

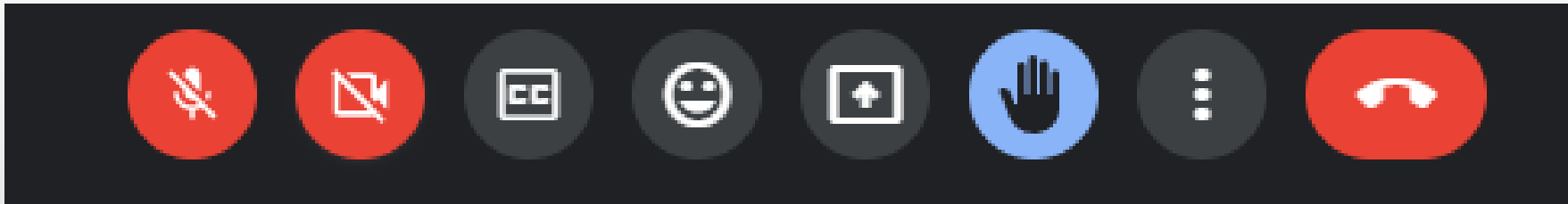
SBR, MBE, VSBE COMBINED LIAISON TRAINING

February 18, 2025



VIRTUAL TRAINING HOUSEKEEPING

- Please **mute** your microphone and **turn off** video camera during training
- 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 you may 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

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

Maria Martinez – Special Secretary

Pamela Gregory – *Chief of Staff*

Laura Gutierrez – *Director of Communications & Outreach*

Davon K. Gardner – *Director of Policy & Legislative Affairs*

Eduardo Hayden – *Small Business Outreach Manager*

Lisa Mitchell Sennaar – *SBR Compliance Manager*

Tanita Johnson – *SBR Compliance Manager*

Danielle N. Davis – *VSBE Compliance Manager*

GOVERNOR'S OFFICE OF SMALL, MINORITY & WOMEN BUSINESS AFFAIRS STAFF (CONT.)

Gerald Stinnett – *MBE Compliance Manager – VLT Operations*

Nichelle Johnson – *MBE Ombudsman*

Tracie Bolden – *MBE Ombudsman*

Karen Reyes – *MBE Compliance Manager*

Catherine Porterfield – *MBE Ombudsman Compliance Manager*

Shanique Pinder – *MBE Ombudsman Compliance Manager*

Tiara Randolph – *MBE Compliance Manager*

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

SPECIAL SECRETARY MARIA MARTINEZ



AGENDA

- Small Business Preference Program
- Outreach
- Executive Order
- SBR Program Updates
- MBE Ombudsman Unit
- **BREAK**
- MBE Program Updates
- VSBE Program Updates

SMALL BUSINESS PREFERENCE PROGRAM

Overview

PRESENTED BY
JAMIE TOMASZEWSKI
DEPUTY CHIEF PROCUREMENT OFFICER, ACTING
OSP DGS
jamie.tomaszewski@maryland.gov



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SMALL BUSINESS PREFERENCE PROGRAM

HB0850

[COMAR 21.11.01.05](#)

General Procurement questions - central.procurement@maryland.gov



SOCIOECONOMIC OUTREACH

PRESENTED BY LAURA GUTIERREZ
DIRECTOR OF COMMUNICATIONS & OUTREACH



Why Does Outreach to MBE/SBR/VSBES Matter?

Outreach & Innovation

Strengthening connections to unlock partnership and collaboration.

Thriving Communities

Diverse organizations pooling expertise to drive progress.

Community Impact

Strengthens local economies, fosters job creation, and reinvests in communities.

Dynamic Ecosystems

Cultivating synergy for economic development and prosperity.

Economic Growth

Encourages small business participation, creates jobs, and fosters economic mobility.

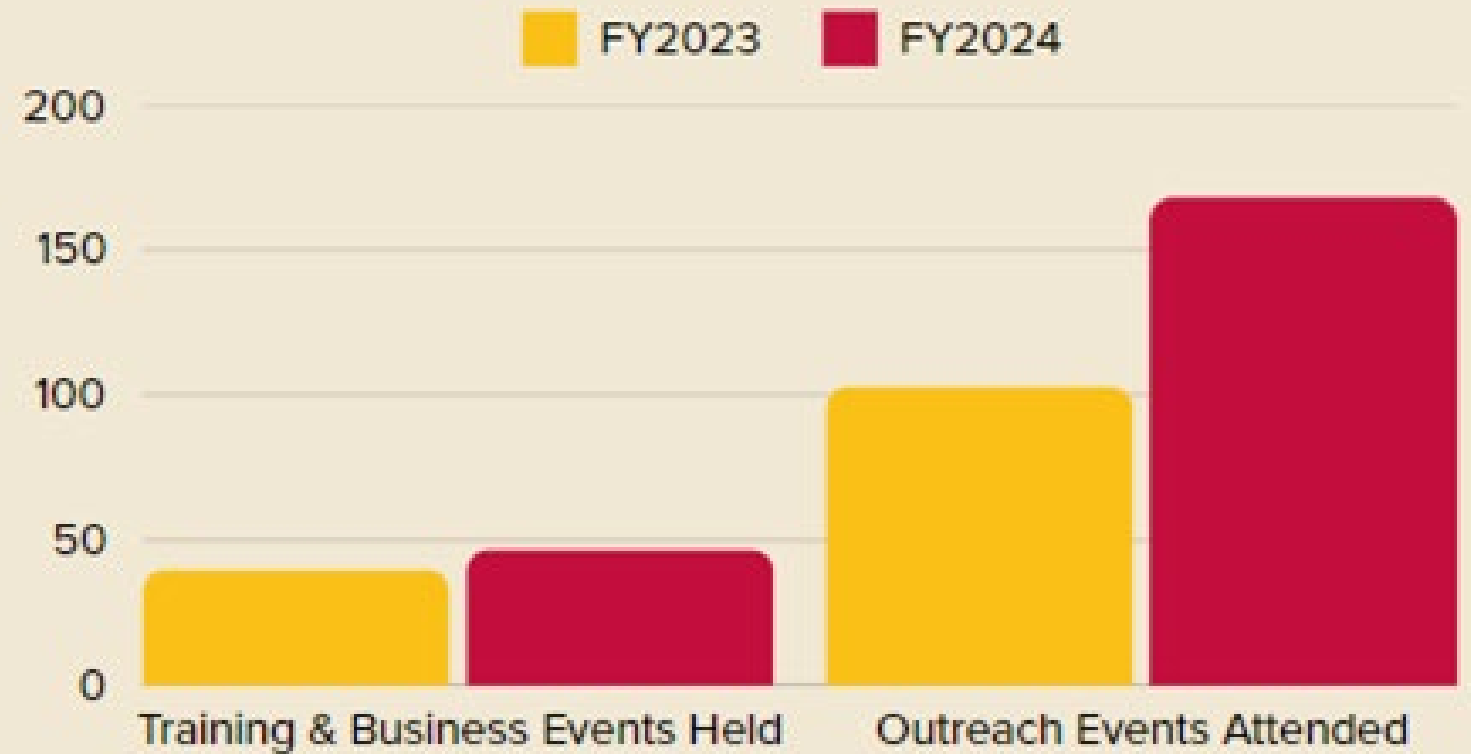
Pipeline Development:

Creates pathways for emerging small businesses to grow, compete, and scale within state procurement.



Outreach by the Numbers

Figure 1: Outreach events hosted and attended comparison between FY23 and FY24



Our Current Outreach Initiatives: A Foundation to Build Upon

1

Networking Events

Bringing people together. Fostering collaboration and relationships.

2

Online Resources

Websites, webinars, and social media. Making information accessible.

3

T.I.P.S. Small Business Webinars

Guidance and support for small businesses. Growing and scaling.

4

Certification Workshops

Helping businesses obtain or renew their SBR/VSBE certifications.

5

Ready, Set, GROW! Workshops

Connecting vendors with state buyers for procurement opportunities.

6

Targeted Engagement

Ensuring small and diverse businesses are aware of and prepared for procurement opportunities.



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T.I.P.S. Small Business Webinar Series: Training and Insights for Procurement Success

A promotional graphic for the T.I.P.S. Small Business Webinar Series. It features a dark blue background with red and yellow geometric shapes. The title 'T.I.P.S. SMALL BUSINESS WEBINAR SERIES' is prominently displayed in white and yellow. Below it, the subtitle 'TRAINING & INSIGHTS FOR PROCUREMENT SUCCESS' is in white. Three bullet points with icons describe the series: '2 WEBINARS MONTHLY' (calendar icon), '9AM-12PM' (clock icon), and 'CLASSES LED BY SUBJECT MATTER EXPERTS' (person icon). A red banner at the bottom says 'TO REGISTER VISIT: GOMDSMALLBIZ.MARYLAND.GOV'. A hexagonal inset image shows a person's hands working on a laptop and holding a smartphone.

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

TRAINING & INSIGHTS FOR
PROCUREMENT SUCCESS

- 2 WEBINARS MONTHLY
- 9AM-12PM
- CLASSES LED BY SUBJECT MATTER EXPERTS

TO REGISTER VISIT:
[GOMDSMALLBIZ.MARYLAND.GOV](https://gomds-smallbiz.maryland.gov)

- Monthly free training for small, minority, women, and veteran business owners
- Topics include financial management, subcontracting, compliance, proposal writing, and more.
- 2 Webinars Monthly - 9 AM - 12PM
- Registration at: gomds-smallbiz.maryland.gov

Ready, Set, GROW! Procurement Connections Workshops

- **Connecting Vendors with State Agencies:**
 - Learn about upcoming procurement opportunities
 - Meet procurement officers and agency buyers
 - Gain insights into Maryland's small business programs
- **Upcoming 2025 Workshops:**
 - **March 20 – Horseshoe Casino, Baltimore**
 - June 10 – MGM Casino, National Harbor
 - September 12 – Rocky Gap Casino, Western Maryland
 - December (TBD)



Ready, Set, GROW! Procurement Connections Workshops



- **Helping Businesses Obtain or Renew Certifications:**
 - Learn about VSBE & SBR certification requirements
 - Hands-on assistance with certification applications
 - Direct support from state procurement officials
- **Monthly Workshops**

Best Practices in Socioeconomic Procurement Outreach

Learn key outreach strategies. These will ensure effective engagement and broader participation. Send any events you are planning to GOSBA Communications & Outreach Team: Laura Gutierrez, laura.gutierrez@maryland.gov and Eduardo Hayden, eduardo.hayden@maryland.gov



Targeted Messaging

Identify businesses with your data to pinpoint key industries or regions with low participation. Tailored messaging to different business types through segmented outreach.



Trust and Relationship Building

Fostering trust. Developing long-term partnerships. Leverage certifications. Host webinars and workshops.



Continuous Improvement

Evaluating results. Adapting to meet evolving needs. Utilizing procurement forecast to establish year's priorities. Offering meet the primes events for your unit.



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Virtual Outreach Strategies: Maximizing Online Connections

1

Access & Capacity Building

Interactive presentations. Sharing expertise and insights. Partnering with offices to provide step-by-step guidance on State procurement, from registration to bid. Share upcoming contracting opportunities with small businesses by socializing forecast. Offer FAQs, step-by-step checklists, and explainer videos on how to navigate government contracting.

2

Social Media & Website

Engaging content. Building communities and sparking conversations. Include an "upcoming procurement opportunities" section in your unit's newsletters. Use Social Media digital ads to share procurement opportunities.

3

Online Forums & Meetings

Dedicated discussions. Encouraging collaboration. Dedicating time with cadence for 1:1 support by linking up your calendar to calend.ly or other scheduling tools.

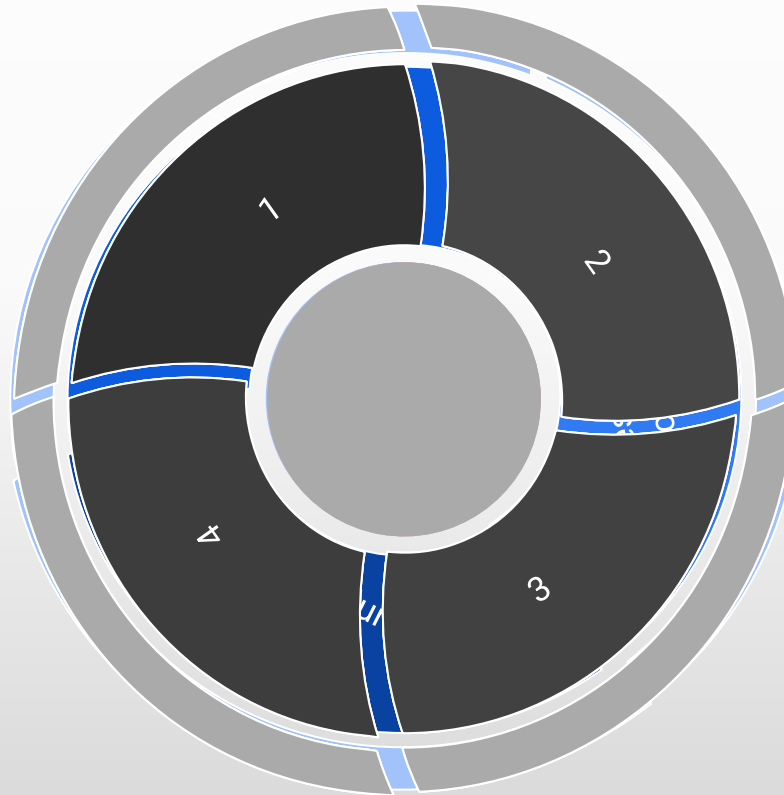
In-Person Outreach: Making Meaningful Connections

Attending Conferences & Business Networking Events

Showcasing/tabling opportunities.
Networking with small and minority
businesses. Facilitating information on
procurement forecasts.

Hosting your Own Event

Control Over Content & Messaging. Stronger
Agency Branding & Visibility. More Direct &
Personalized Engagement. Interagency
Coordination and Partnership Opportunities
fine tuned to your unit's needs.



Workshops & Webinars

Hands-on training. Developing practical skills.
Collect surveys to understand gaps between
your needs and businesses you are reaching
to refine future outreach.

One-on-One Meetings

Offer office hours or 1:1 consultations post-
event.

Attending Procurement Events: Strategic Networking

Maximize event participation. Use these events to connect to the right people. Cultivate opportunities.

1

Prepare

Research attendees and speakers. Print out copies of your forecasted opportunities and meet with agency procurement officers to understand what opportunities to highlight. Set clear objectives.

2

Engage

Network actively. Exchange contact information. Print out a QR code linking to your newsletter or bring business cards.

3

Follow Up & Track Impact

Send personalized emails. Nurture new connections. Track businesses that attended and follow up with procurement opportunities they may qualify for. Maintain a contact list to continue sharing new opportunities.



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Organizing an Outreach Event

Host impactful events. Drive small business engagement and increase MBE/SBR/VSBE procurement participation in your unit.

1

Planning

Define goals. Secure logistics- date & time, location, audiovisual needs, food/beverages, ample parking, what opportunities you will highlight, and who can speak about them. Partner with stakeholders and agencies that can amplify your message or provide a clearer/broader understanding of your work.

2

Promotion

Develop a registration link. Spread the word. Use multiple channels to get the event known (newsletters, social media, flyers, email blasts, etc.). Take advantage of GOSBA's network, the eMMA directory and MDOT's MBE Directory to find businesses in your industry area. Collaborate with stakeholders and agencies that could help to reach the audience you seek.

3

Execution

Establish an event structure and agenda. Define staff roles. Engage attendees. Prepare informational materials (procurement guides, bid checklists, certification FAQs- you can request these from the governing agencies/offices). Capture the event through photos and video clips. Recognize your partners. Gather feedback for future improvement. Post event follow up- share resources, forecasts, and additional training opportunities. Follow ups for technical assistance.

Share your events with GOSBA:

Laura Gutierrez

Communications & Outreach Director

laura.gutierrez@maryland.gov

Eduardo Hayden

Outreach Manager

Eduardo.Hayden@maryland.gov



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Next Steps for Outreach:

Drive meaningful outreach within your agencies.

Action Plan

Develop an outreach strategy.
Identify target audiences.

Collaboration

Partner with local organizations.
Share resources. Reach out to
GOSBA and we can share with our
network.

Continuous Learning

Stay updated on best practices.
Embrace innovation. Create new
events!

EXECUTIVE ORDER 01.01.2024.38

PRESENTED BY
NICHELLE JOHNSON
MBE OMBUDSMAN



EXECUTIVE ORDER

Section D

POs must designate a procurement as SBR if market research indicates that two or more certified small businesses in the SBR Program are available – *eff. immediately*

POs (if operating as the contract managers) must perform annual reviews to identify compliance with those established contractual MBE and VSBE participation goals and if necessary, require corrective action plans from prime contractors – *eff. immediately*

GOSBA must ensure that performance data is standardized across state agencies and transparently reported.

GOSBA must carry out a feasibility study of taking over ALL preferred provider programs.

GOSBA/MDOT to extend certifications to three years.

GOSBA directed to implement a vendor training program on prime and subcontractor responsibilities and MBE/VSBE forms.

GOSBA must implement a Procurement Officer and Liaison training program regarding compliance and the goal-setting process for all programs

EXECUTIVE ORDER

Section D

MBE/VSBE forms must be reviewed and updated as needed, annually.

GOSBA must design and administer a Mentor Protégé Program per State Government 9-305

GOSBA must commission a study on the effect of the 60% rule on businesses

Section E

Work with OSP/MDOT:

- To determine the feasibility of withholding payments to prime contractors related to MBE/VSBE goals
- Requiring attestations from bidder/offers concerning making a Good Faith Effort to obtain certified small businesses in the preparation of their bid/proposal
- GOSBA directed to develop additional recommendations to strengthen compliance efforts on state contracts with MBE/VSBE goals
- Promulgate regulations related to persistent failure as required by 14-305(c)

EXECUTIVE ORDER

Section G

Establish agency-level goals for the MBE, VSBE, and SBR Programs

Review agency-level goals on an annual basis

Publish an annual report that contains unit goals, statewide goals and each unit's achievement.

Section H

Special Secretary of GOSBA to lead the Governor's Subcabinet on Socioeconomic Procurement Participation which will

- Identify further statutory and regulatory reforms
- Implement process improvements for the MBE/SBR/VSBE programs
- Study the best practices of other states
- Analyze statewide and procurement unit performance data

EXECUTIVE ORDER

Section I

Work with OSP to determine the feasibility of increasing the bond requirement threshold to 400K

GOSBA will provide outreach and education on any changes to bond requirement thresholds

Section K

GOSBA to work with DBM on developing a methodology for the 5% goal for utilizing HBCUs via interagency agreements.

Relevant Links:

[Executive Order 01.01.2024.38](#) (E.O. link is at the bottom of the press release)

[HB2025500 Procurement Reform Act of 2025](#)

MBE/VSBE SCORECARD

PRESENTED BY



NEW SCORECARD PROCESS

COMING SOON

- The unit's annual procurement data and compliance data will be analyzed to determine the unit's impact and contribution toward the statewide MBE/VSBE goal.
- The unit will provide an annual self-evaluation of the success of its MBE/VSBE program, which shall include a brief description of the (unit's) outreach efforts to MBE/VSBE prime contractors and subcontractors.
- If directed, the unit will provide a detailed action plan to address MBE/VSBE participation, compliance shortfalls, as well as how to strengthen their MBE/VSBE program.
- Each of these factors will be utilized to evaluate a unit's contribution and good faith efforts toward achieving MBE/VSBE goals.

SBR, MBE, VSBE Combined Liaison Training



SBR PROgram updates

Presented by Tanita Johnson



SBR PROGRAM UPDATES

Per Executive Order 01.01.2024.38

D. Expanding Participation for Small and Socially and Economically Disadvantaged-owned Business Programs in State Procurement

1. 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;

SBR PROGRAM UPDATES

Small Business Preference (SBP) Program

The SBP gives another opportunity to increase awards to Certified Small Businesses (CSB).

When a CSB obtains this, you are able to count this participation within the 20% set-aside.



FY24 SBR Report Findings

FY24 SBR REPORT FINDINGS

-End of FY24, SBR (CSB) Vendors exceeded 4,900

-Total SBR Payments ➡ \$483,263,666

-Total SBR Participation 10%

-2,400+ SBR (CSB) Vendors Received Payments

-Awards will be included in reporting for FY25



↑ 29%
Percent Increase in
Certified Vendors

\$483M
Payments

10%
Payment Attainment

↑ 2,400
Vendors Participating

**To be included
in FY25**
Awards

FY24 SBR REPORT FINDINGS

- Ten units achieved or exceeded the 15% set-aside requirement**
- 28 units met or exceeded the overall 15% Total SBR Participation target**

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

FY24 SBR REPORT FINDINGS

**Thanks to MD State Police and Motor Vehicle Administration
for sharing their best practices & strategies for success!**

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

FY24 SBR REPORT FINDINGS

**Their best practices & strategies for success
included the following:**

- Attending outreach events and connecting with known vendors-- active engagement with small businesses**
- Conducting thorough research to identify small businesses**

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

FY24 SBR REPORT FINDINGS

Their best practices & strategies for success included the following:

- Sharing details of SBR (CSB) certified vendors with procurement team/other departments– streamlining communication**
- Designating all applicable procurements as SBR, as per Executive Order**
- Reaching the SBR goal**

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



FY25 SBR Reporting

FY25 SBR Reporting

- Thanks to all of the units that submitted their FY25 2nd Quarter SBR Reports!
- FY25 SBR Report differs from FY24, awards are now included and the format has changed
- The following slides will share tips with completing the report
(remember that you can contact our office for one-on-one sessions)

FY25 SBR Reporting

New 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)							
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							
INSTRUCTIONS: Complete all green cells. Automatic calculations will appear in peach cells. Do not edit this Report Summary template.							
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	QTY 709 & 710 REPORT	\$ from 709 & 710 REPORTS	QTY from 709 & 710 REPORT	\$ from 709 & 710 REPORT			
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 Prime 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	\$ from 065/ 067 REPORT	\$ from 065/067 REPORT	\$ from 721 REPORT		

FY25 SBR Reporting

-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** 068 Report

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

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

>>“P-Card Awards”, 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	QTY 709 & 710 REPORT	\$ from 709 & 710 REPORTS	QTY from 709 & 710 REPORT	\$ from 709 & 710 REPORT			
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 Prime 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	\$ from 065/ 067 REPORT	\$ from 065/067 REPORT	\$ from 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	QTY 709 & 710 REPORT	\$ from 709 & 710 REPORTS	QTY from 709 & 710 REPORT	\$ from 709 & 710 REPORT			
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 Prime 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	\$ from 065/ 067 REPORT	\$ from 065/067 REPORT	\$ from 721 REPORT	

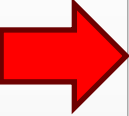


FY25 SBR Reporting

Information found within SBR Quarterly/Annual Report Template:

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>	

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.

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

FY25 SBR Reporting



<https://www.youtube.com/watch?v=es1B03Y5tgM>

FY25 SBR Reporting

“Remember to” Items

- Place data within the correct corresponding fields in the Summary Report
- 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 709/710 Reports; OR if you decide not to use those reports for the data, access the 068 Report
- For “DV Awards”, utilize the 717 Report

FY25 SBR Reporting

“Remember to” Items

- P-Card data should be listed in both the “Awards” and “Payments” section, as these items are counted as both awards and payments to SBR (CSB) Vendors
- Although designated and non-designated SBR (CSB) awards are now being counted, be sure to continue designating SBR (CSB) 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 and Report Template)

FY25 SBR Reporting

Additional information

-Procurements between \$50,000 and \$500,000 are automatically designated as SBR per the Executive Order

(Remember that procurements above \$500,000 should also be considered for SBR Designation)

-Procurements between \$50,000 and \$500,000 that are not designated SBR require a waiver of the SBR designation be submitted to the SBR Waiver Mailbox, following the guidance from PRG Evaluation - SBR Program Designation Worksheets (as listed on the Office of State Procurement (OSP) website)

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

Contact information

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SBR Compliance Manager
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MBE OMBUDSMAN UNIT

PRESENTED BY
NICHELLE JOHNSON



MBE Ombudsman Unit – Our Role

Ombudsman Unit Duties include:

- ✓ Conducting training for state agency personnel on enforcement of the requirements of current MBE laws and regulations
- ✓ Conducting training for prime contractors as well as MBEs performing in the prime and/or subcontracting role
- ✓ Serve as a resource to minority business enterprise liaisons, procurement officers in units of State government, and others.
- ✓ Work with prime contractors, MBEs, and state agencies to resolve issues that arise during contract performance
- ✓ Developing policies and guidance to assist agencies in implementing the MBE Program

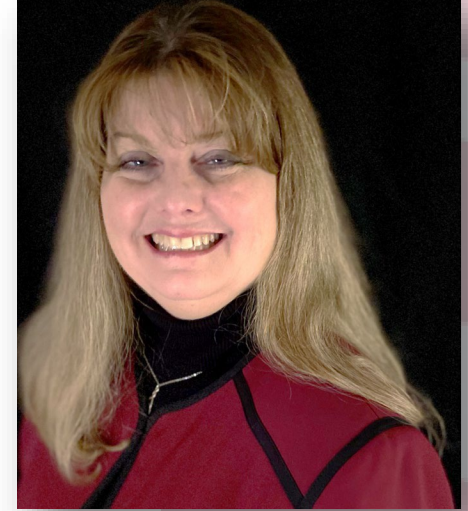
The MBE Ombudsman Unit – Our Staff



Tracie Bolden



Shanique Pinder



Catherine Porterfield

MBE Ombudsman Compliance Managers



Nichelle Johnson
MBE Ombudsman

MBE PROGRAM COMPLIANCE

- As a part of the compliance process for the MBE program, you are to monitor, facilitate, promote, and ensure compliance with MBE Program Laws, Regulations, Guidelines, Policies, and Objectives at both the state and agency levels.
- You should be both effective and just in advocating for the proper treatment of Small, Minority & Women business owners. Specifically, to State certified MBE businesses.
- This includes a commitment to identifying and acting on both compliance lapses and fraud.

MBE LIAISON

COMAR 21.11.03.05

The Liaison Role works hand in hand with contract monitors, contract managers, procurement officers, and compliance staff. Why is this important?

The MBE Liaison is one of the main compliance measures put in place to help ensure the successful implementation of the MBE Program at the agency level.

Real-life examples – The results when the system breaks down.

- A solicitation with MBE goals that had no MBE clauses or paperwork in the solicitation documents
- Incorrectly calculated liquidated damages figures
- Persistent bad behavior by a prime throughout the contract (ex. The prime asking the MBE firm to perform work they are not certified for and trying to count those dollars towards the MBE goal or persistent lateness in processing payments to subcontractors)



PROGRAM IMPLEMENTATION & COMPLIANCE

SUCCESSFUL IMPLEMENTATION OF THE MBE PROGRAM THROUGH OPTIMAL PERFORMANCE AT INPUT, PROCESS & OUTPUT STAGES.



SUCCESSFUL IMPLEMENTATION OF THE MBE PROGRAM

At the input phase:

When setting MBE goals, ensure your agency is evaluating solicitations on a case-by-case basis; use past similar contract compliance as a model and be sure to include written justification in PRG documents

- MBE goals/subgoals and MBE forms should be on the agenda at all Pre-bid Conferences
- Directly solicit certified MBE firms at every opportunity – build up your pool of vendors



PROCUREMENT REVIEW GROUP (PRG)

- There should be at least one or more standing procurement review group(s) within your unit.
- The PRG shall be comprised of:
 - Agency's chief procurement official or senior-level procurement official designated to act in his/her place
 - SBR, MBE & VSBE Liaison Officers or designees
 - Your unit's legal counsel to provide support and advice, as necessary

PRG (CONT.)

Did your Agency Consider:

- If the procurement be broken down into subcontracting opportunities
- Does the contract structure support subcontracting?
- Did the unit list all possible subcontracting UNSPSC/NAICS Codes on the PRG Form
 - Are small, minority, women, and veteran-owned businesses available in the identified categories?
 - Does it make sense geographically?
- Consider the 60% Rule's impact on MBE goal setting and goal achievement
- Treat the MBE & VSBE Programs as mutually exclusive
 - Dually-certified firms can count toward both program goals)
- Provide as much detail and context as possible on your PRG Determination (for historical purposes and protest)

PRG (CONT.)

Ensure that the agency is doing a:

- Thorough evaluation of 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
- Resource: BPW Advisory 2001-1
- PRG Guidance and Worksheets are on OSP's website:
<https://procurement.maryland.gov/procurement-review-group-prg/>

PRG (CONT.)



- Best practices:
- ✓ Documents should be completely filled out & signed
- ✓ Units should include a clear and adequate justification for goals, especially 0% goals.
- ✓ Provide all relevant documentation including PRG Forms, Research with SBR/MBE/VSBE firms identified, Engineers' Estimate, SOW



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

ARE SUBGOALS APPLIED CORRECTLY?

- Your agency must fill out the subgoal worksheet and determine if Subgoals will be set on procurements

Any relevant Subgroup with less than 3 certified firms available results in no subgoal being set for that subgroup

Ex.: **Construction** Contract with an **overall MBE goal of 25%** would be evaluated for Subgoals. If your search reveals that **2 African American MBE firms** and **10 Women owned MBE firms** were available, this will result in only a **Women Subgoal of 11%**

TABLE 2 – RECOMMENDED SUBGOALS								
Combined Industry Category (Check appropriate column per Step 5.)			Cons	AE-CRS	Main	IT	Serv	CSE
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. # of Firms	10. ≥ 3 Y/N	Subgroups						
		African American	8%	7%	9%	10%	—	6%
		Hispanic American	—	—	3%	—	2%	2%
		Asian American	—	—	2%	—	3%	—
		Women	11%	10%	—	10%	10%	8%
Subgoal Total			19%	17%	14%	20%	15%	16%
*Subgoal Total Plus 2% Margin			21%	19%	16%	22%	17%	18%
*The Subgoal Total Plus 2% Margin is the sum of the Recommended Subgoals plus 2%.								
<input checked="" type="checkbox"/> Refer to Table 2 above. If there are 3 or more certified firms in a Subgroup for the work of the procurement (indicated by a “Y” in Column 10), the Recommended Subgoal for the Combined Industry Category in Table 2 should be set for that Subgroup unless an explanation is provided in Step 11.								
<input checked="" type="checkbox"/> A subgoal may not be set if the number of certified firms in that Subgroup is less than 3 (indicated by an “N” in Column 10).								
11. The following Recommended Subgoals have not been set because:								

COMPLIANCE REGULATIONS - PROCESS



COMAR 21.11.03.13 – General Compliance Requirements



COMAR 21.11.03.10 – Contract Award Compliance Requirements including Good Faith Efforts considerations for Waiver Requests and Contract provisions, such as Liquidated Damages.



COMAR 21.07.01.14 – Mandatory Liquidated Damages provisions for all contracts with certified MBE participation goals and any other contracts deemed appropriate by PO in consultation with that AAG.

PROGRAM IMPLEMENTATION AND COMPLIANCE

○ Review agency contracting procedures to ensure compliance

- Ensuring that solicitation documentation includes the necessary forms, clauses, and language for each program
- Answering internal agency questions to ensure current contracts are upholding socioeconomic policies
- Reviewing MBE forms & waiver requests (Good Faith Efforts Documentation)

○ Know the rules; Make sure your Agency follows the rules

- Reviewing legislation and resulting policy changes
- Attending training
- Contract Award reviews
- Assist MBE contractors with issues that arise during contract performance (should go through contract monitor/manager)
- Attend Corrective Action Meetings

MBE PROGRAM COMPLIANCE

COMAR 21.11.03.09 - 10 and 21.11.03.11

Review MBE forms for accuracy and completeness, especially Waiver paperwork.

MBE Participation Forms

- Thoroughly review MBE forms to ensure they are correct and complete, including the application of the 60% rule (COMAR 21.11.03.12-1).

D-1A - MBE Utilization and Fair Solicitation Affidavit and MBE Participation Schedule

D-3A - MBE Subcontractor Project Participation Certification

➤ Along with this document, you would also be requesting copies of MBE subcontract agreements per COMAR 21.11.03.10

D-3B - MBE Prime Contractor Participation Certification

- Procurement staff are directed to contact the agency MBE Liaison if there are issues or if additional guidance is needed.
- Sample Forms are provided on our website, as well as a Forms training in the MBE toolkit:
<https://gomdsmallbiz.maryland.gov/Pages/Reporting-Tool-MBE.aspx>

MBE PROGRAM COMPLIANCE

COMAR 21.11.03.11

Waiver Documentation

- Carefully review any waiver documentation to make sure it fits the “good faith efforts” requirement.
 - D-1B - Exhibit A: MBE Subcontractor Unavailability Certificate
 - D-1C - Good Faith Efforts Documentation (as defined in COMAR 21.11.03.11)
 - D-2 - MBE Outreach Efforts Compliance Statements
- Procurement Officers should follow the guidance and best practices found in the MBE & VSBE Goal Waiver Guidance: *Good Faith Efforts Review & Documentation*

MBE PROGRAM COMPLIANCE

COMAR 21.11.03.13

COMAR 21.10.08

- Contract Compliance should be reviewed by the contract monitor or other assigned staff using the MBE reports (Attachment D) regularly received from Primes/Subcontractors
 - D-4A - Prime Contractor Paid/Unpaid Invoice Report
 - D-4B - MBE Prime Contractor Report
 - D-5 - MBE Subcontractor Paid/Unpaid Invoice Report
- Payment Issues should be handled promptly per Prompt Payment Guidelines
- Agency contract compliance reports should be regularly generated by liaisons, contract monitors, or other assigned staff that utilize this data.
- This data is essential when performing contract close-out.

MBE COMPLIANCE - OUTPUT

Presenter Notes
2025-02-18 17:51:48

As a reminder – the MBE Quarterly Compliance Check-in should be submitted each quarter. In quarter 2 only 28 agencies (39%) submitted their check-in.

Annual Agency MBE Compliance Assessment Report

In the 2022 Legislative Session, HB569, Chapter 115 was passed, putting into place new Compliance Assessment Report requirements for procurement units participating in the MBE Program. Effective July 1, 2022 (FY2023) agencies are responsible for reporting, annually, their compliance data on contracts that were completed during the fiscal year to the Governor's Office of Small, Minority & Women Business Affairs.

AGENCY: FY: 2023 DATE:

Provide the requested compliance data **ONLY** for contracts with MBE goals which ended during FY2023 (period July 1, 2022 - June 30, 2023). Each field is **required** and cannot be left blank.

The completed compliance assessment report must be submitted to the Governor's Office of Small, Minority & Women Business Affairs by September 30th annually. Submit reports to: mbereports.gosba@maryland.gov.

Contract #	Waiver % (Hover over this cell for dataset explanation)	MBE Goal	Award Date	Award Amount	Expiration Date	Prime Contractor Name	Prime MBE Designation (Select from dropdown)	Total Sub Payments (non-MBE)	Total MBE Sub Payments	Total Prime Payments	MBE Participation %	Full Contract Compliance Rate	Compliance Rate (No more than 100%)	Procurement Category	Description of Work	Description of Factors Leading to Compliance below 100%
A555105	5.00%	10.00%	9/1/2019	\$10,000,000.00	8/31/2022	Peleton Construction Company	Non-Minority	\$50,000.00	\$52,000.00	\$10,778,000.00	0.48%	4.82%	4.82%	Construction	Retaining Wall and Storage facility construction	After the commencement of this project, the agency determined that the square footage of the storage facility had to be reduced in size, which reduced the scope of work initially awarded to MBE
											#DIV/0!	#DIV/0!	#DIV/0!			
											#DIV/0!	#DIV/0!	#DIV/0!			
											#DIV/0!	#DIV/0!	#DIV/0!			

Contract Number (Hover over this cell for dataset explanation)	Award Date	Award Amount	Expiration Date	Subcontractor Name	MBE Designation (Select from dropdown)	Total Subcontractor Payments	Description of Work (Relevant to this subcontractor only)
A555105	9/1/2019	\$10,500.00	8/31/2022	Applied Brick and Mortar	African American	\$7,500.00	Retaining wall, masonry (i.e., block, brick, stone), construction

The Compliance Assessment Report data will be used by the Ombudsman unit to track and monitor contracts that did not meet the established MBE goal. Contracts that do not meet the MBE goal are required to list valid mitigating factors.

MBE PROGRAM COMPLIANCE

- Procurement staff should collaborate with the Prime, the MBE liaison, and legal counsel to quickly resolve issues with MBE subcontractors.
- Only after these steps should procurement staff or subcontractors reach out to the MBE Ombudsman Unit for assistance.
- Procurement staff, compliance staff, and the MBE liaison should ensure that issues are handled in accordance with COMAR, procurement guidelines, and best practices

REMEDIES TO NON-COMPLIANCE

COMAR 21.07.01 & 21.10.08

COMAR 21.11.03.13

There are several tools at the agency level to handle these issues, such as

- ✓ Letter of non-performance
- ✓ Corrective Action Plans
- ✓ Withholding Payment
- ✓ Liquidated Damages
- ✓ Contract Termination for Cause or Convenience

COMPLIANCE VS FRAUD



•**Fraud:** “deceit, trickery, or breach of confidence for profit or to gain some unfair or dishonest advantage.”

- ✓ Using the MBE in name only (pass-through)
- ✓ Listing employees on certified payroll when actually paid by another company
- ✓ Reporting work is being performed by MBE when another firm is actually doing the work

**Alleged Fraud is handled by the Attorney General's Office
and can be reported to the Ombudsman Unit at**

mbe.ombudsman@maryland.gov

RESOURCES

- Your main resources will be:
 - Office of State Procurement Website
 - Latest Forms (PRG, Attachment D- **NEW forms coming**)
 - Procurement Manual including Policies, Procedures, and Best Practices
 - GOSBA MBE Toolkit
 - Guidance (Liquidated Damages, Subgoals, Reporting, Sample Forms, Training Materials)
 - MBE Ombudsman Page – State Agency Resources
 - MDOT Directory
 - State Certified MBE Vendors
 - BPW Website
 - Advisories - 2001-1 (PRG Guidance), 2003-2 (Waivers Report)

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MBE Program updates

Presented by Karen Reyes
MBE compliance Manager



NEW Addition to the GOSBA team!



Tiara Randolph joined GOSBA at the end of December as an MBE Compliance Manager. Tiara has jumped right in and some of you may have already noticed her in the compliance call and one-on-one agency meetings. Tiara brings a wealth of experience from the Office of Minority Business Enterprise where she assisted MBE businesses through the certification process. Tiara is innovative and dedicated to the MBE community.

Tiara's Designated Agencies:		
STATE AGENCIES:	MDOT:	UNIVERSITIES:
AGING	MOTOR VEHICLE ADMINISTRATION	BOWIE STATE UNIVERSITY
ARCHIVES	TRANSIT ADMINISTRATION	COPPIN STATE UNIVERSITY
COMMERCE	TRANSPORTATION AUTHORITY	FROSTBURG STATE UNIVERSITY
COMMISSION ON CIVIL RIGHTS		SALISBURY UNIVERSITY
COMPTROLLER		U OF MD, COLLEGE PARK
EMERGENCY MANAGEMENT		U OF MD, GLOBAL CAMPUS
EXECUTIVE DEPARTMENT		UNIVERSITY OF BALTIMORE
GOV-CRIME CONTROL & PREVENTION		
HEALTH BENEFIT EXCHANGE		
HIGHER EDUCATION COMMISSION		
HOUSING & COMMUNITY DEVELOPMENT		
INSURANCE ADMINISTRATION		
JUVENILE SERVICES		
LOTTERY & GAMING CONTROL		
MILITARY DEPARTMENT		
PLANNING		
PUBLIC DEFENDER		
PUBLIC SAFETY & CORRECTIONAL SERVICES		
PUBLIC WORKS		
SCHOOL FOR THE DEAF		
STATE PROSECUTOR		
STATE RETIREMENT AGENCY		
SUBSEQUENT INJURY FUND		
VETERANS AFFAIRS		
WORKER'S COMPENSATION COMMISSION		

Tiara’s Designated Agencies are listed on the left-hand side, any MBE Liaisons who need assistance feel free to email or schedule a one-on-one on Tiara’s Calendly Link here:

[Calendly - Tiara Randolph -GOSBA-](#)

Karen's Designated Agencies:		
STATE AGENCIES:	MDOT:	UNIVERSITIES:
AGRICULTURE	AVIATION ADMINISTRATION	BALTIMORE CITY COMMUNITY COLLEGE
ASSESSMENTS & TAXATION	PORT ADMINISTRATION	MORGAN STATE UNIVERSITY
ATTORNEY GENERAL	STATE HIGHWAY ADMINISTRATION	SAINT MARY'S COLLEGE OF MARYLAND
BUDGET & MANAGEMENT	TRANSPORTATION (TSO)	TOWSON UNIVERSITY
CANAL PLACE PRESERVATION		U OF MD, BALTIMORE
EDUCATION		U OF MD, BALTIMORE COUNTY
ENVIRONMENT		U OF MD, EASTERN SHORE
ENVIRONMENTAL SERVICES		
FOOD CENTER AUTHORITY		
GENERAL SERVICES		
HEALTH		
HUMAN SERVICES		
INFORMATION TECHNOLOGY		
LABOR		
MARYLAND STATE LIBRARY		
NATURAL RESOURCES		
PEOPLE'S COUNSEL		
PUBLIC BROADCASTING COMMISSION		
PUBLIC SERVICE COMMISSION		
STADIUM AUTHORITY		
STATE BOARD OF ELECTIONS		
STATE POLICE		
SUPPLEMENTAL RETIREMENT		
TAX COURT		
TREASURER		

Karen’s Designated Agencies are listed on the left-hand side, any MBE Liaisons who need assistance feel free to email or schedule a one-on-one on Karen’s Calendly Link here:

[Calendly - Karen Reyes -GOSBA-](#)



MBE REPORTING TOOLKIT UPDATEs

New look to the Toolkit!

- Dedicated sections in the toolkit:
 - ANSWERS website link
 - Welcome new MBE Liaisons resources
 - MBE Program Updates
 - Calendly Links to Schedule one-on-one sessions
 - Procurement compliance Bulletins
 - Compliance Calls
 - Program resource links

The screenshot displays the MBE Reporting Toolkit website. On the left is a sidebar with a 'Quick Links' menu containing: About Us, Legislation and Policy, Outreach, News, Reports, Contact Us, and Recent. The main content area is titled 'MBE Reporting Toolkit' and includes a welcome message, a 'Welcome New MBE Liaisons' section with three numbered steps, an 'MBE Program Updates' section with a new announcement and Calendly links, and a list of resources. The right sidebar features 'Resource Links' and 'MBE Program Resources'. Red circles highlight the 'Procurement Compliance Bulletins' list, the 'Welcome New MBE Liaisons' section, the 'MBE Program Updates' section, the 'Compliance Call Recap' in the sidebar, and the 'Resource Links' and 'MBE Program Resources' sections.

Quick Links

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

Procurement Compliance Bulletins

- 1.22.2025
- 12.23.2024
- 11.22.2024

Upcoming Compliance Call

Next compliance call date is TBD

Call 410-697-9605 to be added to our mailing list

Missed the last call?
View the meeting recap here:

Compliance Call Recap
6.06.2024

MBE Reporting Toolkit

This toolkit contains valuable information to assist State agencies/departments with the management and compliance of the Minority Business Enterprise (MBE) Program.

To access your agencies data, visit the **ANSWERS** website. Please note, you must be connected to the VPN for access.

Welcome New MBE Liaisons

Have you recently been named an MBE Liaison and need to know your **Next Steps**?

1. **Contact** one of the MBE Compliance Managers at **410-697-9600** to:
 - Make sure you are listed as the point of contact in our MBE Liaison Directory
2. **Get familiar** with your **new liaison duties** by watching the Liaison Onboarding Training
 - View the training video here: **Liaison Onboarding Training Video**
 - Download the training slide deck here: **Liaison Onboarding Slide Deck**
3. **Download** your **New MBE Liaison Welcome Packet**

MBE Program Updates:

NEW The GOSBA team is excited to announce that we now have two MBE Compliance Managers, **Karen Reyes** and **Tiara Randolph**. Each MBE Compliance Manager has been assigned to specific participating agencies, to provide more tailored and hands-on assistance to the MBE Liaisons. Below are our Calendly links to make it easy for you to schedule one-on-one sessions whenever you need guidance or have questions. We look forward to collaborating with you to ensure your success as an MBE liaison.

Karen Reyes Calendly Link

Tiara Randolph Calendly Link

In January 2024, the MBE Ombudsman Unit was started. Per State and Government Articles 59-303.3, the MBE Ombudsman will

- Work with prime contractors, MBEs, and state agencies to resolve issues that arise during contract performance
- Develop policies and guidance to assist agencies in implementing the MBE Program
- Oversee data collection of documented nonperformance by prime contractors
- Conduct trainings for procurement officers, Compliance Officers, and MBE liaisons in units of State government on enforcement of the requirements of Title 14, Subtitle 3 of the State Finance and Procurement Article

SBR PROGRAM REPORTING TOOLKIT

VSBE PROGRAM REPORTING TOOLKIT

Resource Links

- Disparity Study Vendor Survey 2024
- eMaryland Marketplace Advantage (eMMA)
- MBE Prime Regulation 2014
- Liquidated Damages Guidelines
- Liquidated Damages Worksheet
- Liquidated Damages Hourly Rate Calculations
- Board of Public Works Advisories
- Directory of Certified MBEs
- FMIS Bulletin Board System (BBS) Log In Page
- DBM Master Contracts
- DGS Master Contracts
- DoIT Master Contracts
- DoIT Customer Service Desk
(For FMIS/ADPICS information, online training and assistance in obtaining user name and password as needed.)

MBE Program Resources

- MBE Program Subgoal Guidance
- MBE Program Subgoal Worksheet
- MBE RFP Solicitation Language
- PRG Guidance & Worksheets (located on the Office of State Procurement's website)
- Section 4 Sample PRG Template in Excel
- **SAMPLE MBE FORMS**

New look to the Toolkit!(cont.)

- Dedicated sections in the toolkit:
 - Upcoming Reminders & Deadlines
 - Dedicated drop-down menus for State Agencies, Universities, MDOT & Public-School Construction Reporting Requirements
 - Drop-down menus are broken down by:
 - Annual reporting
 - Quarterly reporting
 - Strategic Plans
 - Procurement Forecast
 - Video Training Series

Upcoming Reminders:

- **MBE QTR 2 Report** due date has been extended to February 5, 2024
- Next **Combined Liaison Training** is February 18, 2025 must register via zoom here: https://us06web.zoom.us/webinar/register/WN_buNIBEJaSUy3_YwYHECsdw#/registration

State Agency, Universities & MDOT Reporting Requirements & Resources

- FY2024 MBE Annual Reporting- Due September 30, 2024
- FY2025 Quarterly Reporting- Due on a QTR basis
- FY2025 Socioeconomic Strategic Plan-Due June 30, 2024
- FY2025 Procurement Forecast- PAST DUE FOR FY25
- MBE Video Training Series- Annual Reporting
- MBE Video Training Series- Quarterly Reporting
- MBE Video Training Series- MBE Forms
- MBE Live Liaison Training Recordings & Slide Decks

Public School Construction Reporting Requirements & Resources

- FY24 LEA MBE Annual Reporting Requirements- Due to IAC by September 13, 2024
- FY25 LEA MBE Quarterly Reporting Requirements
- MBE Video Training Series-Annual Reporting

ANNUAL REPORT FY 2024

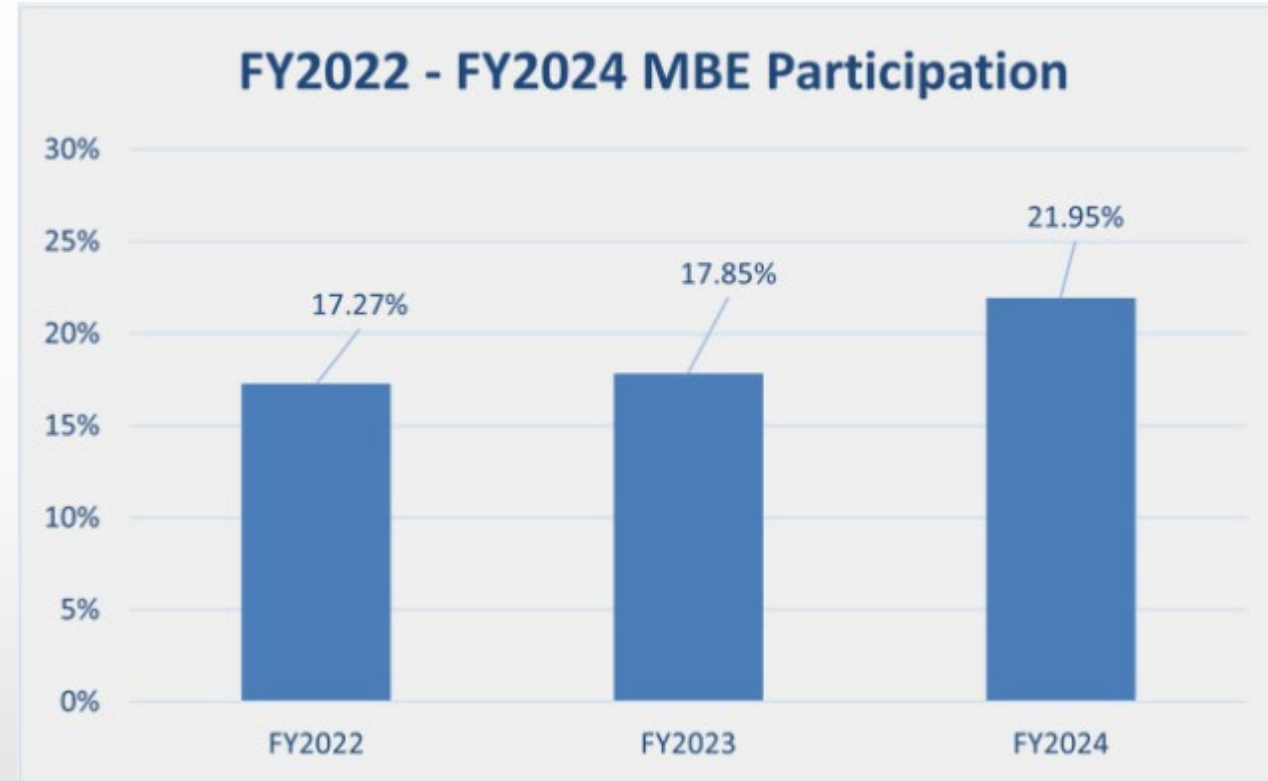
Wes Moore, Governor
Aruna Miller, Lt. Governor
Y. Maria Martinez, Special Secretary

FISCAL YEAR 2024 ANNUAL REPORT

MBE Annual report

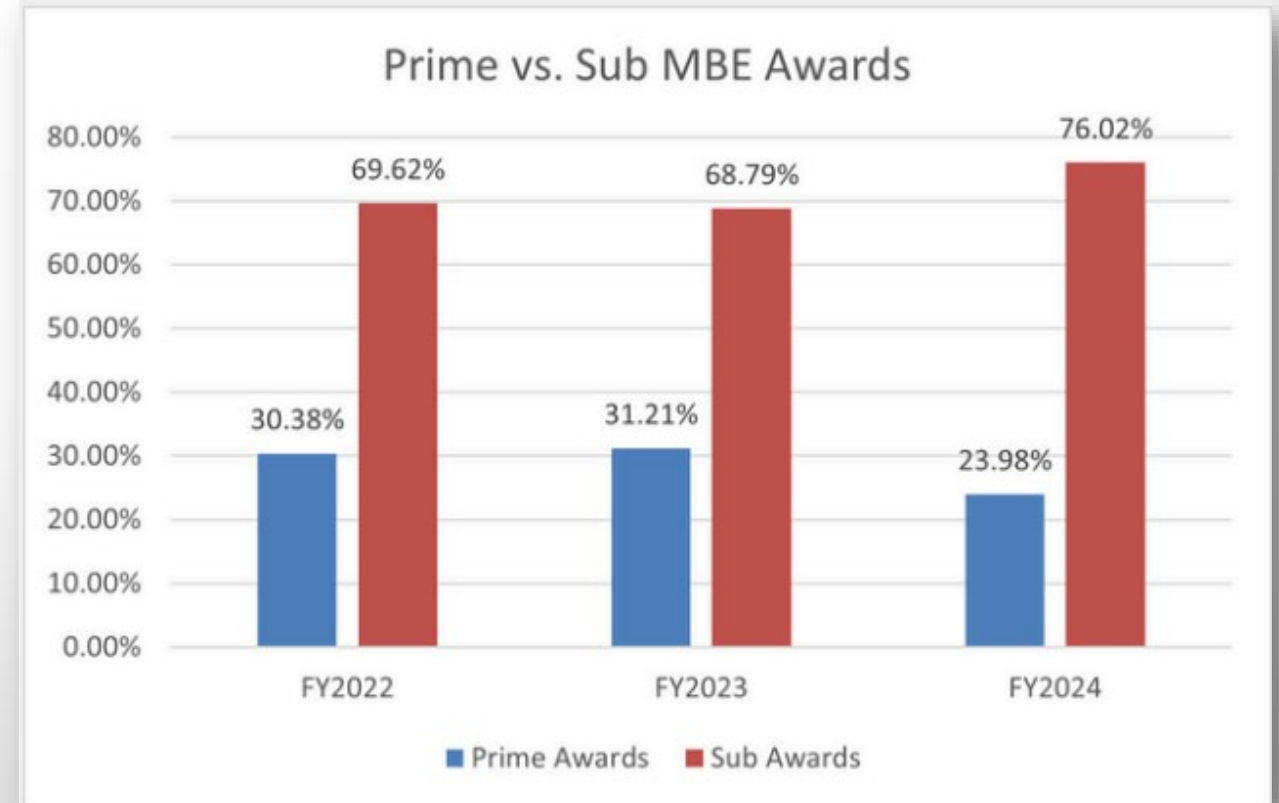
Findings

- The overall progression of the MBE goal attainment has increased by 23%!!
- MBE Program performance is measured by dollars awarded to MBE certified firms
 - Statewide spending among MBE participating units increased 50%
 - Similarly, total dollars awarded to MBEs increased significantly by 85% in FY2024



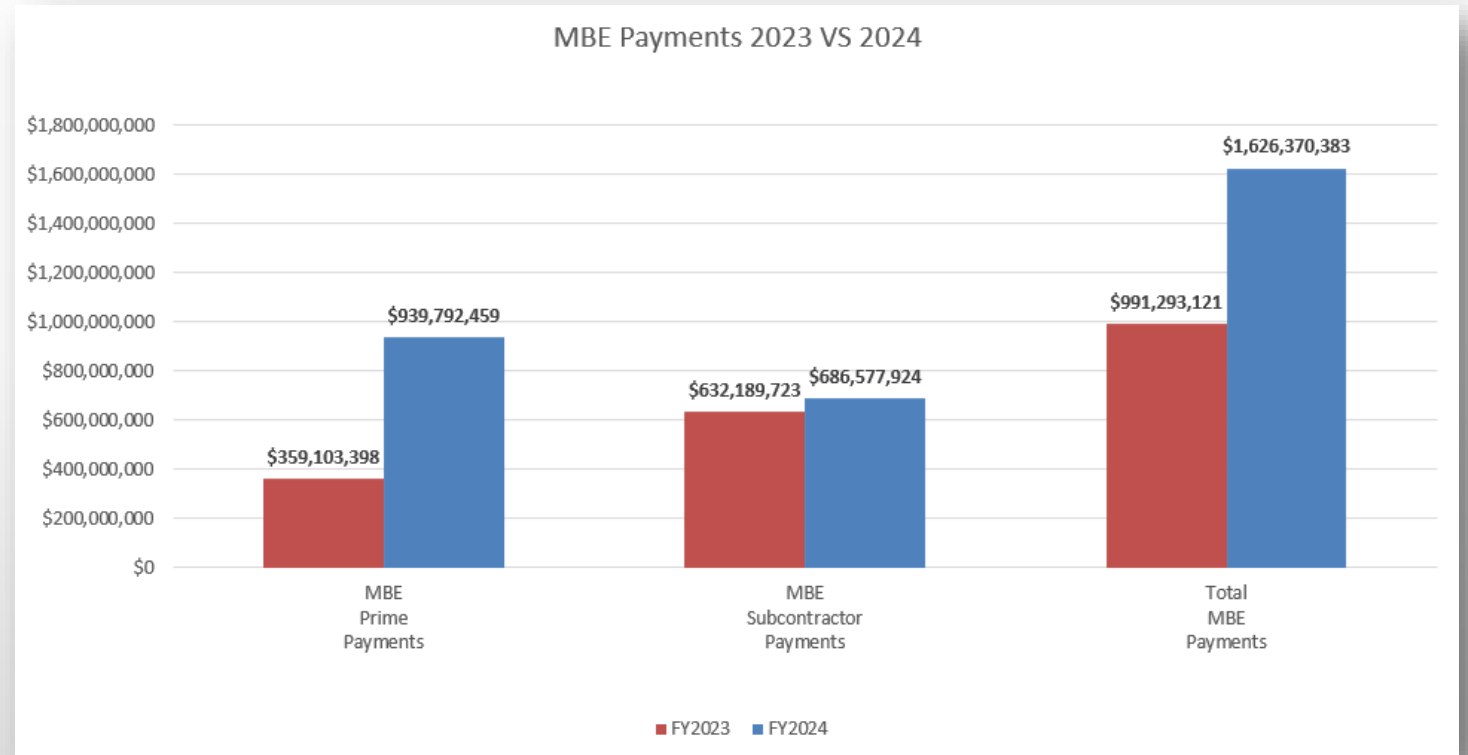
PRIME VS. SUB Awards

- Total **MBE awards** represent dollars awarded to certified MBEs operating as both prime contractors and subcontractors.
 - 76% was awarded to MBE subcontractors
 - 24% was awarded to MBE prime contractors
- This is significant as the utilization of more Minority Business Enterprise (MBE) subcontractors increases when contracts include MBE

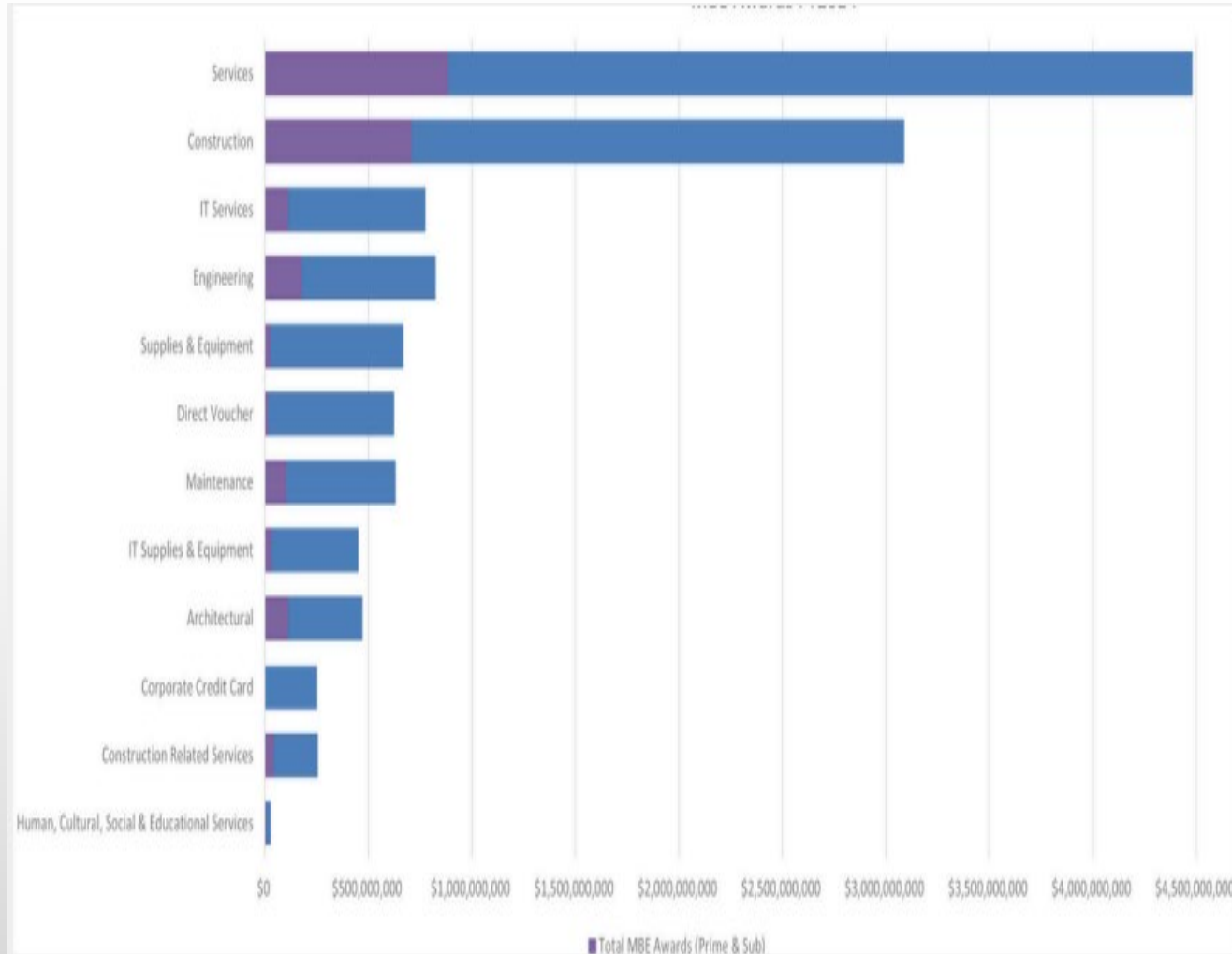


MBE Annual report Payments Highlight

- Overall, payments to MBE firms **increased by 64%**,
- Number of MBE firms to receive payments increased by 14%
- Payments to MBEs prime contractors increased by 161%
- Payments to MBE subcontractors increased by 8%



MBE Awards by Procurement Category



- Top three procurement categories for MBE Awards:
 - Services
 - Construction
 - Engineering
- It is important for agencies to enter their industry data correctly to ensure the data is being captured accurately

REAL PROPERTY TITLING SERVICES

- Fiscal year 2024 was the first year in which agencies and departments were required to report real property title insurance services awards to GOSBA
- Be sure to be inquisitive and collaborate with your agencies team that is handling real property titling services to be prepared for Annual Reporting time!

Fiscal Year 2024	
Agency Submission Status	
No Data to Report	64
Non-Responsive	5
Reported Real Property Title Insurance Service Awards in FY24	2
Total Participating Agencies	71

Fiscal Year 2024						
Real Property Title Insurance Services Awards (RPTIS)						
Agency Name	Total number (#) of RPTIS contracts awarded	Total dollar (\$) amount of RPTIS contracts awarded	Total number (#) of RPTIS contracts awarded to MBE Prime Contractors	Total dollar (\$) amount of RPTIS contracts awarded to MBE Prime Contractors	Total number (#) of RPTIS contracts awarded to MBE Subcontractors	Total dollar (\$) amount of RPTIS contracts awarded to MBE Subcontractors
Department of General Services	9	\$180,000.00	2	\$40,000.00	0	\$0.00
Transit Administration	0	\$0.00	1	\$3,768,400.00	1	\$433,366.00



QTR 2 Findings

AGENCY SUBMISSIONS QTR2

- Quarterly data is submitted directly to the Governors Office
- Timely and accurate submissions are required 30 days at the end of each quarter
- Next report will be due for **QTR 3 on April 30, 2025**

# of Agency Submissions for MBE Procurement	
Agency Submission Status	Activity Report
+ SUBMISSION RECEIVED	54
+ NO SUBMISSION	18
MBE Participation Agency Total	
72	

# of Agency Submissions for MBE Participation Data	
Agency Submission Status	
+ SUBMISSION RECEIVED	56
+ NO SUBMISSION	16
Grand Total	
72	

QTR Submission

- 3 Submissions are required for the MBE Program on a quarterly basis:
 - QTR MBE Report Forms 1 & 2 (Excel file)
 - QTR MBE Procurement Activity Report (Excel File)
 - Quarterly Compliance Check-In Survey (Google Form)

State Agency, Universities & MDOT Reporting Requirements & Resources

● FY2024 MBE Annual Reporting- Due September 30, 2024

● FY2025 Quarterly Reporting- Due on a QTR basis

Please submit the following:

1. Quarterly MBE Report Forms: Form 1, Form 2, and Outreach Data as EXCEL sheets (1 file)
2. Quarterly MBE Procurement Activity Report Requirements: Contract Awards, Contract Modifications, and Contract Renewals as EXCEL sheets (1 file)
3. Quarterly Compliance Check-In Survey: Please utilize the survey link below to submit the Check-in via Google Forms. Preview the full survey here: [PDF MBE Quarterly Compliance Check-In - Google Forms.pdf](#)

All documentation above is mandatory and must be submitted to the MBEreports.gosba@maryland.gov email box. The 2025 report templates are below:

- [FY2025 Quarterly MBE Report Forms 1.2025 v3 .xls](#)
- [FY2025 Quarterly MBE Procurement Activity Report 1.15.2025.xlsx](#)
- **Compliance Check-In Survey**
(This quarterly assessment of your unit's compliance relevant to MBE Program statutes, regulations, and directives should be completed by the Procurement Director or Senior Procurement Official in collaboration with the MBE Liaison.)

Use the link(s) above to complete the FY25 Quarterly MBE Report requirements. Reports are due no later than 30 days following the quarter being reported, and should contain data from the start of the fiscal year.

Reports should be submitted via email in
EXCEL FORMAT to: MBEreports.gosba@maryland.gov

Quarterly reports are cumulative. No 4th quarter MBE Report is due. Instead, the full fiscal year is reported in the Annual Report. Data for the Annual Report is submitted 90 days after the close of the fiscal year being reported. However, the Procurement Activity Report for the full fiscal year and the 4th quarter Compliance Check-in Survey are due on October 15, 2025.

LS


Percent (%) of Renewals with MBE Goals	Percent (%) of Renewals that Met MBE Goal at Time of Renewal	Percent (%) of Renewals that did NOT Meet MBE Goal at Time of Renewal	Percent (%) of Renewals with MBE PRIMES
61.38%	15.73%	13.48%	2.76%

Quick snapshot of new QTR data points

Percent (%) of Contracts with MBE Goals	Percent (%) of Contracts with MBE PRIMES
3.80%	7.28%

SOLICITATIONS

Total Quantity (#) of Direct Solicitations	Percent (%) of Direct Solicitations Made to MBEs
39535	1.89%



***NEW* Training structure for
MBE reporting**

***NEW* QTR Report Trainings**

- Several virtual quarterly reporting trainings will now be available the month prior to reports being due
- These trainings will be in a shorter format to clarify and break down the reporting requirements

Official training dates & details will be released in March 2025

- QTR 3 trainings for MBE will be hosted between the dates of April 1 -April 25

***NEW* ANNUAL Report Trainings**

- Several virtual annual reporting trainings will now be available the 3 months prior to reports being due
- These trainings will be in a shorter format to clarify the varying reporting requirements in a more digestible format

Official training dates & details will be released in May 2025

- Annual reporting trainings for MBE will be hosted between the dates of July 1 – September 25

ATTENDANCE IS KEY!



- Attending training sessions, is essential to your role as a liaison and your agencies compliance to the MBE program
 - If your agency becomes non-compliant, attendance will play a factor on whether the agency is doing the necessary due diligence to comply with the MBE program
 - Turnover happens, GOSBA is here to support your agency with those transitions as well
- If you are unable to attend one of the training sessions, **contact your designated MBE Compliance Manager** to schedule a one-on-one session

Best practices!



- Stay in touch with your designated MBE Compliance Manager
 - Any questions you may have do not be afraid to ask
 - Put a meeting on our calendar by utilizing our Calendly links
- Collaborate with your agencies procurement, outreach, and other departments who play apart in executing the MBE program requirements
- Watch the reporting training videos available to you in the toolkit 24/7
- Utilize the MBE Supplemental Reporting Guidance & Socioeconomic Data Reporting Guidance when reporting

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

KAREN REYES
KAREN.REYES@MARYLAND.GOV

SCHEDULE A ONE-ON-ONE:
[Calendly - Karen Reyes -GOSBA-](#)

TIARA RANDOLPH
TIARA.RANDOLPH@MARYLAND.GOV

SCHEDULE A ONE-ON-ONE:
[Calendly - Tiara Randolph -GOSBA-](#)

VSBE Program updates

Danielle Davis
VSBE Compliance manager



VSBE REMINDERS

COMAR 21.11.14.01-

A. Each procurement agency shall structure its procedures for making procurements to try to achieve **an overall minimum of 3 percent of the unit's total dollar value of all procurement contracts made directly or indirectly with veteran-owned small business enterprises;**




VSBE REMINDERS

All certified VSBEs are only found in eMaryland Marketplace Advantage (eMMA)

Login

Welcome to eMaryland Marketplace Advantage (eMMA)



eMaryland Marketplace Advantage

eMMA is Maryland's new online procurement platform used to connect the vendor community with contracting opportunities from state, county, and local government entities. Registered vendors will receive notices of bid opportunities, can submit bid responses online, and may obtain bid results online.

Qualified vendors may also complete the self-certification process for the Small Business Reserve (**SBR**) Program and Veteran-owned Small Business Enterprise (**VSBE**) Program.

eMMA facilitates an open, transparent, and efficient procurement process. We look forward to doing business with you!

Additional information can be found in the [Frequently Asked Questions](#) and [Quick Reference Guides](#). Any questions please contact the eMMA Help Desk at eMMA.helpdesk@maryland.gov.

LOGIN

Login*


Login must have a value

Password*


Login

State SSO Login (login.md.gov) MDoT SSO Login(MSAzure)


[Lost your password?](#)




New Vendor? Register Now




Public Solicitations



Public Contracts

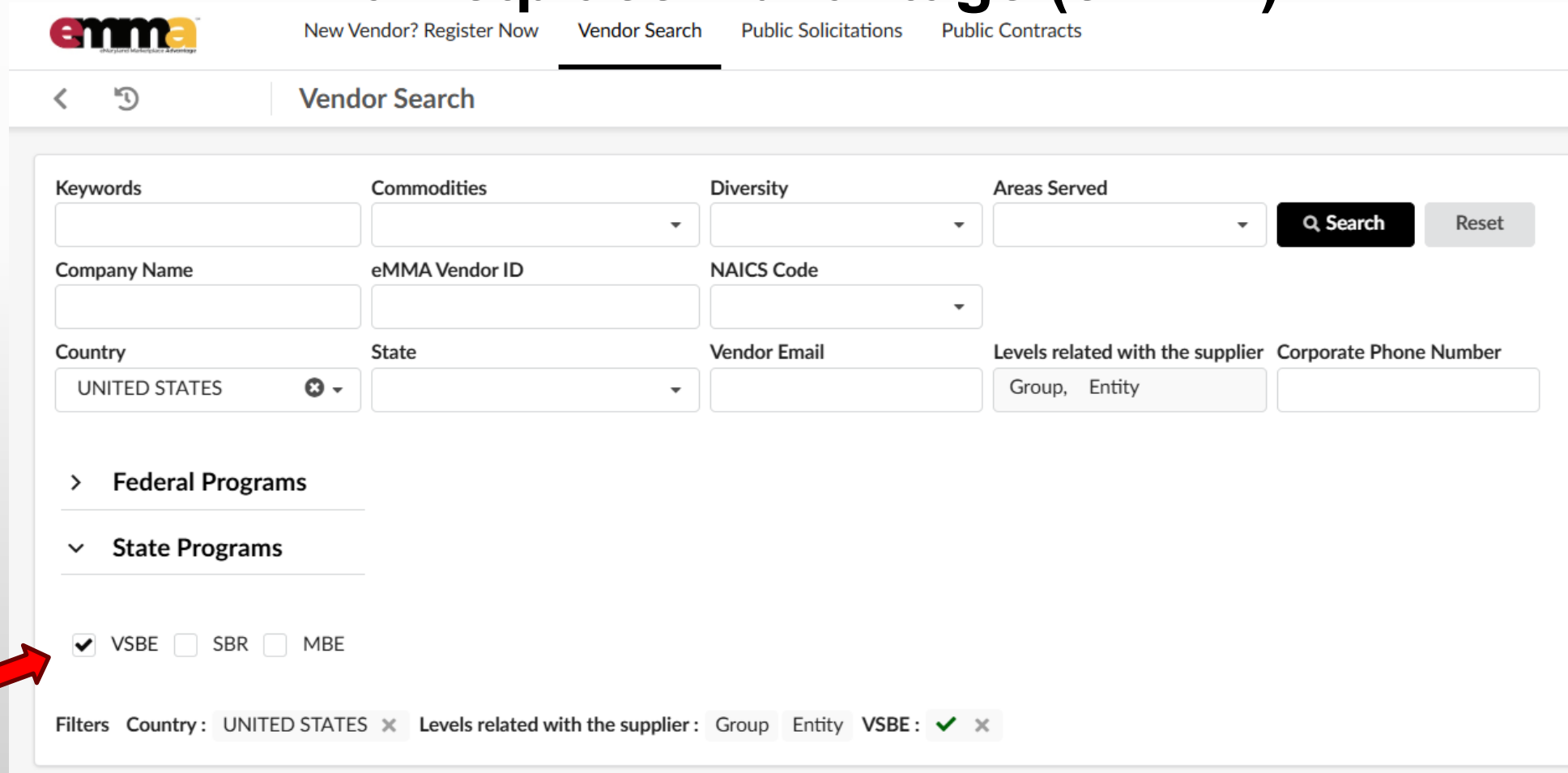


Vendor Search



VSBE REMINDERS

All certified VSBEs are only found in eMaryland Marketplace Advantage (eMMA)



The screenshot shows the eMMA Vendor Search interface. At the top, the eMMA logo is on the left, and navigation links for 'New Vendor? Register Now', 'Vendor Search', 'Public Solicitations', and 'Public Contracts' are on the right. The 'Vendor Search' link is underlined. Below the navigation bar, there are search filters organized into rows. The first row contains 'Keywords', 'Commodities', 'Diversity', and 'Areas Served', each with a text input or dropdown field, followed by a 'Search' button and a 'Reset' button. The second row contains 'Company Name', 'eMMA Vendor ID', and 'NAICS Code'. The third row contains 'Country' (set to 'UNITED STATES'), 'State', 'Vendor Email', 'Levels related with the supplier' (with 'Group' and 'Entity' options), and 'Corporate Phone Number'. Below these filters, there are expandable sections for 'Federal Programs' and 'State Programs'. Under 'State Programs', there are checkboxes for 'VSBE' (checked), 'SBR', and 'MBE'. A red arrow points to the 'VSBE' checkbox. At the bottom, a 'Filters' summary bar shows 'Country: UNITED STATES', 'Levels related with the supplier: Group Entity', and 'VSBE: ✓'.

eMMA
New Vendor? Register Now Vendor Search Public Solicitations Public Contracts

< ↺ **Vendor Search**

Keywords Commodities Diversity Areas Served **Search** Reset

Company Name eMMA Vendor ID NAICS Code

Country State Vendor Email Levels related with the supplier Corporate Phone Number

UNITED STATES Group Entity

> **Federal Programs**

▼ **State Programs**

☒ VSBE ☐ SBR ☐ MBE

Filters Country: UNITED STATES Levels related with the supplier: Group Entity VSBE: ✓

VSBE REMINDERS

For this example, we are using a Commodity Code. Make sure the VSBE Vendor flag is checked

The screenshot shows the 'Vendor Search' interface. Red arrows point to the following fields: 'Keywords', 'Commodities' (which contains '44120000 - Office supplies'), 'Diversity', and the 'VSBE' checkbox in the 'Federal Programs' section. The 'VSBE' checkbox is checked, while 'SBR' and 'MBE' are unchecked. The 'Country' is set to 'UNITED STATES'. The 'Levels related with the supplier' are set to 'Group' and 'Entity'. The bottom filter bar shows the active filters: Commodities: 44120000 - Office supplies, Country: UNITED STATES, VSBE: [checked], and Levels related with the supplier: Group, Entity.

< ↺ | Vendor Search

Keywords
Commodities
Diversity
Areas Served

Company Name
eMMA Vendor ID
NAICS Code

Country
State
Vendor Email
Levels related with the supplier
Corporate Phone Number

UNITED STATES

> Federal Programs

State Programs

☒ VSBE ☐ SBR ☐ MBE

Filters Commodities: 44120000 - Office supplies Country: UNITED STATES VSBE: ✓ Levels related with the supplier: Group Entity

VSBE REMINDERS

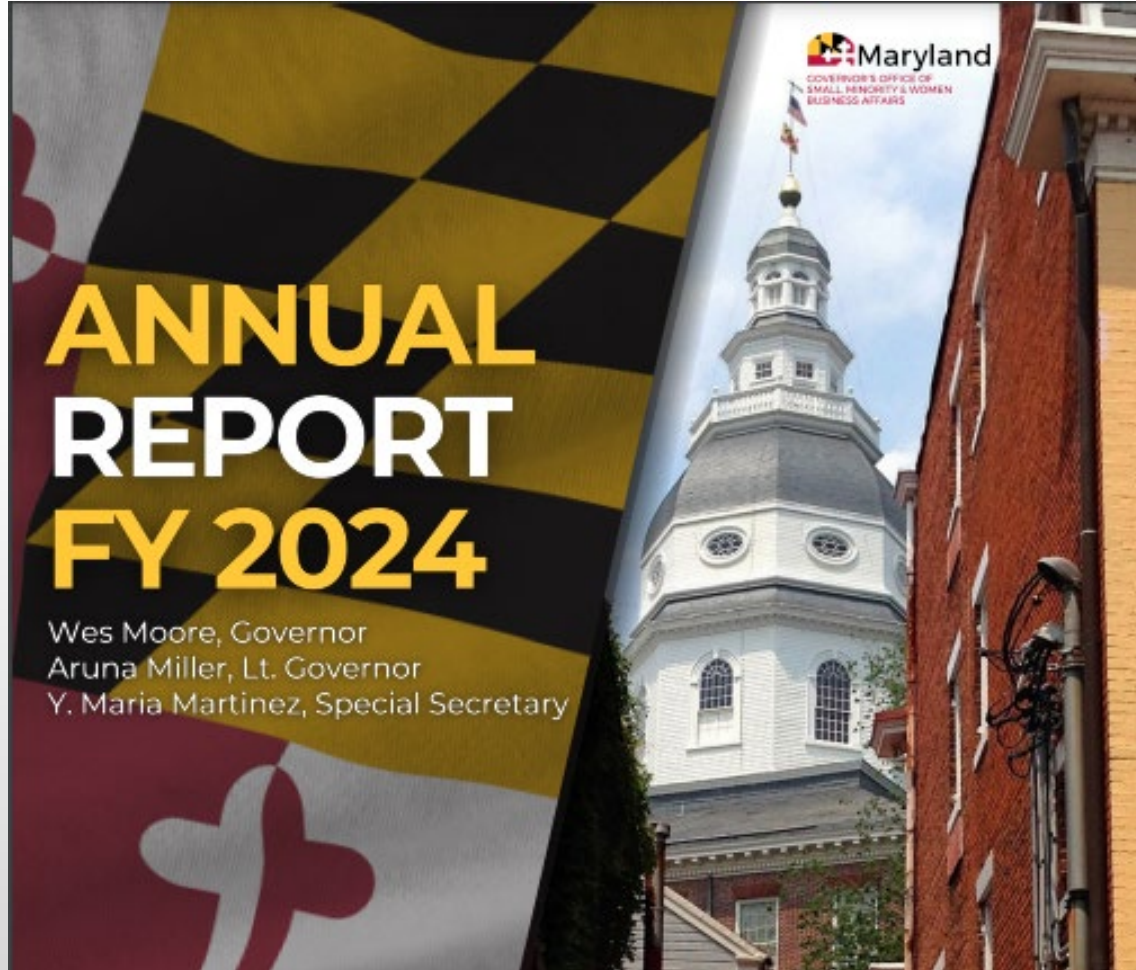
☒ VSBE ☐ SBR ☐ MBE

Filters Commodities : 44120000 - Office supplies Country : UNITED STATES x VSBE : ☒ x Levels related with the supplier : Group Entry

eMMA Vendor ID	Company Name	City	State	Postal Code	Vendor Contact	SBR Vendor	SBR Certification #	SBR Expiration Date	VSBE Vendor	VSBE Certification #	VSBE Expiration Date	Vendor Email	Corporate Phone Number	Website
SUP1063322	Arcadian	Waldorf	MD	20602	Dasanda Springer	<input checked="" type="checkbox"/>	SB24-070665	12/7/2025	<input checked="" type="checkbox"/>	VB25-072116	1/9/2026	info@arcadian-management.com	8777920725	https://arca managemer
SUP1006364	BPI Supply	Jefferson City	MO	65109	Sam Bartow	<input type="checkbox"/>			<input checked="" type="checkbox"/>	VB24-064645	7/29/2025	info@bpisupply.com	5736326000	bpisupply.c
SUP994071	Infinite Global Solutions	Upper Marlboro	MD	20774	Amber Payton	<input checked="" type="checkbox"/>	SB24-061316	5/23/2025	<input checked="" type="checkbox"/>	VB24-030381	5/23/2025	Amber@infniteglobalsolutions.com	2025961094	
SUP1053296	N.O.A.H., LLC	Bowie	MD	20715	CLEMENT BUCHANAN	<input checked="" type="checkbox"/>	SB24-066414	9/6/2025	<input checked="" type="checkbox"/>	VB24-066413	9/6/2025	support@noahllc.net	8444105678	https://noa
SUP026349	Page Global	Washington	DC	20024	James Page	<input checked="" type="checkbox"/>	SB24-062097	6/6/2025	<input checked="" type="checkbox"/>	VB24-062098	6/6/2025	sevans@pgafterpg.com	2022967247	www.pageg
SUP1050437	RSS Defense	Saratoga Springs	NY	12866		<input type="checkbox"/>			<input checked="" type="checkbox"/>	VB24-062060	6/6/2025	robert.domenici@resilientsupportservices.com	5188582611	www.resilie
SUP1050766	TANARR DEVELOPMENT COMPANY LLC	SILVER SPRING	MD	20910	CHRIS TANGANG	<input checked="" type="checkbox"/>	SB24-062010	6/5/2025	<input checked="" type="checkbox"/>	VB24-062040		Chris@tanarr.com	2404700129	www.Tanar
SUP016813	TEDABLE SOLUTIONS, L.L.C.	White Plains	MD	20695	EBENEZER QUAYNOR	<input checked="" type="checkbox"/>	SB24-055539	2/16/2026	<input checked="" type="checkbox"/>	VB24-056091	2/26/2025	equaynor@tedablesolutions.com	6464645603	www.tedab
SUP1020372	Tontine Group	Raleigh	NC	27612	Dale Thornhill	<input checked="" type="checkbox"/>	SB24-059188	4/13/2025	<input checked="" type="checkbox"/>	VB24-059185	4/13/2025	dthornhill@tontinegroup.com	4152256764	www.tontir
SUP1040088	Valor Construction and Supply LLC	Baldwin	MD	21013	Nicholas Heffler	<input checked="" type="checkbox"/>	SB24-056698	3/5/2025	<input checked="" type="checkbox"/>	VB24-056765	3/5/2025	nchvalor@gmail.com	14436555375	

FY2024 VSBE Analytics

New FY24 annual report



VSBE FY24 HIGHLIGHTS

- **30** units made awards to VSBEs out of 51 participating units
- **727** prime awards and **68** subcontract awards were made to VSBEs
- **\$124.2 Million** was awarded to VSBEs
- **104** VSBEs vendors received payment
- 14 units made their 1% VSBE goal
- These units each contributed significantly to the increase in awards made in FY24:
 - **Department of Human Services**
 - **Department of Public Safety & Correctional Services**
 - **Department of Health**
 - **Department of General Services**
 - **Maryland Transportation Authority**



VSBE FY24 HIGHLIGHTS

- Overall VSBE statewide participation rate, increasing by **144 percent** from 0.75% in FY23 to **1.83%** in FY24
- In FY2024, **504 new veteran businesses** were certified as VSBEs, while **186** expired businesses reentered the program after their certification expired

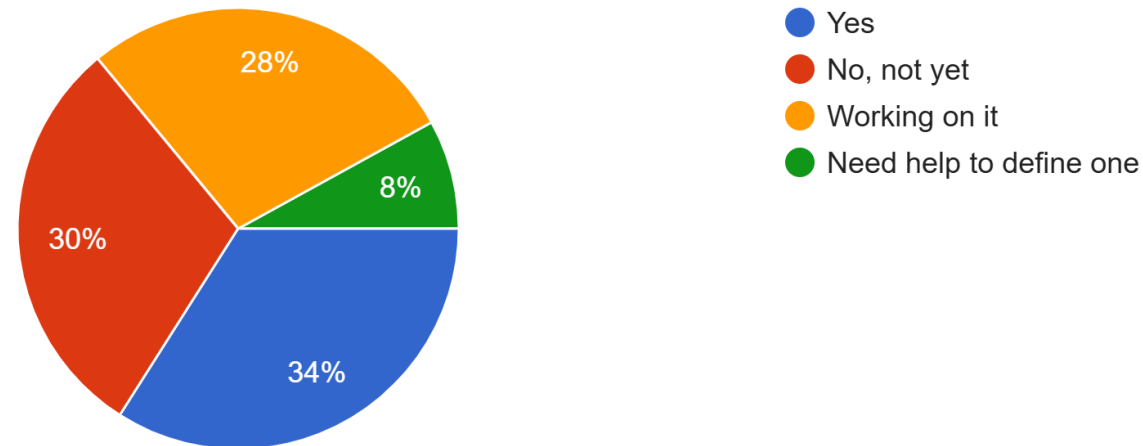


VSBE FY24 Outreach dATA

- We have work to do!
- 30% of Units reported they did not have a defined outreach strategy to veteran-owned businesses

Does your unit have a defined outreach strategy for engaging veteran-owned small businesses?

50 responses

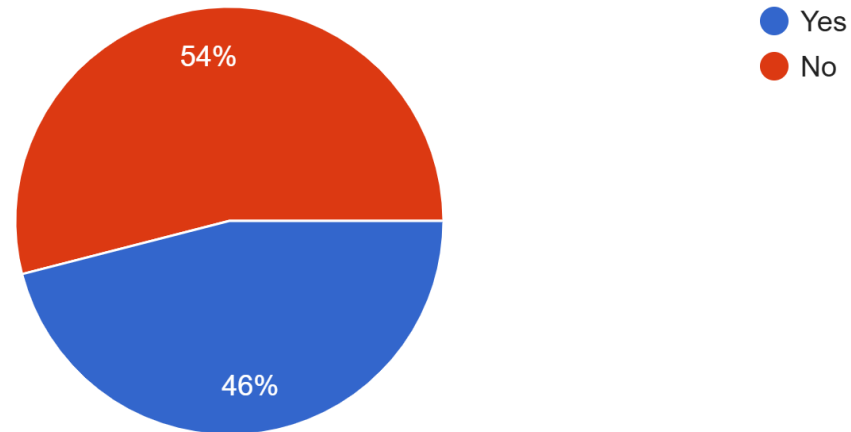


VSBE FY24 Outreach dATA

- We have work to do!
- **46% of Units did not solicit to VSBEs**

Did your unit directly solicit certified VSBEs in FY2024?

50 responses



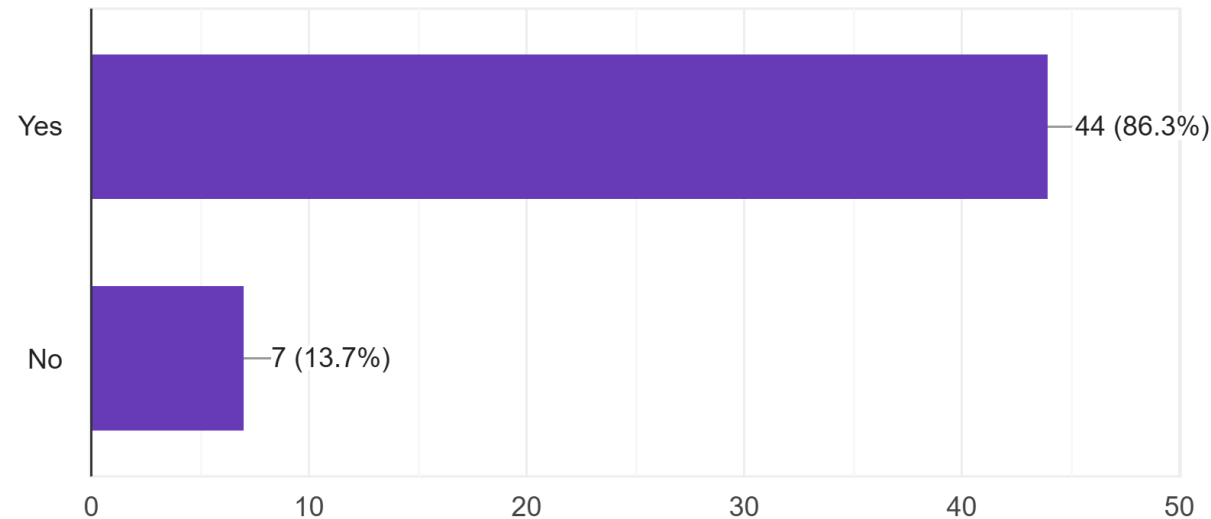
FY25 VSBE STRATEGIC PLANS

VSBE FY25 STRATEGIC PLAN THEMES

- VSBE Liaison is required to be involved in the PRG process
- **13.7% of VSBE Liaisons are not apart of the PRG process**

Is the VSBE liaison an active participant and signatory on the Procurement Review Group (PRG)?

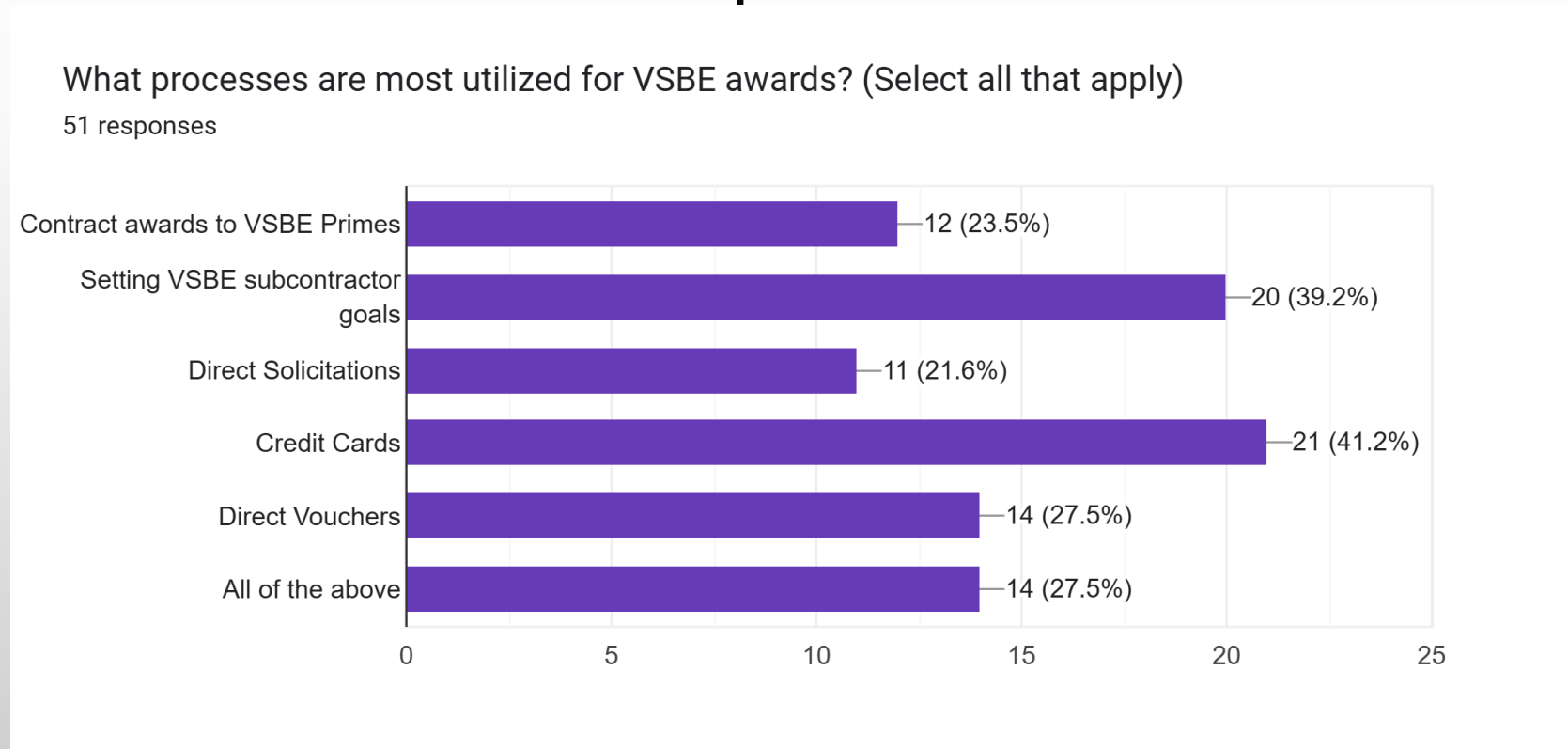
51 responses



VSBE FY25 STRATEGIC PLAN THEMES

- Outreach= More vendors getting certified
 - On average, I add about 10 new vendors a week into the VSBE database

Credit Cards were the most utilized process for awards for VSBEs

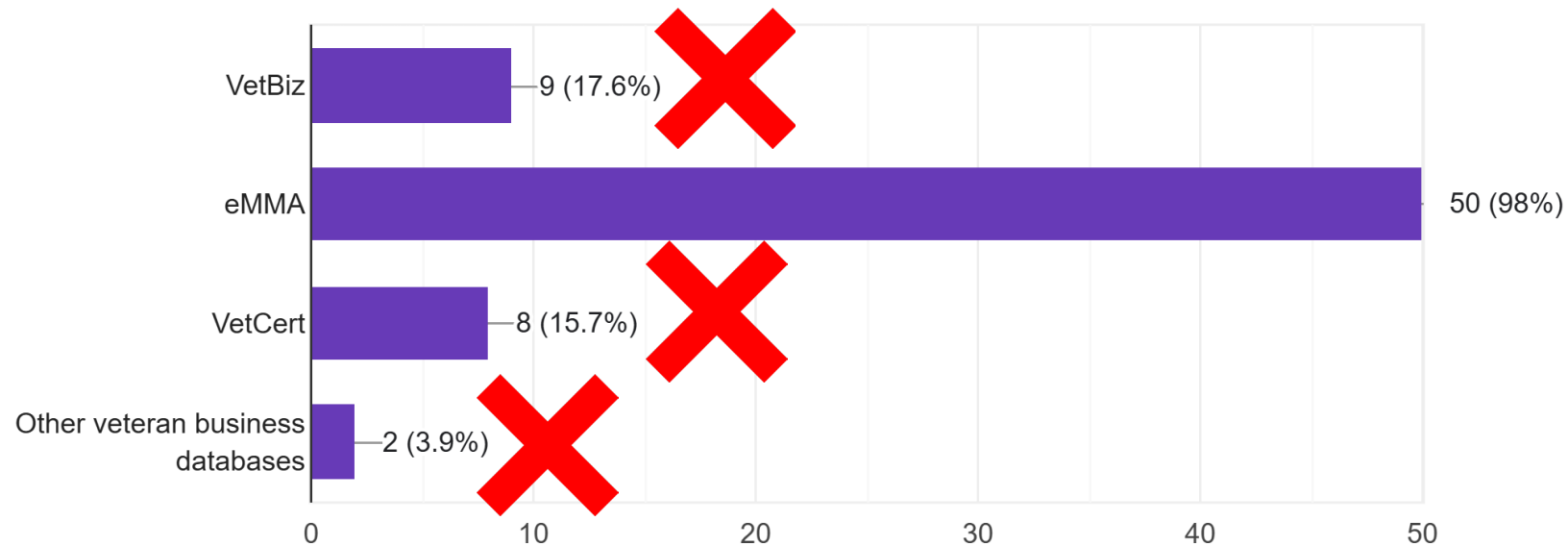


VSBE FY25 STRATEGIC PLAN THEMES

- Platforms for VSBE Certification

What platform is used to verify VSBE certification status prior to contract award?

51 responses



VSBE Reporting

Vsbe toolkit

The VSBE Toolkit is the home for all report preparers and Liaisons for templates and tools to be successful.

Submissions are
MANDATORY!

Reports are cumulative!

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

goMDsmallbiz.maryland.gov

VSBE Reporting Toolkit

This toolkit contains valuable information to assist State agencies/departments with the management and compliance of the Veteran-Owned Small Business Enterprise (VSBE) Program.

eMaryland Marketplace Advantage (eMMA) is the only platform to verify vendors in the VSBE Program.




*****Updated Templates FY2025 have now been posted below****

This report is mandatory and must be submitted to:
vsbereports.gosba@maryland.gov





VSBE Annual Report Instructions and Template:

-  [FY2024 VSBE REPORTING MANUAL FINAL V-1.docx](#)
-  [FY2024 VSBE Annual Form Template.xlsx](#)
- [FY24 Outreach Google Report](#)

VSBE Quarterly Report Templates:

-  [FY2025 VSBE Quarterly Form Template Final.xlsx](#) 
-  [FY2025 Quarterly VSBE Procurement Activity Report 1.8.2025.xlsx](#) 

VSBE Additional Reporting Document Tools:

-  [Socioeconomic Data Reporting Guidance Final.pdf](#)
-  [VSBE Annual Supplemental Guidance- ANSWERS.xlsx](#)
-  [VSBE Annual Supplemental Guidance- NON ANSWERS.xlsx](#)
-  [VSBE Program Guide.png](#)

VSBE Quarterly Reporting

Veteran-Owned Small Business Enterprise (VSBE) Quarterly Report

Fiscal Year 2024

Beginning in Fiscal Year 2019, the work of firms verified by the Center For Veterans Enterprise of the United States Department of Veterans Affairs or the Maryland Department of Veterans Affairs may be counted toward a defined VSBE contract goal (see COMAR 21.11.14).

INSTRUCTIONS: Complete all yellow cells. Automatic calculations will appear in blue cells. Do not edit this template

Agency Reporting:

Individual Completing Report:

Awards to VSBEs

	Total # All Procurement Contracts Awarded	Total \$ All Procurement Contracts Awarded	Total # Contracts Awarded to VSBEs as Prime Contractors	Total \$ Contracts Awarded to VSBEs as Prime Contractors	Total # VSBE Subcontracts Awarded	Total \$ VSBE Subcontracts Awarded
Procurement Contracts	QTY	709 & 710 Rpts Combined Total	QTY	VSBE 710	QTY	VSBE 720 Rpt
Corporate Credit Card	QTY	721 &/or Internal Report	QTY	VSBE 721/Credit Cards		
Direct Voucher	QTY	717 Data	QTY	VSBE 717		
Total		\$0		\$0		\$0
Should match MBE Rpt total agency awards Form						

Payments to VSBEs

Total \$ Payments to All Prime Contractors (Total of ALL Payments)	Total \$ Payments to VSBEs as Prime	Total \$ Payments to VSBEs as Subcontractors	VSBE Payments as % of All Payments
717 + 718 + Credit Card Report (721 or Internal) = All totals	VSBE only 717 + VSBE only 718 + Credit Card Rpt (721 or Internal) = VSBE Total Prime	VSBE only 719	#VALUE!

VSBE Quarterly Reporting

<u>Payments to VSBEs</u>			
Total \$ Payments to All Prime Contractors (Total of ALL Payments)	Total \$ Payments to VSBEs as Prime	Total \$ Payments to VSBEs as Subcontractors	VSBE Payments as % of All Payments
	\$ -	\$ -	

PRIMES

SUBS

+

<u>Payments to VSBEs</u>			
Total \$ Payments to All Prime Contractors (Total of ALL Payments)	Total \$ Payments to VSBEs as Prime	Total \$ Payments to VSBEs as Subcontractors	VSBE Payments as % of All Payments
717 + 718 + Credit Card Report (721 or Internal) = All totals	VSBE only 717 + VSBE only 718 + Credit Card Rpt (721 or Internal) = VSBE Total Prime	VSBE only 719	#VALUE!

Best VSBE REPORTING PRACTICES

1. Run all your data reports with VET flags
2. Scrub out your non-reportable data
3. Open both VSBE Quarterly Templates (you will use certain information on BOTH reports)
4. Start with Awards- Contract Data (709 & 710, 720)
5. Use said scrubbed data for both Quarterly reports
6. Use VET 717 (Direct Vouchers) and 721 (Credit Cards) for both award and payment data on both reports
7. End with rest of payment data scrubbed



VSBE q2 Procurement activity template

VSBE Program Procurement Activity Report

The Governor's Administration has requested VSBE Procurement Activity Reports on a quarterly basis.

Pursuant to COMAR 21.11.14.06 (B.) Each procurement agency shall furnish any other information or periodic reports requested by the Governor's Office of Small, Minority & Women Business Affairs in connection with its VSBE procurements, or any other matters related to the administration, effectiveness, or continuation of the VSBE Program.

As outlined in the Instructions tab, the data requested is collected cumulatively and the final submission for FY25 must be reported by VSBE Participating Agencies on or before **October 15, 2025**.

Completed Reports should be submitted electronically by email to vsbereports.gosba@maryland.gov

Agency Name:

Data from the detail tab automatically populates the table below. **ONLY** complete the certification section below the table with your units Quarter 4 submission on October 15, 2024.

Procurement Activity July 1, 2024 - June 30, 2025	Total Quantity (#)	Total Cumulative Value	Total Quantity (#) VSBE Goal Met at Time of Action (Modification or	Total Quantity (#) VSBE Goal Not Met at Time of Action	Total Quantity (#) of VSBE Prime Contractors Awarded
All contract awards issued	0	\$0			0
All contract awards with VSBE goals	0				
All contract modifications	0	\$0			0
All contracts modified that had VSBE goals	0		0	0	
All contract renewal options exercised	0	\$0			0
All contracts whose renewal options were exercised that had VSBE goals	0		0	0	

Direct Solicitations July 1, 2024 - June 30, 2025	Total Quantity Direct Vouchers (#)	Total Quantity Credit Cards (#)	Total Cumulative Value of Direct Solicitations(\$)
All Direct Solicitations (DV and CC)	0	0	\$0
(#) of VSBE Vendors Direct Solicited	0		

VSBE q2 Procurement activity template

VSBE Direct Solicitation Tab is specifically only wanting VSBE Awards

VSBE Program Procurement Activity Report

Cumulative Data Collection: Procurement Activity Detail for July 1, 2024 through June 30, 2025

Direct Solicitation- Vendor Name (Credit Card and Direct Vouchers)		DV OR CC?	Value (\$)	VSBE Vendor (Select from Dropdown)

Awards to VSBEs	
Total # Contracts Awarded to VSBEs as Prime Contractors	Total \$ Contracts Awarded to VSBEs as Prime Contractors
QTY	VSBE 710
QTY	VSBE 721/Credit Cards
QTY	VSBE 717
	\$0

VSBE q3 Procurement activity template

Data from the detail tab automatically populates the table below. **ONLY** complete the certification section below the table with your units Quarter 4 submission on October 15, 2024.

Procurement Activity July 1, 2024 - June 30, 2025	Total Quantity (#)	Total Cumulative Value (\$)	VSBE Goal Met at Time of Action (Modification or Renewal)	(#) VSBE Goal Not Met at Time of Action (Modification or Renewal)	Total Quantity (#) of VSBE Prime Contractors Awarded
All contract awards issued	QTY	\$710			710 VET FLAG
All contract awards with VSBE goals	0				
All contract modifications	QTY	\$709			709 VET FLAG
All contracts modified that had VSBE goals	0		0	0	
All contract renewal options exercised	Internal Process	\$0			0
All contracts whose renewal options were exercised that had VSBE goals	0		0	0	

Direct Solicitations July 1, 2024 - June 30, 2025	Total Quantity Direct Vouchers (#)	Total Quantity Credit Cards (#)	Total Cumulative Value of Direct Solicitations(\$)
All Direct Solicitations to VSBEs (DV and CC)	QTY 717 VET FLAG	QTY 721 VET FLAG	\$ VSBE 717 & 721
(#) of VSBE Vendors Direct Solicited			

VSBE quarterly updates

Quarter 1

- Number of Units submitted- **47**
- Total Dollars Awarded thus far in FY25- \$6,904,241
- 36 agencies had reached VSBE participation lower than 1%
- 9 agencies had reached VSBE participation between 1%-3%
- 2 agencies had achieved VSBE participation higher than 3%

Quarter 2

- Number of Units submitted- **43**
- Total Dollars Awarded thus far in FY25- \$30,555,446
- 34 units reached VSBE participation lower than 1%
- 5 units reached VSBE participation between 1%-3%
- 4 units achieved VSBE participation higher than 3%
- **18 of 43 units have made 0 awards to VSBEs**

VSBE upcoming

Veteran Small Business Preference

Evaluation. When a procurement under COMAR 21.05.02 has been designated for a small business preference, the procurement officer shall accept the most favorable responsive bid from a responsible small business if the bid does not exceed the most favorable responsive bid price received from a responsible bidder that is not certified as a small business by:

(a) More than 5 percent;

(b) **More than 7 percent for a veteran-owned small business;**

- VSBEs

(c) **More than 8 percent for a disabled-veteran-owned small business;** or

- <https://veterans.certify.sba.gov/#home>

(d) The predetermined percentage preference.

Veteran Small Business Preference

On the federal space, their certified veteran businesses will differentiate SDVOSB vs VOSB.
Please invite veteran businesses to get VSBE certified!

Athos1 LLC

Service Disabled Veteran Owned Small Business

Certification Information

DUNS	DBA	Last Verified	Expiration Date
118258183	-----	Feb 25, 2022	Feb 25, 2027

Business Information

SAM UEI	Cage Code	Entity Type	Year Established
DCD6DV1BMCN5	95HW9	Limited Liability Company (LLC)	2021

Website
<https://www.athos1.com>

Business Address 1	Business Address 2	City	State/Territory	Zip Code
6021 University Blvd., Ste. 330	-----	Ellicott City	MD	21043

NAICS CODES

523920	Portfolio Management
541330	Engineering Services
541512	Computer Systems Design Services
541513	Computer Facilities Management Services
541519	Other Computer Related Services
541611	Administrative Management and General Management Consulting Services



3G's Trucking LLC

Veteran Owned Small Business

Certification Information

DUNS	DBA	Last Verified	Expiration Date
111497494	-----	Apr 20, 2021	Apr 20, 2026

Business Information

SAM UEI	Cage Code	Entity Type	Year Established
CWBSHWSBKTQ9	8TMH6	Limited Liability Company (LLC)	-----

Website

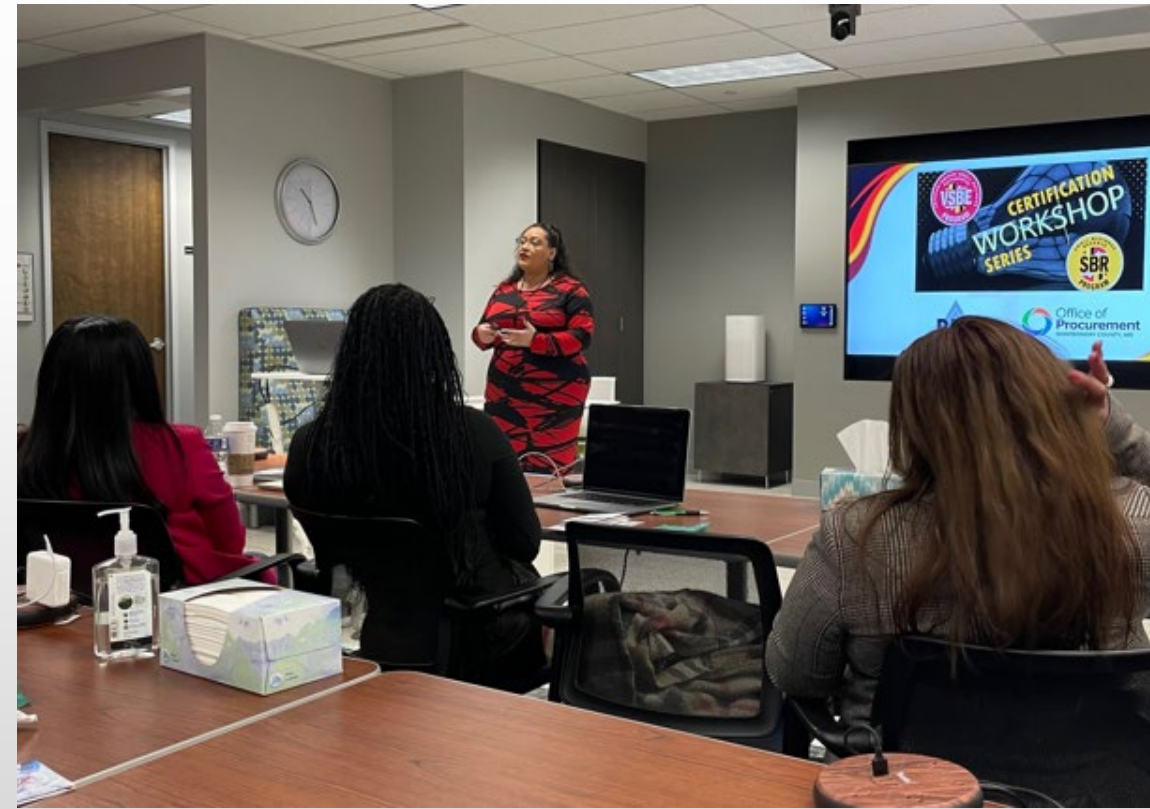
Business Address 1	Business Address 2	City	State/Territory	Zip Code
249 North St.	-----	Saint Michaels	MD	21663

NAICS CODES

484110	General Freight Trucking, Local
484210	Used Household and Office Goods Moving
541611	Administrative Management and General Management Consulting Services

UPCOMING for the vsbe program

- VSBE Compliance COMAR chapter to be updated FY26
- Veteran definition to be updated to allow even more VSBEs in the database
- VSBE specific outreach coming
- More VSBE Liaison Specific Training



Thank you

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,

Danielle.Davis2@maryland.gov