

SAN GABRIEL VALLEY WATER COMPANY

**UTILITY SUPPLIER
DIVERSITY PROGRAM**

2017 Annual Report | 2018 Plan

G.O. #156 Section		Page Number
	Annual Report	
<hr/>		
9.1.1	Description of WMDVLGBTBE Program Activities During the Previous Calendar Year	3
9.1.2	WMDVLGBTBE Annual Results by Ethnicity	7
9.1.2	WMDVLGBTBE Direct Procurement by Product and Service Categories	8
9.1.2	WMDVLGBTBE Subcontractor Procurement by Product and Service Categories	9
9.1.2	WMDVLGBTBE Procurement by Standard Industrial Categories	10
9.1.2	Number of WMDVLGBTBE Suppliers and Revenue Reported to the Clearinghouse	12
9.1.2	Description of Number of WMDVLGBTBE Suppliers with CA Majority Workforce	13
9.1.3	WMDVLGBTBE Program Expenses	13
9.1.4	Description of Progress in Meeting or Exceeding Set Goals	13
9.1.4	WMDVLGBTBE Results and Goals	14
9.1.5	Description of Prime Contractor Utilization of WMDVLGBTBE Subcontractors	14
9.1.5	Summary of Prime Contractor Utilization of WMDVLGBTBE Subcontractors	15
9.1.6	A List of WMDVLGBTBE Complaints Received and Current Status	16
9.1.7	Description of Efforts to Recruit WMDVLGBTBE Suppliers in Low Utilization Categories	16
	Annual Plan	
<hr/>		
10.1.1	WMDVLGBTBE Annual SHORT, MID, AND LONG-TERM Goals	20
10.1.2	Description of WMDVLGBTBE Planned Program Activities for the Next Calendar Year	21
10.1.3	Plans for Recruiting WMDVLGBTBE Suppliers in Low Utilization Areas	21
10.1.4	Plans for Recruiting WMDVLGBTBE Suppliers Where Unavailable	22
10.1.5	Plans for Encouraging Prime Contractors to Subcontract WMDVLGBTBE Suppliers	22
10.1.6	Plans for Complying with WMDVLGBTBE Program Guidelines	22

San Gabriel Valley Water Company	2017 Report	G.O. #156 Sec. 9.1.1
Description of WMDVLGBTBE Program Activities During the Pervious Calendar Year		

Internal Program Activities

Staff changes

Vice President of Engineering, Matt Yucelen, was given broad executive-level authority over the supplier diversity and purchasing departments. This change brought supplier diversity and general purchasing under the same umbrella as major construction activities, concentrating control and responsibility for program results in one department. Additionally, the Supplier Diversity Coordinator was elevated to Supplier Diversity Manager signaling greater influence and authority to supplier diversity initiatives.

Continued Work on Improving Internal Supplier Diversity Information System

A “user friendly” data entry screen has been put into production giving the supplier diversity manager the ability to update vendor profile in real time without relying on other departments. A dedicated IT staff person has been assigned to supplier diversity to more readily respond to other programming enhancements as the need arises.

Procurement Documents Update

The process of updating our procurement documents has proven to be a daunting undertaking. Some of the company’s procurement documents have been in place for over 40 years. All of these contracts and forms need to be carefully reviewed not only for supplier diversity provisions, but for legal and business consistency between documents. The process is ongoing and we expect to complete it during 2018.

Success Stories



In 2017, San Gabriel hired Afro-America Women-owned firm, Merriwether & Williams Insurance Services. We look forward to a long-lasting relationship with Ms. Merriwether and company.

We also began work with our mentee, Vobecky Enterprises. This award winning company was recently honored by Wells Fargo as Small Business of the year. Bianca and her husband Pete have proven to be trusted partners.



External Program Activities

Collaboration with the California Water Association

In 2017, through the California Water Association (CWA), we established a partnership with the San Jose-, Fresno-, and Los Angeles-Minority Business Development Agencies to host a series of workshops across the state.

Our first workshop March 10th in Citrus Heights had 74 RSVPs and included discussions on doing business with the water utilities and bonding. It also included discussions on access to capital in the form of state- and federal-guaranteed loans. We featured speakers from the Small Business Administration, Suhr Risk Services and the California Capital Financial Development Corporation.

At our second workshop, June 29th, a University of Southern California classroom was packed with small business owners who took advantage of the day to learn about doing business with California water companies. The workshop, with 90 RSVPs, also featured discussions on doing business with the water utilities and bonding. An SBA-moderated panel of lending officers from Boston Private Bank and Trust, Bank of America and Pacific Western Bank discussed 101/SBA Programs and access to capital. This innovative approach allowed suppliers to get perspectives from small, medium and large lending entities. The event was jointly organized by the San Jose Minority Business Development Agency (MBDA) Business Center and Los Angeles MBDA Business Center.

The agenda also included a presentation on the different procurement opportunities with CWA participating companies, a bonding and Access to Capital discussion moderated by Victor Parker, District Director of Small Business Administration (SBA) Los Angeles. It featured Boston Private Bank and Trust, Bank of America, and Pacific Western Bank. Acting National Director of MBDA, Chris Garcia, also made a quick appearance and briefly addressed the attendees. As the event came to an end, small business owners were given the opportunity to network with the speakers and create meaningful connections. Emma Maxey, Supplier Diversity Program Manager with Golden State Water Company commented, “Working with the MBDA has broadened our reach to small businesses by developing relationships between our industry and the banking institutions. We are excited to be a part of this endeavor.” Her sentiment was echoed by Jose G. Espinoza, Supplier Diversity Program Manager with California Water Service, “Our partnership with MBDA is key to the California Water Association’s efforts towards capacity building and technical assistance. We’re proud of the results and remain committed to our mission of providing a forum to address the challenges our suppliers are facing.”



**CWA-MBDA Los Angeles
Workshop**

We hosted our third workshop October 13th in San Jose partnering with PG&E and the Santa Clara Valley Transportation Authority. The focus was on Effective Marketing to Public Utilities featuring two experts from the community who give their perspective to diverse suppliers. Shirley Tan, from Systems Coach spoke about identifying your ideal customer prior to crafting your marketing message and website. Teri Williams with the Regional Monterey Bay Procurement Technical Assistance Center discussed best practices for writing capabilities statements. We concluded the event with a panel discussion moderated by Hien Tran with Anvil Builders (DVBE # 11030010). With 119 RSVPs the event proved a success.



**Edward Simon, Cal-Am &
Jackie Glover SGVW**

For our final workshop December 8th in San Diego, we partnered with a Google Digital Coach to discuss digital marketing strategies. The event concluded with suppliers taking the opportunity to direct questions about doing business with the utilities to a panel moderated by Aestocia Ramirez from Lyden Electric (VON# 14090099). Panel members included representatives from San Gabriel Valley Water Company, California-American Water, Metropolitan Water District of Southern California and San Diego County Water Authority. We had 110 RSVPs for the event.



CWA-CNB Workshop

With an added focus on access to capital, we established a relationship with Higher Growth Strategies, LLC and City National Bank (CNB) to host two workshops solely focused on alternative loan vehicles.

Our first workshop May 12th in Los Angeles featured a CNB Community Reinvestment Officer discussing how to establish a banking relationship, identify capital needs, sources and criteria.

Our second workshop August 9th in San Francisco featured a CNB Community Development Officer who addressed alternatives to banks as capital sources, such as credit unions and community-based lending entities.

In February and March, CWA participating utilities collaborated with Edison and the UC Riverside Career Center to present the Elevate Entrepreneur Institute. The program promotes an ecosystem that boosts the competitive advantage of participants. It convened a selected group of accomplished and growing diverse suppliers to elevate their success as it developed them

into stronger leaders. The program covered three topics, Strategic Thinking, Influence and Innovation.



In June, CWA participating utilities sponsored their annual Meet the Primes event in Citrus Heights. We introduced a Vendor Showcase that featured two minute capabilities presentations from vetted diverse suppliers in construction, engineering, new technologies and other selected commodities that fit our sourcing needs. It also included presentations from utility representatives and a major prime. Reviews were excellent. We also introduced our first Prime Contractor of the Year award. This award went to the prime contractor that contributed most to the success of our supplier diversity efforts. The 2017 Prime Contractor of the Year went to West Valley Construction Company. We plan to continue this award and expand it to include a DBE of the Year as well.

We attended several other outreach events during the year. The Black Business Association’s (BBA) Procurement Summit was particularly beneficial.

The BBA’s Salute to Black Women Business Conference was beneficial as well.



Matt Yucelen, San Gabriel’s VP Eng. answering questions regarding procurement at the BBA Summit



Ed Simon, Cal-Am Water, Jackie Glover and Veronica Neri, San Gabriel Valley Water at the BBA’s Salute to Black Women event

San Gabriel Valley Water Company	2017 Report	G.O. #156 Section 9.1.2
WMDVLGBTBE Annual Results by Ethnicity		

		2017				
		Direct	Sub	Total \$	%	
1	Minority Male	Asian Pacific American	176,211.00	\$ 503,250.00	\$679,461.00	1.63%
2		African American	32,188.00	\$ 44,888.35	\$77,076.35	0.19%
3		Hispanic American	2,818,498.00	\$ 578,908.01	\$3,397,406.01	8.16%
4		Native American	1,136,558.00		\$1,136,558.00	2.73%
5		Total Minority Male	\$4,163,455	\$ 1,127,046.36	\$5,290,501.36	12.71%
6	Minority Female	Asian Pacific American	51,818.00		\$51,818.00	0.12%
7		African American	619,662.00		\$619,662.00	1.49%
8		Hispanic American	41,630.00		\$41,630.00	0.10%
9		Native American	-		\$0.00	0.00%
10		Total Minority Female	\$713,110.00	0.00	\$713,110.00	1.71%
11	Total Minority Business Enterprise (MBE)		\$4,876,565.00	\$ 1,127,046.36	\$6,003,611.36	14.42%
12	Women Business Enterprise (WBE)		\$2,728,167.00	\$ 46,037.10	\$2,774,204.10	6.66%
13	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)		\$468,836.00		\$468,836.00	1.13%
14	Disabled Veteran Business Enterprise (DVBE)		\$44,141.00	\$ 62,140.00	\$106,281.00	0.26%
15	Other 8(a)*		\$0.00		\$0	0.00%
16	Total WMDVLGBTBE		\$8,117,709.00	\$ 1,235,223.46	\$ 9,352,932.46	22.46%
17	Net Procurement**		\$ 41,635,111.36			

NOTE: *FIRMS CLASSIFIED AS 8(a) OF SMALL BUSINESS ADMINISTRATION INCLUDES NON-WMDVLGBTBE
 **NET PROCUREMENT INCLUDES PURCHASE ORDER, NON-PURCHASE ORDER, AND CREDIT CARD DOLLARS
 Direct – DIRECT PROCUREMENT
 Sub – SUBCONTRACTOR PROCUREMENT
 % - PERCENTAGE OF NET PROCUREMENT

San Gabriel Valley Water Company	2017 Report	G.O. #156 Section 9.1.2
WMDVLGBTBE Direct Procurement by Product and Service Categories		

			Products		Services		Total	
			\$	%	\$	%	\$	%
Minority Male	Asian Pacific American	Direct	61513.17	0.15%	114698	0.28%	176211.17	0.42%
	African American	Direct	0	0.00%	32188.02	0.08%	32188.02	0.08%
	Hispanic American	Direct	416474.99	1.00%	2402023.49	5.77%	2818498.48	6.77%
	Native American	Direct		0.00%	1136558.55	2.73%	1136558.55	2.73%
	Total Minority Male	Direct	\$ 477,988.16	1.15%	\$ 3,685,468.06	8.85%	\$ 4,163,456.22	10.00%
Minority Female	Asian Pacific American	Direct	50680.49	0.12%	1138	0.00%	51818.49	0.12%
	African American	Direct		0.00%	619662.93	1.49%	619662.93	1.49%
	Hispanic American	Direct	16378.25	0.04%	25252.36	0.06%	41630.61	0.10%
	Native American	Direct		0.00%		0.00%	0	0.00%
	Total Minority Female	Direct	\$ 67,058.74	0.16%	\$ 646,053.29	1.55%	\$ 713,112.03	1.71%
Total Minority Business Enterprises (MBE)		Direct	\$ 545,046.90	1.31%	\$ 4,331,521.35	10.40%	\$ 4,876,568.25	11.71%
Women Business Enterprises (WBE)		Direct	\$ 2,465,706.57	5.92%	\$ 262,461.00	0.63%	\$ 2,728,167.57	6.55%
Lesbian, Gay, Bisexual, Transgender Business Enterprises (LGBTBE)		Direct	\$ -	0.00%	\$ 468,836.52	1.13%	\$ 468,836.52	1.13%
Disabled Veteran Business Enterprises (DVBE)		Direct	\$ 16,004.86	0.04%	\$ 28,136.63	0.07%	\$ 44,141.49	0.11%
Other (8a)*		Direct	\$ -	0.00%		0.00%	\$ -	
TOTAL WMDVLGBTBE		Direct	\$ 3,026,758.33	7.27%	\$ 5,090,955.50	12.23%	\$ 8,117,713.83	19.50%

Total Product Procurement	\$ 3,026,758.33
Total Service Procurement	\$ 5,090,955.50
Net Procurement**	\$ 41,635,111.36
Total Number of WMDVLGBTBEs that Received Direct Spend	56

NOTE: *FIRMS CLASSIFIED AS 8(a) OF SMALL BUSINESS ADMINISTRATION INCLUDES NON-WMDVLGBTBE
 **NET PROCUREMENT INCLUDES PURCHASE ORDER, NON-PURCHASE ORDER, AND CREDIT CARD DOLLARS
 Direct – DIRECT PROCUREMENT
 Sub – SUBCONTRACTOR PROCUREMENT
 % - PERCENTAGE OF NET PROCUREMENT

San Gabriel Valley Water Company	2017 Report	G.O. #156 Section 9.1.2
WMDVLGBTBE Subcontractor Procurement by Product and Service Categories		

			Products		Services		Total	
			\$	%	\$	%	\$	%
Minority Male	Asian Pacific American	Sub	500,000.00	1%	3,250.00	0%	503,250.00	1.21%
	African American	Sub		0%	44,888.35	0%	44,888.35	0.11%
	Hispanic American	Sub	89,848.67	0%	489,059.34	1%	578,908.01	1.39%
	Native American	Sub	-	0%	-	0%	-	0.00%
	Total Minority Male	Sub	\$ 589,848.67	1%	\$ 537,197.69	1%	\$ 1,127,046.36	2.71%
Minority Female	Asian Pacific American	Sub	-	0%	-	0%	-	0.00%
	African American	Sub	-	0%	-	0%	-	0.00%
	Hispanic American	Sub	-	0%	-	0%	-	0.00%
	Native American	Sub	-	0%	-	0%	-	0.00%
	Total Minority Female	Sub	\$ -	0%	\$ -	0%	\$ -	0.00%
Total Minority Business Enterprises (MBE)		Sub	\$ 589,848.67	1%	\$ 537,197.69	1%	\$ 1,127,046.36	2.71%
Women Business Enterprises (WBE)		Sub	\$ 41,237.10	0.10%	\$ 4,800.00	0.01%	\$ 46,037.10	0.11%
Lesbian, Gay, Bisexual, Transgender Business Enterprises (LGBTBE)		Sub	-	0.00%	-	0.00%	-	0.00%
Disabled Veteran Business Enterprises (DVBE)		Sub	-		\$ 62,140.00	0.15%	\$ 62,140.00	0.15%
Other (8a)*		Sub	-		-		-	
TOTAL WMDVLGBTBE		Sub	\$ 631,085.77	1.52%	\$ 604,137.69	1.45%	\$ 1,235,223.46	2.97%
Total Sub-Products Procurement			\$ 631,085.77					
Total Sub-Services Procurement			\$ 604,137.69					
Total 2nd Tier Spend			\$ 1,235,223.46					
Net Procurement**			\$ 41,635,111.36					

NOTE: *FIRMS CLASSIFIED AS 8(a) OF SMALL BUSINESS ADMINISTRATION INCLUDES NON-WMDVLGBTBE
 **NET PROCUREMENT INCLUDES PURCHASE ORDER, NON-PURCHASE ORDER, AND CREDIT CARD DOLLARS
 Direct – DIRECT PROCUREMENT
 Sub – SUBCONTRACTOR PROCUREMENT
 % - PERCENTAGE OF NET PROCUREMENT

WMDVLGBTBE Procurement by Standard Industrial Classification Categories

SIC Code Category	\$ - %	Asian Pacific American		African American		Hispanic American		Native American		Minority Business Enterprises (MBE)	Women Business Enterprises (WBE)	Lesbian, Gay, Bisexual, Transgender Business Enterprises (LGBTBE)	Disabled Veterans Business Enterprises (DVBE)	Other 8(a)**	Total WMDVLGBTBE	Total Dollars Total Percentage
		Male	Female	Male	Female	Male	Female	Male	Female							
15	\$				164,948.93					164,948.93	55,844.00				220,792.93	2,837,346.53
	%				0.40					0.40	0.13				0.53	6.80
16	\$				519,648.61			1,136,558.55		1,656,207.16		468,836.52			2,125,043.68	2,125,043.68
	%				1.25			2.73		3.98		1.13			5.11	5.11
17	\$				7,987.17					7,987.17			28,136.63		36,123.80	7,590,270.74
	%				0.02					0.02			0.07		0.09	18.22
25	\$	16,496.38								16,496.38	92,717.52				109,213.90	109,213.90
	%	0.04								0.04	0.22				0.26	0.26
28	\$									0					-	11,745.49
	%									0					-	0.02
29	\$									0					-	5,130.46
	%									0					-	0.04
30	\$									0	1,891,140.89				1,891,140.89	1,891,140.89
	%									0	4.54				4.54	4.54
32	\$					14,923.38				14,923.38					14,923.38	547,840.38
	%					0.04				0.04					0.04	1.31
34	\$					7,408.37	16,378.25			23,786.62					23,786.62	63,455.50
	%					0.02	0.04			0.06					0.06	0.15
35	\$	33,823.50	50,680.49			6,048.42				90,552.41					90,552.41	374,227.84
	%	0.08	0.12			0.01				0.21					0.21	0.88
36	\$									0					-	46,210.43
	%									0					-	0.10
37	\$					4,432.69				4,432.69					4,432.69	4,432.69
	%					0.01				0.01					0.01	0.01
38	\$					356,481.92				356,481.92					356,481.92	541,798.98
	%					0.86				0.86					0.86	1.31
39	\$									0			16,004.86		16,004.86	1,632,418.05
	%									0			0.04		0.04	3.92
42	\$									0	14,862.83				14,862.83	14,862.83
	%									0	0.04				0.04	0.04
44	\$						13,545.31			13,545.31					13,545.31	13,545.31
	%						0.03			0.03					0.03	0.03
46	\$									0					-	1,988,986.87
	%									0					-	4.78
47	\$									0					-	840,769.60
	%									0					-	2.02
48	\$									0					-	222,879.39
	%									0					-	0.54
50	\$	11,193.29				27,180.21				38,373.50	12,006.91				50,380.41	90,447.18
	%	0.03				0.07				0.1	0.03				0.13	0.23
51	\$									0	492.47				492.47	400,085.78
	%									0	0				-	0.96
52	\$									0					-	77,598.16
	%									0					-	0.19
54	\$									0					-	35,778.60
	%									0					-	0.09

WMDVLGBTBE Procurement by Standard Industrial Classification Categories (Cont.)

SIC Code Category*	\$-%	Asian Pacific American		African American		Hispanic American		Native American		Minority Business Enterprises (MBE)	Women Business Enterprises (WBE)	Lesbian, Gay, Bisexual, Transgender Business Enterprises (LGBTBE)	Disabled Veterans Business Enterprises (DVBE)	Other 8(a)**	Total WMDVLGBTBE	Total Dollars	Total Percentage
		Male	Female	Male	Female	Male	Female	Male	Female								
55	\$									0	467,560.12				467,560.12	808,021.13	
	%									0	1.12				1.12	1.94	
57	\$									0					-	3,931.00	
	%									0					-	0.01	
59	\$									0	1,788.66				1,788.66	5,739,422.49	
	%									0	0				-	13.79	
60	\$									0					-	107,577.16	
	%									0					-	0.26	
63	\$									0					-	3,129,207.92	
	%									0					-	7.52	
64	\$				454,714.00					454,714.00					454,714.00	714,938.08	
	%				1.09					1.09					1.09	1.72	
65	\$									0					-	84,945.00	
	%									0					-	0.20	
67	\$									0					-	50.00	
	%									0					-	0.00	
70	\$									0					-	24,400.87	
	%									0					-	0.06	
73	\$	2,588.75	1,138.00	25,000.00		151,815.44				180,542.19	137,754.23				318,296.42	1,787,269.19	
	%	0.01	0.00	0.06		0.36				0.43	0.33				0.76	4.29	
75	\$					54,589.35				54,589.35					54,589.35	601,471.19	
	%					0.13				0.13					0.13	1.44	
76	\$									11,707.05					11,707.05	13,165.95	
	%									0.03					0.03	0.03	
79	\$									0					-	57,630.37	
	%									0					-	0.14	
80	\$									0					-	2,948,483.56	
	%									0					-	7.08	
81	\$									0					-	215,770.12	
	%									0					-	0.52	
82	\$									0					-	16,644.77	
	%									0					-	0.04	
83	\$									0					-	500.00	
	%									0					-	-	
87	\$	96,537.10		7,188.02		1,449,348.06				1,553,073.18	46,634.94				1,599,708.12	2,324,548.13	
	%	0.23		0.02		3.48				3.73	0.11				3.84	5.58	
89	\$	15,572.15				218,634.86				234,207.01	7,365.00				241,572.01	1,591,905.15	
	%	0.04				0.53				0.57	0.02				0.59	3.83	
TOTAL		\$ 176,211.17	\$ 51,818.49	\$ 32,188.02	\$ 619,662.93	\$ 2,818,498.48	\$ 41,630.61	\$ 1,136,558.55	\$ -	\$ 4,876,568.25	\$ 2,728,167.57	\$ 468,836.52	\$ 44,141.49	\$ -	\$ 8,117,713.83	\$ 41,635,111.36	
TOTAL		0.43	0.12	0.08	1.49	6.78	0.10	2.73	-	11.73	6.54	1.13	0.11	-	19.51	100.00	

Total Product Procurement \$14,371,885.82
Total Service Procurement \$27,253,225.54

Net Procurement* \$41,635,111.36**

NOTE: * FIRMS WITH MULTI MINORITY OWNERSHIP STATUS
 ** FIRMS CLASSIFIED AS 8(a) OF SMALL BUSINESS ADMINISTRATION INCLUDES NON-WMDVLGBTBE
 *** NET PROCUREMENT INCLUDES PURCHASE ORDERS, NON-PURCHASEORDERS, AND CREDIC CARD DOLLARS
 TOTAL DOLLARS - TOTAL PROCUREMENT DOLLARS AMOUNT IN THE SPECIFIC SIC CATEGORY
 % - PERCENTAGE OF TOTAL DOLLARS

San Gabriel Valley Water Company	2017 Report	G.O. #156 Section 9.1.2 (D.11-05-019 & D.06-11-028)
Number of WMDVLGBTBE Suppliers and Revenue Report to the Clearinghouse		

	Data on Number of Suppliers												
	Revenue (Range) Reported to CHS						Utility-Specific 2017 Summary						
	# WMDVLGBTBEs	MBE	WBE	LGBTBE	DVBE	Other 8(a)*	Grand Total	MBE	WBE	LGBTBE	DVBE	Other 8(a)*	Grand Total
Under \$1 million or Unknown		9	9		2		20	30	21	1	2		54
Under \$5 million		9	3				12		2				2
Under \$10 million		3	6				9						0
Above \$10 million		10	4	1			15						0
TOTAL		31	22	1	2	0	56	30	23	1	2	0	56
	Revenue and Payment Data												
	(Average) Revenue Reported to CHS						Utility-Specific 2017 Summary						
	# WMDVLGBTBEs	MBE	WBE	LGBTBE	DVBE	Other 8(a)*	Grand Total	MBE	WBE	LGBTBE	DVBE	Other 8(a)*	Grand Total
Under \$1 million or Unknown		1,797,623.00	3,315,562.00		0		\$ 5,113,185.00	1,312,065.00	1,999,718.00		44,141.00		\$ 3,355,924.00
Under \$5 million		23,275,922.00	4,897,885.00				\$ 28,173,807.00	827,241.00	111,593.00				\$ 938,834.00
Under \$10 million		27,073,443.15	33,392,302.00				\$ 60,465,745.15	1,319,219.00	134,434.00				\$ 1,453,653.00
Above \$10 million		1,853,646,007.00	2,610,863,548.00	12,000,000.00			\$ 4,476,509,555.00	1,418,044.00	482,423.00	468,837.00			\$ 2,369,304.00
TOTAL		\$1,905,792,995.15	\$2,652,469,297.00	\$12,000,000.00	\$ -	\$ -	\$ 4,570,262,292.15	\$ 4,876,569.00	\$2,728,168.00	\$ 468,837.00	\$ 44,141.00	\$ -	\$ 8,117,715.00

NOTE: * FIRMS CLASSIFIED AS 8(a) OF SMALL BUSINESS ADMINISTRATION INCLUDES NON-WMDVLGBTBE
CHS: SUPPLIER CLEARINGHOUSE

San Gabriel Valley Water Company	2017 Report	G.O. #156 Section 9.1.2
Description of WMDVLGBTBEs with CA Majority Workforce		

This information for 2017 is not readily accessible.

San Gabriel Valley Water Company	2017 Report	G.O. #156 Section 9.1.3
WMDVLGBTBEs Program Expenses		

Expenses Category	2017
Wages	\$57,800.31
Other Employee Expenses	\$7,231.94
Program Expenses	\$11,514.34
Reporting Expenses	\$0.00
Training	\$0.00
Consultants	\$2,344.10
Other (CBO Sponsorships)	\$2,825.00
TOTAL	\$83,732.69

San Gabriel Valley Water Company	2017 Report	G.O. #156 Section 9.1.4
Description of Progress in Meeting or Exceeding Set Goals		

We are very pleased to report that our procurement with WMDVLGBTBEs increased sixty-five percent in 2017 to \$8,117,709 in direct spend, compared to \$4,907,311 in 2016. We are also pleased to report \$1,235,223 in 2nd tier spend, compared to \$88,253 in 2016, a fourteen-fold increase. As mentioned earlier, these results can be attributed to the concentration of control for the program into one department.

San Gabriel Valley Water Company	2017 Report	G.O. #156 Section 9.1.4
WMDVLGBTBE Results and Goals		

Category	2017 Results	2017 Goals
Minority Men	12.71%	
Minority Women	1.71%	
Total Minority Business Enterprise (MBE)	14.42%	15%
Women Business Enterprise (WBE)	6.66%	5%
Lesbian, Gay, Bisexual, Transgender Business Enterprises (LGBTBE)		2.38%
Disabled Veteran Business (DVBE)	0.26%	1.5%
Other (8a)	0%	
TOTAL WMDVLGBTBE	22.46%	23.88%

% - PERCENTAGE OF NET PROCUREMENT

San Gabriel Valley Water Company	2017 Report	G.O. #156 Sec. 9.1.5
Description of Prime Contractor Utilization of WMDVLGBTBE Subcontractors		

San Gabriel’s prime contractors utilized WMDVLGBTBE for both products and services; from trucking to pipe fabrication and materials to engineering services.

Our prime contractors recognize that their participation in our 2nd tier program adds value to the supplier/customer relationship and are committed to assisting us meet our program goals.

San Gabriel Valley Water Company	2017 Report	G.O. #156 Section 9.1.5
Summary of Prime Contractor Utilization of WMDVLGBTBE Subcontractors		

	Minority Male	Minority Female	Minority Business Enterprise (MBE)	Women Business Enterprise (WBE)	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)	Disabled Veterans Business Enterprises (DVBE)	Other 8(a)*	TOTAL WMDVLGBTBE
Direct \$	\$ 4,163,455.00	\$ 713,110.00	\$ 4,876,565.00	\$ 2,728,167.00	\$ 468,836.00	\$ 44,141.00	\$ -	\$ 8,117,709.00
Subcontracting \$	\$ 1,127,046.36	\$ -	\$ 1,127,046.36	\$ 46,037.10	\$ -	\$ 62,140.00	\$ -	\$ 1,235,223.46
Total \$	\$ 5,290,501.36	\$ 713,110.00	\$ 6,003,611.36	\$ 2,774,204.10	\$ 468,836.00	\$ 106,281.00	\$ -	\$ 9,352,932.46
Direct %	10.00%	1.71%	11.71%	6.55%	1.13%	0.11%	0.00%	19.50%
Subcontracting %	2.71%	0.00%	2.71%	0.11%	0.00%	0.15%	0.00%	2.97%
Total %	12.71%	1.71%	14.42%	6.66%	1.13%	0.26%	0.00%	22.46%

Net Procurement**	\$ 41,635,111.36
-------------------	-------------------------

NOTE: *FIRMS CLASSIFIED AS 8(a) OF SMALL BUSINESS ADMINISTRATION INCLUDES NON-WMDVLGBTBE
 ** NET PROCUREMENT INCLUDES PURCHASE ORDERS, NON-PURCHASE ORDER, AND CREDIT CARD DOLLARS
 % - PERCENTAGE OF NET PROCUREMENT
 DIRECT – DIRECT PROCUREMENT
 Sub – SUBCONTRACTOR PROCUREMENT

San Gabriel Valley Water Company	2017 Report	G.O. #156 Sec. 9.1.6
A List of WMDVLGBTBE Complaints Received and Current Status		

San Gabriel received no complaints and none were filed in 2017 relative to its USDP.

San Gabriel Valley Water Company	2017 Report	G.O. #156 Sec. 9.1.7
Description of Efforts to Recruit WMDVLGBTBE Suppliers in Low Utilization Categories		

Legal

San Gabriel utilizes in-house General Counsel for most routine legal issues. The company’s General Counsel is aware of the goal to seek to increase use of WMDVLGBTBEs in legal services.

Finance

San Gabriel utilizes the DBE accounting firm, Vasquez & Company, to provide audit and tax services including tax return preparation and advisory services.

Highly Technical

San Gabriel’s primary water quality testing laboratory is Weck Labs, a DBE. San Gabriel also utilized DBE’s to provide studies and reports dealing with highly technical water resource planning, environmental compliance issues, and general civil engineering.

IT product acquisition is another area where San Gabriel utilizes a minority owned business.

2018 ANNUAL PLAN

San Gabriel Valley Water Company	2018 Plan	G.O. #156 Sec. 10.1.1
WMDVLGBTBE Annual SHORT, MID, LONG-TERM Goals by Product and Service Category		

Products	Short-Term 2018					Mid-Term 2019					Long-Term 2020				
	Minority Business Enterprise (MBE)	Women Business Enterprise (WBE)	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)	Disabled Veterans Business Enterprise (DVBE)	TOTAL WMDVLGBTBE	Minority Business Enterprise (MBE)	Women Business Enterprises (WBE)	Lesbian, Gay, Bisexual, Transgender Business Enterprises (LGBTBE)	Disabled Veterans Business Enterprises (DVBE)	TOTAL WMDVLGBTBE	Minority Business Enterprise (MBE)	Women Business Enterprises (WBE)	Lesbian, Gay, Bisexual, Transgender Business Enterprises (LGBTBE)	Disabled Veterans Business Enterprises (DVBE)	TOTAL WMDVLGBTBE
25	0.04%	0.22%			0.00	0.04%	0.22%			0.00	0.04%	0.22%			0.00
30		4.54			4.54		4.54			4.54		4.54			4.54
32	0.04				0.04	0.04				0.04	0.04				0.04
34	0.06	0.22			0.28	0.06	0.22			0.28	0.06	0.22			0.28
35	0.19				0.19	0.19				0.19	0.19				0.19
37	0.01				0.01	0.01				0.01	0.01				0.01
38	0.86				0.86	0.86				0.86	0.86				0.86
39				0.04	0.04				0.04	0.04				0.04	0.04
50	0.10	0.03			0.13	0.10	0.03			0.13	0.10	0.03			0.13
51		0.01			0.01		0.01			0.01		0.01			0.01
55		1.12			1.12		1.12			1.12		1.12			1.12
59	0.01				0.01	0.01				0.01	0.01				0.01
Subtotals	1.27	5.92	0.00	0.04	7.23	1.27	5.92	0.00	0.04	7.23	1.27	5.92	0.00	0.04	7.23

Services	Short-Term 2018					Mid-Term 2019					Long-Term 2020				
	Minority Business Enterprise (MBE)	Women Business Enterprises (WBE)	Lesbian, Gay, Bisexual, Transgender Business Enterprises (LGBTBE)	Disabled Veterans Business Enterprises (DVBE)	TOTAL WMDVLGBTBE	Minority Business Enterprise (MBE)	Women Business Enterprises (WBE)	Lesbian, Gay, Bisexual, Transgender Business Enterprises (LGBTBE)	Disabled Veterans Business Enterprises (DVBE)	TOTAL WMDVLGBTBE	Minority Business Enterprise (MBE)	Women Business Enterprises (WBE)	Lesbian, Gay, Bisexual, Transgender Business Enterprises (LGBTBE)	Disabled Veterans Business Enterprises (DVBE)	TOTAL WMDVLGBTBE
15	0.83				0.83	0.83				0.83	0.83				0.83
16	3.98		1.13		5.11	3.98		1.13		5.11	3.98		1.13		5.11
17	2.87			0.07	2.94	2.87			0.07	2.94	2.87			0.07	2.94
42	0.04				0.04	0.04				0.04	0.04				0.04
44	0.03				0.03	0.03				0.03	0.03				0.03
64	1.09				1.09	1.09				1.09	1.09				1.09
73	0.43	0.33			0.76	0.43	0.33			0.76	0.43	0.33			0.76
75	0.13				0.13	0.13				0.13	0.13				0.13
76	0.03				0.03	0.03				0.03	0.03				0.03
87	3.73	0.11			3.84	3.73	0.11			3.84	3.73	0.11			3.84
89	0.57	0.02			0.59	0.57	0.02			0.59	0.57	0.02			0.59
Subtotals	13.73	0.33	1.13	0.07	15.39	13.73	0.33	1.13	0.07	15.39	13.73	0.33	1.13	0.07	15.39

TOTAL	15.00	6.25	1.13	1.50	23.88	15.00	6.25	1.13	1.50	23.88	15.00	6.25	1.13	1.50	23.88
--------------	--------------	-------------	-------------	-------------	--------------	--------------	-------------	-------------	-------------	--------------	--------------	-------------	-------------	-------------	--------------

San Gabriel Valley Water Company	2018 Plan	G.O. #156 Sec. 10.1.2
Description of WMDVLGBTBE Planned Program Activities for the Next Calendar Year		

Internal Activities

Capacity Building and Technical Assistance Program

Our goal is to work with Vobecky to introduce them to underground utility construction.

San Gabriel will seek to support the Disabled Veterans Business Alliance and the Black Business Association groups in our local communities.

Contractor meetings

Plans are underway for a San Gabriel contractors meeting.

External Activities

Collaboration with CWA

San Gabriel will continue its collaborative work through CWA to bring procurement and growth opportunities to women, minority, disabled veterans and LGBT businesses. Those plans include a Capacity Building and Technical Assistance Program, and two Meet the Primes events.

Additionally, San Gabriel will continue its involvement with CBO’s and Chambers of Commerce through memberships and participation in their outreach events as a member of CWA and individually.

San Gabriel Valley Water Company	2018 Plan	G.O. #156 Sec. 10.1.3
Plans for Recruiting WMDVLGBTBE Suppliers in Low Utilization Areas		

San Gabriel will continue to seek to identify and recruit WMDVLGBTBEs in areas where their utilization is low by supporting events targeted at these areas. Purchasers of these services will be reminded of the importance to attend these events and to make every reasonable effort to retain WMDVLGBTBEs when opportunities arise.

San Gabriel Valley Water Company	2018 Plan	G.O. #156 Sec. 10.1.4
Plans for Recruiting WMDVLGBTBE Suppliers Where Unavailable		

San Gabriel continues to seek out WMDVLGBTBE suppliers in all areas through attending outreach events, working with CBOs and identifying businesses in the Supplier Clearinghouse.

San Gabriel Valley Water Company	2018 Plan	G.O. #156 Sec. 10.1.5
Plans for Encouraging Prime Contractors to Subcontract WMDVLGBTBE Suppliers		

San Gabriel, in connection with CWA, will sponsor a prime contractors meeting with the primary goal to educate our prime contractors on ways to assist us in meeting program goals, and secondly to facilitate relationships between primes and DBEs.

San Gabriel Valley Water Company	2018 Plan	G.O. #156 Sec. 10.1.6
Plans for Complying with WMDVLGBTBE Program Guidelines		

San Gabriel will take steps to continue implementation of its Supplier Diversity Strategic Plan. This plan details strategies to implement an outreach program to inform and recruit WMDVLGBTBEs for inclusion in its contracting and procurement opportunities. It also includes a DBE sustainability plan and a 2nd tier program.

Our objective is to achieve compliance with the WMDVLGBTBE Program guidelines established by the Commission as required by the California Public Utilities Code section 8283 (c).

#####

Report Created by
Jacqueline R. Glover
Utility Supplier Diversity Program Manager
Resubmitted March 9, 2018

