MBE/SBR LIAISON TRAINING

Presented by
Governor’s Office of
Small, Minority & Women Business Affairs (GOSBA) Staff

April 20, 2018
For Internal Training Purposes Only
AGENDA

1. Welcome & GOSBA Staff Introduction
2. Special Secretary Jimmy Rhee
3. Outreach – Alison Tavik
4. RSG’s – Eduardo Hayden
5. Legislative Update (Gabe Gnall, James King)
6. VOSB Update – Comment from DVA
7. MBE Updates – Lisa Sanford & Chantal Kai Lewis
   - 60 % Rule
   - Procurement Forecast
   - MBE Strategic Plan
   - PRG Scenarios
   - MBE Forms Training

8. SBR Updates – Lisa Mitchell Sennaar & Lisa Sanford
   - SBR Strategic Plan
   - SBR Liaison Expectations
   - Searching for SBR’s
   - SBR Scrubbing
Ready, Set, GROW Events
Technical Training Classroom
Responsiveness of Liaisons
T-FACTOR Source Documents

- “MBE CONTRACTS INVENTORY” excel file
- Double check document: MBE Awards Form1 file
## T-FACTOR

<table>
<thead>
<tr>
<th></th>
<th>Agency A</th>
<th>FY16</th>
<th>FY17</th>
<th>FY16</th>
<th>FY17</th>
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<td>$4,267,934</td>
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### Total Contract Awards by Procurement Categories

<table>
<thead>
<tr>
<th>Procurement Category</th>
<th>Total # All Prime Contracts (including MBE)</th>
<th>Total All Prime Contracts Dollar Value Awarded (including MBE)</th>
<th>Total # of Prime Contract Waivers</th>
<th>Total Dollar Value of Prime Contract Waivers</th>
<th>Total # MBE Prime Contracts Awarded</th>
<th>Total MBE Prime Contract Dollar Value Awarded</th>
<th>Total # MBE Subcontracts Awarded</th>
<th>Total MBE Subcontract Dollar Value Awarded</th>
<th>Total # MBE Contracts Awarded-Prime &amp; Sub</th>
<th>Total $ of MBE Contracts Awarded-Prime &amp; Sub</th>
<th>Total MBE Participation Percentage</th>
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<tbody>
<tr>
<td>Architectural</td>
<td></td>
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<tr>
<td>Construction</td>
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<td>11</td>
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<td>15.16%</td>
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For Internal Training Purposes Only

Governor's Office of Small, Minority & Women Business Affairs
### Total Contract Awards by Procurement Categories

<table>
<thead>
<tr>
<th>Procurement Category</th>
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<th>Total All Prime Contracts Dollar Value Awarded (Including MBE)</th>
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<th>Total MBE Participation Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Architectural</td>
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<td>$0</td>
<td>0</td>
<td>$0</td>
<td>0</td>
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<td>0</td>
<td>$0</td>
<td>0</td>
<td>$0</td>
<td>0.00%</td>
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<tr>
<td>Engineering</td>
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<td>$0</td>
<td>0</td>
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<td>0</td>
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<tr>
<td>Construction</td>
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<tr>
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<td>18.10%</td>
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<td>18.10%</td>
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<td>0</td>
<td>$0</td>
<td>0</td>
<td>$0</td>
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<td>$643,738</td>
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<td>$643,738</td>
<td>29.91%</td>
<td>$643,738</td>
<td>29.91%</td>
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<tr>
<td>Direct Voucher</td>
<td>0</td>
<td>$0</td>
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<td>$0</td>
<td>0</td>
<td>$0</td>
<td>0</td>
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<td>$13,498,367</td>
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<td>$3,061,381</td>
<td>190</td>
<td>$16,559,748</td>
<td>22.97%</td>
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For Internal Training Purposes Only
Connecting to Small Procurements

How do small business vendors get on your radar?
Learn More

Ready, Set, GROW! Procurement Connection Workshop
- Meet buyers from state agencies
- Connect with small business resource organizations
- Held at locations around the state
- 10 per year

Technical Training Classroom
- In-depth classes
- Broad range of topics
- Held in Crownsville, MD
- 22 classes per year
Legislative Update
Gabe Gnall, Procurement Advisor, BPW
James King, Director of Policy & Legislative Affairs, GOSBA
# 2018 Passed Procurement-related Legislation

<table>
<thead>
<tr>
<th>Bill Number</th>
<th>Title</th>
<th>Primary Sponsor</th>
<th>Status</th>
<th>Synopsis</th>
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<tbody>
<tr>
<td>SB0040</td>
<td>Maryland Stadium Authority - Exemption From Department of Information Technology Oversight</td>
<td>Chair, Education, Health, and Environmental Affairs Committee</td>
<td>Returned Passed</td>
<td>Exempting the Maryland Stadium Authority from certain provisions of law relating to the purchase, lease, or rental of information technology or any changes to the purchase, lease, or rental of information technology.</td>
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<tr>
<td>SB0245</td>
<td>Procurement – Security Requirements – Forms</td>
<td>Senator Robinson</td>
<td>Passed Enrolled</td>
<td>Requiring the Board of Public Works to adopt regulations to establish separate forms for procurement officers to use to require security for construction contracts and contracts for supplies, services, or construction related services; and requiring that a certain form provide for annual and renewable contracts. Regulations – Separate bond forms – annual and renewable</td>
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<td>Bill Number</td>
<td>Title</td>
<td>Primary Sponsor</td>
<td>Status</td>
<td>Synopsis</td>
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<tr>
<td>SB0251</td>
<td>Minority Business Enterprises - Required Regulations - Liquidated Damages Prohibition</td>
<td>Senator Conway</td>
<td>Returned Passed</td>
<td>Requiring regulations adopted by the Board of Public Works to prohibit a unit from assessing liquidated damages for certain contracts for which a certain minority business enterprise was named on a participation schedule or named on a participation schedule and qualified based on a certain code; and providing that existing obligations or contract rights may not be impaired by the Act. Regulations – exemption from assessing MBE liquidated damages if unit did not request performance or delivery of task.</td>
</tr>
<tr>
<td>SB0286</td>
<td>State Procurement - Information Technology - Nonvisual Access</td>
<td>Senator Conway Delegate Cullison</td>
<td>Passed Enrolled</td>
<td>Requiring the Secretary of Information Technology, or the Secretary's designee, on or before January 1, 2020, to adopt new nonvisual access procurement standards that provide individuals with disabilities with certain nonvisual access so the individuals have the same information, engage in the same interactions, and enjoy the same services as users without disabilities; requiring the Secretary or the Secretary's designee to establish a process for determining if certain information technology meets certain standards and for enforcing the Act; etc. Non-visual Access Clause to be updated</td>
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<td>Bill Number</td>
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<tr>
<td>SB0383</td>
<td>Video Lottery Terminals - Minority Business Participation Goals - Sunset Extension</td>
<td>Senator Benson</td>
<td>Returned</td>
<td>Providing that a certain applicant or licensee is subject to a certain minority business participation goal established by the Special Secretary for the Office of Small, Minority, and Women Business Affairs; requiring a certain certification agency, in consultation with the General Assembly and the Office of the Attorney General, to study the Minority Business Enterprise Program to evaluate the program's compliance with certain requirements and to report to the Legislative Policy Committee by December 14, 2018; etc. MBE goal to apply to video lottery terminal-related construction and procurements. Sunset extended to 2019.</td>
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<tr>
<td>HB1622</td>
<td>Video Lottery Terminals - Minority Business Participation Goals - Sunset Extension</td>
<td>Delegate Wilson</td>
<td>Passed</td>
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<td>SB0414</td>
<td>Governor’s Office of Small, Minority, and Women Business Affairs – Small Business Resources and Data Collection</td>
<td>Senator Robinson</td>
<td>Returned Passed</td>
<td>Requiring the Governor's Office of Small, Minority, and Women Business Affairs to collaborate with certain State entities to identify all State resources available to small businesses and develop a plan to coordinate resources with the Office; requiring the Office to convene a workgroup to study and make recommendations regarding the collection of data by State agencies that may be used to assist small businesses in accessing State resources and bidding on State contracts; requiring a certain report from the Office by December 1, 2018; etc.</td>
</tr>
<tr>
<td>Bill Number</td>
<td>Title</td>
<td>Primary Sponsor</td>
<td>Status</td>
<td>Synopsis</td>
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<tr>
<td>SB0492</td>
<td>Procurement - Board of Public Works - Workforce Health Care Study</td>
<td>Senator Zucker</td>
<td>Returned</td>
<td>Requiring the Board of Public Works to collect certain information related to health care for all construction-related, competitive sealed bids for projects for a certain time period; requiring the Board to direct certain agencies to include certain information in a certain request; requiring the Board, by November 1, 2018, to report certain information to the Senate Education, Health, and Environmental Affairs Committee and the House Health and Government Operations Committee; etc.</td>
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<td>HB0776</td>
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<td>Delegate Rosenberg</td>
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<td>SB1020</td>
<td>Procurement - Architectural Services and Engineering Services - Reciprocal Preference</td>
<td>Senator Conway, Delegate Hayes</td>
<td>Returned Passed</td>
<td>Requiring a unit to give a certain preference under certain circumstances to a certain resident firm that is licensed or otherwise authorized to provide architectural services or engineering services in the State; requiring a certain nonresident firm to submit certain documentation concerning certain preferences to a unit at the request of the unit; requiring a unit to apply certain preferences to certain proposals in a certain manner; etc. BPW to adopt regulations and post and maintain list of all states with in-state preference.</td>
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<tr>
<td>Bill Number</td>
<td>Title</td>
<td>Primary Sponsor</td>
<td>Status</td>
<td>Synopsis</td>
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<td>SB1045</td>
<td>State Government - Grants and Contracts - Reimbursement of Indirect Costs</td>
<td>Senator Kagan</td>
<td>Returned Passed</td>
<td>Requiring that the terms of a certain grant or contract allow for reimbursement of indirect costs at the same rate the nonprofit organization has negotiated and received for indirect costs under a direct federal award or negotiated and received from a nonfederal entity based on certain cost principles or, under certain circumstances, at a rate of at least a certain percent of certain costs; and applying the Act.</td>
</tr>
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<td>Status</td>
<td>Synopsis</td>
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<tr>
<td>SB1165</td>
<td>Procurement – Veteran–Owned Small Business Enterprise Participation</td>
<td>Senator Waugh Delegate Carozza</td>
<td>Returned Passed</td>
<td>Altering the definition of “veteran” for purposes of certain provisions of law governing veteran-owned small business enterprise participation in procurement to include only individuals who are verified by the State Department of Veterans Affairs as having served on active duty in the armed forces of the United States, other than for training and were discharged or released under conditions other than dishonorable; etc. “Veteran” = verified by MDVA. Transfers responsibility for adopting regulations, tracking, and reporting of data of VSBE program from BPW to GOMA.</td>
</tr>
<tr>
<td>Bill Number</td>
<td>Title</td>
<td>Primary Sponsor</td>
<td>Status</td>
<td>Synopsis</td>
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<tr>
<td>HB1237</td>
<td>Procurement - Disposition of Property - Public Universities</td>
<td>Delegate Hayes</td>
<td>Returned</td>
<td>Specifying that the Board of Regents of the University System of Maryland may sell or exchange any part of its real properties with the approval of the Board of Public Works; and altering the requirement for approval by the Board of Public Works for contracts exceeding $1,000,000 that dispose of certain property of certain public universities.</td>
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<tr>
<td>HB1400</td>
<td>State Employee and Retiree Health and Welfare Benefits Program – Employees of Qualifying Organizations</td>
<td>Delegate Morhaim</td>
<td>Passed</td>
<td>Providing that participation by certain organizations in the State employee and Retiree Health and Welfare Benefits Program may not impede, undermine, or conflict with certain obligations or statuses; authorizing an employee of a county board to participate in the State Employee and Retiree Health and Welfare Benefits Program; establishing the Task Force to Study Cooperative Purchasing for Health Insurance; requiring the Task Force to report its findings and recommendations to the Governor and the General Assembly by January 1, 2020; etc.</td>
</tr>
</tbody>
</table>
Veteran Business Owner Program
Devan Perry, BPW

Link to FY15 VSBE REPORT:
Veteran-Owned Small Business Enterprise (VSBE) Participation Goal Notifications to the Maryland Department of Veterans Affairs (MDVA)

Use the following format to notify MDVA of Agency Procurements with VSBE participation goals:

1. Send an email to Dana Hendrickson at Dana.Hendrickson@maryland.gov.
2. State in the Subject line:
   a. Agency Acronym;
   b. Solicitation Title; and
   c. VSBE % Participation Goal.
3. In the body of the email provide the following information:
   a. Agency Acronym;
   b. Solicitation Title;
   c. The eMaryland Marketplace (eMM) "Bid No.;"
   d. The due date and time for the proposals/bids; and
   e. The link to the eMM solicitation posting.

For example:

<table>
<thead>
<tr>
<th>Agency Acronym</th>
<th>Solicitation Title</th>
<th>eMM Bid No.</th>
<th>Due Date and Time</th>
<th>Link to eMM Solicitation</th>
</tr>
</thead>
<tbody>
<tr>
<td>MDTA</td>
<td>Third Party Environmental Auditing Services</td>
<td>MDJ0731024164</td>
<td>January 29, 2016 at 3:00pm</td>
<td>[eMM Link]</td>
</tr>
</tbody>
</table>

(*The highlighted information is a link to eMM.)

Note: Only submit solicitations with VSBE participation goals. If your solicitation has a 0% goal, you do not need to submit the solicitation notification to MDVA.

Governor’s Office of Small, Minority & Women Business Affairs
PROCUREMENT FORECASTS

- Due July 31, 2018
- No changes to the format
- Be mindful of descriptions
MBE STRATEGIC PLANS

- Due July 31, 2018
- Slight changes to capture T-Factor information
- Be creative
SBR Dredging Company was a subcontractor to a large firm on a $5.0m dredging and tug boat project in 2015 and handled $1.5m worth of dredging work.

New dredging work arises in 2018 that is estimated at $3.0m, PRG is reviewing the scope and determines it is a good opportunity to designate this as an SBR, because they believe that there are enough small firms to bid on this work.

What is the best practice to put forth the solicitation:
- to open market with no MBE goal
- to open market with 3% VSBE goal
- as SBR designation as SBR designation and accept winning bid with SBR naming a large subcontractor to perform 70% of the work
- to open market with an MBE goal
- as SBR designation with an MBE goal
- As SBR designation
PRG Scenario #2

Agency has the need for three Project Managers to handle a routine IT data migration project. Estimated cost is $100,000 over 2 year period.

What is the best practice to put forth the solicitation:

- to open market with no MBE goal
- to open market with VSBE goal
- as SBR designated
- to open market with an 20% MBE goal
- as SBR designation with an MBE goal
**PRG Scenario #3**

Agency has the need for bridge decking and iron work repair on 58 bridges throughout the state estimated to cost $12m over two year period. At least 12 bridges only need minor bridge decking repairs. There are two MBE firms that do this type of work and there are at least five small businesses that can handle the minor decking repairs.

What is the best practice to put forth the solicitation:

- to open market with no MBE goal
- to open market with VSBE goal
- as SBR designated
- to open market with an 30% MBE goal
- as SBR designation with an MBE goal
This form includes Instructions and the MBE Utilization and Fair Solicitation Affidavit & MBE Participation Schedule which must be submitted with the bid/proposal. If the bidder/offeror fails to complete and submit this Affidavit and Schedule with the bid or proposal, the Procurement Officer shall deem the bid non-responsive or shall determine that the proposal is not reasonably susceptible of being selected for award.
MBE FORM
PART 1 - INSTRUCTIONS

1. Contractor shall structure its procedures for the performance of the work required in this Contract to attempt to achieve the minority business enterprise (MBE) subcontractor participation goal stated in the Invitation for Bids or Request for Proposals. Contractor agrees to exercise good faith efforts to carry out the requirements set forth in these Instructions, as authorized by the Code of Maryland Regulations (COMAR) 21.11.03.

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Governor’s Office of Small, Minority & Women Business Affairs
2. MBE Goals and Subgoals: Please review the solicitation for information regarding the Contract’s MBE overall participation goals and subgoals. After satisfying the requirements for any established subgoals, the Contractor is encouraged to use a diverse group of subcontractors and suppliers from the various MBE classifications to meet the remainder of the overall MBE participation goal.
Governor's Office of Small, Minority & Women Business Affairs

Overall MBE Goal = 40%

African American Subgoal = 7%

Asian American Subgoal = 2%
3. MBE means a minority business enterprise that is certified by the Maryland Department of Transportation (“MDOT”). Only MBEs certified by MDOT may be counted for purposes of achieving the MBE participation goals. In order to be counted for purposes of achieving the MBE participation goals, the MBE firm, including a MBE prime, must be MDOT-certified for the services, materials or supplies that it is committed to perform on the MBE Participation Schedule. A firm whose MBE certification application is pending may not be counted.
MBE FORM

PART 1 - INSTRUCTIONS

4. Please refer to the MDOT MBE Directory at... to determine if a firm is certified with the appropriate North American Industry Classification System (“NAICS”) Code and the product/services description (specific product that a firm is certified to provide or specific areas of work that a firm is certified to perform). For more general information about NAICS codes, please visit .... Only those specific products and/or services for which a firm is certified in the MDOT Directory can be used for purposes of achieving the MBE participation goals.

CAUTION: If the firm’s NAICS Code is in graduated status, such services/products may not be counted for purposes of achieving the MBE participation goals. A NAICS Code is in the graduated status if the term “Graduated” follows the Code in the MDOT MBE Directory.
5. **Guidelines Regarding MBE Prime Self-Performance.** Please note that when a certified MBE firm participates as a prime contractor on a Contract, a procurement agency may count the distinct, clearly defined portion of the work of the Contract that the certified MBE firm performs with its own workforce toward fulfilling up to, but no more than, fifty-percent (50%) of the overall MBE participation goal, including up to one hundred percent (100%) of not more than one of the MBE participation subgoals, if any, established for the Contract.
MBE SELF-PERFORMANCE

Overall MBE Goal = 40%

African American Subgoal = 7%

Asian American Subgoal = 2%
In certain instances where the percentages allocated to MBE participation subgoals add up to more than 50% of the overall goal, the portion of self-performed work that an MBE Prime may count toward the overall goal may be limited to less than 50%. Please refer to the Governor’s Office of Small Minority & Women Business Affairs’ website for the MBE Prime Regulations Q&A for illustrative examples.

MBE FORM
PART 1 - INSTRUCTIONS

6. Subject to items 1 through 5 above, when a certified MBE performs as a participant in a joint venture, a procurement agency may count a portion of the total dollar value of the Contract equal to the distinct, clearly-defined portion of the work of the Contract that the certified MBE performs with its own forces toward fulfilling the Contract goal, and not more than one of the Contract subgoals, if any.
7. The work performed by a certified MBE firm, including an MBE prime, can only be counted towards the MBE participation goal(s) if the MBE firm is performing a commercially useful function on the Contract. Please refer to COMAR 21.11.03.12-1 for more information regarding these requirements.
9. **Dually certified firms.** An MBE that is certified in more than one subgroup category may only be counted toward goal fulfillment of **ONE** of those categories with regard to a particular contract.

Example: A woman-owned Hispanic American (dually certified) firm may be used to fulfill the women-owned OR Hispanic American subgoal, but not both on the same contract.

Overall MBE Goal = 40%

Hispanic American Subgoal = 5%

Woman Subgoal = 12%
MBE FORM
PART 1 - INSTRUCTIONS

10. CAUTION: The percentage of MBE participation, computed using the percentage amounts determined for all of the MBE firms listed in Part 3, MUST meet or exceed the MBE participation goal and subgoals (if applicable) as set forth in Part 2 for this solicitation. If a bidder/offeror is unable to meet the MBE participation goal or any subgoals (if applicable), then the bidder/offeror must request a waiver in Part 2 or the bid will be deemed not responsive, or the proposal not reasonably susceptible of being selected for award. You may wish to use the attached Goal/Subgoal Worksheet to assist in calculating the percentages and confirming that your commitment meets or exceeds the applicable MBE participation goal and subgoals (if any).
This MBE Utilization and Fair Solicitation Affidavit and MBE Participation Schedule must be completed and included with the bid/proposal. If the bidder/offeror fails to complete and submit this Affidavit and the Schedule in Part 3 with the bid or proposal as required, the Procurement Officer shall deem the bid non-responsive or shall determine that the proposal is not reasonably susceptible of being selected for award.
□ I acknowledge and intend to meet IN FULL both the overall certified Minority Business Enterprise (MBE) participation goal of _____ percent and all of the following subgoals:
  _____ percent for African American-owned MBE firms
  _____ percent for Hispanic American-owned MBE firms
  _____ percent for Asian American-owned MBE firms
  _____ percent for Women-owned MBE firms

Therefore, I am not seeking a waiver pursuant to COMAR 21.11.03.11. I acknowledge that by checking the above box and agreeing to meet the stated goal and subgoal(s), if any, I must complete Part 3 - MBE Participation Schedule and Part 4 Signature Page in order to be considered for award.
OR

☐ After making good faith outreach efforts prior to this bid submission, I conclude that I am unable to achieve the MBE participation goal and/or subgoals. I hereby request a waiver, in whole or in part, of the overall goal and/or subgoals. I acknowledge that by checking this box and requesting a partial waiver of the stated goal and/or one or more of the stated subgoal(s) if any, I must complete Part 3, the MBE Participation Schedule and Part 4 Signature Page for the portion of the goal and/or subgoal(s) if any, for which I am not seeking a waiver, in order to be considered for award. I acknowledge that by checking this box and requesting a full waiver of the stated goal and the stated subgoal(s) if any, I must complete Part 4 Signature Page in order to be considered for award.
## MBE FORM

### PART 3 - MBE PARTICIPATION SCHEDULE

**SECTION A:** For MBE Prime Contractors ONLY (including MBE Primes in a Joint Venture)

| MBE Prime Firm Name: ______________________________ |
| MBE Certification Number: __________________________ |

(If dually certified, check only one box):
- [ ] African American-Owned
- [ ] Hispanic American-Owned
- [ ] Asian American-Owned
- [ ] Women-Owned
- [ ] Other MBE Classification

Percentage of total Contract Value to be performed with own forces and counted towards the MBE overall participation goal (up to 50% of the overall goal): ________%

Please refer to Item #8 in Part 1-Instructions of this document for new MBE participation guidelines regarding materials and supplies.

- [ ] Supplier, wholesaler and/or regular dealer (COUNT 60%)
- [ ] Manufacturer (count 100%)
- [ ] Broker (count reasonable fee/commission only)
- [ ] Furnish and Install and other Services (count 100%)

Percentage of total Contract Value to be performed with own forces and counted towards the subgoal, if any, for my MBE classification (up to 100% of not more than one subgoal): ________%

Description of the Work to be performed with MBE prime’s own forces: __________________________________________

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

DRAFT FOR DISCUSSION PURPOSES
MBE FORM

PART 3 - MBE PARTICIPATION SCHEDULE

SECTION B: For all Contractors (including MBE Primes and MBE Primes in a Joint Venture)

<table>
<thead>
<tr>
<th>MBE Firm #</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:_________________________</td>
</tr>
<tr>
<td>MBE Certification Number: ______________________</td>
</tr>
</tbody>
</table>

(if dually certified, check only one box.)
| African American-Owned |
| Hispanic American-Owned |
| Asian American-Owned |
| Women-Owned |
| Other MBE Classification |

Please refer to Item #8 in Part 1- Instructions of this document for new MBE participation guidelines regarding materials and supplies.

- Supplier, wholesaler and/or regular dealer (COUNT 60%)  
- Manufacturer (count 100%)  
- Broker (count reasonable fee/commission only)  
- Furnish and Install and other Services (count 100%)

Complete the applicable prompt (select only one) from prompts A-C below for MBE Firm #__ to calculate the commitment to MBE Firm #_.

A. Percentage amount of subcontract where MBE Firm is being used for manufacturer, furnish and install, and/or services (excluding products/services from suppliers, wholesalers, regular dealers and brokers) ___%

B. Percentage amount for items of work where the MBE firm is being used as supplier, wholesaler, and/or regular dealer. Total value of Supplies/Products ___ X 60% (60% Rule) = ___% (amount to be counted towards achieving the MBE Participation Goal and Subgoals).

C. Percentage amount of fee where MBE firm is being used as broker. ___ %

Description of the Work to be Performed:
_________________________________________________

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I solemnly affirm under the penalties of perjury that: (i) I have reviewed the instructions for the MBE Utilization & Fair Solicitation Affidavit and MBE Schedule, and (ii) the information contained in the MBE Utilization & Fair Solicitation Affidavit and MBE Schedule is true to the best of my knowledge, information and belief.
SBR STRATEGIC PLANS

- Due July 31, 2018
- Slight changes to capture T-Factor information
- Be creative
SBR Liaison Expectations

Daily

Quarterly & Annually
SBR Liaison Expectations

- Be accessible to small businesses
- Review & forward capability statements, web links, etc. to buyers
SBR Liaison Expectations

Assist vendors in locating the SBR Program registration

There is a Quick Reference Guide for SBR Certification and Re-Certification on the eMaryland Marketplace home page.

procurement.maryland.gov/

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SMALL BUSINESS RESERVE CERTIFICATION

To participate in the state’s small business programs, your company must first register in the Small Business Reserve (SBR). To determine if your company qualifies, review the SBR Qualification Criteria.

To register, complete the SBR self-certification process in eMaryland Marketplace. If your company is not yet registered in eMaryland Marketplace you can complete the SBR self-certification during your initial registration. Follow the instructions to Register Your Business in eMaryland Marketplace. If your company is already registered in eMaryland Marketplace and you wish to review the status of your SBR certification or complete the SBR self-certification follow the instructions for SBR Certification and Renewal.

SBR Renewal Notice – To continue eligibility in the small business programs your SBR certification must be renewed annually. To complete this renewal, logon to your company profile and follow the instructions for SBR Certification and Renewal.
Small Business Reserve Certification and Re-Certification

This Quick Reference Guide shows the step-by-step procedures for completing the Small Business Reserve (SBR) certification process and re-certification process, if your business is already registered in eMaryland Marketplace.

If you have not registered your business with eMaryland Marketplace, refer to the Business Registration Quick Reference Guide for instructions on registering your business, which includes the Small Business Reserve certification process.

Login to eMaryland Marketplace and select the Seller Administrator tab. If this tab is not available as an option, refer to someone within your organization that has been assigned the Seller Administrator role. Only users who have been assigned the Seller Administrator role may make changes to the organization profile.

From the home screen, select Maintain Organization Information.

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Select Maintain Program Qualification.

Maintain General Organization Information
This section is used for maintaining general organization information.

Maintain Addresses
This section is used to maintain addresses.

Maintain Commodity Codes & Services
This section is used to maintain commodity codes and services.

Maintain Program Qualification
This section is used to maintain program qualification.

Maintain Regions
This section is used to maintain regions.

Maintain Terms and Categories
This section is used to maintain terms and categories.

Maintain Quote Attachment Repository
This section is used to maintain files in the quote attachment repository.

Credit Memo List
This section is used to view credit memos.

Exit

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Your current certification information will appear. If you are not currently certified, “No Certification Date” will be displayed in the Certification Date field. In addition, the Certificate Number field will be blank.

To complete the certification process, click Continue.

The SBR Pre-Qualification statement will appear. Read over the entire statement and select one of three options:

I Acknowledge – Select this option if you accept the SBR Pre-Qualification statement. By selecting I Acknowledge you will be prompted to continue with the SBR self-registration process.

I Disagree – Select this option if you do not agree with the Pre-Qualification Statement. Note: By selecting I Disagree, you will bypass the SBR self-registration process and will continue through the remainder of the business registration process.
After acknowledging the Pre-Qualification statement, the Pre-Qualification questions will open. Answering the questions on this screen will determine your eligibility for the Small Business Reserve.

After completing all questions, select Save.
To obtain your SBR Certification Number, click on **Maintain Program Qualification**.

From the SBR Program Details page, select the Renewal tab. Your new certification number will be listed in the Certification Number column. You will also note the Renewal Date in the column to the right. You must renew your certification by this date (one year from the day of your initial certification) to remain certified in the SBR program.
From the SBR Program Details page, select the Renewal tab. Your new certification number will be listed in the Certification Number column. You will also note the Renewal Date in the column to the right. You must renew your certification by this date (one year from the day of your initial certification) to remain certified in the SBR program.
SBR Liaison Expectations

Must Know How to Search For Businesses and Business Information (Including SBR) on eMaryland Marketplace

procurement.maryland.gov/
USER ASSISTANCE

eMaryland Marketplace Instruction Guides provide step by step instructions to help users navigate the system and complete common processes.
Terminology and Concepts

3. General Navigation
4. Creating a Solicitation

5. Cloning a Bid
6. Creating a Bid Amendment

7. Extending the Bid Opening Date
8. Requesting a Proposal Revision

9. View and Print SBR/MBE Bid
10. Entering a Bid Received Offline

11. Bid Evaluation and Award
12. View Bid Tab Report

13. Searching for Registered Businesses

14. Agency Admin Organization Maintenance
   For Internal Training Purposes Only
15. Adding Users
Searching for Small Businesses

**Cast a Wide Net**

- **MDOT MBE Directory**
  [https://mbe.mdot.maryland.gov/directory/search_select.asp](https://mbe.mdot.maryland.gov/directory/search_select.asp)

- **SBA Small Business Search**
Suggestions/Ideas?
SBR Liaison Expectations

- Daily seek out opportunities to connect with new SBR vendors

- Participate in the PRG process
SBR Liaison Expectations

- Look at current vendors who are eligible to become SBR vendors

- Connect vendors to small purchases (Should be part of your Strategic Plan)
Quarterly & Annually

- The T Factor
- Clean Reporting
- Cheat Sheet
*NEW* The number of unique SBR firms to receive a designated award or payment. This is the “T” Factor now being measured by GOSBA.

**Line 6:** *NEW* Enter the total number of SBR Contractors receiving awards and payments in FY2018, i.e., the total number of unique vendors, not the total number of transactions. Count/tally the number of individual firms from your support data (PCH068 Awards “SBR Indicator” column and PCH-067 Payments) and enter it on Line 6. If there are 50 payments made to AJ Stationers, you count them as 1 SBR vendor.
<table>
<thead>
<tr>
<th>Vendor Name</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>MILLENNIUM MARKETING SOLUTIONS</td>
<td>2</td>
</tr>
<tr>
<td>MONUMENTAL PROCESS SERVERS INC</td>
<td>Total</td>
</tr>
<tr>
<td>MOSA TECHNOLOGY SOLUTIONS LLC</td>
<td>Total</td>
</tr>
<tr>
<td>MV'S INC</td>
<td>Total</td>
</tr>
<tr>
<td>MEDICAL TECHNOLOGIES, INC</td>
<td>Total</td>
</tr>
<tr>
<td>ODDRITE COMPANY OF BALTIMORE</td>
<td>Total</td>
</tr>
<tr>
<td>DRASES CONSULTING CORPORATION</td>
<td>Total</td>
</tr>
<tr>
<td>PRIORITY ONE STAFFING SERVICES INC</td>
<td>Total</td>
</tr>
<tr>
<td>QUALITY ASSOCIATES INC</td>
<td>Total</td>
</tr>
<tr>
<td>REALISTIC COMPUTING INC</td>
<td>Total</td>
</tr>
<tr>
<td>RTC DIRECT MAILING INC</td>
<td>Total</td>
</tr>
<tr>
<td>SCHUMAN CLEANING SERVICES</td>
<td>Total</td>
</tr>
<tr>
<td>SIGNS BY TOMORROW BALTIMORE INC</td>
<td>Total</td>
</tr>
<tr>
<td>SOLOMONS EXTERMINATORS INC DBA SOLOMONS</td>
<td>Total</td>
</tr>
<tr>
<td>STAR COMPUTER SUPPLY LLC</td>
<td>Total</td>
</tr>
<tr>
<td>TAYLOR SECURITY AND LOCK Total</td>
<td>Total</td>
</tr>
<tr>
<td>TCP/CEGENGE LEARNING Total</td>
<td>Total</td>
</tr>
<tr>
<td>UPTOWN PRESS INC</td>
<td>Total</td>
</tr>
<tr>
<td>USC CANTERBURY CORP</td>
<td>Total</td>
</tr>
<tr>
<td>VICTORY GLOBAL SOLUTIONS INC (WEB/MM)</td>
<td>Total</td>
</tr>
<tr>
<td>VITAL SIGNS LLC</td>
<td>Total</td>
</tr>
<tr>
<td>WORKPLACE ESSENTIALS INC</td>
<td>Total</td>
</tr>
<tr>
<td>Purple indicate Awards from M&amp;G report</td>
<td>Total</td>
</tr>
</tbody>
</table>
Governor’s Office of Small, Minority & Women Business Affairs

Clean Reporting/
Scrubbing Your Data

FY2018 SMALL BUSINESS RESERVE QUARTERLY REPORT INSTRUCTIONS

• With the exception of preferred provider purchases and conflicting federal requirements, the criteria for determining reportable payments for the SBR and MBE programs are the same. SBR units should contact the appropriate control agency and/or GOSBA with questions regarding items that may/may not be reportable.
In order to verify the accuracy and completeness of each SBR unit’s annual report, GOSBA requires detailed documentation to support the data contained in the report. Specifically, any changes to the total payment amounts found on the accounting report containing the raw data, including the monthly P-card reports, must be included as tabs in report template. The objective here is to show your work. Show that you have reviewed (“scrubbed”) your data to produce the most accurate report possible, given system limitations and coding situations.
One very visible way is to highlight your data in various colors to indicate changes. For example in the excel example attached, yellow indicates items excluded and blue indicates items added back in. It’s a personal choice but one we find very easy to follow in reviewing your supporting document.
<table>
<thead>
<tr>
<th>Department Title</th>
<th>Dept Code</th>
<th>Proc Meth Work Cat</th>
<th>Voucher Id</th>
<th>No Vendor Name</th>
<th>FNA BPA Id</th>
<th>Effective Date</th>
<th>Contract Title</th>
<th>Voucher Amount</th>
<th>Reportable Amount</th>
<th>SRI Vendor SRI Proc Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>DLR CONFRAAC P09131</td>
<td>R CSE</td>
<td>P085700</td>
<td>670725</td>
<td>WELLS FARGO FINANCIAL LEASING P095340978</td>
<td>10/17/2012</td>
<td>PHOTOCOPERS &amp; FAX MACHINES</td>
<td>$264.78</td>
<td>$264.78</td>
<td>6/29/2017</td>
<td></td>
</tr>
<tr>
<td>DLR OFFICE P081130</td>
<td>DV DV</td>
<td>P097345</td>
<td>347393</td>
<td>WELLS FARGO HOME MORTGAGE</td>
<td>2/24/2017</td>
<td></td>
<td>$174.98</td>
<td>$174.98</td>
<td>2/24/2017</td>
<td></td>
</tr>
<tr>
<td>DLR OFFICE P081130</td>
<td>DV DV</td>
<td>P097345</td>
<td>347393</td>
<td>WELLS FARGO HOME MORTGAGE</td>
<td>2/24/2017</td>
<td></td>
<td>$668.00</td>
<td>$668.00</td>
<td>2/28/2017</td>
<td></td>
</tr>
</tbody>
</table>
Create A Cheat Sheet

SMALL BUSINESS RESERVE (SBR) REPORT INSTRUCTIONS

The Business Reserve (SBR) Program is to designate or require for small business-only participation so that the contractor's share of the total dollar amounts or contracts awarded in accordance with this section. The program is implemented through a process of solicitation, award, and performance based on the following:

- SBR reporting requirements
- SBR reporting process
- SBR reporting forms
- SBR reporting deadlines

Small, Minority & Women Business Affairs (SMBBA), SCWB, is required to perform the SBR Program. This program shall include:

- SBR reporting requirements
- SBR reporting process
- SBR reporting forms
- SBR reporting deadlines

The purpose of the SBR Program is to:

- Promote and maintain a fair and equitable business environment
- Increase the participation of small businesses in state contracts
- Ensure compliance with the Maryland Statutes and Executive Orders

SBR payments resulting from designated LUMS programs:

- Special consideration for small businesses that provide services in the state
- Increased opportunities for small businesses in state contracts
- Compliance with state mandates

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

For Internal Training Purposes Only

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