

BALTIMORE CITY MAYOR'S OFFICE OF Small and Minority Business **ADVOCACY & DEVELOPMENT**



**ANNUAL
REPORT
FY 23**

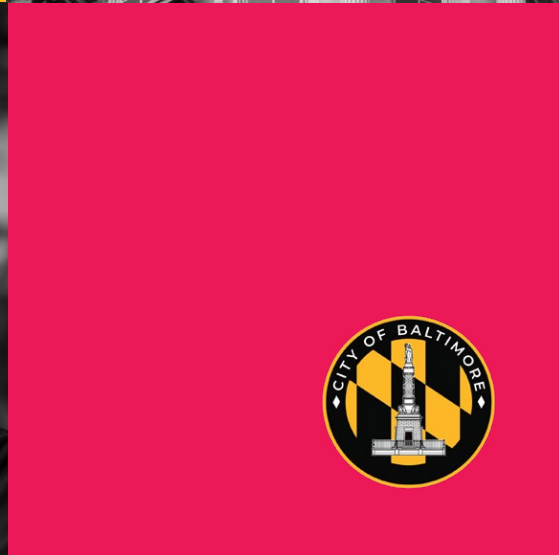


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August 7, 2024

The Clerk of the Honorable Baltimore City Board of Estimates
100 Holliday St.
Baltimore, MD 21202

Re: The Baltimore City Mayor's Office of Small & Minority Business Advocacy & Development (formerly MWBOO) Fiscal Year 2023 Annual Report

Dear Honorable Members of the Board:

Enclosed is the Baltimore City Mayor's Office of Small & Minority Business Advocacy & Development, formerly Minority and Women's Business Opportunity Office (MWBOO), Fiscal Year 2023 (FY23) Annual Report. This report encompasses Fiscal Year 2023, July 1, 2022–June 30, 2023, and is the final report of the former MWBOO office within the Law Department.

Pursuant to Baltimore City Code Article 5, Section 28-10, MWBOO is responsible for the administration of the Minority & Women's Business Program. City Code Article 5, Subtitle 28. MWBOO is required to annually "review MBE and WBE participation on all contracts and procurement to evaluate the effect of the Program and the City's progress towards meeting the annual goals" and report the findings to the Board of Estimates. City Code Article 5, § 28-25.

We made historic advancements in FY23. The Mayor's Office of Minority & Women's Business Development (MWBD), led by Paul Taylor, merged to become a part of MWBOO. It was a tremendous undertaking to bring the operations of both offices together. Our new teammates have been advocates for the business community and engaged in developmental efforts via the Small Business Resource Center (SBRC). Paul currently serves as Director of the SBRC. We had distinct groups but combined our staff and operations to become an even stronger team.

When I became Chief of MWBOO, I understood the necessity to identify best practices for Diversity Compliance Programs. Deputy Campbell and I attended our Diversity Compliance Management System provider's, B2G, user training and are in the process of obtaining the American Contract Compliance Association's (ACCA) Certified Compliance Administrator Certification. We will be working to certify all our compliance officers. The National Main Street Now Conference will provide additional insight on how to further our Baltimore Main Streets program. We have started to analyze our contracts and identify how to unbundle these contracts into smaller contracts that will provide additional right-sized opportunities for small, local, and minority businesses. I am now routinely contacted by other jurisdictions for insight on how to structure a diversity compliance program, implement citywide software, and conduct their Disparity Study. We will continue to improve our process to ensure that we are a model of government efficiency and partnership.

To start Fiscal Year 2024, we became the Mayor's Office of Small & Minority Business Advocacy & Development (SMBA&D)! Thank you, Mayor Scott, for giving me the opportunity to lead this fantastic team as the inaugural Director of SMBA&D! The agency now includes oversight of the Minority & Women's Business Program—M/WBE certification, active certification directory, contract compliance, & investigations for compliance with the MWB Program; the Small Business Resource Center, the Baltimore Main Streets neighborhood revitalization program, and the U.S. Department of Commerce Minority Business Development Agency (MBDA) Mid-Atlantic Region Advanced Manufacturing Center. The agency now brings a host of diverse services to benefit small, local, minority, & women's business enterprises via our digitized process. These services are overdue.

Our current level of service serves merely as a baseline of expectations of our support and advocacy for the business community. Next year's report will detail year one of SMBA&D but, here are a few brief highlights as we have begun staffing the agency. This has resulted in:

- Baltimore Main Streets Dream Team of five fantastic folks under the leadership of Director Charlyn Nater.
- The announcement of the 9th Baltimore Main Street in the Park Heights Neighborhood.
- The Small Business Resource Center currently offers over 130 webinars for business education and development in addition to providing technical assistance.
- There is now a team of contract compliance officers to monitor contracts and ensure that M/WBEs are utilized.
- A Training Officer & Payment Liaison to ensure the agencies are aware of the requirements of the MWB Program, our review process, and ensure that M/WBEs are paid timely and in accordance with the Statement of Intent for the contract.
- There are now multiple investigators to ensure compliance and recommend penalties as warranted.
- Certification can now be accomplished in well under 60 days.
- We have added a Chief of Innovation & Strategic Partnerships to ensure our efficiency as we grow & strengthen existing and develop additional partnerships.
- Importantly, we now have a Chief of Public Relations to inform you of all our resources, events, and new programming.

The SMBA&D team is bringing an unprecedented number of individuals dedicated to the advocacy and development of the business community.

Due to Workday configuration issues, Citywide B2G contract compliance was delayed until March 2024. B2G provides the City overall spending and the subset of M/WBE utilization data and spending. SMBA&D continues to innovate and bring new resources to Baltimore. I look forward to continuing to implement process improvements to improve efficiency, identify ways to better serve M/WBEs, continue to expand development efforts, and advocate for greater emphasis on increasing both availability and capacity of M/WBEs. M/WBEs are the catalyst to an improved and thriving Baltimore City!

Our success is inherently intertwined with the extent of our intentionality. We must be intentional in our efforts and plans to remedy historical inequalities in City procurement of goods and services and our business community. It takes not only investment but ongoing accountability. My team now possesses the staff, resources, and expertise to serve the business community. Economic development, entrepreneurship, neighborhood revitalization, and community ownership are the key components to elevating the lives and conditions of Baltimoreans. The SMBA&D team will continue to raise and support the business community. We must have training, entrepreneurship, and City contracting opportunities to ensure our youth have a successful future. Please stay tuned for upcoming additional programming, support, and resources. I thank you in advance for your partnership in pursuit of this vision for the local business community.

Regards,



Christopher R. Lundy, Esq.

Director Mayor's Office of Small & Minority Business Advocacy & Development ([SMBA&D](#))

Small Business Resource Center

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Baltimore, Maryland 21215

[Contact SMBA&D](#)

■ OVERVIEW OF THE MINORITY & WOMEN'S BUSINESS PROGRAM

SMBA&D, formerly MWBOO, is responsible for the administration of City Code Article 5, Subtitle 28 (the Minority & Women's Business Program) pursuant to City Code Article 5, § 28-10. As a result of being City Code based, SMBA&D does not always possess the same latitude that some agencies are able to exercise via their discretion. SMBA&D takes extremely seriously our role in ensuring compliance with the City Code and all contractual terms.

In Fiscal Year 2023, the Mayor's Office of Minority & Women's Business Development (MWBD) merged to become a part of MWBOO, but we remained a small office. We combined the functions and the staff become part of the team. SMBA&D was created at the start of FY24. SMBA&D was created to support the various needs of small and minority businesses in Baltimore City. The mission remains grounded in ensuring equitable rights and opportunities for small and minority businesses. SMBA&D will support the business community by conducting outreach, advocacy, and facilitating training.

Additional responsibilities of the office include:

- reviewing all City contracts over \$50,000 for MBE/WBE utilization goal setting,
- reviewing requisitions under \$50,000 for award to small & minority businesses,
- examining contract compliance requests,
- evaluating new, renewal, & expansion M/WBE certification applications, &
- investigating potential violations of the City Code.

SMBA&D's broad involvement in City operations and the procurement process as an approving agency enables the agency to review and work with partners, contractors, suppliers, the community, and private developers. SMBA&D collaborates with agencies throughout the City during the procurement process and contract term to ensure that there are opportunities for MBE/WBE participation.

Furthermore, the agency includes outreach and developmental resources such as:

- The June 15, 2023, City of Baltimore Procurement Conference offered contracting opportunities for small, minority and women-owned businesses from City, County, State, Federal and government agencies, universities, financial institutions, organizations, and corporations. Mayor Brandon M. Scott, the Mayor's Office of Small and Minority Business Advocacy, Baltimore City Information & Technology, and Baltimore City Bureau of Procurement hosted this event for the first time since 2019. The Conference had 749 participants and 60 exhibitors.
- The Small Business Resource Center which offered 95 webinars annually during FY23 & has increased further in FY24.
- The Baltimore Main Streets Program to revitalize neighborhoods by uplifting local businesses and community organizations. There are currently eight Main Street neighborhoods in the program.
- Sourcelink, the online resource hub to start, grow, & seek funding for your business.

- Sizeup Baltimore, a tool to measure business performance, optimize marketing, enhance advertising, analyze demographics. This is like having a consultant analyze your business against your competitors.
- The U.S. Department of Commerce Mid-Atlantic Region Minority Business Development Agency (MBDA) Advanced Manufacturing Center to help makers bring their ideas to life.

With these additional duties we are keenly focused upon increasing small, local, and M/WBE entrepreneurship.

The inclusion of MBE/WBE utilization goals, and monitoring compliance, ensures that M/WBE utilization injects dollars directly into minority and women's owned businesses. We are actively working to recruit and retain minority and women businesses seeking to do business with the City of Baltimore by expanding contracting opportunities with the MWB Program. We are additionally working to increase all small local businesses, especially in our Main Streets neighborhoods.

Be sure to visit [Sourcelink](#), the online resource hub for small businesses. We provide business guides for popular business, how to start and grow a business, secure funding, obtain grants, and Sizeup Baltimore where you can measure your business performance, identify suppliers, competitors, optimize marketing and advertising, and analyze demographics. The Small Business Resource Center (SBRC) offered during FY23 a robust schedule of 95 webinars and workshops to assist small businesses including: growing your business, budgeting during crisis, becoming a homeowner, developing a business plan, and cashflow planning.

The Minority and Women's Business Program (MWB Program) is "necessary to overcome the effects of past discrimination and to prevent ongoing discrimination in the City's contracting process, while assuring that high quality goods and services are obtained through the competitive bidding process." City Code § 28-3(a) (4). The MWB Program requirements are applicable to all City contracts and spending. SMBA&D's duties overseeing the MWB Program are governed by Baltimore City Code Article 5, Subtitle 28, which states:

§28-10 (a) The Minority and Women's Business Opportunity Office is responsible for the administration of this subtitle.

The Office's duties include:

- (1) certification of business enterprises covered by this subtitle;
- (2) maintaining a directory of business enterprises certified under this subtitle;
- (3) providing information and needed assistance to business enterprises covered by this subtitle to increase their ability to compete effectively for the award of City contracts;
- (4) investigating alleged violations of this subtitle and, when appropriate, making written recommendations for remedial action;
- (5) developing and distributing all necessary forms, applications, and documents necessary to comply with this subtitle;

- (6) maintaining statistics on and reviewing regularly the progress of agencies towards achieving the annual goals for the utilization of minority business enterprises, women's business enterprises, small business enterprises, and local business enterprises;
- (7) recommending to appropriate City officials' methods to further the policies and goals of this subtitle;
- (8) monitoring contractors throughout the duration of their contracts to ensure that all efforts are made to comply with this subtitle; and
- (9) certifying compliance with this subtitle before contracts are submitted to the Board of Estimates for award.

SMBA&D is here to assist, counsel, provide resources to foster growth, and zealously advocate to protect the interests of small, minority, and women-owned businesses.



■ BALTIMORE MAIN STREETS

The [Baltimore Main Streets Program](#) uplifts local businesses, provides them with developmental resources, and spotlights neighborhoods throughout our City. The Baltimore Main Streets program follows the Main Street America approach centered around transformation strategies organized as four points: Economic Vitality, Design, Promotion, and Organization.

Baltimore Main Streets has an annual event to highlight our Main Streets and encourage Baltimoreans to shop local. Small Business Saturday is a day dedicated to celebrating and supporting small businesses and all they do for their communities. Small Business Saturday kicks off the holiday shopping season. Baltimore City residents are encouraged to shop small and support local businesses located in Baltimore's eight Main Streets districts. Founded by American Express in 2010 and officially co-sponsored by U.S. Small Business Administration since 2011, Small Business Saturday has become an important part of small businesses' busiest shopping season. Mayor Brandon M. Scott, Mayor's Office of Small and Minority Business Advocacy and Development and Baltimore Main Streets hosted this event.



Charlyn Nater, following being Interim Director, now serves as the permanent Baltimore Main Streets Director. Director Nater was integral in the administration of the Baltimore BASE Network Grant, which provided 15 Baltimore Main Streets' businesses grants totaling \$300,000. She has been active in establishing and furthering our partnerships with: Downtown Partnership, Baltimore Public Markets, Impact Hub, Baltimore City Chamber of Commerce, Maryland Hispanic Chamber of Commerce, [BmoreNews.com](#), [Baltimore Times](#), BPD's Shield Network, We Our Us, and My Father's Plan. Additionally, we furthered our relationships with financial partners: M&T Bank, JP Morgan Chase Bank, Truist Bank and Fulton Bank.

Outreach Collaboration/Events include: Main Street Now Conference, BMS Listening Session Tours, Restaurant Week, CIAA Tournament, MACo, BUY in Baltimore, Small Business Saturday, Holidays On Main Streets, Director Nater participated as a speaker for 10k Goldman Sachs Small Business cohort, participated in Main Street America's Capitol Hill Advocacy Day, and attended an event hosted by First Lady of Maryland Dawn Moore to discuss partnerships, collaboration, and minority women small business initiatives. We are ecstatic to bring additional staff and services to our now **9 Main Streets!**

Please be sure to shop local in the Main Streets: Belair-Edison, Fell's Point, Hamilton Lauraville, Highlandtown, Federal Hill, Park Heights, Pennsylvania Avenue, Pig Town, & Waverly.

■ THE MID-ATLANTIC REGION MINORITY BUSINESS DEVELOPMENT AGENCY ADVANCED MANUFACTURING CENTER

The Mid-Atlantic Region Minority Business Development Agency Advanced Manufacturing Center (MBDA AMC), located in Baltimore, Maryland, partners with organizations in the Mid-Atlantic Region to provide industry-focused services targeting minority-owned manufacturing enterprises in Baltimore City, other Maryland jurisdictions, and surrounding states in the region. The MBDA AMC has a dedicated leader committed to the business development of minority and underserved communities, Representative N. Scott Phillips, Esq.



Funded through a grant by the U.S. Department of Commerce Minority Business Development Agency to the City of Baltimore Mayor's Office of Small and Minority Business Development and Advocacy, the Baltimore MBDA AMC is one of only four specialized MBDA Advanced Manufacturing Centers in the country, offering targeted assistance to minority manufacturers that aim to employ new technologies to increase the number of "Made in America" products that can be sold domestically and globally.

The Center is staffed by business specialists who work with clients and customers to help them categorize immediate and long-term business needs and goals and to aid in gaining access to financing, contracts and other sales opportunities, domestic and global markets, specialized consulting and training, and support through business and industry advocacy.

The Center leverages a network of local, state, regional, and national relationships to open doors for clients and customers to larger and emerging markets. Beyond Strategic Partners, formally cited in the MBDA grant, the Center has engaged a host of Alliance Partners. The network includes:

- Baltimore City Mayor's Office of Small and Minority Business Advocacy and Development, the Center's Operator;
- Minority Business Development Agency, including the agency's headquarters, specialty centers, business centers, and programs across the country;
- Regional Manufacturing Institute of Maryland (RMI), a Center Strategic Partner;
- Capital Region Minority Supplier Development Council, a Center Strategic Partner;
- Virginia Manufacturers Association, a Center Strategic Partner ;
- Meridian Management Group, a Center Strategic Partner;
- Maryland Governor's Office of Small, Minority, and Women Business Affairs, a Center Strategic Partner;
- Strengthening the Mid-Atlantic Region for Tomorrow, a Center Strategic Partner;
- Maryland Department of Commerce, a Center Alliance Partner;
- Maryland Manufacturing Extension Partnership, a Center Alliance Partner, and Manufacturing Extension Partnerships across the Mid-Atlantic Region by the U.S. Department of Commerce National Institutes of Standards and Technology, a sister Agency to the MBDA;
- Maryland TEDCO, a Center Alliance Partner;
- APEX Accelerators, Operated Nationally through Funding from the U.S. National Defense Logistics Agency;
- Exim Export-Import Bank of the United States, a MBDA Network Partner;&
- HBCUs, Alliance Partners, including Coppin State University, Morgan State University, and Virginia Union University.

The Center increased its client engagements to serve **113** minority manufacturing firms through formal agreements for company specific services and more than **350** customers informally through specialized initiatives providing training, advocacy, and information services.

Based on a sample performance by clients, the Center reported exceeding its overall goals for fiscal year by **11.9 percent**, including **50** new client jobs created, **230** client jobs retained, **\$40.1 Million** in sales, and various metrics for clients and customers assisted with or referred to specialized training and/or initiatives.

Leveraging technology through automation and robotics for increased productivity and efficiency in manufacturing often leads to job losses in the sector. Fortunately, Center clients have not seen significant job loss; however, productivity and efficiencies have reduced the number of new jobs created. We are working to scale newer companies, as they often create jobs at a faster rate than mature businesses that are using technology to increase output.

Examples of client assistance with business expansions included location assistance for:

- Fashion Spa House with planning and securing financing for expansion from a kiosk to a shop at the BWI airport, where the company has operated a retail store for skin care products manufactured in Baltimore City and fashion and accessory lines since 2017. Owner Cynthia Rumph is a graduate of Launch Pad BWI.
- Food Opportunity with planning and securing financing for expansion to a second location, “Ninety Ten,” located in Washington, D.C., a retail and food service location for products including the manufacturer’s DC Sweet Potato Cake brand and other baked goods produced in the company’s Baltimore City plant. With widespread community support, the manufacturer also reopened its retail shop in Baltimore after a break-in closed retail operations last year.
- NuTech, LLC with facility selection and financing for their relocation from Prince George’s County to Baltimore City for Atlas Transit Solutions, a suite of technology transit shelters. The system integrator and smart manufacturing company is focused on renewable energy, sustainable product development, and production for emerging technologies. CEO Tracye Johnson received technical assistance from the Center in accessing financing, including preparation for a winning Siemens grant for MBDA clients in 10 major U.S. Cities.

Center staff actively engaged with groups supporting MBE manufacturers, including participation in more than **100** live or virtual meetings, speaking engagements, webinars, podcasts, trade shows, and other special events and outreach venues.

The Center was designated the lead center by peer MBDA Advanced Manufacturing Centers of the newly launched Manufacturing Workgroup, comprised of representatives from all four Advanced Manufacturing Centers — Baltimore, Connecticut, Kentucky, and San Antonio — joined by representatives from the Atlanta Business Center. Center Director N. Scott Phillips moderated a MiHUB Monday webinar discussion on Advanced Manufacturing Center services on August 29, 2022, on Minority Made in America: MBDA Advanced Manufacturing Center Chat.

The Center collaborated with CARES Act Strategic Consulting Fund Project Director Winsome Leslie and private sector consultants to support Center clients Cindy J Cosmetics, Danae Inc, Fabpro Technologies, Food Opportunity, Granite Works, Hiatus Cheesecakes, M Luis, and Oyin, which received technical assistance, business development, and training services through an MBDA award to the City to support **50** minority and women-owned businesses in their recovery from the negative effects of COVID-19.

Examples of engagement in center-operated initiatives follow:

- The MBDA AMC — Baltimore convened quarterly meetings of its Advisory Board, established to help shape the Center grow resources and deliver on services by providing recommendations and feedback on Center policies and operations. Board members are also asked to engage their networks to assist Center clients.
- Center team members facilitated virtual CEO Advisory Roundtable sessions, giving participating clients the opportunity to discuss business problems, issues, and opportunities with peers and to hear guest speakers on resources for MBEs.
- The Center hosted Minority Made: Minority Enterprise Development Symposium May 25, 2023, presenting sessions on Innovation and Investment in Minority Manufacturing and on Advance 1000 Minority Manufacturers, in collaboration with the Manufacturing Innovation Hub Cooperative (MiHUB), the Baltimore City Mayor's Office of Small and Minority Business Development and Advocacy, along with sponsor, Maryland TEDCO, a Center Alliance Partner. This Fourth Annual Minority Enterprise Symposium was attended by more than 75 minority industry stakeholders, including center clients and prospects as well as industry resource and service providers.

The Mid-Atlantic Region MBDA Advanced Manufacturing Center continues to provide advice, counsel, technical assistance, and advocacy to help minority manufacturers flourish. Our track record of success is evidence of our dedication to secure services and resources for business expansion, acquiring specialized equipment to enhance productivity, and staying at the forefront of the Industry 4.0 transition. While the struggle for diversity, equity and inclusion continues, we are seeing more opportunities to level the playing field due to their work.

■ CONTRACT COMPLIANCE BY THE NUMBERS

Contract Compliance reviews all contracts over \$50,000 and is inclusive of City funded private development like Baltimore Peninsula, formerly Port Covington. This also includes reviewing all agency small spends to ensure that they are considering, obtaining quotes, and utilizing M/WBEs. These functions are critical to ensuring equitable opportunities in the procurement process for M/WBEs. We must be mindful that all the data in this Annual Report is indicative of real businesses, owners, and families that are impacted by the public dollars that fund these contracts. SMBA&D continues to work in partnership with the agencies to ensure that they are seeking out opportunities, in accordance with the City Code, for local minority businesses.

960 items were sent for review from the Bureau of Procurement (BOP) and City Agencies

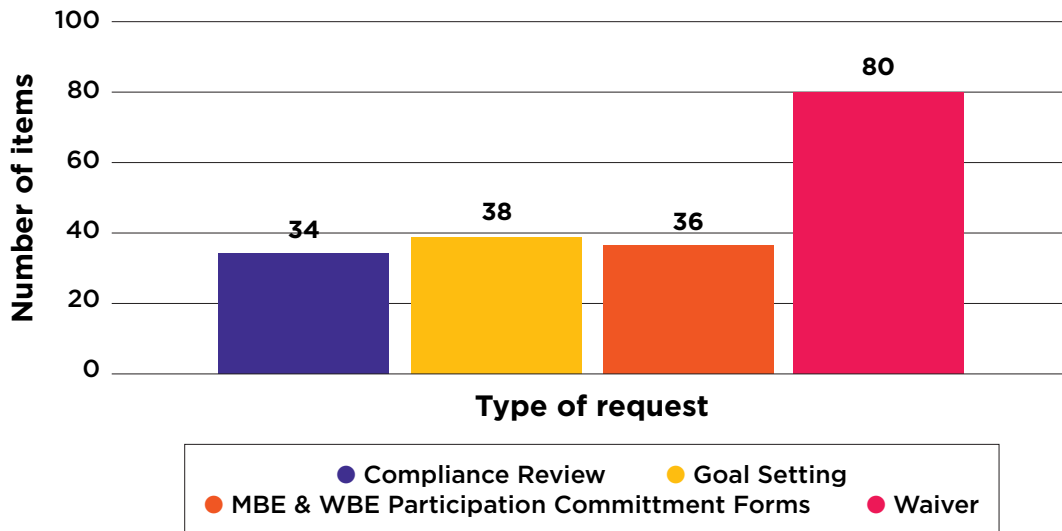
BOP and City Agencies submit items that require MWBOO review via a Smartsheet form. These items are broken down by the type of request. Compliance reviews and MBE & WBE Participation Commitment Forms can have multiple prime contractors or bidders, each requiring an individual review and MWBOO action.

885 New and Renewal Minority Business Enterprise (MBE) and Women’s Business Enterprise (WBE) applications were submitted

Dollars Paid based on Compliance Reviews and Release of Retainage Completed:

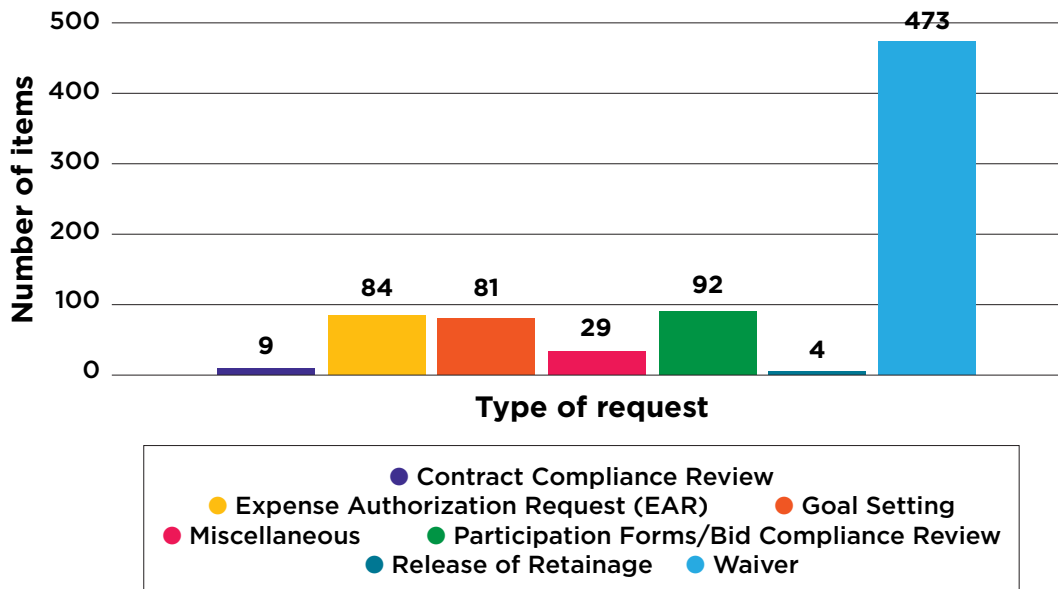
MBE’s	\$19,843,457.43
WBE’s	\$3,599,695.45
M/WBE total dollars reviewed by SMBA&D	\$23,443,152.88
Investigations	49
Questions Submitted Online to MWBOO	235

BOP Submissions



Items submitted for review	188
Average days to complete	8.9
Dollars Paid to MBE's based on BOP compliance reviews completed	\$5,286,360.07
Dollars Paid FY23 to WBE's based on BOP compliance reviews completed	\$6,715,472.95

Agency Submissions



FY23 Agency Items submitted to MWBOO	772
Average days to complete	26.75

Some examples of miscellaneous items include changing an MBE/WBE on a contract and reallocation of funds.

Dollars Paid FY23 to MBE based on Release of Retainage	\$709,980.72
Dollars Paid FY23 to WBE based on Release of Retainage	\$4,174,126.69

■ M/WBE CERTIFICATION

SMBA&D certifies businesses as minority and/or woman-owned business enterprises. The B2G Diversity Management System is the home of the actively [certified M/WBE directory](#). The directory lists all current and actively City certified MBE and WBEs. There has been a great need to update the software relied upon to identify minority and women-owned businesses to utilize on Baltimore City contracts. The certified directory provides the needed visibility to ensure that M/WBE businesses are being contacted and contractually engaged to work on City contracts and City funded private development projects.

All functions in FY23 were tracked in Smartsheet or B2G. B2G contract compliance will enable a detailed review of agency M/WBE contract spending and work towards exceeding the annual goals.

1,059 Certified M/WBEs in the B2G Active Certified Directory at the close of FY23

8.32 Average days to process certification application or renewal

The certification processing number deserves its own celebration! In the past businesses have waiting extended periods of numerous months to obtain certification. This is far faster than other certifying agencies in the country; many of which ask for a minimum of six months to obtain certification; including State MDOT certification. The digitization and utilization of B2G has revolutionized the M/WBE application submission and review. We are thrilled to bring this level of efficiency and improvement to the City. SMBA&D has prioritized the review, processing, and investigation of applications to ensure eligible businesses are certified and eligible to count towards the applicable M/WBE contract goals. We strive to process all certifications within 60 days, which allows time for investigation.

It is important to note that the Baltimore City SMBA&D certification is accepted and relied upon by other jurisdictions, including Baltimore County, Anne Arundel County, Howard County, and Montgomery County. The acceptance of City M/WBE certification is instrumental in procurement throughout Maryland. Moreover, the Minority & Women's Business Program's scope of eligibility for certification is second only to State MDOT certification. SMBA&D is a pivotal certifying agency in the area that zealously advocates for opportunities for and the development of M/WBEs.

The Code provides the criteria for obtaining M/WBE certification:

- The minority and/or women must own at least 51% of the company and have operational and managerial control;
- Be an independent, operating, small business;
- Have been in operation for at least 12 months before applying for certification;
- Have been minority or women-owned for at least 12 months before applying for certification; &
- Have an active operating office in the Baltimore City Market Area.

City Code Art. 5, § 28-78. Both the initial and renewal certification application are now in [B2G](#). The entire application can be saved, completed, and submitted via the website. Even if denied certification, there is an ability to seek additionally review if you follow the protest and/or appeal procedures detailed in the initial denial letter.

■ SMALL BUSINESS RESOURCE CENTER & SOURCELINK OUTCOMES

The SBRC continued to provide valuable technical assistance to the business community. The SBRC provided a host of scheduled webinars and trainings throughout the year, including but not limited to creating a winning business plan, cash flow planning, business finance basics. Additionally, they provide valuable technical assistance to business owners. Their work is instrumental in developing our business community.



Clients Served	This Period
Clients Counseled	73
Total Counseling Sessions	93
Total Counseling Hours	267.42
Total Prep Hours	42
Total Travel Hours	9.00
Total Hours	454.20

Training	This Period
Clients Trained	842
Total Training Attendance	898
Total Event Training Hours	90
Total Clients Served	898
Total Client Participation	1,740

Client Mix by Business Stage	This Period
Pre-Venture	542
Existence-Infancy	450
Early Growth Stage	509
Expansion	50
Maturity	46
Decline	21
No Response	122
Total Hours	1,740

Businesses Created	18
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Funding and Contracts	This Period
Loans Obtained	19
Loans Obtained (\$)	\$435,100
Equity Investments Obtained	0
Equity Investments (\$)	\$0
Bonding Capacity	\$0
Grants/Gifts Received	30
Grants/Gifts Received	\$350,789
Contracts Received	0
Contracts Received (\$)	\$0

Gender of Clients Served	This Period
Female	678 (39%)
Male	504 (29%)
Nonbinary	0 (0%)
No Response	558.54 (32.1%)

Race of Clients Served	This Period
African American or Black	1,183 (68%)
Asian American	10 (0.6%)
Hispanic (Ethnicity)	382.8 (0.1%)
Native American/AK Native	1 (0.1%)
Native HI/Pacific Islander	1 (0.1%)
White	545 (1.0%)

Referrals	This Period
10,000 Small Biz Referrals	0
UEF Referrals	0
Other Referrals	735
Total Referrals	735

*Definitions for SBRC Sourcelink Center Impact Report can be found on page 30.

■ EXTERNAL OUTREACH, DEVELOPMENT, & COLLABORATION

We continue to enhance the resources available to businesses to enhance resiliency during COVID-19 and as we move forward. These efforts are focused upon local, small, minority, and women-owned businesses. These ongoing efforts include Sourcelink an online resource hub for small businesses and the Small Business Resource Center (SBRC). In FY23 we participated in **112** business development webinars, speakers, and conferences, and programs. The SBRC offered a robust schedule of **95** webinars and workshops to assist small businesses. We provided or participated in **58** training and outreach sessions.

Our premier event in FY23 was the City of Baltimore Procurement Conference — June 15, 2023. The 2023 City of Baltimore Procurement Conference offered contracting opportunities for small, minority and women-owned businesses from City, County, State, Federal and government agencies, universities, financial institutions, organizations, and corporations.



Attendees heard directly from procurement officials about contracting opportunities for small, minority and women-owned businesses. Workshop sessions were offered: Workshop Session I: Information & Technology Contracts (Current and Future), Workshop Session II: City of Baltimore MBE/WBE Certification, Workshop Session III: How to Do Business with the City of Baltimore, and Workshop Session IV: Prequalification for Contractors and Consultants.

Mayor Brandon M. Scott, Mayor's Office of Small and Minority Business Advocacy and Development, Baltimore City Information & Technology and Baltimore City Bureau of Procurement hosted this event. The last time the City of Baltimore held a procurement conference was in 2019.

Stats: 749 Participants; 60 exhibitors

SMBA&D hosted or attended numerous **external trainings or outreach events**. This includes the following highlights:

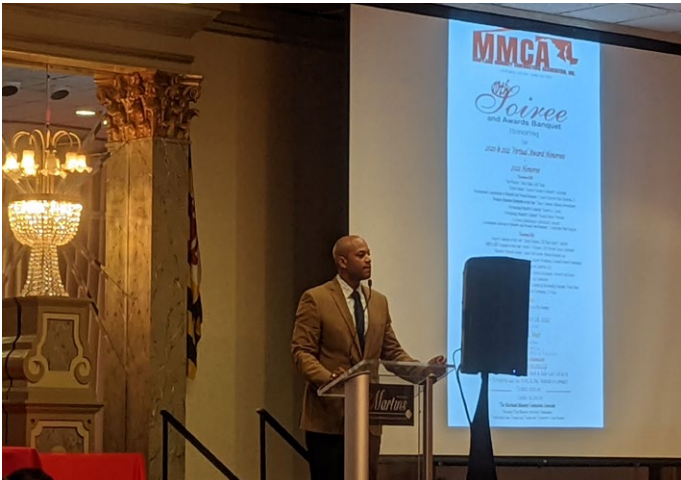
EVENTS WITH COUNTIES &/OR THE STATE IN THE BALTIMORE MARKET AREA

- Ready, Set, GROW! Procurement Connections Workshop hosted by MD Gov's Office Small, Minority, Women Business Affairs. Participated as an exhibitor
- Montgomery County Office of Procurement Fair Lundy Participated on Procurement Fair Certifying Agencies Panel & Meet the Primes Outreach Event
- 14th Annual Meet the Primes Meet & Greet hosted by Baltimore County Government.

EVENTS WITH CITY PARTNERS

- DHCD Affordable Housing Trust Fund Grant and Community Catalyst Grant orientation presentations to operating and capital project recipients to ensure they are aware of MWB Program requirements
- Dept of Planning Employment & Resource Fair Racheal Wilson Memorial Park
- Baltimore City O to 100 Accelerator Program Training Sessions 1-9 – In Person, Final Pitch and Graduation Hosted by M&T Bank and Baltimore City Small Business Resource Center (SBRC)
- ACEC Annual Meeting with City
- Face Time with Primes hosted by DPW Office of Boards and Commissions Participated as an exhibitor.

LOCAL ORGANIZATIONS SUPPORTING BUSINESSES



- 10th Soiree and Awards Banquet hosted by Maryland Minority Contractors Association (MMCA)
- Metro Baltimore Hispanic Contractors Association Inaugural Networking Event
- Turner Construction Introduction & Certification Presentation
- WBEC Greater DMV Breakthrough Breakfast
- 2022 Maryland Manufacturing Celebration hosted by Regional Manufacturing Institute of Maryland (RMI) Hosted by RMI, CFG Bank, MBDA AMC – Baltimore, Maryland MEP, Maryland Department of Commerce, TEDCO
- Partnership Business Breakfast Hosted by Mayor’s Office of Small, Minority and Women Business in Partnership with JHU and JHMS
- EBDI Economic Inclusion Committee Meeting Presentation
- Live! Casino & Hotel Minority Outreach Fair
- Turner-Mahogany Joint Venture – Henrietta Lacks Building Virtual Trade Partner Outreach Event hosted by JHU
- Level Up with HopkinsLocal Event hosted by JHU Attended (Director Lundy was a speaker)
- M/WBE Night at Baltimore Peninsula hosted by MAG Partners (Director Lundy was a speaker)
- Critical Community & Infrastructure Investment Summit hosted by JHU Carey Business School
- Money Power Day hosted by Cash Campaign of Maryland

- Entrepreneurship Matters Alumni Networking Event hosted by JHU
- Baltimore Strategic Networking Session Hosted by Kaiser Permanente and ICIC in partnership with SMBA&D
- M&T Bank Supplier Networking Mixer
- MWMCA Live! Casino & Hotel's Minority Outreach Fair
- MEA and Women Leadership Magazine USA Networking Series - Celebrating Women In Leadership
- Future of Baltimore Breakfast with Mayor Brandon Scott hosted by Baltimore City Chamber of Commerce (BCCC) SMBA&D is BCCC Board member
- Inaugural DC Inner City Alumni Network (ICAN) Kick-Off Reception
- Capital Region Minority Supplier Development Council (CRMSDC) 50th Anniversary Leaders and Legends Evening of Golden Memories featuring the MBE Hall of Fame Attended. SMBA&D is a CRMSDC board member.

■ CONFERENCES, PROGRAMS, & WEBINARS

- Business Seminar Hosted by SMBA&D and MBDA CARES Act Strategic Consulting Fund
- August 17, 2022 MWBOO Wells Fargo Helping Small Businesses Build a Stronger Financial Future
- JHU Entrepreneurship Matters Weekly Webinars (18) Hosted by JHU and Johns Hopkins Health System. Sponsored by SMBA&D.
- 2022 National Minority Enterprise Development (MED) Week — Hybrid and Virtual
- 2022 Small Business Development Growth By Design Program (SBDP) hosted by Baltimore City Department of Public Works (DPW) — Business Plan Writing Session. Paul Taylor was the facilitator. Additionally, Director Lundy & SBRC Director Taylor both served as instructors regarding M/WBE certification and contract performance.
- The Nuts and Bolts of Starting a Business Training Presentation via webinar hosted in partnership with Maryland Small Business Development Center and SMBA&D
- 7th Annual Business Opportunities & Entrepreneurial Training Summit hosted by Maryland Department of Transportation
- Baltimore Together Summit — Day 1, Day 2 & Closing Reception
- 2022 ICIC Annual Conference
- 32nd Annual Government Procurement Conference hosted by Federal Business Council
- Goldman Sachs 10KSB Business Support Panel (Paul participated on a panel)
- Sustainability, Energy & Environment Conference hosted by Maryland Manufacturing Extension Partnership (MEP) and RMI.

■ PARTNER EVENTS

Partnership Events that we attended or participated as an exhibitor include, but are not limited to:

2022 Inner City Capital Connections (ICCC) Program Baltimore Cohort *June 2022–November 2022*

The Initiative for a Competitive Inner City (ICIC) and Kaiser Permanente in partnership with the Mayor’s Office of Small and Minority Business Advocacy & Development (SMBA&D) has hosted the Inner City Capital Connections (ICCC) Program in Baltimore since 2018. The ICCC program is a tuition-free executive leadership training program designed and delivered by the ICIC to help business owners in under-resourced communities build capacity for sustainable growth and resiliency. Through in-person and virtual seminars, digital learning modules, and individual coaching, this self-paced 40-hour “mini-MBA” allows business owners to customize a curriculum to fit their business’s specific needs. The ICCC program is comprised of four key components with a time commitment of 40 hours spread over a 5-month period. The 2022 cohort was held virtually.



The 2,430 businesses served in Kaiser Permanente sponsored cohorts have an average revenue growth of 42%, 1,906 jobs created, and \$108.56 million in total capital raised.

2022 Building for Growth (BFG) Program Cohort *May 2022–October 2022*

The inaugural Building for Growth (BFG) is a new tuition-free executive education program that aims to help Black, Indigenous, and People of Color (BIPOC) and woman-owned construction subcontractors build capacity and develop sustainable growth strategies that position their businesses to increase revenues and profits. The interactive 21-week curriculum virtual program was designed by the Initiative for a Competitive Inner City (ICIC). The ICIC’s innovative research and programming has developed and prepared thousands of small business owners to access capital and achieve business growth. The program featured a variety of speakers. BFG’s inaugural cohort began in Spring 2022 with a maximum class size of 50 companies that are independent, for-profit corporations in the construction industry. The inaugural BFG program served 54 construction businesses from 4 states including Washington, D.C.; 91% of the businesses in the inaugural cohort were BIPOC-owned and 53% were woman-owned. The participants represent the New England area through the Mid-Atlantic area (Georgia, Maryland, Massachusetts, New York and Washington, DC).

Stats: Total Nominations: 444; Applicants Applied: 68; Baltimore Cohort Participants: 45

Comcast Corporate Diversity and Practice Breakfast *October 20, 2022*

The Mayor’s Office of Small and Minority Business Advocacy & Development hosted in partnership with Comcast. The breakfast offered information about Comcast’s Supplier Diversity Program and strategies for success. The supplier diversity program is designed to promote, increase, and improve the participation of diverse businesses within the corporate supply chain – including companies owned by small, minority and women-owned businesses. The event also offered information about procurement opportunities, remarks from business owners about lessons learned with Comcast, Q&A and networking.

Johns Hopkins University and Johns Hopkins Health System Business Breakfast December 1, 2022

The Mayor's Office of Small and Minority Business Advocacy & Development hosted in partnership with Johns Hopkins University (JHU) and Johns Hopkins Health System (JHHS). The purpose of the event was for attendees to learn about JHU and JHHS's local initiatives, programs, procurement opportunities and resources for small, minority and women-owned business owners. Programs that have an impact on the small business community in Baltimore are HopkinsLocal: BUILD, HIRE, and BUY. The event also offered Q&A and networking.

Additional Events

- Building Bridges to Global Markets Series hosted by U.S. Commercial Service
- 3rd Annual Social Enterprise Showcase
- Arctaris Impact Investors Breakfast, Tour and Dinner — Building Vibrant Communities Through Public and Private Partnerships
- September CEO Briefing hosted by The Presidents' Roundtable
- Black Wall Street of Baltimore Business Walk hosted by Notre Maison Connects in collaboration with The Baltimore Times
- 2022 Transportation Summit: Building A Better Transit Future... Get On Board! Webinar hosted by Greater Baltimore Committee
- Downtown Partnership of Baltimore (DPOB) Annual Meeting Presented by COPT & attended the State of Downtown Baltimore event.
- Visit Baltimore's 2022 Annual Meeting
- Press Event and Ribbon Cutting for Light of Baltimore Hub for Baker Donelson in partnership with JHU and Bloomberg Philanthropies in supporting the Goldman Sachs 10,000 Small Businesses Program
- Launch of 4MLK in the University of Maryland BioPark
- Get Down to Business Outreach Event hosted by Whiting-Turner Contracting Company
- Women's Leadership Summit hosted by The Daily Record
- Open Baltimore Day Event hosted by GoDaddy in Partnership with Impact Hub Baltimore
- Power of DEIB Strategies — How Businesses Win & Communities Grow Event Presented by I95 Business
- Grow Your Business (A Business Development Event Hosted by Associated Builders and Contractors DEI Peer Group and Maryland Minority Contractors Association)
- CEO Advisory Roundtable Sessions Hosted by MBDA AMC — Baltimore
- Graduation for DPW's Small Business Development Program
- 48th Annual Mayor's Business Recognition Awards hosted BDC and GBC
- 2023 Economic Equity Tour and Academy: Building Stronger Communities hosted by Caesars Entertainment and Caesars Foundation
- Maryland Business Night in Annapolis Presented by TEDCO, The Flywire & Greater Baltimore Black Chamber of Commerce



- Mayor Scott's Tour of P. Flanigan and Sons Site
- The Presidents' Roundtable Virtual Legislative Reception 2023 — Discuss the Black Business Agenda
- Downtown BOOST Program Business Plan Development Virtual Workshop hosted by DPOB
- Reshore to Restore Event
- Central Atlantic Supplier Day hosted by Business Network for Offshore Wind
- Goldman Sachs 10,000 Small Businesses Graduation
- Comcast RISE & Baltimore City Small Business Celebration hosted by Comcast and BCCC
- 37th Maryland Small Business Week Awards Ceremony hosted by U.S. Small Business Administration
- Clark Construction Baltimore SPP 2023 Celebration and Graduation Breakfast where Director Lundy was a speaker
- Lutheran Immigration and Refugee Service and Mayor's Office of Immigrant and Multicultural Affairs Community Resource Fair
- Law Department Diversity Equity & Inclusion in the Workplace Event (participated as an exhibitor)



■ AWARDS & RECOGNITIONS

- 20th Annual Spring Breakfast and Business Showcase hosted by MWMCA. We participated an exhibitor and Director Lundy was an honored as the Most Resourceful Government Administrator for MBE Success.
- Honored by the 2023 B2G User Training Got It Done Award



■ M/WBE CONTRACT UTILIZATION/PARTICIPATION GOALS & WAIVERS

SMBA&D is here to assist and frequently meets with contractors and subcontractors to discuss their questions, issues, concerns, or comments regarding how SMBA&D can improve. This section is to provide guidance on the requirements of the Minority & Women's Business Program.

Goals are the vehicle that SMBA&D utilizes to eliminate the underutilization of M/WBEs in the City procurement process. The lack of M/WBE utilization is at the heart of the data that was analyzed in the 2022 Disparity Study. SMBA&D often hears from prime contractors, Bureau of Procurement Buyers, and agency contract administration that the goals set on a specific procurement are too high. The Disparity Study clearly refutes this position. There remains a statistically significant disparity in the City's utilization M/WBEs. Additionally, the increased utilization and development of M/WBEs is in accordance with [Mayor Scott's Action Plan](#) for his administration. There are dozens of City Agencies, Offices, & The Bureau of Procurement that each have contract administrators and/or buyers that vastly outnumber SMBA&D's small team.

We must be mindful that SMBA&D is not in this alone. The Agencies are to play a critical role in creating opportunities for M/WBEs:

- **§ 28-70** requires that all contracting opportunities must be evaluated in an effort to divide/segment the total requirements of a contract to provide reasonable opportunities for participation by MBE/WBEs.
- **§ 28-68** requires that each agency head or designee must assume primary responsibility for achieving the goals of the program and on a continuing basis, review all aspects of the program's operations to assure that the purpose is being attained.
- SMBA&D will request that agencies provide an annual report "All City agencies must submit to the Office [MWBOO], on an annual basis, a written report on the efforts made under this subsection [Article 5, Subtitle 28 The Minority & Women's Business Program]." City Code Article 5, § 28-50(c)(1).

The importance of the requirements of the Minority & Women's Business Program in the Code requires that City contracts:

- (1) incorporate this chapter by reference;
- (2) provide that the failure of any bidder, contractor, or subcontractor to comply with this chapter is a material breach of contract; and
- (3) require that, during its term, the contractor will:
 - fulfill the commitments submitted with the bids;
 - continue to make good faith efforts to utilize minority and women's business enterprises; and
 - maintain records reasonably necessary for monitoring compliance.

§ 28-54. Contract compliance issues originate in the agencies due to them having project managers and daily inspectors on construction projects and contract administration to manage other types of contracts. SMBA&D will be increasing compliance efforts via digital goal progress tracking in B2G and annually requesting that agencies report on their efforts to further opportunities for M/WBEs.

■ CONTRACT GOAL SETTINGS & EXCLUSIONS

The current annual participation goals are MBE 27% and WBE 10%. These goals are not universally applicable and will be revised with the implementation of the 2022 MGT Disparity Study recommendations. Rather, the annual participation goals are to aid the City in its annual evaluation of the effectiveness of the Minority and Women's Business Enterprise Program.

Goals or waivers remain applicable and typically are not changed during the contract term. To change or impose goals upon a contract it must be resolicited. Nonetheless, goals can be negotiated on a contract with an existing waiver via the contractor/vendor voluntarily entering into a Commitment to Comply with contract participation goals. This has been done on several occasions notably for contracts that BCIT has identified can be segmented for M/WBE utilization, despite the contract previously being granted a waiver.

MBE/WBE goals, if applicable, must be set for each specific contract considering, but not limited to, the following factors:

- the availability in various industry classifications and professions of MBE/WBEs that are qualified and willing to provide goods, expertise, and services on the particular contract;
- the level of utilization of these firms in past contracts awarded by the City;
- the contract specifications;
- the adverse impact on non-MBEs and WBEs; &
- any other relevant factors.

§ 28-22.

SMBA&D sets goals, absent a waiver, for all contracts, private developments, capital developments, special agreements that include City funding in excess of \$50,000. There is no City spending or procurement in excess of \$50,000 that is automatically excluded from SMBA&D requirements, with the exception of procurements where there is only a sole source to provide the goods and/or services to the City. SMBA&D currently consults the directory to determine the number of certified firms using the prequalification code service description. We utilize a spreadsheet containing a formula to calculate the goals by factoring the contract dollar amount, service codes, and total number of MBE/WBEs certified in the program. If there are no applicable service codes available, goals will be set based upon the dollar range of the contract.

Goals aim to take into the account the totality of the circumstances of available MBE/WBEs and the ability to segment the contract. The goal setting process will be substantially improved when the next phase of B2G is implemented to that will enable auto goal calculation based upon the NAICS code for the services and the availability in the market area detailed in the Disparity Study. SMBA&D is in the process of working in partnership with the Office of Boards and Commissions to update the prequalification codes and transition to the NAICS codes. This will provide SMBA&D with the most recent and accurate data to allow the goals to be calculated based upon the dollar amount of the NAICS codes within the scope of work. The auto goal calculation will provide an enhanced process to better reflect the actual availability to provide the services and/or goods.

Goals exclude aspects of the budget, such as:

- Salaries
- Profits (& Losses)
- Rent or Leases
- Travel
- Utilities
- Communications (Telephone/Internet/Cable)
- General Overhead
- Bonds
- Premiums
- Taxes and Interests

SMBA&D Compliance Officers ensure compliance with contract goals. For each contract over \$50,000 with M/WBE goals, SMBA&D contacts each prime for an accounting of all payments to M/WBE subcontractors. Thereafter, all named subcontractors are contacted to confirm payment in that amount. With the accounting of subcontractor payments, the compliance officer is able to calculate the money paid to all MBE and WBE contractors to measure compliance with the applicable contract goal. The goal is applicable for the entire contract, not merely the period being evaluated in the individual compliance review. This is why it is crucial to review the SMBA&D comments and whether the review indicates that one or both of the goals have been achieved or exceeded. If the goals have been achieved or exceeded for the contract, it would only be altered if additional funds are added to the contract that would result in a corresponding increase of the amount of money to be paid to the M/WBE subcontractors to achieve the goal.

■ WAIVER GUIDANCE

SMBA&D is working to set goals on all contracts to the extent applicable. Although we are undertaking substantial efforts to increase M/WBE contracting opportunities and utilization, there are numerous instances that may necessitate the need to seek a waiver of the M/WBE goals. Waivers are often vilified in large part to a lack of understanding of the particular circumstances that necessitate a waiver of the M/WBE goal requirements. It must be noted that there is no guarantee of a waiver, merely a request. As such, each request is being evaluated individually and is highly scrutinized. There is not always a blanket reason to grant a waiver but is due to the actual circumstances encountered at the time that the contract is moving through the procurement process or emergency procurement process.

SMBA&D is advising agencies to not request a waiver unless the contract is:

- a sole source,
- limited to salary and fringe benefits, or
- is limited to services that cannot be segmented to be subcontracted.
- SMBA&D is advising Contractors/Vendors to not request a waiver unless prior to submitting the waiver they:
 - conduct market research which is, at a minimum, searching the [SMBA&D active certification database](#) for eligible MBE/WBEs to perform the contract services;
 - exhaust all commercially useful functions that can be performed by MBE/WBEs on the contract (Code Article 5, 28-32(a) defined as performance of real and distinct work for which the business enterprise has the skill, expertise, and actual responsibility to perform, manage, and supervise);
 - discuss the difficulties you are experiencing achieving compliance with the contracting agency.

You should not be seeking a waiver if there are available certified firms to provide the goods and/or perform the contract services.

A waiver may be requested due to:

■ A lack of M/WBE availability

Goals cannot be set if we do not have at least 2 certified M/WBEs to provide the goods and/or services sought via the procurement. We are working to utilize the Disparity Study data to conduct targeted outreach and development to limit the need for availability waivers; or

A business may be certified for a service, but lack the specific certification or equipment necessary to competently perform the services. In these cases, a waiver may be granted due to the specialization eliminating the available M/WBEs.

■ Change in Availability Post-Award

There are times when a subcontractor due to changes in circumstance, the project site, or the cost of materials may seek price escalation. Any price escalation will be governed by the contract, but

there are occasions when a subcontractor is unwilling to continue work on the project if their price escalation demands are not met; or

There are instances where a M/WBE goes out of business or loses capacity and is no longer able to complete the project.

■ **Dispute**

There are times when the prime and M/WBE have a dispute grounded in the project, financial, or otherwise where their business relationship is irreparable and they no longer seek to work with one another. SMBA&D does not control contractual relationships of the prime and subcontractors. All parties have their independent legal rights and should seek legal consult prior to stating that they are no longer and/or unable to work on a project.

■ **State Funded**

SMBA&D does not set goals on majority State-funded contracts that have their own State MDOT DBE goals or waiver that is applicable. In those circumstances SMBA&D does not set a second set of goals or monitor State governed contracts to avoid confusion regarding certification and what work is applicable to which goal for the project.

■ **Unable to Segment**

The contract is composed of just a commodity or good, a salary for an employee, or other services that the end user agency is mandating that the prime perform;

It is proprietary technology that cannot be segmented since it was specifically developed by that company; or

It is a subscription, such as software that has no opportunity to segment the work.

■ **Sole Source**

Is automatically exempt per the code if (1) needed goods or services are available only from a sole source; and (2) the prospective contractor is not currently disqualified from doing business with the City. Art 5, § 28-64.

■ CLOSING REMARKS

It is my hope that this report has provided you with an overview of MWBOO's work in Fiscal Year 2023. This is the part of where I begin to feel both overwhelmingly proud of my team and anxious to share the fantastic advancements that we're currently making in our first year as SMBA&D. This has been a historic and impactful year.

Last year I concluded in the report:

I want to leave you with a phrase that is appropriate in thinking of the approach we need as we move forward—intentional, purposeful investment. We must be deliberate and have a distinct purpose in our investments in the M/WBE business community.

I am thrilled that we followed through on this sentiment throughout FY23. We have been intentional in our actions. We combined two very small offices serving the business community to create an agency with a renewed and combined mission grounded in advocacy and development. This was something that many thought would never happen. Nonetheless, this was a necessary change to improve what the City provides to the local, small, and minority business community.

I applaud the work that MWBD did prior to joining us. SMBA&D in FY24 received a multi-million-dollar budget enhancement to allow this new agency to have staff in place to provide the much-needed oversight, advocacy, and development of businesses. The impact of the work of this team is broad and able to be observed throughout the City.

In our work as a reviewing agency in the procurement process, we review all City purchases. We provided additional training in FY24 to ensure that agencies maximize the utilization of M/WBEs. An increase in local spending will have a profound impact on the community. Dollars paid to local businesses are consequential. Furthermore, we cannot lose sight of the impact of our decisions as individuals on the community. Our local businesses support our communities, employ our neighbors, and revitalize our neighborhoods. We are proud to be a part of making Baltimore better each day.

The Minority & Women's Business Program has improved and continues to provide opportunities for M/WBEs, but it is not enough. We need to establish and grow even more minority and women-owned businesses. We are committed to providing more technical assistance to our existing businesses to ensure that they gain the skills needed to allow them to thrive. This will be accomplished only by having a consistent intentionality in our approach to eradicating the significant underutilization of M/WBEs by segmenting contracts, seeking out minority and women-owned businesses for goods and services, ensuring prompt payment, compliance monitoring, investigating violations of the City Code, and providing mechanisms and structures to increase and encourage entrepreneurship.

We must further invest in SMBA&D to allow for programming and grants to better serve the business community to ensure that it is representative of the citizens of Baltimore. Our investment and dedication of resources is pivotal to our recognition of the needs of the M/WBE business community. With intentional, purposeful investment in small M/WBEs we will see increased job opportunities and open the door of possibilities to our youth. SMBA&D is here to support and advocate for your business. Please be sure to visit

[SMBA&D](#) for more information and resources. Thank you for taking time to read this report!

Regards,

A handwritten signature in cursive script, appearing to read "Christopher R. Lundy".

Director Christopher R. Lundy, Esq.

[SMBA&D](#)

[Contact SMBA&D](#)

■ DEFINITIONS FOR SBRC SOURCELINK CENTER IMPACT REPORT

COUNSELING

Clients Counseled: Total number of people for whom interactions have been recorded in the reporting period.

Counseling Sessions: Total number of interactions recorded within the reporting period. This number may be greater than the number of clients served as each client may have multiple interactions recorded.

Total Counseling Hours: *Total Contact Time* for interactions within the reporting period. Does not include *Prep Time* or *Travel Time*.

Total Prep Hours: Total preparation hours for interactions within the reporting period.

Total Travel Hours: Total travel hours for interactions within the reporting period.

Total Hours: The sum of Total Counseling Hours + Total Prep Hours + Total Travel Hours within the reporting period.

Year to Date (YTD) is calculated from the day the report is pulled. Not the end of the selected time period. For example, if you pull the report on March 12, YTD will be from that day. 'This Period' reflects the date range selected in your report parameters.

TRAINING

Clients Trained: Total number of unique people flagged as *attended* for at least one training event in the reporting period. This number may be lower than the *Total Training Attendance* number as one person may attend more than one training session. Only events with an *Event Type* of *Seminar* or *Class/Training* are calculated in the BA420.

Total Training Attendance: Number of times people are marked *Attended* on *Event Attendance Tab* within the reporting period. Only events with an *Event Type* of *Seminar* or *Class/Training* are included.

Total Event Training Hours: Sum of event training hours within the reporting period where the session has "Hours are Reportable" checked. For each event, training hours are calculated by the number of attendees flagged as *Attended* times the number of *Session Training Hours*.

TOTAL CLIENTS SERVED

Total Clients Served: Total number of people attending at least one counseling session (Interactions) or one training session (Events) within the reporting period. This number will be less than the sum of *Clients Counseled* and *Clients Trained* since some clients attend both a counseling session and a training session. They will only be counted once.

Total Client Participation: The sum of *Total Counseling Sessions* and *Total Training Attendance*.

CLIENT MIX BY BUSINESS STAGE

Provides a count of clients by business stage for all snapshots created during the current reporting period. If a client record has two or more snapshots recorded in the period, the business stage from the most recent snapshot is used.

BUSINESSES CREATED

Counts client records where the *Business Stage* has progressed from *Pre-Venture* in a previous snapshot to any other business stage during the current reporting period (*Existence/Infancy, Early Growth Stage, Expansion Stage, Maturity or Decline*).

% Revenue Growth: Compares revenue from the last *Annual* snapshot in the current period with the most recent previous *Annual* snapshot.

Annual Gross Revenue/Sales Growth (%): Compares revenue from the last *Annual* snapshot within the End Date year with the prior year's most recent *Annual* snapshot for each client.

Annual Gross Revenue/Sales (\$): Sums all revenue from the last *Annual* snapshot within the End Date year for each client.

FUNDING AND CONTRACTS

Number of Loans Obtained: Number of loans recorded within the reporting period on the *Sources of Capital* tab within *Snapshots*.

Dollar Amount of Loans Obtained: Sum value of loans recorded within the reporting period on the *Sources of Capital* tab within *Snapshots*.

Number of Equity Investments Obtained: Number of equity investments recorded within the reporting period on the *Sources of Capital* tab within *Snapshots*.

Dollar Amount of Equity Investments: Sum value of equity investments recorded within the reporting period on the *Sources of Capital* tab within *Snapshots*.

Bonding Capacity: Sum value of bonding capacity within reporting period on *Snapshots* tab.

Number of Grants/Gifts Received: Sum value of grants/gifts recorded within the reporting period on the *Sources of Capital* tab within *Snapshots*.

Dollar Amount of Grants/Gifts Received: Sum value of grants/gifts recorded within the reporting period on the *Sources of Capital* tab within *Snapshots*.

Number of Contracts Received: Count of contracts recorded within the reporting period on the *Sources of Capital* tab within *Snapshots*.

Dollar Amount of Contracts Received: Sum value of contracts recorded within the reporting period on the *Sources of Capital* tab within *Snapshots*.

GENDER OF CLIENTS SERVED

Lists the number and percentage of Female, Male and Nonbinary clients served in the selected time period.

RACE AND ETHNICITY OF CLIENTS SERVED

Lists the number and percentage for Race and Ethnicity including: African American or Black, Asian American, Native American/AK Native, Native HI/Pacific Islander, White clients served in selected time period. Ethnicity either Non-Hispanic or Non-Latinx or Hispanic or Latinx from the People view in the client record.

REFERRALS

10,000 Small Biz Referrals: Counts referrals made to *10,000 Small Businesses* within the current reporting period.

UEF Referrals: Counts referrals made to *Urban Empowerment Fund* within the current reporting period.

Other Referrals: Counts referrals made to all other organizations within the current reporting period. To be counted, referrals must be created on the *Referrals Tab* of a Client Record (and the referral organization must have a client record in the database).