



# MBE CONTRACTS INVENTORY

**IN-DEPTH VIDEO TRAINING**



**Maryland**

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

# AGENDA

- General Overview & Legislation
- Entering data into the PRIMES spreadsheet
- Entering data into the SUBS spreadsheet
- Review and submission



# **GENERAL OVERVIEW & LEGISLATION**



# WHAT IS THE MBE CONTRACTS INVENTORY?

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

The MBE Contracts Inventory excel template captures the detailed data for all:

- MBE Prime Awards
- MBE Sub Awards

#	Procurement Unit Name	MBE Prime Contractor Name	Prime Contractor MBE Cert. #	Prime Contractor MBE Classification (Select from Dropdown)	Credit Card / Direct Voucher (Select ONLY from the Dropdown)	Contract Description (Procurement Category) (Select from Dropdown)	Award Amount	Contract # ONLY (Please list the contract #, do NOT include Credit Card or Direct Voucher data on this line)
1								
2								
3								
4								
5								

**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) and (3)

**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;



# 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](mailto: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



For Internal Training Purposes Only

# ENTERING DATA INTO THE PRIMES TAB



# PRIMES TAB

- Enter the SCRUBBED MBE Prime award detailed data from the PCHL709, 710, 717 and 721 reports
- Columns E, F and G require selections from dropdowns ONLY
- For Direct Vouchers (717) and Credit Card (721) data it does not require a contract # within column I



Minority Business Enterprise MBE Prime Contract Awards Report								
For Fiscal Year 20XX								
Date Submitted:								
(List all MBE prime contracts awarded.)								
#	Agency Name	MBE Prime Contractor Name	Prime Contractor MBE Cert. #	Prime Contractor MBE Classification (Select from Dropdown)	Credit Card / Direct Voucher (Select ONLY from the Dropdown)	Contract Description (Procurement Category) (Select from Dropdown)	Award Amount	Contract # ONLY (Please list the contract #, do NOT include Credit Card or Direct Voucher on this line)
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								

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

**Reminder:**  
 \*\*Your Contracts Inventory MBE Prime Contractors table should mirror the data you entered in your Form 2 Prime Contractors Table. The totals of both tables should match.



# ENTERING DATA INTO THE SUBS SPREADSHEET

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# SUBS TAB

- Enter the **SCRUBBED** MBE sub award detailed data from the PCHL720 report
- Columns E and G require selections from dropdowns ONLY

Minority Business Enterprise MBE Subcontract Awards Report							
For Fiscal Year 20XX							
Date submitted:							
(List all MBE subcontracts awarded.)							
#	Agency Name	MBE Subcontractor Name	Subcontractor MBE Cert. #	Subcontractor MBE Classification (Select from Dropdown)	Agency Prime Contract #	Prime Contract Description (Procurement Category) (Select from Dropdown)	Award Amount
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							

**Awards that should be included in the MBE Subcontractors Tab:**  
 720- MBE Subcontractor Awards & any change order activity associated with an MBE Subcontractor

**Reminder:**  
 \*\*Your Contracts Inventory MBE Subcontractors table should mirror the data you entered in your Form 2 MBE Subcontractors Table. The totals of both tables should match.





# REVIEW AND SUBMISSION



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# REVIEW AND SUBMISSION OF DATA

- Be sure to review the completed Contract Inventory 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 as well as the Form 2 to ensure accuracy
- Final submission of the Annual Report Forms template should be submitted to the: [mbereports.gosba@maryland.gov](mailto: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:**

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