars	\$0	\$0	\$0	720-MBE Subcontractor Awards & any change order activity associated with an MBE Subcontractor					\$0	\$0			\$0	\$0
	# of Contracts	0	0	0						0	0	0	0	0	0
Services	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0	
	# of Contracts	0	0	0	0	0	0	0	0	0			0	0	
Supplies & Equipment	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0	
	# of Contracts	0	0	0	0	0	0	0	0	0			0	0	
IT Services	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0	
	# of Contracts	0	0	0	0	0	0	0	0	0			0	0	
IT Supplies & Equipment	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0	
	# of Contracts	0	0	0	0	0	0	0	0	0			0	0	
Human, Cultural, Social & Educational Services	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0	
	# of Contracts	0	0	0	0	0	0	0	0	0			0	0	
Totals	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0	
	# of Contracts	0	0	0	0	0	0	0	0	0			0	0	



ENTERING DATA INTO THE FORM 1 SPREADSHEET

For Internal Training Purposes Only

16

FORM 1 - WAIVER DATA

- Enter the **SCRUBBED** MBE Waiver data from the PCHL711
- Enter **both** the dollar value (\$) and the # of waivers within each category

Minority Business Enterprise Annual Procurement Report Reporting Form #1

Reporting Department/Agency: 0

Fiscal Year 2022 July 1, 2021 - June 30, 2022

Total Contract Awards by Procurement Categories

Procurement Category	Total # All Prime Contracts (Including 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 s 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	0.00%

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.**

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

FORM 1- TOTAL ALL AWARDS

- Enter the **SCRUBBED** awards data from the PCHL709, 710, 717 and 721
 - Enter **both** the dollar value (\$) and the # of contracts within each category
- **You must include both MBE award totals and non-MBE award totals within the Total All Awards in the Form 1 data entry****

Minority Business Enterprise Annual Procurement Report											Reporting Form #1
Reporting Department/Agency:		0									
Fiscal Year 2022		July 1, 2021 - June 30, 2022									
Total Contract Awards by Procurement Categories											
Procurement Category	Total # All Prime Contracts (Including 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 s 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	0.00%

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

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

FORM 1- UNDERSTANDING PARTICIPATION CALCULATION

- The Form 1, will calculate:
 - Participating agency's overall MBE Participation %
 - MBE participation % by procurement category
- The numerator is auto-populated from the MBE data entered in the Form 2
- The Denominator calculates from the Total All Awards data that is entered in the Form 1

Procurement Category	Total # All Prime Contracts (Including	Total All Prime Contracts Dollar Value Awarded (Including MBE)	Total # of Prime Contract Waivers	Total Dollar Value of Prime Contract Waivers	Total # MBE Prime Contracts Awarded	Total MBE Prime Contract Dollar Value Awarded	Total # MBE Subcontracts Awarded	TOTAL MBE	TOTAL ALL AWARDS	TOTAL MBE PARTICIPATION
Architectural					0	\$0	0			
					0	\$0	0			
					0	\$0	0	\$0	0	0.00%
					0	\$0	0	\$0	0	0.00%
					0	\$0	0	\$0	0	0.00%
					0	\$0	0	\$0	0	0.00%
					0	\$0	0	\$0	0	0.00%
					0	\$0	0	\$0	0	0.00%
					0	\$0	0	\$0	0	0.00%
					0	\$0	0	\$0	0	0.00%
Corporate Credit Card					0	\$0	0			0.00%
Direct Voucher					0	\$0	0			0.00%
Totals	0	\$0	0	\$0	0	\$0	0	\$0	0	0.00%
Note(s):	Denominator				Numerator					

Final MBE Participation % for the FY being reported

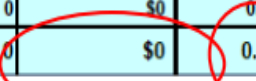
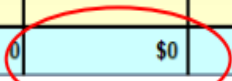
MBE PARTICIPATION CALCULATION:

NUMERATOR

(MBE AWARDS detailed on FORM #2)

DENOMINATOR

(Total Reportable Awards FORM #1 which includes MBE Prime and Sub Awards)



FORM 1 - ERROR MESSAGES

- If MBE totals are not included in the Form 1 Total all awards, an **error message** will appear
 - For each procurement category Architectural through Direct Vouchers, the MBE participation should **never be greater than 100%**. If calculation is greater than 100%, double check your denominator to make sure it includes all reportable awards including the Awards to MBE Primes and MBE Subs.
- In this example, the total all awards for IT Supplies and Equipment did not include the 6 MBE Contract awards reported in the Form 2 which caused the Total MBE Participation column (Column L) to reflect over 100% MBE Percentage

Procurement Category	Total # All Prime Contracts (Including MBE)	Total All Prime Contracts Dollar Value Awarded (Including MBE)	Total # of Prime Contract Waivers	Total Dollar Value of Prime Contract Waivers	Total # MBE Prime Contracts Awarded	Total MBE Prime Contract Dollar Value Awarded	Total # MBE Subcontracts Awarded	Total MBE Subcontract Dollar Value Awarded	Total # of MBE Contracts Awarded-Prime & Sub	Total \$ of MBE Contracts Awarded-Prime & Sub	Total MBE Participation Percentage
Architectural	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0.00%
Engineering	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0.00%
Construction	3	\$1,000,000	0	\$0	2	\$300,000	0	\$0	2	\$300,000	30.00%
Construction Related Services	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0.00%
Maintenance	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0.00%
Services	0	\$1,250,000	0	\$0	0	\$250,000	0	\$0	2	\$250,000	20.00%
Supplies & Equipment	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0.00%
IT Services	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0.00%
IT Supplies & Equipment	1	\$80,000	0	\$0	6	\$500,000	0	\$0	6	\$500,000	625.00%
Human, Cultural, Social & Educational Services	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0.00%
Corporate Credit Card	0	\$0	0	\$0	0	\$0			0	\$0	20 0.00%
Direct Voucher	0	\$0	0	\$0	0	\$0			0	\$0	0.00%
Totals	8	\$2,330,000	0	\$0	10	\$1,050,000	0	\$0	10	\$1,050,000	45.06%

WARNING

FORM 1 - ERROR MESSAGES

- Once the data issue is resolved the agency's Total MBE participation percentage will calculate accurately for each procurement category as well as the agency's overall MBE Participation (%) for the fiscal year being reported for

Procurement Category	Total # All Prime Contracts (Including MBE)	Total All Prime Contracts Dollar Value Awarded (Including MBE)	Total # of Prime Contract Waivers	Total Dollar Value of Prime Contract Waivers	Total # MBE Prime Contracts Awarded	Total MBE Prime Contract Dollar Value Awarded	Total # MBE Subcontracts Awarded	Total MBE Subcontract Dollar Value Awarded	Total # of MBE Contracts Awarded-Prime & Sub	Total \$ of MBE Contracts Awarded-Prime & Sub	Total MBE Participation Percentage
Architectural	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0.00%
Engineering	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0.00%
Construction	3	\$1,000,000	0	\$0	2	\$300,000	0	\$0	2	\$300,000	30.00%
Construction Related Services	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0.00%
Maintenance	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0.00%
Services	0	\$0	0	\$0	2	\$250,000	0	\$0	2	\$250,000	20.00%
Supplies & Equipment	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0.00%
IT Services	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0.00%
IT Supplies & Equipment	7	\$580,000	0	\$0	6	\$500,000	0	\$0	6	\$500,000	86.21%
Human, Cultural, Social & Educational Services	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0.00%
Corporate Credit Card	0	\$0	0	\$0	0	\$0			0	\$0	0.00%
Direct Voucher	0	\$0	0	\$0	0	\$0			0	\$0	0.00%
Totals	14	\$2,830,000	0	\$0	10	\$1,050,000	0	\$0	10	\$1,050,000	37.10%

FOR INTERNAL TRAINING PURPOSES ONLY

FORM 1 - NOTES

- Agencies are encouraged to include unique reporting requirements, circumstances, or anything of importance in regard to the Annual Report submission

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

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

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



ENTERING DATA INTO THE OUTREACH SPREADSHEET

OUTREACH DATA & EVALUATION SPREADSHEET

- Outreach data is collected internally by all procurement units

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

Outreach Data

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

Procurement Unit Resources Available to MBE Vendors

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

Evaluation By Procurement Unit of the Success of its MBE Program

COMAR 21.11.03.17

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



REVIEW AND SUBMISSION



FOR INTERNAL TRAINING PURPOSES ONLY

REVIEW AND SUBMISSION OF DATA

- Be sure to review the completed Annual Report Forms template prior to submitting to GOSBA
 - Check for any error messages within the excel template
 - Cross reference totals entered in the template to backup data totals to ensure accuracy
 - Make sure all necessary report notes are entered in the Form 1
- Final submission of the Annual Report Forms template should be submitted to the: mbereports.gosba@maryland.gov in excel format

ANNUAL MBE REPORT SUBMISSION CHECKLIST

Utilize the Annual MBE Report Submission Checklist found within the MBE Reporting Manual to ensure all necessary documentations have been submitted for a COMPLETE MBE Annual Report

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**)



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

**KAREN REYES
MBE COMPLIANCE MANAGER
KAREN.REYES@MARYLAND.GOV**

For Internal Training Purposes Only

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