

SBR, MBE & VSBE COMBINED LIAISON TRAINING

MAY 4, 2023



Maryland

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

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

Pamela Gregory - *Chief of Staff*

Alison Tavik - *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*

Nichelle Johnson - *MBE Compliance Manager*

Karen Reyes - *MBE Compliance Manager*

Gerald Stinnett - *MBE Compliance Manager – VLT Operations*



MANNY WELSH

BOARD OF PUBLIC WORKS EXECUTIVE
OFFICE OF THE GOVERNOR WES MOORE



OFFICE OF THE GOVERNOR
Wes Moore

AGENDA

- Legislative updates
- General section for all programs
- SBR program training
- Break
- MBE program training
- VSBE program training

LEGISLATIVE UPDATE

PRESENTED BY DAVON K. GARDNER
DIRECTOR OF POLICY & LEGISLATIVE AFFAIRS



HB0809/SB0334

Primary Sponsor: Delegate Harris And Senator Hayes

Bill Title: State Procurement Minority Business Enterprise
Program Extension And Reports

Committee: HB0809

3/6/2023

1:00 P.M.

Report From House Of Origin: HB0809

Current Status: Passed Enrolled

Synopsis: Altering The Termination Date For Certain Provisions Of Law Governing The Minority Business Enterprise Program And Its Application To Offshore Wind Projects And Video Lottery Terminals To July 1, 2025; And Altering The Date By Which Certain Reports Must Be Submitted.

HB0816/SB0510

Primary Sponsor: Delegate Phillips and Senator Ellis

Bill Title: Procurement - Minority Business Enterprises and Veteran-Owned Small Business Enterprises - Participation Goal Scorecard

Committee: HB0816

3/6/2023

1:00 p.m.

Report from House of Origin: HB0816

Current Status: Passed Enrolled

Synopsis: Requiring the Governor's Office of Small, Minority, and Women Business Affairs to develop a scorecard to evaluate units of State government on the units' performance toward meeting certain participation goals under the Minority Business Enterprise Program and the Veteran-Owned Small Business Enterprise Program; establishing a certain grading scale for the scorecard; and requiring grades achieved by each unit to be published each year on the Office's website.

HB0245

Primary Sponsor: Delegate Woods

Bill Title: Minority Business Enterprise Program - Reporting

Committee: HB0245

2/15/2023

1:00 p.m.

Report from House of Origin: HB0245

Current Status: Returned Passed

Synopsis: Requiring the Governor's Office of Small, Minority, and Women Business Affairs to include an attestation that all units required to report are represented in its annual report beginning December 31, 2023; requiring the Office to conduct a certain periodic audit to ensure the accuracy of the attestation; requiring a certain annual report to be submitted to the Joint Committee on Fair Practices and State Personnel Oversight; etc.

GENERAL SECTION ALL PROGRAMS



Maryland

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

REPORTING REMINDERS



Maryland

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

REPORTING REMINDERS

- Procurement Forecast
- SBR & MBE Consolidated Strategic Plan
 - Annual Reports

PROCUREMENT FORECAST

- Forecast data will be available to the public in a searchable format on our website
- Agencies only need to submit one report with all projected procurements, including SBR designated procurements and those with MBE and VSBE goals
- Follow the instructions when completing the worksheet, using the drop-down menus, filling in all mandatory fields that apply
- Do not attempt to override the template adding other columns, etc.
 - This data is fed into a database

PROCUREMENT FORECAST SUBMISSION

- All agencies are required to submit one report with all projected purchases in excel format no later than June 30, 2023
- Do not use previous templates and instructions
 - Retrieve the updated instructions and the template for FY2024 in the SBR, MBE, and VSBE Toolkits
- Submissions should be sent via email to:
 - compliance.gosba@maryland.gov
- The submission should include:
 - Detailed FY2024 Procurement Forecast excel spreadsheet
 - Signed attestation in PDF format

SBR & MBE CONSOLIDATED STRATEGIC PLAN

- This radically revised consolidated strategic plan is a mandatory report
- Our hope in streamlining the strategic plan is to:
 - Make it more user friendly
 - Re-structuring the questions in a way that add more meaning & value to your agencies current processes
- When answering the questions keep in mind to:
 - Be in a reflective space regarding past performance
 - Be open minded when brainstorming future improvements that could be possible for your agency

SBR & MBE CONSOLIDATED STRATEGIC PLAN SUBMISSION

- Consolidated strategic plan google form link & PDF are available in the SBR & MBE toolkits
 - <https://forms.gle/JZPL13xY8Q9fWzhs7>
- **One** submission is required per agency by June 30, 2023
 - We encourage agencies to download the PDF version before submission to allow for collaboration amongst multiple contributors

QUESTIONS & CONCERNS

Any procurement forecast questions, contact:

Lisa Mitchell Sennaar
lisa.sennaar@maryland.gov
410-697-9613

Any strategic plan questions, contact:

Karen Reyes
karen.reyes@maryland.gov
410-697-9608

ANNUAL REPORTS

- Fourth quarter reports are not required, you will submit your annual report instead
- Report covers the period between July 1, 2022- June 30, 2023
- All documentation is mandatory for each programs report
 - Each program will detail within this training what documentation is required for submission

ANNUAL REPORT SUBMISSIONS

- SBR submission deadline & email:
 - Due on September 30, 2023
 - Email for submission: sbrreports.gosba@maryland.gov
- MBE submission deadline & email:
 - Due on September 30, 2023
 - Email for submission: mbereports.gosba@maryland.gov
- VSBE submission deadline & email:
 - Due on October 1, 2023
 - Email for submission: vsbereports.gosba@maryland.gov

LIAISONS



LIAISON COMAR REGULATION

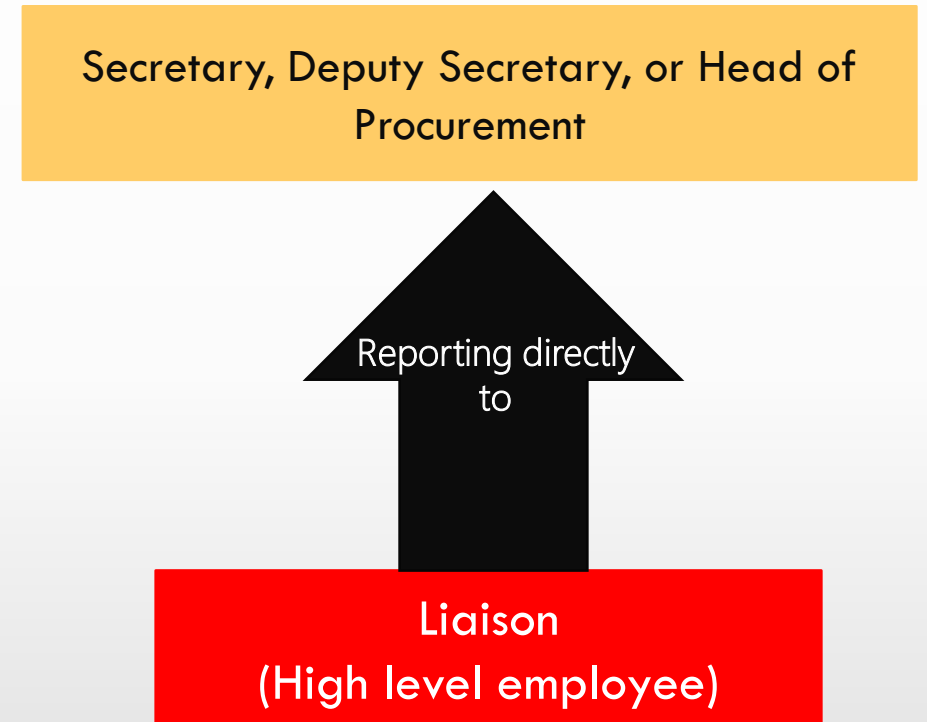
SBR- 21.11.01.06

MBE- 21.11.03.05

VSBE- 21.11.14.05

LIAISON HIERARCHY

- The head of each procurement agency shall designate an employee to be an SBR, MBE, or VSBE liaison.
 - This will look different at each agency depending on the programs your required to report for.



LIAISON RESPONSIBILITIES

- Coordinating agency outreach efforts
- Reviewing agency contracting procedures to ensure compliance
- Assisting in resolution of contracting issues
- Submitting required program reports or information

WHAT COULD THIS LOOK LIKE?

Coordinating agency outreach efforts

- Brainstorming with your units:
 - Contract monitors
 - Compliance manager
 - Buyers
 - Fair practice offices
 - Outreach coordinators
 - Communications & marketing team

Reviewing agency contracting procedures to ensure compliance

- Participating in your agency's Procurement Review Group (PRG)
- Ensuring that solicitation documentation includes the necessary forms, clauses, and language for each program

WHAT COULD THIS LOOK LIKE?

Assisting in resolution of contracting issues

- Advocating for certified vendors
 - Helping a vendor mitigate payment issues
 - Assist vendors who are experiencing fraud/fraudulent behavior
 - Providing resources or points of contact if vendors have questions
 - Answering internal agency questions to ensure current contracts are upholding socioeconomic policies

Submitting required program reports or information

- Speaking with appropriate staff on your procurement team to have a clear understanding of how reporting works within your unique agency.
- Submitting quarterly reports on time to lessen your annual report load by end of FY.
- One-on-one meetings with GOSBA compliance managers
- Utilizing the reporting toolkits, manuals, and cheat sheets.

THE LIAISON PROMISE

The Liaison Promise

- To uphold the tenets of the Socioeconomic Programs
- To ensure my procurement unit follows the statutes, regulations, policies & guidelines of Maryland's Socioeconomic Programs
- To assist procurement staff & advocate on behalf of certified vendors, as needed, to successfully ensure compliance to the Socioeconomic Programs
- To bridge the gap between the state and our community of certified vendors

SBR PROGRAM



Maryland

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

SBR ANNUAL REPORTING

- SBR Reporting Requirements
- Resources available in SBR Toolkit
- Share how/when to submit the SBR Annual Report
- Importance of referring to the BPW Advisory 2005-1 and Gad List when reporting (scrubbing)
- Importance of SBR vendor verification of certification
- Reminder about Liaisons

SBR PROGRAM REQUIREMENTS

COMAR 21.13.01.03 Reporting

- Units must submit both Quarterly and Annual SBR Reports (backup data should be included).
- Email completed reports in EXCEL FORMAT to: sbrreports.gosba@maryland.gov

SBR REPORTING

-Be certain to follow the steps provided in the [SBR Reporting ToolKit](#) as it pertains to the SBR FY2023 Annual and Quarterly Report Instructions/Templates.

-Instead of submitting a 4th Quarter Report, you will provide an Annual Report, consisting of all 4 quarters. The SBR Quarterly Reports are cumulative, so those who submitted the 1st-3rd Quarter Reports have a head start on this Annual Report.

Remember:

*SBR Annual Report is due before
or on September 30, 2023*

SBR TOOLKIT

The screenshot shows the Maryland.gov website with the following elements:

- Browser Address Bar:** `gomdsmallbiz.maryland.gov/Pages/default.aspx`
- Navigation Bar:** Home (highlighted with a red box), MBE PROGRAM, SBR PROGRAM, VSBE Program, RESOURCES, PROCUREMENT FORECAST.
- Header:** Maryland.gov logo, State Directory, State Agencies, search bar, and social media icons (Facebook, YouTube, Twitter).
- Main Content Area:**
 - Left Sidebar:** "GOVERNOR'S COORDINATING OFFICES HOME" banner, "Quick Links" menu (About Us, Legislation and Policy, Outreach, News, Reports, Contact Us), and three "SBR PROGRAM REPORTING TOOLKIT" buttons (SBR, MBE, VSBE).
 - Center:** A large graphic of a blue keyboard key with an envelope icon and the word "Newsletter". A red-bordered box highlights the "SBR PROGRAM REPORTING TOOLKIT" button, with red lines connecting it to the corresponding button in the sidebar.
 - Right Column:** "Attention SBR & VSBE Vendors" text, "TOP WEBSITE PICKS" list, "PUBLIC DATA MINING STRATEGIES" section, and "Procurement Forecast" and "Board of Public Works" sections.

SBR TOOLKIT

Quick Links

About Us

Legislation and Policy

Outreach

News

Reports

Contact Us

SBR Program Overview

eMMA QRG - SBR Certification and Recertification

Policies and Procedures

PRG Guidance and Worksheets
(located on the Office of State Procurement's
(OSP) website)

SBR Designation for Statewide Contracts with
Multiple Contract Awards

Procurement Compliance Bulletins

4.20.2023

3.22.2023

2.22.2023

1.17.2023

12.14.2022

11.17.2022

SBR Liaison

Small Business Reserve (SBR) Program Reporting Toolkit

This toolkit contains valuable information to assist State agencies/departments with the management and compliance of the Small Business Reserve (SBR) Program. (This page is for intended for internal state users only. **Vendors do not submit these reports.**)

FY2023 Small Business Reserve (SBR) Quarterly Report

FY2023 3rd Quarter Report is due by April 30, 2023

SBR Quarterly report data is cumulative. Quarterly Reports for the first three quarters are due no later than 30 days following the quarter being reported, and should contain data from the start of the fiscal year. **No 4th quarter 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.**

[SBR Quarterly Report Instructions](#)
[SBR Quarterly Report Template](#)

Forward completed reports via email in
EXCEL FORMAT to: sbrrports.gosba@maryland.gov

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

FY2024 Procurement Forecast


is due by June 30, 2023

This data, which includes all projected purchases of \$100,000 and above for the fiscal year. Keep in mind the forecast is provided to the public and serves as an important tool for the small, minority, women, and veteran business community. Please give the proper attention to this mandatory report by following the instructions and being thorough with your responses.

[FY2024 Procurement Forecast Instructions](#)

SBR TOOLKIT

Resources

- Program Overview
 - Updated Report Instructions and Templates
 - Policies and Procedures
 - Monthly Procurement Compliance Bulletins
 - Previous Liaison Training Slide Decks and Recordings
 - Compliance Call Library
- 

SBR ANNUAL REPORT INSTRUCTIONS

- The SBR Annual Report Instructions are provided as a guideline to completing this report. If you follow the step-by-step instructions, you should be able to effectively prepare the report.
- Be certain to read through the instructions in its entirety.
- Remember that you can contact us (SBR admins) with any questions that you may have in regards to the SBR Annual Report.

SBR ANNUAL REPORT INSTRUCTIONS

SMALL BUSINESS RESERVE FY2022 ANNUAL REPORT INSTRUCTIONS

The SBR Annual Report is due no later than 90 days after the end of each fiscal year, in a format determined by the Governor's Office of Small, Minority & Women Business Affairs

GENERAL GUIDELINES:

The objective of the Small Business Reserve (SBR) Program. B. Scope. To the extent practicable, each procurement unit shall structure its procurement procedures to achieve the result that a minimum of 15 percent of the unit's total dollar value of procurements for goods, supplies, services, maintenance, construction, construction-related services, architectural services, and engineering services are expended directly with certified small businesses at the prime contract level on SBR designated procurements per **COMAR 21.11.01.06 (B)**. Firms must be certified in the SBR Program at the time of the award and payments for agencies to count that payment toward the 15 % SBR mandated achievement.

SBR ANNUAL REPORT TEMPLATE

- The SBR Annual Report Template is to be submitted, which requires signatures from the Agency Head and Chief Financial Officer. Quarterly Reports do not require signatures currently.
- The template should only be altered if adding tabs to provide extra back-up data.
- Please make sure that you are using the SBR Annual Report Template and Instructions for the most recent fiscal year that are located in the SBR Toolkit.

REPORT TEMPLATE

SUMMARY STATEMENT TAB

Governor's Office of Small, Minority & Women Business Affairs	
FY 2022 Annual Small Business Reserve Summary Statement	
July 1, 2021- June 30, 2022	
(Enter Data In Yellow Boxes Only. Tan Boxes Are Calculated Totals)	
1. Total Credit Card Payments	link to support
2. Total Credit Card Payments to SBR Contractors	link to support
3. Total Procurement Payments (not including Credit Card Payments)	link to support
4. Total Dollars Paid to SBR Contractors Under a Designated SBR Procurement	link to support
5. Total Dollars Paid to SBR Contractors Under a Non-Designated Procurement	link to support
6. Total Number of SBR Contractors receiving award and payments	link to support
7. Total DESIGNATED SBR Procurement Payments (Line 2 and Line 4)	#VALUE!
8. Total SBR Procurement Payments (Lines 2, 4 & 5)	#VALUE!
9. Total Procurement Payments (Lines 1 and Line 3)	#VALUE!
10. Percentage All SBR Designated Payments to All Payments (Line 7/Line 9)	#VALUE!
11. Percentage All SBR Payments to All Payments (Line 8/Line 9)	#VALUE!
Agency Name:	
Agency Head Signature:	
Chief Financial Officer Signature:	
Submitted By:	
Title:	
Telephone Number:	
Submission Date:	
<p>Did the agency attain the 15% SBR Designated set aside? Yes or No. If agency did not attain 15 % designated set aside, use the Notes section to explain the lack of attainment.</p>	<p>NOTES:</p>

FY 2022 SBR Annual Summary

P-CARD LINE1

P-CARD-SBR-LINE2

067-SCRUBBED-LINE 3

067-SBR LINE 4-5 ...

REPORT TEMPLATE

SUMMARY STATEMENT TAB

Note that in the first tab, "SBR Annual Summary" (i.e. Summary Statement), amounts for Lines 1-6 are to be manually entered by the report preparer.

Governor's Office of Small, Minority & Women Business Affairs	
FY 2022 Annual Small Business Reserve Summary Statement	
July 1, 2021- June 30, 2022	
(Enter Data In Yellow Boxes Only. Tan Boxes Are Calculated Totals)	
1. Total Credit Card Payments	link to support
2. Total Credit Card Payments to SBR Contractors	link to support
3. Total Procurement Payments (not including Credit Card Payments)	link to support
4. Total Dollars Paid to SBR Contractors Under a Designated SBR Procurement	link to support
5. Total Dollars Paid to SBR Contractors Under a Non-Designated Procurement	link to support
6. Total Number of SBR Contractors receiving award and payments	link to support
7. Total DESIGNATED SBR Procurement Payments (Line 2 and Line 4)	#VALUE!
8. Total SBR Procurement Payments (Lines 2, 4 & 5)	#VALUE!
9. Total Procurement Payments (Lines 1 and Line 3)	#VALUE!
10. Percentage All SBR Designated Payments to All Payments (Line 7/Line 9)	#VALUE!
11. Percentage All SBR Payments to All Payments (Line 8/Line 9)	#VALUE!
Agency Name:	
Agency Head Signature:	
Chief Financial Officer Signature:	
Submitted By:	
Title:	
Telephone Number:	
Submission Date:	
<p>Did the agency attain the 15% SBR Designated set aside? Yes or No. If agency did not attain 15 % designated set aside, use the Notes section to explain the lack of attainment.</p>	<p>NOTES:</p>

REPORT TEMPLATE

SUMMARY STATEMENT TAB

For Lines 7-11, these values are automatically calculated based upon totals entered in prior line items.

Governor's Office of Small, Minority & Women Business Affairs FY 2022 Annual Small Business Reserve Summary Statement July 1, 2021- June 30, 2022 (Enter Data In Yellow Boxes Only. Tan Boxes Are Calculated Totals)	
1. Total Credit Card Payments	link to support
2. Total Credit Card Payments to SBR Contractors	link to support
3. Total Procurement Payments (not including Credit Card Payments)	link to support
4. Total Dollars Paid to SBR Contractors Under a Designated SBR Procurement	link to support
5. Total Dollars Paid to SBR Contractors Under a Non-Designated Procurement	link to support
6. Total Number of SBR Contractors receiving award and payments	link to support
7. Total DESIGNATED SBR Procurement Payments (Line 2 and Line 4)	#VALUE!
8. Total SBR Procurement Payments (Lines 2, 4 & 5)	#VALUE!
9. Total Procurement Payments (Lines 1 and Line 3)	#VALUE!
10. Percentage All SBR Designated Payments to All Payments (Line 7/Line 9)	#VALUE!
11. Percentage All SBR Payments to All Payments (Line 8/Line 9)	#VALUE!
Agency Name:	
Agency Head Signature:	
Chief Financial Officer Signature:	
Submitted By:	
Title:	
Telephone Number:	
Submission Date:	
Did the agency attain the 15% SBR Designated set aside? Yes or No. If agency did not attain 15 % designated set aside, use the Notes section to explain the lack of attainment.	NOTES: [Empty text area for notes]

REPORT TEMPLATE

SUMMARY STATEMENT TAB

Governor's Office of Small, Minority & Women Business Affairs
 FY 2022 Annual Small Business Reserve Summary Statement

July 1, 2021- June 30, 2022

(Enter Data In Yellow Boxes Only. Tan Boxes Are Calculated Totals)

1. Total Credit Card Payments	link to support
2. Total Credit Card Payments to SBR Contractors	link to support
3. Total Procurement Payments (not including Credit Card Payments)	link to support
4. Total Dollars Paid to SBR Contractors Under a Designated SBR Procurement	link to support
5. Total Dollars Paid to SBR Contractors Under a Non-Designated Procurement	link to support
6. Total Number of SBR Contractors receiving award and payments	link to support
7. Total DESIGNATED SBR Procurement Payments (Line 2 and Line 4)	#VALUE!
8. Total SBR Procurement Payments (Lines 2, 4 & 5)	#VALUE!
9. Total Procurement Payments (Lines 1 and Line 3)	#VALUE!
10. Percentage All SBR Designated Payments to All Payments (Line 7/Line 9)	#VALUE!
11. Percentage All SBR Payments to All Payments (Line 8/Line 9)	#VALUE!

REMEMBER: Signatures are required by the Agency Head and Chief Financial Officer!

Agency Name: _____

Agency Head Signature: _____

Chief Financial Officer Signature: _____

Submitted By: _____

Title: _____

Telephone Number: _____

Submission Date: _____

Did the agency attain the 15% SBR Designated set aside? Yes or No. If agency did not attain 15 % designated set aside, use the Notes section to explain the lack of attainment.

NOTES:

Signatures Required



REPORT TEMPLATE

SUMMARY STATEMENT TAB

Be certain to use the "Notes" section to provide any explanation of the data, specifically if your agency did not obtain 15% of the SBR designated spend.

Governor's Office of Small, Minority & Women Business Affairs	
FY 2022 Annual Small Business Reserve Summary Statement	
July 1, 2021- June 30, 2022	
(Enter Data In Yellow Boxes Only. Tan Boxes Are Calculated Totals)	
1. Total Credit Card Payments	link to support
2. Total Credit Card Payments to SBR Contractors	link to support
3. Total Procurement Payments (not including Credit Card Payments)	link to support
4. Total Dollars Paid to SBR Contractors Under a Designated SBR Procurement	link to support
5. Total Dollars Paid to SBR Contractors Under a Non-Designated Procurement	link to support
6. Total Number of SBR Contractors receiving award and payments	link to support
7. Total DESIGNATED SBR Procurement Payments (Line 2 and Line 4)	#VALUE!
8. Total SBR Procurement Payments (Lines 2, 4 & 5)	#VALUE!
9. Total Procurement Payments (Lines 1 and Line 3)	#VALUE!
10. Percentage All SBR Designated Payments to All Payments (Line 7/Line 9)	#VALUE!
11. Percentage All SBR Payments to All Payments (Line 8/Line 9)	#VALUE!
Agency Name:	
Agency Head Signature:	
Chief Financial Officer Signature:	
Submitted By:	
Title:	
Telephone Number:	
Submission Date:	
<p>Did the agency attain the 15% SBR Designated set aside? Yes or No. If agency did not attain 15 % designated set aside, use the Notes section to explain the lack of attainment.</p>	<p>NOTES:</p> <div style="border: 1px solid red; padding: 10px; text-align: center; color: black; font-weight: bold;">USE THIS AREA</div>

SUMMARY STATEMENT/REPORTING

- Information provided on the Summary Statement should be clearly defined within the listed tabs.
- We should be able to quickly find that amount/related data within the corresponding tab.

For example:

If the Summary Statement, Line 1 (Total Credit Card Payments) states “\$6,000” and Line 2 (Total Credit Card Payments to SBR Contractors) states “\$3,400”, we should be able to click on the corresponding tabs, “P-CARD LINE1” and “P-CARD- SBR-LINE2”, to find how those amounts were determined.

Example of FY2022 Data

If Summary Statement, Line 1 (Total Credit Card Payments) is “\$6,000” and Line 2 (Total Credit Card Payments to SBR Contractors) is “\$3,400”...

Governor's Office of Small, Minority & Women Business Affairs	
FY 2022 Annual Small Business Reserve Summary Statement	
July 1, 2021- June 30, 2022	
(Enter Data In Yellow Boxes Only. Tan Boxes Are Calculated Totals)	
1. Total Credit Card Payments	\$6,000
2. Total Credit Card Payments to SBR Contractors	\$3,400

...The corresponding tab, "P-CARD LINE1", should clearly show how amounts were calculated.

(Note: Highlighting data to clearly define specific grouping of information is highly encouraged.)

Batch_Agency	MBE_Type	MBE_Description	Vendor_No_Masked	Vendor_Name	MBE_Certification	MBE_Exclude	Effective_Date	Cur_Doc_No	Cur_Doc_Sfx	Number_Tran	Payment_Amt	Reportable_Amt	Reportable_MBE_Amt	Vet_Flag	SBR_Flag	ref_Provider	
ABC			****	HILTON		N	7/1/2021	CC			\$137.00						
ABC			****	HILTON		N	11/1/2021	CC			\$252.00						
ABC			****	HAMPTON INN		N	10/1/2021	CC			\$340.00						
ABC			****	HAMPTON INN		N	6/1/2022	CC			\$2,975.00						
ABC			****	SURVEYMONKEY.COM		N	3/1/2022	CC			\$407.00						
ABC			****	USPS		N	11/1/2021	CC			\$10.00						
ABC			****	ROCKY GAP CASINO RESORT		N	8/1/2021	CC			\$136.00						
ABC			****	COMFORT INN		N	10/1/2021	CC			\$162.00						
ABC			****	BEST WESTERN		N	11/1/2021	CC			\$129.00						
ABC			****	SHERATON		N	5/1/2022	CC			\$807.00						
ABC			****	HAMPTON INN		N	6/1/2022	CC			\$352.00						
ABC			****	STATE USE INDUSTRIES		N	8/1/2021	CC			\$287.00						
ABC			****	STATE USE INDUSTRIES		N	9/1/2021	CC			\$529.00						
ABC			****	STATE USE INDUSTRIES		N	12/1/2021	CC			\$191.00						
ABC			****	HOLIDAY INN		N	12/1/2021	CC			\$196.00						
ABC			****	BRIDGETOWER SUBSCRIPTION		N	8/1/2021	CC			\$195.00						
ABC			****	RAMADA INN		N	8/1/2021	CC			\$196.00						
ABC			****	QUALITY INN		N	6/1/2022	CC			\$145.00						
ABC			****	SURVEYMONKEY.COM		N	10/1/2021	CC			\$2,054.00						
ABC			****	J.K CO		N	7/1/2021	CC			\$599.00				Y		
ABC			****	W.E BUSINESS		N	7/1/2021	CC			\$498.00				Y		
ABC			****	AMAZON.COM		N	4/1/2022	CC			\$219.00						
ABC			****	AMAZON.COM		N	5/1/2022	CC			\$300.00						
ABC			****	AMAZON.COM		N	6/1/2022	CC			\$194.00						
ABC			****	S.H INTERNATIONAL		N	1/1/2022	CC			\$224.00						
ABC			****	RITE AID		N	11/1/2021	CC			\$31.00						
ABC			****	C. PROMOTIONS		N	5/1/2022	CC			\$285.00						
ABC			****	A.R. COMPANY		N	3/1/2022	CC			\$215.00						
ABC			****	C. INTELLIGENT		N	9/1/2021	CC			\$594.00						
ABC			****	C. INTELLIGENT		N	3/1/2022	CC			\$784.00				Y		
ABC			****	AMAZON.COM		N	10/1/2021	CC			\$180.00				Y		
ABC			****	AMAZON.COM		N	11/1/2021	CC			\$277.00						
ABC			****	AMAZON.COM		N	12/1/2021	CC			\$239.00						
ABC			****	AMAZON.COM		N	7/1/2021	CC			\$184.00						
ABC			****	AMAZON.COM		N	8/1/2021	CC			\$252.00						
ABC			****	A.S. AGING		N	11/1/2021	CC			\$925.00				Y		
											\$15,500.00	Total All P-card Payments (RAW DATA)					
											\$9,500.00	Total Exclusions (This amount is subtracted from Raw Data)					
											\$6,000.00	Total P-Card Payments - enter on Line 1 (SCRUBBED DATA)					

Total Exclusions

Total P-Card Payments enter on Line 1- note exclusions not included

P-CARD LINE1

Example of FY2022

...The corresponding tab, “P-CARD-SBR-LINE2”, should clearly show how amounts were calculated.

Batch_Agency	MBE_Type	MBE_Description	Vendor_No_Masked	Vendor_Name	MBE_Certification	MBE_Exclude	Effective_Date	Cur_Doc_No	Cur_Doc_Sfx	Number_Tran	Payment_Amt	Reportable_Amt	Reportable_MBE_Amt	Vet_Flag	SBR_Flag	Pref_Provider
ABC			****	J.K CO		N	7/1/2021	CC			\$599.00				Y	
ABC			****	W.E BUSINESS		N	7/1/2021	CC			\$498.00				Y	
ABC			****	C. INTELLIGENT		N	9/1/2021	CC			\$594.00				Y	
ABC			****	C. INTELLIGENT		N	3/1/2022	CC			\$784.00				Y	
ABC			****	A.S. AGING		N	11/1/2021	CC			\$925.00				Y	
											\$3,400.00	Total P-Card Payments to SBRs- enter on Line 2				

Navigation tabs: SBR Annual Summary | P-CARD LINE1 | **P-CARD-SBR-LINE2** | 067-SCRUBBED-LINE 3 | 067-SBR LINE 4-5 | 067-F ...

- This “P-CARD-SBR-LINE2” tab includes the total of all SBR P-Card/Credit Card spend.
- Data provided here (Line 2 tab) is a subset of the information listed in the Line 1 tab.

Example of FY2022

If Summary Statement,

Line 3, has \$754,163

Line 4, has \$629,070

Line 5, has \$12,300...

3. Total Procurement Payments (not including Credit Card Payments)	\$754,163
4. Total Dollars Paid to SBR Contractors Under a Designated SBR Procurement	\$629,070
5. Total Dollars Paid to SBR Contractors Under a Non-Designated Procurement	\$12,300

Example of FY2022

...The corresponding tab, "067-SCRUBBED-LINE 3", should clearly provide how that amount was determined.

Vendor No Mask#	Vendor Name	Po Bpo Id	Effective Dat	Contract Title	Voucher Amount	Reportable Amount	SBR Designated	SBR Non-Designated	SBR Venc	SBR Procure Inc	MBE Stat#	Due Date	Line No - Comm Id
	PRO SYST		11/15/2012	HARDWARE CONTRACT	\$35,373.75	\$35,373.75						7/2/2021	
	K. TECHNOLOGY SOLUTIONS		11/15/2012	HARDWARE CONTRACT	\$14,645.00	\$14,645.00	\$14,645.00		Y	Y	Y	7/30/2021	
	C. SEVERN		11/15/2012	HARDWARE CONTRACT	\$458,821.28	\$458,821.28	\$458,821.28		Y	Y		7/30/2021	
	E.N. SERVICES		11/15/2012	HARDWARE CONTRACT	\$2,424.32	\$2,424.32	\$2,424.32		Y	Y		11/15/2021	
	C. SEVERN		11/15/2012	HARDWARE CONTRACT	\$23,365.00	\$23,365.00	\$23,365.00		Y	Y		11/23/2021	
	C. SEVERN		11/15/2012	HARDWARE CONTRACT	\$40,334.31	\$40,334.31	\$40,334.31		Y	Y		1/28/2022	
	A. TECHNOLOGY SERVICES		11/15/2012	HARDWARE CONTRACT	\$6,563.00	\$6,563.00	\$6,563.00		Y	Y	Y	6/10/2022	
	SHI INTERNAL CORP		10/1/2012	SOFTWARE	\$32,628.00	\$32,628.00						7/23/2021	
	E.N. SERVICES		10/1/2012	SOFTWARE	\$50,643.54	\$50,643.54	\$50,643.54		Y	Y		11/22/2021	
	UNICO GOVERNMENT INC		10/1/2012	SOFTWARE	\$4,725.00	\$4,725.00						3/11/2022	
	K. TECHNOLOGY SOLUTIONS		10/1/2012	SOFTWARE	\$2,318.75	\$2,318.75	\$2,318.75		Y	Y	Y	5/10/2022	
	E. SALES & ENGINEERING		7/23/2021	SERVICES	\$364.50	\$364.50	\$364.50		Y	Y		8/30/2021	
	SHELF		3/16/2021	GRANT	\$40.00	\$40.00						3/20/2021	
	A. POSTAGE		6/6/2022	POSTAGE	\$11,333.00	\$11,333.00						6/10/2022	
	H. MOVING SERVICES LLC		6/21/2022	MOVING SERVICES	\$2,633.00	\$2,633.00	\$2,633.00		Y	Y	Y	6/24/2022	
	NEWS		6/21/2022	SUBSCRIPTION	\$173.00	\$173.00						6/24/2022	
	S. SYSTEMS & TECHNOLOGY		8/31/2021	SCANNER AND SOFTWARE	\$3,070.17	\$3,070.17						12/10/2021	
	SCANWID		12/9/2021	SCANNER	\$13,308.00	\$13,308.00						3/25/2022	
	USP		6/2/2021	POSTAGE	\$30,211.26	\$30,211.26						8/6/2021	
	A. B. MAINTENANCE CO INC		3/1/2020	JANITORIAL SERVICES	\$737.64	\$737.64						7/15/2021	
	P. PEST SOLUTIONS		5/4/2020	PEST CONTROL SERVICES	\$153.75	\$153.75						7/22/2021	
	E. SALES & ENGINEERING		5/12/2021	LIGHTING INSTALLATION	\$2,750.00	\$2,750.00	\$2,750.00		Y	Y		7/30/2021	
	D.T. FIELD		6/8/2021	JANITORIAL SERVICES	\$560.00	\$560.00						8/6/2021	
	A. B. MAINTENANCE CO INC		3/1/2020	JANITORIAL SERVICES	\$737.64	\$737.64						8/13/2021	
	S. ENVIRONMENT		5/25/2021	GRANT	\$23,378.70	\$23,378.70						8/20/2021	
	D.T. FIELD		6/8/2021	JANITORIAL SERVICES	\$560.00	\$560.00						8/20/2021	
	H. MOVING SERVICES LLC		7/15/2021	MOVING RECORDS	\$2,400.00	\$2,400.00	\$2,400.00		Y	Y	Y	8/20/2021	
	AT&T		7/14/2021	PHONE SERVICE	\$5,708.00	\$5,708.00						8/20/2021	
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	\$158.00	\$158.00						9/3/2021	
	I.T.S. ELECTRIC		8/25/2021	UTILITY	\$1,400.00	\$1,400.00						3/20/2021	
	D.T. FIELD		6/8/2021	JANITORIAL SERVICES	\$560.00	\$560.00						3/3/2021	
	A. B. MAINTENANCE CO INC		3/1/2020	JANITORIAL SERVICES	\$737.64	\$737.64						3/10/2021	
	VERIZON		6/30/2021	PHONE SERVICE	\$2,300.00	\$2,300.00					Y	3/10/2021	
	VERIZON		12/30/2019	PHONE SERVICE	\$5,000.00	\$5,000.00						3/25/2021	
	E. SALES & ENGINEERING		6/1/2021	REPLACE AND INSTALL LIGHTING	\$20,540.75	\$20,540.75	\$20,540.75		Y	Y		10/1/2021	
	F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	\$3,075.00	\$3,075.00		\$3,075.00	Y			12/23/2021	
	F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	\$3,075.00	\$3,075.00		\$3,075.00	Y			12/23/2021	
	F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	\$3,075.00	\$3,075.00		\$3,075.00	Y			12/23/2021	
	F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	\$3,075.00	\$3,075.00		\$3,075.00	Y			12/23/2021	
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	\$158.00	\$158.00						3/11/2022	
	A. B. MAINTENANCE CO INC		3/3/2022	JANITORIAL SERVICES	\$828.17	\$828.17						3/11/2022	
	A. B. MAINTENANCE CO INC		3/3/2022	JANITORIAL SERVICES	\$828.17	\$828.17						3/11/2022	
	A. B. MAINTENANCE CO INC		3/3/2022	JANITORIAL SERVICES	\$828.17	\$828.17						3/11/2022	
	A. B. MAINTENANCE CO INC		3/3/2022	JANITORIAL SERVICES	\$828.17	\$828.17						3/11/2022	
	A. B. MAINTENANCE CO INC		3/3/2022	JANITORIAL SERVICES	\$828.17	\$828.17						3/11/2022	
	A. B. MAINTENANCE CO INC		3/3/2022	JANITORIAL SERVICES	\$828.17	\$828.17						3/11/2022	
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	\$158.00	\$158.00						3/28/2022	
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	\$158.00	\$158.00						3/28/2022	
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	\$158.00	\$158.00						3/28/2022	
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	\$158.00	\$158.00						3/28/2022	
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	\$158.00	\$158.00						3/28/2022	
	A. B. MAINTENANCE CO INC		3/3/2022	JANITORIAL SERVICES	\$828.17	\$828.17						4/8/2022	
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	\$158.00	\$158.00						4/8/2022	
					\$838,318.79	\$838,318.79	(RAW DATA)						
						\$84,755.96	(Total Exclusions - subtracted from Raw Data)						
						\$754,162.83	(Total Procurement Payments- enter on Line 3)						

Example of FY2022

The "067-RAWDATA" tab provides data from the 067 Report prior to scrubbing.

Vendor No Masked	Vendor Name	Po Bpo Id	Effective Date	Contract Title	Voucher Amount	Reportable Amount	SBR Designated	SBR Non-Designated	SBR Vend	SBR Procure Ind	MBE Status	Due Date	Line No - Comm Id
	PRD SYST		11/15/2012	HARDWARE CONTRACT	\$35,373.75	\$35,373.75						7/2/2021	
	K. TECHNOLOGY SOLUTIONS		11/15/2012	HARDWARE CONTRACT	\$14,645.00	\$14,645.00	\$14,645.00		Y	Y	Y	7/30/2021	
	C. SEVERN		11/15/2012	HARDWARE CONTRACT	\$458,821.28	\$458,821.28	\$458,821.28		Y	Y		7/30/2021	
	E.N. SERVICES		11/15/2012	HARDWARE CONTRACT	\$2,424.32	\$2,424.32	\$2,424.32		Y	Y		11/15/2021	
	C. SEVERN		11/15/2012	HARDWARE CONTRACT	\$23,965.00	\$23,965.00	\$23,965.00		Y	Y		11/29/2021	
	C. SEVERN		11/15/2012	HARDWARE CONTRACT	\$40,934.91	\$40,934.91	\$40,934.91		Y	Y		1/28/2022	
	A. TECHNOLOGY SERVICES		11/15/2012	HARDWARE CONTRACT	\$6,563.00	\$6,563.00	\$6,563.00		Y	Y	Y	6/10/2022	
	SHI INTERNAL CORP		10/1/2012	SOFTWARE	\$32,628.00	\$32,628.00						7/23/2021	
	E.N. SERVICES		10/1/2012	SOFTWARE	\$50,643.54	\$50,643.54	\$50,643.54		Y	Y		11/22/2021	
	UNICO GOVERNMENT INC		10/1/2012	SOFTWARE	\$4,725.00	\$4,725.00						3/11/2022	
	K. TECHNOLOGY SOLUTIONS		10/1/2012	SOFTWARE	\$2,318.75	\$2,318.75	\$2,318.75		Y	Y	Y	5/10/2022	
	E. SALES & ENGINEERING		7/29/2021	SERVICES	\$364.50	\$364.50	\$364.50		Y	Y		8/30/2021	
	SHELF		9/16/2021	GRANT	\$40.00	\$40.00						9/20/2021	
	A. POSTAGE		6/6/2022	POSTAGE	\$11,939.00	\$11,939.00						6/10/2022	
	H. MOVING SERVICES LLC		6/21/2022	MOVING SERVICES	\$2,699.00	\$2,699.00	\$2,699.00		Y	Y	Y	6/24/2022	
	NEWS		6/21/2022	SUBSCRIPTION	\$173.00	\$173.00						6/24/2022	
	S. SYSTEMS & TECHNOLOGY		8/31/2021	SCANNER AND SOFTWARE	\$8,070.17	\$8,070.17						12/10/2021	
	SCANWID		12/9/2021	SCANNER	\$19,308.00	\$19,308.00						3/25/2022	
	USP		6/2/2021	POSTAGE	\$30,217.26	\$30,217.26						8/6/2021	
	A. B. MAINTENANCE CO INC		9/1/2020	JANITORIAL SERVICES	\$797.64	\$797.64						7/15/2021	
	P. PEST SOLUTIONS		5/4/2020	PEST CONTROL SERVICES	\$153.75	\$153.75						7/22/2021	
	E. SALES & ENGINEERING		5/12/2021	LIGHTING INSTALLATION	\$2,750.00	\$2,750.00	\$2,750.00		Y	Y		7/30/2021	
	D T FIELD		6/8/2021	JANITORIAL SERVICES	\$560.00	\$560.00						8/6/2021	
	A. B. MAINTENANCE CO INC		9/1/2020	JANITORIAL SERVICES	\$797.64	\$797.64						8/13/2021	
	S. ENVIRONMENT		5/25/2021	GRANT	\$29,378.70	\$29,378.70						8/20/2021	
	D T FIELD		6/8/2021	JANITORIAL SERVICES	\$560.00	\$560.00						8/20/2021	
	H. MOVING SERVICES LLC		7/15/2021	MOVING RECORDS	\$2,400.00	\$2,400.00	\$2,400.00		Y	Y	Y	8/20/2021	
	AT&T		7/14/2021	PHONE SERVICE	\$5,708.00	\$5,708.00						8/20/2021	
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	\$158.00	\$158.00						9/3/2021	
	I.T.S ELECTRIC		8/25/2021	UTILITY	\$1,400.00	\$1,400.00						9/20/2021	
	D T FIELD		6/8/2021	JANITORIAL SERVICES	\$560.00	\$560.00						9/3/2021	
	A. B. MAINTENANCE CO INC		9/1/2020	JANITORIAL SERVICES	\$797.64	\$797.64						9/10/2021	
	VERIZON		6/30/2021	PHONE SERVICE	\$2,300.00	\$2,300.00					Y	9/10/2021	
	VERIZON		12/30/2019	PHONE SERVICE	\$5,000.00	\$5,000.00						9/25/2021	
	E. SALES & ENGINEERING		6/1/2021	REPLACE AND INSTALL LIGHTING	\$20,540.75	\$20,540.75	\$20,540.75		Y	Y		10/1/2021	
	F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	\$3,075.00	\$3,075.00		\$3,075.00	Y			12/29/2021	
	F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	\$3,075.00	\$3,075.00		\$3,075.00	Y			12/29/2021	
	F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	\$3,075.00	\$3,075.00		\$3,075.00	Y			12/29/2021	
	F. P. SYSTEMS		12/27/2021	REPAIR / MAINTENANCE SCHEDULE	\$3,075.00	\$3,075.00		\$3,075.00	Y			12/29/2021	
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	\$158.00	\$158.00						3/11/2022	
	A. B. MAINTENANCE CO INC		3/9/2022	JANITORIAL SERVICES	\$828.17	\$828.17						3/11/2022	
	A. B. MAINTENANCE CO INC		3/9/2022	JANITORIAL SERVICES	\$828.17	\$828.17						3/11/2022	
	A. B. MAINTENANCE CO INC		3/9/2022	JANITORIAL SERVICES	\$828.17	\$828.17						3/11/2022	
	A. B. MAINTENANCE CO INC		3/9/2022	JANITORIAL SERVICES	\$828.17	\$828.17						3/11/2022	
	A. B. MAINTENANCE CO INC		3/9/2022	JANITORIAL SERVICES	\$828.17	\$828.17						3/11/2022	
	A. B. MAINTENANCE CO INC		3/9/2022	JANITORIAL SERVICES	\$828.17	\$828.17						3/11/2022	
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	\$158.00	\$158.00						3/28/2022	
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	\$158.00	\$158.00						3/28/2022	
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	\$158.00	\$158.00						3/28/2022	
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	\$158.00	\$158.00						3/28/2022	
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	\$158.00	\$158.00						3/28/2022	
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	\$158.00	\$158.00						3/28/2022	
	A. B. MAINTENANCE CO INC		3/9/2022	JANITORIAL SERVICES	\$828.17	\$828.17						4/8/2022	
	P. PEST SOLUTIONS		7/20/2021	PEST CONTROL SERVICES	\$158.00	\$158.00						4/8/2022	
					\$838,918.79	\$838,918.79							

Example

If Summary Statement, Line 6 states...

6. Total Number of SBR Contractors receiving award and payments	57

Example

The “068-RAW” tab provides data from the 068 Report prior to scrubbing.

Proc Method	Work Category	Po Bpo Id	Amount	Effective D	Vendor No	Vendor Name	SBR Ind	SBR Vend	Description
			\$72,500.00	3/20/2023		I E C CHESAPEAKE APPRNTC & TRAINING INC			
			\$12,500.00	3/20/2023		SEASIDE PLUMBING INC.			
			\$35,000.00	3/20/2023		BALTI ELEC			
			\$5,050.00	3/20/2023		REY ELEC			
			\$2,500.00	3/22/2023		GLAXO KLIN			
			\$911,390.00	3/22/2023		BOARD OF TRUSTEES			
			\$7,500.00	3/22/2023		VANG ENTERPRISES LLC			
			\$30,000.00	3/22/2023		VANG ENTERPRISES LLC			
			\$50,000.00	3/22/2023		EAST DRIVING			
			\$2,500.00	3/22/2023		AUTO STRAT			
			\$2,500.00	3/22/2023		RING CONT			
			\$200,000.00	3/27/2023		WESTERN CONS			
			\$3,292.50	3/30/2023		DOUG ELECTRIC			
			\$573.12	8/30/2022		A. PERFECTION INC	Y	Y	
			\$305.00	7/29/2022		AD SECURITY SAFE &	Y	Y	
			\$16,000.00	9/1/2022		AMERIC LLC	Y	Y	
			\$729.57	9/16/2022		CONTROL SYSY	Y	Y	
			\$2,139.08	9/21/2022		DRINK DELIVERY INC	Y	Y	
			\$2,425.00	9/8/2022		DRINK DELIVERY INC			Y
			\$3,491.00	8/25/2022		DS INC	Y	Y	
			\$117.15	7/15/2022		EAST ELEVATOR			Y
			\$1,222,956.80	1/1/2023		ELEG ENT	Y	Y	
			\$3,082.80	9/1/2022		E.N. SERVICES	Y	Y	
			\$1,413.42	9/8/2022		E.N. SERVICES	Y	Y	
			\$308.28	9/23/2022		E.N. SERVICES	Y	Y	
			\$1,800.00	8/26/2022		G H N INC			Y
			\$3,120.00	9/27/2022		GLEN CONSTRUCTION INC	Y	Y	
			\$3,140.00	8/16/2022		HC HART INC	Y	Y	
			\$3,140.00	9/14/2022		HC HART INC	Y	Y	
			\$1,249.00	8/26/2022		HC HART INC	Y	Y	
			\$1,060.00	8/4/2022		IG INNOV			Y
			\$439.88	8/25/2022		KEL HVAC INC	Y	Y	
			\$250.00	8/30/2022		KOORS SIGNS LLC	Y	Y	

NOTE

For those units who do not utilize the 067/068/721 Answers Reports, you would provide the data as listed from your internal reporting system. Be certain that this information is clearly defined within the Annual Report Template.

BPW ADVISORY 2005-1 SMALL BUSINESS RESERVE PROGRAM

Exclusions:

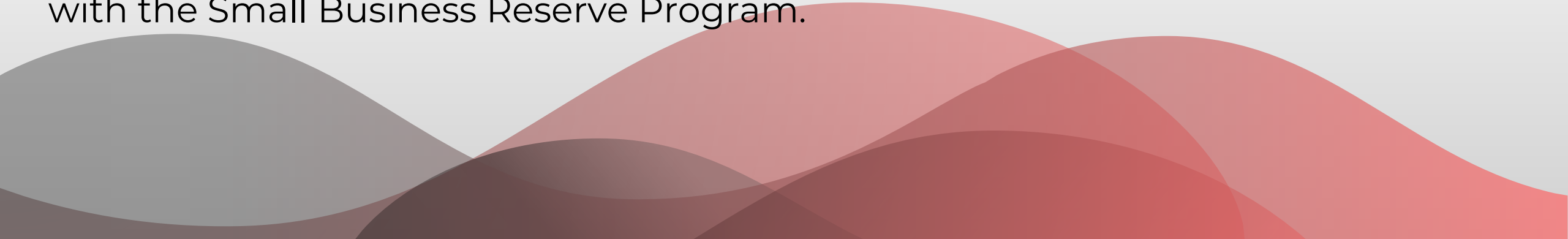
- Where governing federal law or federal grant provisions conflict with this Small Business Reserve Program, the procurement is excluded from these requirements.
- Procurements from Maryland Correctional Enterprises, Blind Industries and Services of Maryland, and the Employment Works Program ([COMAR 21.11.05](#)) and from Maryland Vending Facilities Program for the Blind ([COMAR 21.11.09](#)) are excluded from these requirements.
- The value of excluded procurements is not included in the procurement dollar base from which the 15% reserve is calculated. (the denominator)

BPW ADVISORY 2005-1 SMALL BUSINESS RESERVE PROGRAM


Qualified Expenditures. For purposes of calculating 15% of the dollar value of procurements, include only procurement expenditures that are subject to the Small Business Reserve Program (qualified expenditures).

BPW ADVISORY 2005-1 SMALL BUSINESS RESERVE PROGRAM

For example, the following expenditures are not qualified as they either are not "procurements" under the State Procurement Law or the Procurement Law excludes them from the Small Business Reserve program:

-
- Procurements from a preference provider (Maryland Correctional Enterprises, Blind Industries and Services of Maryland, the Employment Works Program, and the Maryland Vending Facilities Program for the Blind).
 - Procurements governed by federal law or federal grant provisions that conflict with the Small Business Reserve Program.
- 

BPW ADVISORY 2005-1 SMALL BUSINESS RESERVE PROGRAM

- Grant expenditures as defined in [COMAR 21.01.02.01\(B\)\(46\)](#).
 - Pass-through payments (e.g., employee health benefits, employee retirement contributions, employee travel payments), although the administrative and management fees expended to process such payments are included.
 - Expenditures excluded under §11-203 of the State Finance and Procurement Article (see COMAR 21.01.03.01).
- 

GAD LIST

-Pay attention to the GAD List when preparing your reports. This is a list that provides items that should be excluded from reportable data.

-We understand that this may be a time-consuming duty, however, it is important that those items are not included in your final numbers.

Gad List (Controller Objects Commodity Exclusion List)

Some Items

1444	HEATING	X44	Expenditures for services <u>related to the Heating/Air Conditioning Plant</u> of a building, including incidental materials.
0402	IN STATE/CONFERENCES/SEMINARS/TRAININ	D02	In State conferences/seminars/training to include such items as mileage, fares, lodging, meals, parking, fees, and tolls.
0401	IN STATE/ROUTINE OPERATIONS	D01	In State-Business-Routine Operations category for those costs incurred in an activity, which is directly related to the normal or day to day functioning of the agency and which were incurred within the geographical boundaries of Maryland and the District of Columbia. To include such items as mileage, fares, lodging, meals, parking, and tolls. Also included are subsistence/special Allowances, Client Travel Recruitment Travel, and Volunteer Travel.

GAD LIST

Some Items (Cont'd)

0404	OUT-OF-STATE/CONFERENCES/SEMINARS/T	D04	out-of-state conferences/seminars/training to include such items as mileage, fares, lodging, meals, parking, fees, and tolls.
0403	OUT-OF-STATE/ROUTINE OPERATIONS	D03	out-of-state routine operations to include such items as mileage, fares, lodging, meals, parking, tolls, subsistence/special allowances, client travel recruitment travel, volunteer travel.
0301	POSTAGE	C01	Includes stamps, meters, P.O. Box rentals, express and mailing services related to the operator of the agency. Examples include income tax form and rebate mailings, hospital billings and payment due notices, automobile/driver licenses mailings, or any general administrative postage.
1304	SUBSCRIPTIONS	W04	Subscriptions for magazines, newspapers and periodicals.
0622	UTILITIES - COMBINED UTILITY PURCHASES	F22	Any combination of charges involving specific "utility" statewide subobjects.
0620	UTILITIES - ELECTRICITY	F20	Any electricity supplied by a utility company used to generate heat or power or lighting.
0699	UTILITIES - MISCELLANEOUS	F99	Any charges for utilities not defined in specific Statewide subobjects for "Utilities." The DBM's Office of Budget Analysis should be consulted before using this subobject code.
0621	UTILITIES - WATER/SEWAGE	F21	Any charges for utilities not defined in specific Statewide subobjects for "Utilities."
0789	VEHICLE COMMUTER CHARGE	G89	Represents the commute charge to state employees using state vehicles associated with Zones I-IV.
1443	WATER	X43	Expenditures related to Plumbing services, including incidental materials.

VERIFICATION OF SBR VENDORS

SBR report preparers with admin access to eMaryland Marketplace Advantage may also request a “SBR All Active Report” by emailing the emma.helpdesk@maryland.gov. This report can help to verify whether a firm was certified in the SBR Program at the time of payment.

REMINDER

SBR Liaison Directory

- Be certain to verify that the SBR Liaison information is correctly listed for your agency/department.
- Send us an email to provide any correct information at your earliest convenience, as we want to make certain that you are invited to our events, receive information and vendors can reach out to you.
- Keep us updated with any changes (i.e. new SBR Liaison or listed SBR Liaison no longer with your unit)

SBR Liaison Directory

Enter search term

Home MBE PROGRAM SBR PROGRAM VSBE Program RESOURCES PROCUREMENT FORECAST

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

Quick Links

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

SBR Liaison Directory

For information regarding the Small Business Reserve (SBR) Program's certification please email lisa.sennaar@maryland.gov or call 410-697-9600.

Reporting Agency	SBR Liaison Name/Contact Info	Address
Aging	Valarie Tisdale valarieb.tisdale@maryland.gov 410-767-2157	301 W. Preston Street, Suite #1007 Baltimore, MD 21201
Agriculture	Lynn McNally lynn.mcnally@maryland.gov 410-841-5902	50 Harry S. Truman Parkway Annapolis, MD 21401
Archives	Teresa Fawley teresa.fawley@maryland.gov 410-260-6405	350 Rowe Blvd. Annapolis, MD 21401
Assessments & Taxation	Tara L. Gray tara.gray@maryland.gov 410-767-1194	300 West Preston St., Room 605 Baltimore, MD 21201
Attorney General's Office	Janice Clark jclark@oag.state.md.us 410-573-2033	200 St. Paul Place Baltimore, MD 21202

<https://gomdsmallbiz.maryland.gov/Pages/SBR-Liaison-Directory.aspx>

Any questions after today's training, please contact us:

Lisa Mitchell Sennaar
lisa.sennaar@maryland.gov

410-697-9613

410-508-8089

Tanita Johnson
tanita.johnson1@maryland.gov

410-697-9619

667-232-1368



Maryland

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

MINORITY BUSINESS ENTERPRISE (MBE) PROGRAM

AGENDA

- MBE Reporting Requirements
- Report Preparation
- Data Accuracy
- Cheat Sheet
- Compliance Assessment Report
- Announcements and Reminders

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REPORTING REQUIREMENTS

MBE REPORTING REQUIREMENTS

Let's review the reporting requirements for our office:
Found in COMAR 21.11.03.17. *Reporting*

- As we previously discussed our office must receive both Quarterly and Annual MBE Procurement Reports (backup data should be included).
 - Always send to the mbereports.gosba@maryland.gov email box.

MBE REPORTING REQUIREMENTS

Other Reporting Requirements:

Submit to the compliance.gosba@maryland.gov email box

- Waiver Determinations as granted
- Copy our office on the Annual Waiver report to BPW
- MBE Form Amendment Consent/Approval
- We should receive PRG paperwork for solicitations 25 Million and over.

Note:

COMAR 21.11.03.17 C.

Each procurement agency shall furnish any other information or periodic reports requested by the Governor's Office of Small, Minority & Women Business Affairs or the Department of Transportation in connection with MBE certification and procurement, or any other matters related to the administration, effectiveness, or continuation of the Minority Business Enterprise Program.

REPORTING – SOURCE DOCUMENTS FOR DATA REPORTS

- **Generate the following FMIS/ANSWERS Reports:**
 - PCHL709 (BPO/PO Change Orders from contracts awarded in prior fiscal years)**
 - PCHL710 (Contract Awards Detail) run by award date**
 - PCHL711 (Contract Awards Summary) Use Waiver Data Only**
 - PCHL717 (Prime Payments by Direct Voucher; no BPO/PO)**
 - PCHL718 (Prime Voucher Payments made from BPO/PO)**
 - PCHL719 (Subcontractor Payments)**
 - PCHL 720 (Subcontract Awards) run by award date**
 - PCHL 721 or VIEWDIRECT A30USB11(P-Card Total/Detail)**

IFMIS AND OTHER REPORTING SYSTEMS

- EXPECTED REPORTS
 - ❑ CHANGE ORDERS (SIMILAR TO ANSWERS 709 REPORT)
 - ❑ AWARDS (PO/BPO) (SIMILAR TO ANSWERS 710 REPORT)
 - ❑ SUBCONTRACTOR AWARDS (SIMILAR TO ANSWERS 720 REPORT)
 - ❑ SUBCONTRACTOR PAYMENTS (SIMILAR TO ANSWERS 719 REPORT)
 - ❑ VOUCHER PAYMENTS (PO/BPO) (SIMILAR TO ANSWERS 718 REPORT)
 - ❑ DIRECT VOUCHERS (SIMILAR TO ANSWERS 717 REPORT)
 - ❑ CREDIT CARD OR CPC REPORT (SIMILAR TO ANSWERS 721 REPORT)

MBE REPORTING

FMIS CHEAT SHEET

AWARDS = ANSWER reports 709, 710, 717, 720 & 721 OR VIEW DIRECT A30USB11

PAYMENTS = ANSWER reports 717, 718, 719 & 721 OR VIEW DIRECT A30USB11

Reminder: Direct Vouchers and P-card purchases* are reported as both AWARDS and PAYMENTS.

****With the exception of control agency/department statewide contracts***



MBE AWARD REPORT PREPARATION

MBE QUARTERLY REPORT

- Use the Quarterly Form 1 / 2 only. Found in the MBE Reporting toolkit, scroll down to see it.
- Pull quarterly report data from ANSWERS or your agency's internal records (iFMIS, Workday, PeopleSoft, etc.)
- No Form 3 Payment Portal entries are required for quarterly reports.
- Same general rules as Annual Report, except you *include payment data* broken down by MBE Classification on Form 2 and total agency payments including those to MBEs on Form 1.

FORM 2 QUARTERLY

Minority Business Enterprise Quarterly/Monthly Procurement Report													Reporting Form #2				
Reporting Department/Agency:																	
Fiscal Year 2020 Reporting Period:		July 1, 2019 - insert date (cumulative to date)															
Engineering	Total Dollars																\$0
	# of Contract																0
Construction	Total Dollars																\$0
	# of Contract																0
Construction Related Services	Total Dollars																\$0
	# of Contract																0
Maintenance	Total Dollars																\$0
	# of Contract																0
Services	Total Dollars																\$0
	# of Contract																0
Supplies & Equipment	Total Dollars																\$0
	# of Contract																0
IT Services	Total Dollars																\$0
	# of Contract																0
IT Supplies & Equipment	Total Dollars																\$0
	# of Contract																0
Human, Cultural, Social & Educational Services	Total Dollars																\$0
	# of Contract																0
Totals	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	# of Contract	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total MBE Subcontract Payments																	
		African American	Asian	Hispanic	Native American	Women	African American Women	Asian Women	Hispanic Women	Native American Women	Disabled	Non-Profit (Certified)	Community Service Provider	Disadvantaged	Total		
																	\$0.00

FORM 1 QUARTERLY

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






Note(s):

Total \$ Paid - All Prime Contracts	Total \$ Paid - MBE Prime & MBE Subcontracts	% MBE Payments	MBE Prime Contracts \$ Paid	MBE Subcontracts \$ Paid
\$0	\$0	0.00%	\$0	\$0

A thin vertical red line is positioned on the left side of the page. On the right side, there are several overlapping circles in various shades of red and dark red, creating a decorative graphic element.

ANNUAL REPORTING

COMPILING YOUR DATA

Name	Date modified	Type	Size
 Form 3 Data Template OFFICE OF SCRUBBING	1/25/2023 4:59 PM	Microsoft Excel W...	168 KB
 FY22 BACKUP DATA For OFFICE OF SCRUBBING	1/25/2023 5:00 PM	Microsoft Excel W...	58 KB
 FY22 MBE CONTRACTS INVENTORY OFFICE OF SCRUBBING	1/25/2023 5:00 PM	Microsoft Excel M...	145 KB
 FY2022 AnnualReportForms-rev6-2022 OFFICE OF SCRUBBING	2/6/2023 1:53 PM	Microsoft Excel 97...	116 KB
 FY2022 MBE Summary Statement OFFICE OF SCRUBBING	1/25/2023 5:01 PM	Microsoft Edge PD...	1,021 KB

- Once you have completed the scrubbing of your data, you will consolidate and save your data reports with a name that describes the dataset, your agency/department, and the FY, as discussed earlier.
- You will enter data into the correct cells of the fields in the Form 1 / 2, Form 3, and Contracts Inventory
- Perform Checks and Balances to ensure your data is accurate

AWARD REPORTS

- This part of the process will include the preparation of the :
 - ✓ Form 1 / 2 Annual Report
 - ✓ Contracts Inventory Sheet

PAYMENT REPORTS

- This part of the process will include the preparation of the :
 - ✓ Form 3 Payment Portal
 - ✓ Manual entry and deletion method *OR*
 - ✓ Import Method (Form 3 Data Template)

REPORTING MBE AWARDS

FORM 2- SUBCONTRACT AWARDS TABLE

Total MBE Subcontract Awards by MBE Classifications and Procurement Categories

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

FORM 2- PRIME CONTRACT AWARDS TABLE

Total MBE Prime Contract Awards by MBE Classifications and Procurement Categories																					
Procurement Category		African American	Asian	Hispanic	Native American	Women	African American Women	Asian Women	Hispanic Women	Native American Women	Disabled	Non-Profit (Certified)	Community Service Provider	Disadvantaged	Total						
Architectural	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0						
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0						
Engineering	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0						
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0						
Construction	Total Dollars	\$0	\$0	\$0	709- MBE Change Orders 710- MBE Prime Contract Awards For Columns 40-59 (Procurement Categories)						\$0	\$0	\$0	\$0							
	# of Contracts	0	0	0							0	0									
Construction Related Services	Total Dollars	\$0	\$0	\$0							\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0
	# of Contracts	0	0	0							0	0	0	0	0	0	0			0	0
Maintenance	Total Dollars	\$0	\$0	\$0							\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0
	# of Contracts	0	0	0							0	0	0	0	0	0	0			0	0
Services	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0						
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0						
Supplies & Equipment	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0						
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0						
IT Services	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0						
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0						
IT Supplies & Equipment	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0						
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0						
Human, Cultural, Social & Educational Services	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0						
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0						
Corporate Credit Card	Total Dollars	\$0	\$0	\$0	721- MBE Credit Card Transactions						\$0	\$0	\$0	\$0							
	# of Contracts	0	0	0							0	0									
Direct Voucher	Total Dollars	\$0	\$0	\$0	717- MBE Direct Voucher Totals						\$0	\$0	\$0	\$0							
	# of Contracts	0	0	0							0	0									
Total	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0						
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0						

FORM 1- TOTAL CONTRACT AWARDS TABLE

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

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

CONTRACTS INVENTORY- MBE PRIME CONTRACTORS

Minority Business Enterprise MBE Prime Contract Awards Report

For Fiscal Year 2022

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 <small>(Please list the contract #, do NOT include Credit Card or Direct Voucher on this line)</small>
---	-------------	---------------------------	------------------------------	--	--	--	--------------	---

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10
- 11
- 12
- 13
- 14
- 15
- 16
- 17

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 should mirror the totals you entered in your Form 2 Prime Contractors Table.

CONTRACTS INVENTORY- MBE SUB CONTRACTORS

Minority Business Enterprise MBE Subcontract Awards Report

For Fiscal Year 2022

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							
13							
14							
15							
16							
17							

Awards that should be included in the MBE Subcontractors Tab:
720- MBE Subcontractor Awards

Reminder:

****Your Contracts Inventory should mirror the totals you entered in your Form 2 MBE Subcontractors Table.**

REPORTING MBE PAYMENTS

FORM 3 WEB PORTAL - DATA ENTRY

- <https://doit.state.md.us/MBEFORM #3/>
- Retrieve login info from Governor's Office of Small, Minority & Women Business Affairs, if needed.
- Choose your method, **DO NOT DO BOTH**
 - Manual Entry OR
 - Import Template Method
- Be mindful, if you are using the import method, it will overwrite everything currently in working data.
- No matter what method you choose, you must still submit for the reporting year.
- Problems with submitting, contact Governor's Office of Small, Minority & Women Business Affairs:

FORM 3 - IMPORT METHOD

MBE PRIME CONTRACTOR PAYMENTS

ID	Contractor Name	EFIN	MBE Designation	MDOT_Cert	Contract#	StartDate	EndDate	Award Amount	Payments FY	Payments CTD	MBE Goal	Description
A005	M&M, Inc.	00-0000000	Women	01-001	A005	6/28/2018	12/31/2018	\$260,471.00	\$500.00	\$500.00	0%	Emergency Installation of Temporary Steam Lin

Payments that should be included in PRIMES TAB:

- MBE Direct Voucher Payments (717)
- MBE Credit Card Payments (721)
- MBE Voucher Payments (718)
- Non-Minority Voucher Payments (718)

Only if the Non-Minority is attached to a MBE Subcontractor

Reminder:

**The ID in Column A is used to attach the correct MBE Subcontractor to their Prime. This ID should match the PRIME ID to the correct subcontractor

Instructions
PRIMES
SUBS
+

FORM 3 - IMPORT METHOD MBE SUBCONTRACTOR PAYMENTS

Prime ID	Contractor Name	MDOT Cert#	MBE Designation	Award Amount	Payments FY	Payments CTD
A005	CHARDONNAY INC	00-000	Women	\$9,496,151.73	\$918,054.00	\$1,800,005.00

Payments that should be included in SUBS Tab:
-MBE Subcontractor Payments (719)
Reminder:
****Remember that the Prime ID (Column A) must match the Prime ID in the PRIMES Tab to attach the correct Prime to their MBE Subcontractor.****

Instructions | PRIMES | SUBS | +

FORM 3 PORTAL – IMPORT METHOD

- On the left-hand menu under the “Working Data” section, choose the Import Contracts link. This will get you to the Import page. The link is as shown.
- Once you arrive on the import page you will:
- Select the Agency/Agency/Department from the dropdown list (if not already selected).
- Click on the “Select a File To Upload” button. A dialog box will pop up for you to select which Excel file you want to upload. Only one file can be uploaded at a time.
- Once a file has been selected and completely uploaded, click on the “Import Excel” button.
- A “wait” icon will display while the file is being processed. If everything goes well, you will be greeted with the following message:
- If instead you receive errors, resolve them, then try importing the Excel file again.
- Should you need to edit your import data, you can edit the Excel file and reimport it.

Working Data

- > View All Data
- > Add New Contract
- > Import Contracts

Data was Validated & Imported Successfully.

FORM 3 PORTAL - MANUAL ENTRY

After Sign in On the left-hand side, Click:
Working Data
View All Data
Proceed to Edit Data

Click on contract number and revise data as necessary
Or search for contract number and select filter choice from the dropdown box:

The screenshot shows the 'Form 3 Payment Portal' for the 'DEPARTMENT OF AGRICULTURE'. It features a table with columns for Contract#, Awards CTD, Payments FY, Payments CTD, Start Date, End Date, and MBE Goal. The contract number '717-718-cpc' is circled in red. A blue arrow labeled 'SEARCH' points to the search input field. Another blue arrow labeled 'DROPDOWN BOX' points to a dropdown menu that is open, showing filter options: NoFilter, Contains, StartsWith, EndsWith, EqualTo, GreaterThan, LessThan, GreaterThanOrEqualTo, and LessThanOrEqualTo. The 'AGENCY' link in the top navigation bar is also circled in red.

Contract#	Awards CTD	Payments FY	Payments CTD	Start Date	End Date	MBE Goal
717-718-cpc	\$0.00	\$0.00	\$0.00	7/1/2015	6/30/2016	00%
> 717	\$0.00	00			6/30/2016	00%
> 717	\$0.00				6/30/2016	00%

FORM 3 PORTAL - MANUAL ENTRY



Prime Data:

The * denotes a required field.

Save Changes New View All Records Delete Record

Name of Prime Contractor: *

Prime Contractor Classification: *

MDOT Certification Number:

Contract / ID Number: *

Contract Start Date: *

Contract Expiration Date: *

Agency: *

Prime Contractor Awards CTD: *

Prime Contractor Payments FY: *

Prime Contractor Payments CTD: *

MBE Goal %: *
 %

Project Title:

MBE Subcontract Information:

+ Add New MBE Subcontract	
Name	Cert-N

Prime Contractor Awards CTD- Total Award Amount

Prime Contractor Payments FY- Payments made towards that contract that FY

Prime Contractor Payments CTD- Payments made throughout the entire duration of the Contract regardless of FY

Revise dollar amounts or dates as necessary

FORM 3 PORTAL - MANUAL ENTRY

Input a brand new contract:

Maryland.gov Phone Directory State Agencies Online Services

MARYLAND .gov

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

Form 3 Payment Portal

Welcome Agriculture (Logout)

HOME AGENCY

Working Data

- > View All Data
- > Add New Contract
- > Import Contracts

Reporting

- > Prime Payments by MBE
- > Sub Payments by MBE
- > Contract Compliance

Submitted Data

- > View All Data

Governor's Office of Small, Minority & Women Business Affairs MBE Form 3 Web Portal

Welcome to the Governor's Office of Small, Minority & Women Business Affairs MBE Form3 payment Web portal.

Now that you are logged in, you can use the Agency link in the main menu as the next step. From there you can enter in your working

Click ADD NEW CONTRACT to manually input Prime Contractor Data

Contact Us | Privacy | Accessibility

100 Community Place
Crownsville, MD 21032

GOSBA Helpdesk: 410-697-9605

FORM 3 PORTAL - MANUAL

Input prime contractor data:

The screenshot shows the 'Form 3 Portal' interface for inputting prime contractor data. The page includes a header with the Maryland.gov logo and a 'Welcome Agriculture' message. The main content area is titled 'AGENCY' and contains a form with several fields. Annotations include:

- NOTE: Dollar amounts CAN be input with commas. ALWAYS, ALWAYS SAVE YOUR WORK** (pointing to the 'Save' button)
- Reminder, manually input the non-minority vendors, good news is that they will reappear in the future should you need to input them again.* (pointing to the 'Name of Prime Contractor' field)
- After all data has been input, click the SAVE button. Hitting the Enter key will not save your data, you must hit the Save button. To move to the next record hit NEW.** (pointing to the 'Save' button)
- Note: For direct voucher (DV) or credit card (CC) payments, consolidate multiple amounts for individual vendors (i.e. Rudolph Office Supplies) and indicate in the contract id the type of payment, DV or CC. Use FY dates for Start and Expiration Dates.** (pointing to the 'Contract / ID Number' field)
- Input information, fields with red asterisk (*) are required.** (pointing to the 'Agency' dropdown menu)

The form fields include:

- Name of Prime Contractor: *
- Contract / ID Number: *
- Contract Start Date: *
- Contract Expiration Date: *
- Prime Contractor Awards CTD: *
- Prime Contractor Payments FY: *
- Prime Contractor Payments CTD: *
- Prime Contractor Classification: *
- MDOT Certification Number:
- Agency: * (DEPARTMENT OF AGRICULTURE)
- MBE Goal: *

Buttons: Save, New, View All Records

Footer: Contact Us | Privacy | Accessibility
100 Community Place
Crownsville, MD 21032

Reminder, manually input the non-minority vendors, good news is that they will reappear in the future should you need to input them again.

FORM 3 PORTAL - MANUAL ENTRY

- Add subcontractor data:
- Click "Add MBE Subcontractor"
- Input Subcontractor Data
- Click SAVE

Note: If you can't find an MBE in the drop down, search vendor in the MDOT Database <https://mbe.mdot.maryland.gov/directory/> by certification number and confirm Vendor's legal name.

The screenshot displays the 'Form 3 Portal - Manual Entry' interface. At the top, there are navigation links for 'HOME' and 'AGENCY'. The main section is titled 'Prime Data:' and includes a note: 'The * denotes a required field.' Below this, there are several input fields and buttons. The 'Save Changes' button is highlighted with a red circle. The 'New' button is also visible. The 'View All Records' and 'Delete Record' buttons are located to the right. A green message states: 'Prime Contractor Data was Successfully saved.'

The 'Prime Data' section contains the following fields:

- Name of Prime Contractor: * (Dropdown menu with 'LJS Consulting' selected)
- Prime Contractor Classification: * (Dropdown menu with 'Non-Minority' selected)
- MDOT Certification Number: (Text input field)
- Contract / ID Number: * (Text input field with 'AGR2016-001')
- Contract Start Date: * (Date picker with '7/1/2015')
- Contract Expiration Date: * (Date picker with '6/30/2016')
- Agency: * (Dropdown menu with 'DEPARTMENT OF AGRICULTURE' selected)
- Prime Contractor Awards CTD: * (Text input field with '10,000')
- Prime Contractor Payments FY: * (Text input field with '1000')
- Prime Contractor Payments CTD: * (Text input field with '1000')
- MBE Goal %: * (Text input field with '23' and a '%' symbol)
- Project Title: (Text input field with 'Goat Grass Mowing')

The 'MBE Subcontract Information:' section is located below the 'Prime Data' section. It features a table with columns: Name, Cert-Number, MBE, Award Amount, Actual Payments FY, and Actual Payments CTD. The 'Add New MBE Subcontract' button is circled in red. Below the table, there are several input fields for the subcontractor information:

- Contractor: (Text input field with '2 BROTHERS LANDSCAPING, LLC')
- Cert-Number: (Text input field with '13-063')
- MBE Classification: (Dropdown menu with 'Hispanic American' selected)
- Award Amount: (Text input field with '2300')
- Actual Payments FY: (Text input field with '230')
- Actual Payments CTD: (Text input field with '230')

The 'Save' button is circled in red. The 'Cancel' button is also visible. A note at the bottom right states: '(All Fields Required)'.

FORM 3 PORTAL – MANUAL REMOVAL OF PRIOR YEAR/EXPIRED DATA

**Click View All Data
under Working Data**

GOSBA

- > Agency Submissions
- > Missing Agencies
- > View Agency Data (Working)
- > View Agency Data (Submitted)
- > Prime Payments
- > Sub Payments
- > Self Performing
- > FY Unique Vendor Payments

Administration

- > User Management
- > Role Management
- > View Agency List
- > FY Change

Working Data

- > View All Data
- > Add New Contract
- > Import Contracts

Governor's Office Affairs MBE Form

Welcome to the Governor's Office of Small, Minority & Women Business Enterprises

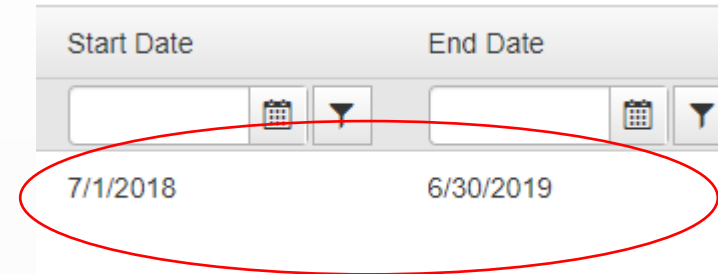
Now that you are logged in, you can use the portal to view and manage your data, or you can select from the submitted data.

For Internal Training Purposes Only

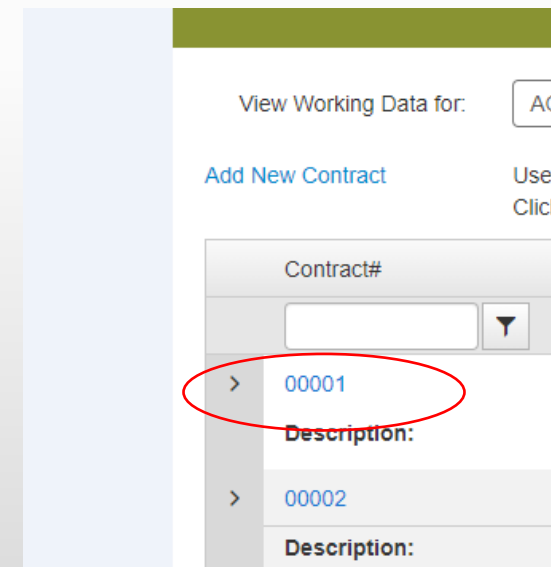
FORM 3 PORTAL – MANUAL REMOVAL OF PRIOR YEAR/EXPIRED DATA

**Example FY 23 would be 7/1/2022
6/30/2023; so, if a contract or
transactions end date is 6/30/2020
this would be a contract or
transaction you need to delete.**

**Click the number under Contract# If
End date is not within the fiscal year
you are reporting for**



A screenshot of a date selection interface. It features two input fields labeled "Start Date" and "End Date". Each field has a calendar icon and a dropdown arrow. Below the "Start Date" field, the date "7/1/2018" is displayed. Below the "End Date" field, the date "6/30/2019" is displayed. A red oval highlights both the date text and the calendar icons.



A screenshot of a contract selection interface. At the top, it says "View Working Data for:" followed by a dropdown menu showing "AGI". Below this are two buttons: "Add New Contract" and "Use t... Click". A "Contract#" section contains a dropdown menu with a list of contract numbers. The number "00001" is highlighted with a red oval. Below "00001" is the label "Description:". Another contract number "00002" is visible below it, also with a "Description:" label.

FORM 3 PORTAL – MANUAL REMOVAL OF PRIOR YEAR/EXPIRED DATA

Click to delete the record,

Prime Data:

The * denotes a required field.

Name of Prime Contractor: *

Prime Contractor Classification: *

MDOT Certification Number:

Click OK to confirm deletion, you will get a success message. Then go on to the next record to delete.

doit.state.md.us says

Are you sure you want to delete?
There is no undoing this!

Prime Data:

The * denotes a required field.

Prime Contractor Data was Successfully deleted.

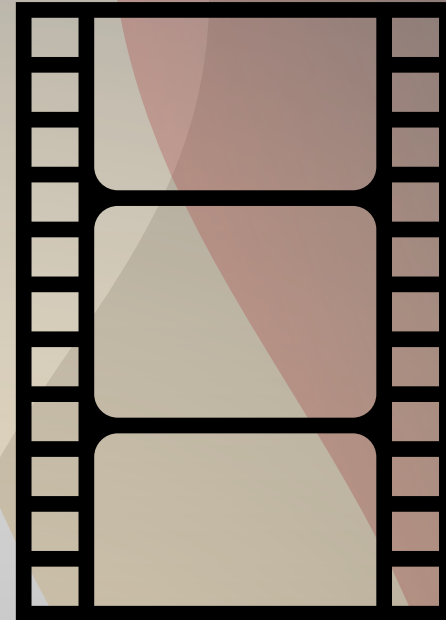


REMEMBER THIS

- The Form 3 Errors and Resolutions section of the reporting manual will help you work through any errors.
- Call us for assistance if you are unable to resolve an error.
- Once the manual entry or data import has been completed, you can review and export the summary data.
- The PRIME and Subcontractor summaries should be submitted with your final report.

REMEMBER OUR TRAINING VIDEO

- The Form 3 Portal in-depth training video is available on our website in the [MBE Reporting Toolkit](#).
- A slide deck is also provided for your review.
- Call us if you still have questions after watching the video.





CHECKS AND BALANCES

FMIS/ANSWERS Data Collection Checklist

The following checklist will assist you in your efforts to collect and compile all the data necessary to complete and submit an accurate summary of your agency/department's procurement activity, including Minority Business Enterprise (MBE) prime contract and subcontract awards and payments:

- Generate the following FMIS/ANSWERS MBE Reports:
 - a) PCHL709 (BPO/PO Change Orders from contracts awarded in prior fiscal years)
 - b) PCHL710 (Contract Awards Detail) run by award date
 - c) PCHL711 (Contract Awards Summary) **Use Waiver Data Only**
 - d) PCHL713 (MBE Prime Contract Awards by Ethnicity) **Reference Document Only**
 - e) PCHL717 (MBE Prime Payments by Direct Voucher; no BPO/PO)
 - f) PCHL718 (MBE Prime Voucher Payments made from BPO/PO)
 - g) PCHL719 (MBE Subcontractor Payments)
 - h) PCHL 720 (MBE Subcontract Awards) run by award date
 - i) PCHL 721 or VIEWDIRECT A30USB11(P-Card Total/MBE Purchases)

Cut along dotted line and post in visible spot

FMIS CHEAT SHEET

AWARDS = ANSWER reports 709, 710, 717, 720 & 721 OR VIEW DIRECT A30USB11

PAYMENTS = ANSWER reports 717, 718, 719 & 721 OR VIEW DIRECT A30USB11

Reminder: Direct Vouchers and P-card purchases are reported as both AWARDS and PAYMENTS.*

**With the exception of control agency/department statewide contracts*

Forms	Data that is required in each form
Form #1- Contract Awards	The anticipated amount of the base period of the contract when it was first awarded or renewed.
Form #2-MBE Prime & Subcontract Awards	The MBE Prime Contractor's Portion of the Contract & the Subcontractor's MBE commitments when the contract was first awarded or renewed.
Form #3-Actual Payments	The confirmed MBE payment amounts actually paid for services rendered or products purchased.

REPORTING CHECKS AND BALANCES

CHECKS AND BALANCES

- Based on FINAL scrubbed backup data reports which include or identify data that was used to produce the values entered in the Annual Form 1 / 2, Form 3, and Contract Inventory Sheet.
- **AWARDS - ANSWERS REPORTS – ALL PRIME CONTRACTS DATA**
 - ✓ Form 1 tab (YELLOW area only should be consistent with the contracts on scrubbed 709 / 710, 717, and 721 reports **MINUS** Statewide Contracts.
 - ✓ Specifically, Form 1 fields B (#) and C (\$) 11-20 = 709 / 710 reports
 - ✓ Form 1 fields B (#) and C (\$) 21 = 721 report
 - ✓ Form 1 fields B (#) and C (\$) 22 – 717 report
 - ✓ While this may seem elementary to some, we often find reports with these totals mismatched because of clerical errors and changes so remember to check at the conclusion of your report preparation before submitting.

CHECKS AND BALANCES

- Based on FINAL scrubbed backup data reports which include or identify data that was used to produce the values entered in the Annual Form 1 / 2, Form 3, and Contract Inventory Sheet.
- **AWARDS - ANSWERS REPORTS – MBE PRIME CONTRACTOR DATA**
 - ✓ Form 2 tab - Primes table, should be consistent with the Contract Inventory – Primes tab **AND** the reportable MBE totals on your 709 / 710, 717, and 721 reports **MINUS** Statewide Contracts
 - ✓ Specifically, Form 2 summary data for MBE Primes on Form 1, fields F (#) and G (\$) 11-20 = 709 / 710 reports (MBE data only)
 - ✓ Form 1 fields F (#) and G (\$) 21 = 721 report, MBE data only
 - ✓ Form 1 fields F (#) and G (\$) 22 – 717 report, MBE data only

CHECKS AND BALANCES

- Based on FINAL scrubbed backup data reports which include or identify data that was used to produce the values entered in the Annual Form 1 / 2, Form 3, and Contract Inventory Sheet.
- **AWARDS - ANSWERS REPORTS – MBE SUBCONTRACTOR DATA**
 - ✓ Form 2 – Subs table, should be consistent with the Contract Inventory – Subs tab **AND** the reportable contracts on your scrubbed 720 report.
 - ✓ Specifically, Form 2 summary data for MBE Subcontractors on Form 1, fields H (#) and I (\$) 11-20 = 720 report

CHECKS AND BALANCES

✓ CAVEATS:

- If you have an MBE Prime with MBE Subcontractors, you will need to take in consideration the amount self-performed and **whether you choose to split the contract award between the Prime and MBE Subs or report the full total under the Prime.**
- Consider contractors who were subject to the 60% percent rule.

CHECKS AND BALANCES

○ PAYMENTS - ANSWERS REPORTERS

- ✓ Form 3 Prime contractor data should be consistent with MBE reportable payment amounts on the scrubbed 718, 717, and 721 reports.
 - ✓ Keep in mind that non-minority contractor data should only be added if it matches MBE subcontractors listed on the subs tab.
- ✓ Form 3 Subcontractor data should be consistent with the MBE payments on your 719 report.

COMMON ERRORS AND OMISSIONS IN REPORTING

Remember, use your MBE Reporting Manual as your
“Reference Document” for reporting.

○ ANSWERS Reports:

- ✓ Do not use the 718 Report for reporting Awards on Form 1 [This is a payments report]
- ✓ The 711 and 713 Reports are for your reference only
- ✓ Submitting PDF formatted backup hinders the verification process
- ✓ Remember to submit all relevant 700 series or internal reports for backup
- ✓ Use the reportable column, if applicable, and highlight or show what is being used for awards/payments within your backup data

COMMON ERRORS AND OMISSIONS IN REPORTING

- Form 1 & 2, Form 3 and, Contracts Inventory:
 - ✓ Use the correct & current Template as things change from year to year
 - ✓ Statewide Contracts should not appear in your awards data (Note: DGS Statewide Contracts and other contracts can be searched via links from our MBE Toolkit)
 - ✓ Negative Numbers and totals should not be included
 - ✓ Contracts Inventory totals should match Form 2
 - ✓ Know what is an Awards vs. Payments
 - ✓ Please do not change/add to templates
 - ✓ MBE goals are only on contracts with subs, everything else should be 0% (PRIMES) in Form 3.
 - ✓ MBE Designations for Form 3 must match those listed in the Manual, p. 35, including using Non-minority for primes with no MBE designation.

REPORT CORRECTIONS

- ✓ Keep in mind that corrections to reports, whether MBE, SBR, or VSBE, will be sent back to the parties who submitted the report.
- ✓ To ensure all parties are aware of correction requests, you can cc all parties on the original submission.

***NEW* THIS YEAR**

MBE REPORTING CHEAT SHEET GUIDE
COMPLIANCE ASSESSMENT
NEW SUMMARY SHEET PROCESS

REPORTING CHEAT SHEET WILL INCLUDE:

- Each report requirement will have a guide, which will list which backup reports will be required to fill in the specific report as well as general reminders for each report.
 - Form 1 & 2
 - Form 3
 - Contracts Inventory
- Check and Balances include:
 - Reporting Checklist
 - Submission Checklist





COMPLIANCE ASSESSMENT REPORT

COMPLIANCE ASSESSMENT

- Will report information about contracts that closed (expired) during the fiscal year and contained MBE goals/subgoals.
- Will include an excel report with a prime and subs tab and a Compliance Report tab which will be printed off and signed by your agency head or designee.
- Aggregate results will be published in the Governor's Office of Small, Minority & Women Business Affairs Annual Report.

COMPLIANCE ASSESSMENT

The Compliance Assessment Report is available now, in the January 17, 2023 Compliance Bulletin. You may also access it in the MBE Reporting Toolkit after July 1st.

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

Quick Links

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

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.

Due Now

MBE Program 2nd Quarter Report
Due January 30, 2023
[Access Template Here](#)
Reporting Period July 1, 2022- December 31, 2022

FY2022 MBE Annual Report

The MBE Annual Report must be completed and submitted on or before September 30, 2022. The Annual Report covers the period July 1, 2021 - June 30, 2022.

Please submit the following:

1. Form 1 & 2 as EXCEL sheets (1 file) and the signed signature page
2. Contracts Inventory Report as EXCEL sheets (1 file)
3. Data entry in the Form 3 Web Portal (Contact GOSBA for technical assistance)
4. A completed and signed Summary Sheet (all figures must match your form 3 data and your Form 1 & 2)

Procurement Compliance Bulletins

- 1.17.2023**
- 12.14.2022
- 11.17.2022

SBR PROGRAM REPORTING TOOLKIT

VSBE PROGRAM REPORTING TOOLKIT

Resource Links

- eMaryland Marketplace Advantage (eMMA)
- MBE Prime Regulation 2014
- Liquidated Damages Guidelines
- Liquidated Damages Worksheet
- Liquidated Damages Hourly Rate Calculations
- GAD List Exclusion Definitions
- 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.)



NEW SUMMARY STATEMENT PROCESS

SUMMARY STATEMENT

Beginning this year, during reporting season, you will no longer find the summary statement template in the MBE reporting toolkit. Annual Reports will now be submitted without this form.

- New Process
 - ✓ Full Report Review
 - ✓ Requesting of corrections
 - ✓ GOSBA will issue a summary statement reflective of your final report numbers.

SUMMARY STATEMENT



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

Annual Minority Business Enterprise (MBE)

Procurement Report

FY2022 Summary Statement

Agency Responsibility:

✓ Review

✓ Confirm

✓ Secure signatures

Reporting Department/Agency:
Fiscal Year: 2022

Category	Amount
1. Total dollars awarded to MBEs (Total from Form 1 Spreadsheet)	FORM 1 COLUMN K23
2. Total dollars paid to MBEs (Total from Form 3 Database, Sum of 2a and 2b below)	0.00
a. Total Actual Subcontractor Payments (Form 3)	FORM 3
b. Total Prime Contractor Actual Payments by (excluding non-minority primes) (Form 3)	FORM 3
3. Total dollars awarded (Total from Form 1 Spreadsheet)	FORM 1 COLUMN C23
4. MBE awards as a percentage of contracts awards (from Form 1 Spreadsheet)	FORM 1 COLUMN L23
Secretary/Agency Head Name:	

This summary is not complete until the three respective signatures on Page 2 have been obtained.

SUBMISSION CHECKS AND BALANCES

USE YOUR CHECKLIST

ANNUAL MBE REPORT SUBMISSION CHECKLIST

(For Agency Use)

- Completed Summary Statement, **signed by three representatives**, please plan accordingly (**hard copy mailed with original signature or scanned signed copy e-mailed to GOSBA**)
- Fiscal Year 2019 MBE Strategic Plan (MS Word or PDF file), send to GOSBA due July 31, 2018
- GOSBA Procurement Awards **Annual Reporting Forms 1 and 2** Excel spreadsheets – 1 file. *(please note that the ANNUAL Report excel file is slightly different from the monthly version), send 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” formerly known as MBE Prime Contractor and MBE Subcontractor Awards Detail Report excel spreadsheets – 1 file, send to GOSBA
- GOSBA Form 3 data entry into web portal
- GOSBA Form 3 Reports to keep on file, you decide, GOSBA has documentation within the portal
- 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, Google Drive or as a last result thumb drive or CD by October 1, 2018. **MANDATORY SUBMISSION**



****For FY23, the Compliance Assessment will be added to this list.**

FINAL ANNOUNCEMENTS & REMINDERS




MBE FORM SAMPLES



Don't Forget!

- Updated MBE Form Samples are located on our website in the MBE toolkit in the MBE Program Resources Section:
- An MBE Forms training video is available on our website in the MBE Reporting Toolkit.

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](#)

SEARCHING TO VERIFY MBE FIRMS

- **To Search by Name or DBA**

- Click to uncheck all Certification Types except MBE (if applicable)
- Enter the Firms Name or DBA in the search field

Search by Certification Type

CERTIFICATIONS

- Airport Concessionaire Disadvantaged Business Enterprise (ACDBE)
- Disadvantaged Business Enterprise (DBE)
- Minority Business Enterprise (MBE)
- Small Business Enterprise (SBE)

Search by Business Name or DBA

BUSINESS NAME/DBA

Tip: Try just a few letters of the firm's name.

SEARCHING TO VERIFY MBE FIRMS

- **To Search by Certification Number**
 - Click to uncheck all Certification Types except MBE (if applicable)
 - Enter the Certification Number

Search by Reference	
MINORITY STATUS	<input type="button" value="Select one or more"/>
CERTIFIED SINCE	Between <input type="text" value="mm/dd/yyyy"/> and <input type="text" value="mm/dd/yyyy"/>
CERTIFICATION NUMBER	<input type="text" value="94-126"/>

2023 MBE & LIAISON SURVEYS

As in previous years, the House Appropriations Committee has mandated an additional series of surveys in order to address concerns about low MBE goal attainment and liaison vacancies.

- Our office will launch the first survey in this new series, the 2023 Agency MBE Participation Attainment Survey, on June 30, 2023.
- Please keep in mind that this survey does require the entry of FY2023 procurement data from your agency's FY2023 MBE Annual Report.
- Submission of this survey is required and agencies who fail to submit the requested data by the due date will be reported as non-responsive to the Committee.
- The survey will be due October 31, 2023. No extension can be granted.

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

NICHELLE JOHNSON

NICHELLE.JOHNSON1@MARYLAND.GOV

410-697-9605

667-232-1369

KAREN REYES

KAREN.REYES@MARYLAND.GOV

410-697-9608

443-346-0630



VSB E P R O G R A M



AGENDA

- Statues and Regulations
- Deadlines- What to Expect!
- Outreach
- Reporting Requirements FY2023
- VSBE Certification Confirmation
- Submission Format
- Waiver Guidance and Waivers
- FY22 Program Highlights

VSB E STATUES AND REGULATIONS



VSBE Program Statutes

STATE FINANCE AND PROCUREMENT ARTICLES

§ 14-601—14-606

- § 14-601. Definitions
- § 14-602. Procurement procedures
- § 14-603. Awarding of contract
- § 14-604. Regulations, procedures and report
 - § 14-604.1. Advisory Committee
- § 14-605. Prohibited acts and Penalties
- § 14-606. Penalties Amendment

VSBE Program Regulations

VSBE POLICIES

COMAR 21.11.14

- 01 General — Purpose
- 02 Definitions
- 03 Scope
- 04 Procurement Agency Responsibility
- 05 VSBE Liaison
- 06 Reporting
- 07 Procurement Solicitations
- 08 Contract Award
- 09 Waiver
- 10 Amendment of VSBE Participation Schedule
- 11 Compliance
- 12 Verification

VSBE PROGRAM GUIDE



VSBE PROGRAM GUIDE FOR LIAISON AND PROCUREMENT OFFICERS

VSBE Vendor Verification

eMaryland Marketplace Advantage (eMMA) is the only platform to verify certified Veteran-Owned Small Business Enterprise (VSBE) Program vendors.

Once certified, the vendor will be assigned a VSBE number (VBXX-XXXXXX) in eMMA. An agency or department must verify a VSBE's certification by the VSBE# and a current application date (not expired).

Counting VSBE Vendor Participation

Only the work of a certified VSBE vendor may be counted toward an established contract goal. This requires the procurement team to verify VSBE status in eMMA both at the time of award and as payments are made throughout the life of the contract.

Vendor Certification

Veteran-owned businesses that want to participate in the VSBE Program must complete the 3-step certification process.

First - Register as a vendor in eMMA

Second - Submit veteran verification

Third - Complete the VSBE Application within eMMA

Are you working with veteran small businesses? Refer them to our website for complete information.

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

Welcome to eMaryland Marketplace Advantage (eMMA)

<https://emma.maryland.gov/>



If you have any questions regarding the VSBE Program, feel free to contact our VSBE Compliance manager Danielle Davis at Danielle.Davis2@maryland.gov

VSBE Goalsetting

Participating agencies/departments shall follow guidelines established in BPW Advisory 2001-1 - Procurement Review Groups: SBR Designations, MBE and VSBE Determinations. <https://bpw.maryland.gov/Pages/adv-2001-1.aspx>

Identifying veteran-owned small businesses is a critical step in setting VSBE goals on a contract-by-contract basis. VSBE liaisons and procurement officers should use all available resources to identify veteran firms.

Primary resources include, but are not limited to:

- eMMA
- VeteranOwnedBusiness.com
- Veteran Small Business Certification (VetCert) <https://veterans.certify.sba.gov/#home>

Note: As of January 1, 2023, VetBiz is no longer in operation.

VSBE Outreach

The VSBE liaison officer is responsible for coordinating outreach efforts to the veteran business community. Please remember to track these efforts as they are now required to be documented and reported at the end of each fiscal year.

DEADLINES!!



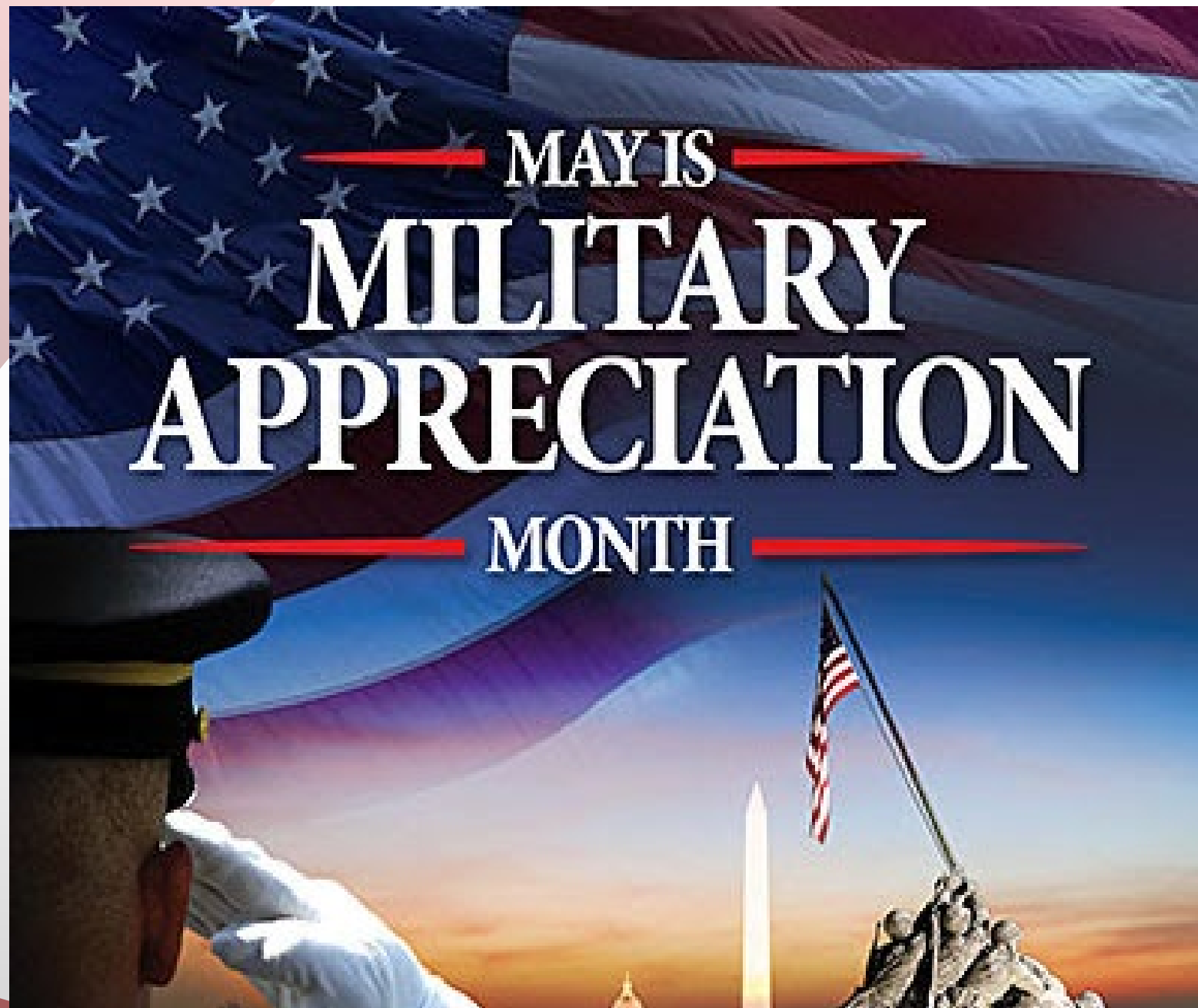
VSBE REPORTING DEADLINE

OCTOBER 1ST



VSBE OUTREACH





VSBE OUTREACH

- Outreach Strategies
 - Use the national military calendar
 - Upcoming Events
 - Collaborations
- Marketing Strategies
 - Our Office Monthly Bulletin
 - VSBE Monthly Emails
 - Website
 - Veteran Resource Partners

Events

Stay connected to the many opportunities for training, networking, and business development that are taking place across Maryland and on virtual platforms. Here is a highlight of some of the events coming up this month.

05/02/2023 - [Introduction to eMMA for Vendors](#)

05/09/2023 - [Capture and Proposal Management](#)

05/11/2023 - [Seeking Funding for Your Business? Speed Lending is for You!](#)

05/11/2023 - [Sales Conversations that Close Deals](#)

05/16/2023 - [Responding to State Solicitations](#)

05/18/2023 - [Selling, Hiring & Working with Independent Contractors](#)

05/23/2023 - [Pricing Strategies to Win More Contracts](#)

05/23/2023 - [Building Your Past Performance Library](#)

05/25/2023 - [Maryland's Veteran-Owned Small Business Enterprise \(VSBE\) Program](#)

05/24/2023 - [Minority Contractor Summit](#)

05/25/2023 - [Budget Builder Workshop for Small Business Owners](#)

05/30/2023 - [Driving Revenue: Leveraging Technology to Capture Clients](#)



Check out the full listing of small business events online at goMDsmallbiz.maryland.gov.

OUTREACH CONTACT

Eduardo Hayden

Small Business Outreach Manager
eduardo.hayden@maryland.gov

VSBE OUTREACH FORM

This is a NEW REPORTING REQUIREMENT for FY23

This is a fillable PDF document

Per COMAR- An evaluation by the procurement agency of the success of its VSBE Program, which shall include a brief description of the procurement agency outreach efforts to VSBE prime and VSBE subcontractors.

Veteran-Owned Small Business Enterprise (VSBE) Program Outreach Form

Fiscal Year 2023

Starting for fiscal year 2023, every participating agency must report their VSBE Program outreach to veteran businesses and overall program evaluation. (see COMAR 21.11.14).

INSTRUCTIONS: Complete all yellow highlighted cells. Do not edit this template.

Agency Reporting:

Individual Completing Form/Title:
Number of Employees Engaged in VSBE Outreach:

What channels do you engage for your VSBE Outreach?

Please check all that apply:

Live/In-Person

Virtual

One on One

Print

Social Media Platforms

Other

Number of outreach events (live or virtual) targeting VSBE's hosted by your Agency/Department?

Number of outreach events (live or virtual) targeting VSBE's attended (not hosted) by your Agency/Department?

Number of Total VSBE outreach events

Does your Agency/Department have a defined outreach strategy for engaging veteran-owned small businesses?

Yes or No?

Does your Agency/Department VSBE Liaison or designee attend pre-bid meetings on solicitations that include VSBE goals?

Yes or No?

If Yes to the preceding question, how many during this fiscal year?

What factors of your outreach efforts contributed to your overall VSBE Program performance?

Add any other information relevant to your veteran-owned small business outreach efforts:

FY23 VSBE OUTREACH FORM

Veteran-Owned Small Business Enterprise (VSBE) Program Outreach Form
Fiscal Year 2023

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- Live/In-Person Virtual One on One
 Print Social Media Platforms Other

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Yes or No?

If Yes to the preceeding question, how many during this fiscal year?

FY23 VSBE OUTREACH FORM

What factors of your outreach efforts contributed to your overall VSBE Program performance?

Add any other information relevant to your veteran-owned small business outreach efforts:

VSBE REPORTING FY2023



VSBE REPORTING CHECKLIST



- PREPARE
- Make sure DATA is ready to be pulled
- Organize/System

A graphic for a VSBE Reporting Checklist. It has a dark blue background with a diagonal line pattern. At the top left is a white square with a red checkmark. To its right is the text "VSBE Reporting Checklist" in white. Below this is a white rectangular box containing a checklist of items, each with a white checkbox and a horizontal line to its right. The items are: "Gather All parties necessary", "VSBE Annual Report Template", "Outreach Form Template", "Scrubbed All Procurement data", "Raw VSBE Data", "All Scrubbed VSBE Supporting Data", "Ran all 'Veteran firms' against eMMA", and a note: "Note: The same total procurement data, reported on MBE Form 1, should match total procurements on VSBE Annual Report Form".

VSBE Reporting Checklist

- Gather All parties necessary
- VSBE Annual Report Template
- Outreach Form Template
- Scrubbed All Procurement data
- Raw VSBE Data
- All Scrubbed VSBE Supporting Data
- Ran all "Veteran firms" against eMMA
-
- Note: The same total procurement data, reported on MBE Form 1, should match total procurements on VSBE Annual Report Form

VSBE TOOLKIT

[HTTPS://GOMDSMALLBIZ.MARYLAND.GOV/PAGES/REPORTING-TOOL-VSBE.ASPX](https://gomdsmallbiz.maryland.gov/pages/reporting-tool-vsbe.aspx)

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

Quick Links

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

Procurement
Compliance
Bulletins

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.

New Source For Federal Veteran Certification Searching

The federal Vets First CVE Verification Program known as VetBiz is no longer in operation. Responsibility for verifying the veteran status of small business owners at the federal level has been transferred to the U.S. Small Business Administration and is now called Veteran Small Business Certification (VetCert).
Effective immediately, the new site to search for federally certified veteran-owned small businesses is now <https://veterans.certify.sba.gov/#home>.

The state's Department of Veteran Affairs continues to perform veteran verifications for Maryland businesses through the eMMA platform.

SBR PROGRAM REPORTING TOOLKIT

MBE PROGRAM REPORTING TOOLKIT

VSBE PROGRAM REPORTING TOOLKIT

Resource Links

- eMaryland Marketplace Advantage
- FY2018 Report on VSBE Participation


VSBE TOOLKIT

FY2023 VSBE Annual Report

The VSBE Annual Report must be completed and submitted on or before October 1, 2023. The Annual Report covers the period July 1, 2022 - June 30, 2023.

Submit the latest VSBE Utilization Data Template by the due date.

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




VSBE Report Instructions and Template:

-  FY2022 VSBE REPORTING MANUAL.docx
-  VSBE Annual Report Template FY22.xlsx
- FY23 Outreach Form-NEW!!



VSBE Additional Reporting Document Tools:

- GAD List
- Annual ANSWERS Cheat Sheet
- Annual Non-Answers Cheat Sheet
-  VSBE Program Guide.png

VSBE DATA REPORT

MAKE SURE TO SELECT VETERAN FLAG

Agency:
(Select multiple agencies by checking the checkbox to the left of the Agency.)

Search Agencies...

- All Agencies
- Statewide DBM (050)
- Statewide DGS (001)
- Statewide Doit (060)

- 600 - Capital Projects- Office of Comptroller (600)

Begin Date: 07/01/2021

End Date: 06/30/2022 (Calculated from Begin Date.)

Date Presets:
(Calculated from today.)

PPFY PFY CFY FYTD PPY PY CY PM CM YTD

Date Type: Fiscal Effective Date Award Date

Report Type: VET ▾

* Report Data is updated weekly and current as of 2/4/2023.

VSBE DATA REPORTS

○ ANSWERS

1. PCHL 709 (PO/BPO Change Orders from contracts awarded in prior fiscal years), no Vet flag (manual review)
2. PCHL 710 (Contract Awards Detail) with Vet Flag
3. PCHL 717 (MBE/VSBE Prime Payments by Direct Voucher; no BPO/PO) with Vet Flag
4. PCHL 718 (MBE/VSBE Prime Voucher Payments made from BPO/PO) with Vet Flag
5. PCHL 719 (MBE/VSBE Subcontractor Payments) with Vet Flag
6. PCHL 720 (MBE/VSBE Subcontractor Awards) run by award dates with Vet Flag
7. PCHL 721 or Internal Agency/Department (MBE/VSBE Credit Card/P-Card Purchases) no Vet Flag, but has Vet column on report

○ NON-ANSWERS

1. PO/BPO Change Orders from contracts awarded in prior fiscal years
2. All Contract Awards Detail with VSBE awards
3. All Prime Payments by Direct Voucher; no BPO/PO with VSBE payments
4. All Prime Voucher Payments made from BPO/PO with VSBE payments
5. All Subcontractor Payments with VSBE payments
6. All Subcontractor Awards with VSBE awards
7. All Internal Agency/Department Credit Card/P-Card Purchases with VSBE Payments

VSBE VENDOR CERTIFICATION



VSBE VENDOR CERTIFICATION

- It is the responsibility of the agency/department to make sure all VSBE's on all FY2023 contracts are certified in the VSBE Database in eMMA
- Failure to do , will result in your agency having to manually extract that data from your FY2023 reports, as no awards or payments can be counted toward VSBE contract goals by veteran firms not in the VSBE Program



EMMA

Welcome to eMaryland Marketplace Advantage (eMMA)



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(SecureAuth)

MDoT SSO Login(MSAzure)

[Lost your password?](#)



New Vendor? Register Now



Public Solicitations



Public Contracts



Vendor Search

SEARCH THE FIRMS IN DATABASE

[New Vendor? Register Now](#)[Vendor Search](#)[Public Solicitations](#)[Public Contracts](#)

Vendor Search

Keywords

Commodities

Areas Served

Q Search

Reset

Company Name

eMMA Vendor ID

Country

UNITED STATES

State

Levels related with the supplier

Group, Entity

VSBE Vendor

SBR Vendor

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

VSBE VENDOR CERTIFICATION

- We have used the Company Name Search in this example
- The vendor has a check box for being a CERTIFIED VSBE, with a VALID Date (has not expired), with a VSBE Certification #- You would count this VSBE for awards and payments

The screenshot displays the eMMA Vendor Search interface. The search filters are as follows:

- Keywords: (empty)
- Commodities: (empty)
- Areas Served: (empty)
- Company Name: HNB SERVICES LLC
- eMMA Vendor ID: (empty)
- Country: UNITED STATES
- State: (empty)
- Levels related with the supplier: Group, Entity
- VSBE Vendor:
- SBR Vendor:

Filters: Country: UNITED STATES x Levels related with the supplier: Group Entity Company Name: HNB SERVICES LLC x

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
SUP015773	HNB SERVICES LLC	BALTIMORE	MD	21234	Dirk Hill	<input type="checkbox"/>			<input checked="" type="checkbox"/>	VB22-029999	12/6/2023

1 Result(s)

VSBE VENDOR CERTIFICATION-EXPIRED

- We have used the eMMA Vendor ID Search in this example
- The vendor **does not** have a check box for currently being a CERTIFIED VSBE, with a VALID Date. They have Expired. Therefore, if I were to have made this award TODAY, I could NOT count this vendor towards ANY awards or payments.

The screenshot shows the eMMA Vendor Search interface. At the top, there are navigation links: "New Vendor? Register Now", "Vendor Search", "Public Solicitations", and "Public Contracts". The "Vendor Search" link is underlined. Below the navigation is a search form with the following fields:

- Keywords:
- Commodities:
- Areas Served:
- Company Name:
- eMMA Vendor ID:
- Country:
- State:
- Levels related with the supplier:
- VSBE Vendor
- SBR Vendor

Filters: Country: UNITED STATES x Levels related with the supplier: Group Entity eMMA Vendor ID: SUP015637 x

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	Website
SUP015637	TRUST CONSULTING SERVICES INC	WALDORF	MD	20602	James Radford	<input checked="" type="checkbox"/>	SB22-022942	6/25/2023	<input type="checkbox"/>		4/29/2023	www.tcsservices.net

FEDERAL VETERAN SEARCH

NEW

Home Veteran Small Business Search Eligibility Benefits Support

Veteran Small Business Certification (VetCert)

Veteran-owned small businesses can use this application to be certified by SBA to compete for federal contracts. Certified veteran-owned businesses (VOSBs) will have the opportunity to pursue sole-source and set-aside contracts at the Department of Veterans Affairs and Vets First program. Certified service-disabled veteran-owned small businesses (SDVOSBs) will have the opportunity to compete for sole-source and set-aside contracts across the federal government.

[Register](#) [Sign In](#)

Search for a Certified Veteran Small Business

Search By DUNS Number

- Business Name
- SAM.gov UEI
- DUNS Number
- State/Territory
- NAICS Code

Certification Eligibility

SUBMISSION FORMAT



VSBE SUBMISSION FORMATS

Scenario #1

(1) Excel Spreadsheet containing:

- **VSBE Annual Template**
- **Raw and Scrubbed Data with VSBE Totals**

(1) Completed PDF Outreach Form

Scenario #2

(2) Separate Excel Spreadsheets containing:

- **VSBE Annual Template**
- **Raw and Scrubbed Data with VSBE Totals**

(1) Completed PDF Outreach Form

VSBE GUIDANCE & WAIVERS



VSBE WAIVER GUIDANCE

- There is now MBE & VSBE Waiver Guidance. All VSBE Waivers Determinations are required to be emailed to vsbe.gosba@maryland.gov
- Modifications included Waiver Guidance (E-1C) with definitions, Good Faith Efforts outlined, and other valuable information in the VSBE Forms (Attachment E)



https://procurement.maryland.gov/wp-content/uploads/sites/12/2022/11/BP-MBE_VSBE-Waiver-Guidance-v1-10.17.2022.pdf

FY22 VSBE PROGRAM HIGHLIGHTS

- Awards to VSBE vendors in FY2022 totaled \$52 million, a **76 percent increase** from \$29.5 million in FY2021.
- The VSBE Program's statewide participation rate increased from 0.60 percent in FY2021 to **0.94 percent** in FY2022.
- Payments to VSBE vendors in FY2022 was \$34.9 million, an **18 percent increase** from \$29.6 million in FY2021.

VSBE PROGRAM FY2022 KUDOS

VSBE AWARDS

- ARCHIVES
- GENERAL SERVICES
- HOUSING & COMMUNITY DEVELOPMENT
- INSURANCE ADMINISTRATION
- LIBRARY
- MOTOR VEHICLE ADMINISTRATION
- PORT ADMINISTRATION
- STATE RETIREMENT AGENCY



CONTACT ME!

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Danielle.Davis2@maryland.gov
443-346-0717



“THANK YOU!”