



# Utility Supplier Diversity Program

2021 Annual Report  
and 2022 Plan



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G.O. #156	Annual Report	
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## Message From Our President

“**At** Liberty, our purpose is sustaining energy and water for life. We provide essential services as an active, engaged member of the communities we serve. Community engagement includes creating opportunities for businesses that represent and reflect the rich, diverse heritage and culture of California.



Our Utility Supplier Diversity Program (USDP) is an integral part of Liberty’s commitment to community engagement. The USDP is embedded in our procurement process that provides opportunities to diverse businesses to partner with Liberty. With major growth in new projects to promote future sustainability, Liberty has engaged new diverse businesses that provide quality and innovative products, services, and solutions.

Liberty Utilities (CalPeco Electric) LLC is an investor-owned utility that serves approximately 49,000 customers in the Lake Tahoe basin, supplying electric distribution services in parts of Alpine, El Dorado, Mono, Nevada, Placer, Plumas, and Sierra counties in California.

As part of the USDP, we continually develop business relationships with talented minority, women, disabled veteran and lesbian, gay, bisexual, and transgender-owned diverse businesses.

Liberty has seen significant improvement in our USDP over the past three years, which continues with the 2021 results. In 2021, we achieved 27.73% of spend with diverse businesses, equating to approximately \$19.4 million of products and services amongst 40 diverse businesses, exceeding the CPUC goal of 21.5%.

We are committed to expanding and strengthening our relationships with our diverse suppliers and increasing our annual spend with diverse businesses.”

*Edward Jackson*

Edward Jackson  
President, Liberty, California

**27.73%**  
Diverse  
Business  
Spend

**\$19.4  
Million**  
Diverse  
Purchase

**40**  
Diverse  
Vendors

## Description of WMDVLGBTBE Program Activities During the Previous Calendar Year

### Internal Program Activities

Liberty continued to drive education and process improvement to strengthen its Supplier Diversity Program in 2021.

The overall spend to diverse businesses increased by over \$4 million or just over 26% over 2020, including increased spending on wildfire mitigation and additional construction projects to harden the Liberty infrastructure.

The procurement team continued to build on the foundations laid in previous years, with more communication and collaboration with the key engineering and planning teams to allow more time to review appropriate suppliers to include in bid opportunities.



Liberty's workforce continued to work remotely during the ongoing COVID-19 pandemic, and increased use of video conferencing and communication led to the improved collaboration. With continued changes in the team supporting Liberty, strong communication enabled the diversity program to continue to blossom and gather support internally from key stakeholders.

With diversity and inclusion being a core part of Liberty, the Liberty team responsible for supplier diversity held virtual education sessions to highlight the history, approach, successes, and future plans for continuing to promote and develop the Supplier Diversity Program. This continued internal education helped employees to understand the importance of the program to both Liberty and the communities it serves.

Although many activities have remained virtual, Liberty held a number of meet-and-greet sessions in 2021 with diverse businesses to assess their capabilities and fit for Liberty's needs. The ongoing support of the internal stakeholders from across the business has been critical to the success of these events and meetings.

The sub-contracting section of Liberty's RFP templates and contracts were also reviewed in 2021, with Liberty achieving tracking of subcontractors for the first time in four years with an initial 0.32% or \$223,000 of subcontracted spend with diverse suppliers through improved understanding of the process by Liberty's procurement and business teams.

In 2021, Liberty continued to demonstrate its internal commitment to its Supplier Diversity Program with the increase in spend and an additional diverse business supplier added to Liberty's supply base. Liberty will continue to develop and improve its Supplier Diversity Program in 2022.

## Description of WMDVLGBTBE Program Activities During the Previous Calendar Year (cont.)

### External Program Activities

Migrating from traditional in-person events to virtual meetings, exhibitions, and meet-and-greet sessions continued in 2021. Liberty supported a number of these events.

Continuing the work from previous years, Liberty's procurement team worked with various business stakeholders to identify potential suppliers who could support Liberty's needs and engaged in targeted outreach to identify suppliers for ongoing and new work in the areas of vegetation management, construction, and other services/materials. Vegetation management, which has long been a success story for Liberty, added more suppliers as requirements grew substantially.



Procurement efforts led to more competitive bidding in various areas (engineering, construction, vegetation management, wildfire mitigation, materials, etc.), providing more opportunities for qualified, capable diverse suppliers. This resulted in the growth of incumbent diverse supplier relationships and spend and brought in other diverse suppliers who successfully won business. This activity increased during 2021, and Liberty anticipates continued improvement in 2022.

Liberty attended CPUC Virtual Expos during the year, meeting and talking with diverse suppliers who were then reviewed by business departments for meeting their needs. Some of these suppliers had individual meetings with the departments, or departments reviewed their qualifications, matched them against Liberty's needs, and included them in bid opportunities where applicable.

At the Annual Supplier Diversity En Banc held by the CPUC in October 2021, the Director of Supply Chain for Liberty – West Region represented Liberty on a panel with the CEOs of Southern California Gas Company, Southern California Edison, San Diego Gas & Electric Company, and the EVP/COO of Pacific Gas and Electric Company to discuss the challenges and opportunities faced by the utilities in the previous year. The invitation to participate on the panel recognized Liberty's continued upward trend with its Supplier Diversity Program during the COVID-19 pandemic the previous year.

2021		2021 Report				
		Direct	Sub	Total \$	%	
1	Minority Male	Asian Pacific American	\$1,082,732	\$0	\$1,082,732	1.55%
2		African American	\$121,556	\$0	\$121,556	0.17%
3		Hispanic American	\$11,532,096	\$59,843	\$11,591,940	16.56%
4		Native American	\$0	\$0	\$0	0.00%
5		Total Minority Male	\$12,736,384	\$59,843	\$12,796,228	18.28%
6	Minority Female	Asian Pacific American	\$218,253	\$0	\$218,253	0.31%
7		African American	\$0	\$0	\$0	0.00%
8		Hispanic American	\$265,457	\$0	\$265,457	0.38%
9		Native American	\$0	\$0	\$0	0.00%
10		Total Minority Female	\$483,710	\$0	\$483,710	0.69%
11	Total Minority Business Enterprise (MBE)		\$13,220,094	\$59,843	\$13,279,937	18.98%
12	Women Business Enterprise (WBE)		\$4,542,563	\$162,910	\$4,705,473	6.72%
13	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)		\$0	\$0	\$0	0.00%
14	Disabled Veteran Business Enterprise (DVBE)		\$1,421,979	\$0	\$1,421,979	2.03%
15	Other 8(a)*		\$0	\$0	\$0	0.00%
16	<b>TOTAL WMDVLGBTBE</b>		<b>\$19,184,637</b>	<b>\$222,753</b>	<b>\$19,407,390</b>	<b>27.73%</b>
17	<b>Net Procurement**</b>		<b>\$69,984,840</b>			

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

2021				Products		Services		Total	
				\$	%	\$	%	\$	%
1	Minority Male	Asian Pacific American	Direct	\$1,081,762	1.55%	\$970	0.00%	\$1,082,732	1.55%
2		African American	Direct	\$0	0.00%	\$121,556	0.17%	\$121,556	0.17%
3		Hispanic American	Direct	\$232,243	0.33%	\$11,299,853	16.15%	\$11,532,096	16.48%
4		Native American	Direct	\$0	0.00%	\$0	0.00%	\$0	0.00%
5		Total Minority Male	Direct	\$1,314,005	1.88%	\$11,422,379	16.32%	\$12,736,384	18.20%
6	Minority Female	Asian Pacific American	Direct	\$0	0.00%	\$218,253	0.31%	\$218,253	0.31%
7		African American	Direct	\$0	0.00%	\$0	0.00%	\$0	0.00%
8		Hispanic American	Direct	\$0	0.00%	\$265,457	0.38%	\$265,457	0.38%
9		Native American	Direct	\$0	0.00%	\$0	0.00%	\$0	0.00%
10		Total Minority Female	Direct	\$0	0.00%	\$483,710	0.69%	\$483,710	0.69%
11	Total Minority Business Enterprise (MBE)		Direct	\$1,314,005	1.88%	\$11,906,089	17.01%	\$13,220,094	18.89%
12	Women Business Enterprise (WBE)		Direct	\$1,698,295	2.43%	\$2,844,268	4.06%	\$4,542,563	6.49%
13	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)		Direct	\$0	0.00%	\$0	0.00%	\$0	0.00%
14	Disabled Veteran Business Enterprise (DVBE)		Direct	\$478,553	0.68%	\$943,426	1.35%	\$1,421,979	2.03%
15	Other 8(a)*		Direct	\$0	0.00%	\$0	0.00%	\$0	0.00%
16	TOTAL WMDVLGBTBE		Direct	\$3,490,853	4.99%	\$15,693,784	22.42%	\$19,184,637	27.41%
17	Total Product Procurement			\$8,858,494					
18	Total Service Procurement			\$61,126,346					
19	Net Procurement**			\$69,984,840					
20	Total Number of WMDVLGBTBEs that Received Direct Spend			40					

<b>DIRECT</b>	<b>\$69.9 Mil Net Procurement</b>		
	<b>\$3.5 Mil</b> Total Diverse Product Procurement	<b>\$15.7 Mil</b> Total Diverse Services Procurement	<b>40</b> Total Number Diverse Direct Vendors

# WMDVLGBTBE Subcontractor Procurement by Product and Service Categories

9.1.2

2021				Products		Services		Total	
				\$	%	\$	%	\$	%
1	Minority Male	Asian Pacific American	Sub	\$0	0.00%	\$0	0.00%	\$0	0.00%
2		African American	Sub	\$0	0.00%	\$0	0.00%	\$0	0.00%
3		Hispanic American	Sub	\$0	0.00%	\$59,843	0.09%	\$59,843	0.09%
4		Native American	Sub	\$0	0.00%	\$0	0.00%	\$0	0.00%
5		Total Minority Male	Sub	\$0	0.00%	\$59,843	0.09%	\$59,843	0.09%
6	Minority Female	Asian Pacific American	Sub	\$0	0.00%	\$0	0.00%	\$0	0.00%
7		African American	Sub	\$0	0.00%	\$0	0.00%	\$0	0.00%
8		Hispanic American	Sub	\$0	0.00%	\$0	0.00%	\$0	0.00%
9		Native American	Sub	\$0	0.00%	\$0	0.00%	\$0	0.00%
10		Total Minority Female	Sub	\$0	0.00%	\$0	0.00%	\$0	0.00%
11	Total Minority Business Enterprise (MBE)		Sub	\$0	0.00%	\$59,843	0.09%	\$59,843	0.09%
12	Women Business Enterprise (WBE)		Sub		0.00%	\$162,910	0.23%	\$162,910	0.23%
13	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)		Sub	\$0	0.00%	\$0	0.00%	\$0	0.00%
14	Disabled Veteran Business Enterprise (DVBE)		Sub	\$0	0.00%	\$0	0.00%	\$0	0.00%
15	Other 8(a)*		Sub	\$0	0.00%	\$0	0.00%	\$0	0.00%
16	<b>TOTAL WMDVLGBTBE</b>		<b>Sub</b>	<b>\$0</b>	<b>0.00%</b>	<b>\$222,753</b>	<b>0.32%</b>	<b>\$222,753</b>	<b>0.32%</b>
17	<b>Total Product Procurement</b>							<b>\$8,858,494</b>	
18	<b>Total Service Procurement</b>							<b>\$61,126,346</b>	
19	<b>Net Procurement**</b>							<b>\$69,984,840</b>	

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 Categories

SIC Category	2021										Minority Business Enterprise (MBE)	Women Business Enterprise (WBE)	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)	Disabled Veterans Business Enterprise (DVBE)	Other 8(a)**	Total WMDVLGBTBE
	Asian Pacific American		African American		Hispanic American		Native American									
	Male	Female	Male	Female	Male	Female	Male	Female								
07. Agricultural	\$	\$137,478			\$8,090,613						\$8,228,091	\$910,795				\$9,138,885
	%	0.00%	0.20%	0.00%	0.00%	11.56%	0.00%	0.00%	0.00%		11.76%	1.30%	0.00%	0.00%	0.00%	13.06%
16. Heavy Construction other than Building Construction Contractors	\$				\$2,618,288						\$2,618,288	\$244,820		\$943,426		\$3,806,535
	%	0.00%	0.00%	0.00%	0.00%	3.74%	0.00%	0.00%	0.00%		3.74%	0.35%	0.00%	1.35%	0.00%	5.44%
36. Electronic & Other Electric Equipment	\$	\$857,697			\$232,243						\$1,089,940	\$1,145,764				\$2,235,703
	%	1.23%	0.00%	0.00%	0.00%	0.33%	0.00%	0.00%	0.00%		1.56%	1.64%	0.00%	0.00%	0.00%	3.19%
47. Transportation Services	\$	\$223,574									\$223,574	\$400,638		\$476,629		\$1,100,841
	%	0.32%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		0.32%	0.57%	0.00%	0.68%	0.00%	1.57%
50. Wholesale Trade - Durable Goods	\$	\$491									\$491	\$255,643		\$1,924		\$258,059
	%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		0.00%	0.37%	0.00%	0.00%	0.00%	0.37%
51. Wholesale Trade - No-Durable Goods	\$										\$0					\$0
	%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
73. Business Services	\$	\$970	\$80,775	\$121,556	\$301,662						\$504,963	\$333,107				\$838,070
	%	0.00%	0.12%	0.17%	0.43%	0.00%	0.00%	0.00%	0.00%		0.72%	0.48%	0.00%	0.00%	0.00%	1.20%
87. Engineering & Management Services	\$				\$349,132	\$285,457					\$614,589	\$338,278				\$952,867
	%	0.00%	0.00%	0.00%	0.50%	0.38%	0.00%	0.00%	0.00%		0.88%	0.48%	0.00%	0.00%	0.00%	1.36%
95. Environmental Services	\$										\$0	\$1,076,429				\$1,076,429
	%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		0.00%	1.54%	0.00%	0.00%	0.00%	1.54%
<b>TOTAL</b>	\$	\$1,082,732	\$218,252.65	\$121,556.01	\$-	\$11,591,938.86	\$265,457.00	\$-	\$-	\$13,279,937	\$4,705,473.61	\$-	\$1,421,979	\$-	\$-	\$19,407,390
	%	1.55%	0.31%	0.17%	0.00%	16.56%	0.38%	0.00%	0.00%	18.98%	6.72%	0.00%	2.03%	0.00%	0.00%	27.73%

Total Product Procurement	\$8,858,494
Total Service Procurement	\$61,126,346
<b>Net Procurement**</b>	<b>\$69,984,840</b>

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

Data on Number of Suppliers												
# WMDVLGBTBEs	Revenue Reported to CHS						Utility-Specific 2021 Summary					
	MBE	WBE	LGBTBE	DVBE *	Other 8(a)**	Grand Total	MBE	WBE	LGBTBE	DVBE	Other 8(a)*	Grand Total
Under \$1 million	5	3	0	0	0	8	15	19	0	3	0	37
Under \$5 million	1	6	0	0	0	7	1	1	0	0	0	2
Under \$10 million	2	3	0	0	0	5	1	0	0	0	0	1
Above \$10 million	9	8	0	1	0	18	0	0	0	0	0	0
<b>TOTAL</b>	<b>17</b>	<b>20</b>	<b>0</b>	<b>3</b>	<b>0</b>	<b>40</b>	<b>17</b>	<b>20</b>	<b>0</b>	<b>3</b>	<b>0</b>	<b>40</b>

\* Only 1 of the DVBE suppliers has recorded revenue due to it also being recorded as an alternative DBE category

Revenue and Payment Data												
WMDVLGBTBE \$M	Revenue Reported to CHS						Utility-Specific 2021 Summary					
	MBE	WBE	LGBTBE	DVBE	Other 8(a)*	Grand Total	MBE	WBE	LGBTBE	DVBE	Other 8(a)*	Grand Total
Under \$1 million	\$ 1,882,088	\$ 1,864,762	\$ -	\$ -		\$ 3,746,850	\$ 2,571,035	\$ 3,401,567	\$ -	\$ 1,421,979	\$ -	\$ 7,394,582
Under \$5 million	\$ 3,734,461	\$ 17,174,552	\$ -	\$ -		\$ 20,909,013	\$ 2,618,288	\$ 1,140,996	\$ -	\$ -	\$ -	\$ 3,759,284
Under \$10 million	\$ 17,965,006	\$ 23,137,449	\$ -	\$ -		\$ 41,102,455	\$ 8,030,770	\$ -	\$ -	\$ -	\$ -	\$ 8,030,770
Above \$10 million	\$ 858,703,713	\$ 1,282,057,973	\$ -	\$ 173,777,396		\$ 2,314,539,082	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>TOTAL</b>	<b>\$ 882,285,268</b>	<b>\$ 1,324,234,736</b>	<b>\$ -</b>	<b>\$ 173,777,396</b>	<b>\$ -</b>	<b>\$ 2,380,297,400</b>	<b>\$ 13,220,094</b>	<b>\$ 4,542,563</b>	<b>\$ -</b>	<b>\$ 1,421,979</b>	<b>\$ -</b>	<b>\$ 19,184,637</b>

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



## Number of WMDVLGBTBE Suppliers with California Majority

9.1.2

Thirty of the 40 Diverse Business Enterprises (DBE) utilized by Liberty are headquartered in California, accounting for \$17.2 million of Liberty's spend in 2021, which was just under 90% of Liberty's spend with diverse businesses.

Six more suppliers are based in Nevada, accounting for another \$743,000 of spend. Of those six suppliers, three were based in Reno, NV, which is geographically close to Liberty's operations.

The remaining \$1.2 million of diverse spend was split between four different suppliers (one each from Texas, Washington, Virginia, and Pennsylvania).



## WMDVLGBTBE Program Expenses

9.1.3

Expense Category	2021
Wages	\$30,567
Other Employee Expenses	\$983
Program Expenses	
Reporting Expenses	\$5,049
Training	
Consultants	
Other (Clearinghouse)	\$2,049
<b>TOTAL</b>	<b>\$38,648</b>

## Progress in Meeting or Exceeding Set Goals

## 9.1.4

Liberty achieved diverse business spend of 27.73% in 2021, increasing the spend with diverse suppliers by over \$4 million. The overall spend increased substantially due to wildfire mitigation, system hardening, and line replacements, so the percentage did drop from 2020, despite the increase in spend. This percentage decrease can partially be attributed to the major increase in construction where local diverse contractors are not readily available, and the subcontracting program is still in its infancy. As Procurement works with the other departments on improving forecasting of future projects, Liberty anticipates that enough work could be packaged to offer opportunities to non-local construction companies to better amortize their mobilization costs, making them more cost-competitive than across single or smaller projects.

Liberty's progress in its diversity program is demonstrated with the increase in supplier pool and the continuing relationships Liberty continues to build through this diversity program, combined with the increase in spend.

In 2021, Liberty exceeded 15% for MBE, 5% for WBE, and 1.5% for DVBEs for the first time.

With LGBT being formally added in 2022 as a goal, Liberty will continue to work to find qualified LGBT+ suppliers and provide opportunities to win Liberty's business.

	2017	2018	2019	2020	2021
<b>Total Procurement \$</b>	\$ 26,644,711	\$ 28,950,545	\$ 25,373,185	\$ 41,829,285	\$ 69,984,840
<b>% change</b>	1%	9%	-12%	65%	67%
<b>Total WMDVLGBTBE \$</b>	\$ 4,990,216	\$ 5,520,084	\$ 6,535,190	\$ 15,301,389	\$ 19,407,390
<b>% Spend</b>	18.73%	19.07%	25.76%	36.58%	27.73%
<b>% Change</b>	-38.36%	10.62%	18.39%	134.14%	26.83%

## WMDVLGBTBE Results and Goals

## 9.1.4

Category	2021 Results	2021 Goals
Minority Men	18.28%	12.00%
Minority Women	0.69%	4.00%
Minority Business Enterprise (MBE)	18.98%	16.00%
Women Business Enterprise (WBE)	6.72%	6.00%
Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)	0.00%	1.00%
Disabled Veteran Business (DVBE)	2.03%	1.50%
<b>TOTAL WMDVLGBTBE</b>	<b>27.73%</b>	<b>24.50%</b>

% - PERCENTAGE OF NET PROCUREMENT

## Prime Contractors Utilization of WMDVLGBTBE Subcontractors

9.1.5

In 2021, Liberty recorded 0.32% and \$223,000 of diverse business subcontracting.

Subcontracting is a continuous area of improvement for Liberty, with this being the first year in the last four years during which Liberty's prime contractors recorded subcontract spend. Although the prime contractors engaged by Liberty engaged diverse subcontractors certified by the CPUC, the prime contractors also engaged other potentially diverse subcontractors in the execution of their work.

This is partly due to Liberty's geographical location closer to larger population centers in Northern Nevada, where supplier diversity programs are not necessarily as well developed.

In 2022, Liberty will continue to educate prime contractors through communication and reinforcement in RFP and contract documentation and identify potential suppliers for Supplier Clearinghouse certification that may not have been certified in 2021.

## Summary of Prime Contractor Utilization of WMDVLGBTBE Subcontractors

9.1.5

	Minority Male	Minority Female	Minority Business Enterprise (MBE)	Women Business Enterprise (WBE)	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)	Disabled Veterans Business Enterprise (DVBE)	Other 8(a)*	Total WMDVLGBTBE
<b>Direct \$</b>	\$12,736,384	\$483,710	\$13,220,094	\$4,542,563	\$0	\$1,421,979	\$0	\$19,184,637
<b>Subcontracting \$</b>	\$59,843	\$0	\$59,843	\$162,910	\$0	\$0	\$0	\$222,753
<b>Total \$</b>	<b>\$12,796,228</b>	<b>\$483,710</b>	<b>\$13,279,937</b>	<b>\$4,705,473</b>	<b>\$0</b>	<b>\$1,421,979</b>	<b>\$0</b>	<b>\$19,407,390</b>
<b>Direct %</b>	18.20%	0.69%	18.89%	6.49%	0.00%	2.03%	0.00%	27.41%
<b>Subcontracting %</b>	0.09%	0.00%	0.09%	0.23%	0.00%	0.00%	0.00%	0.32%
<b>Total %</b>	<b>18.28%</b>	<b>0.69%</b>	<b>18.98%</b>	<b>6.72%</b>	<b>0.00%</b>	<b>2.03%</b>	<b>0.00%</b>	<b>27.73%</b>
<b>Net Procurement**</b>	<b>\$69,984,840</b>							

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

% - PERCENTAGE OF NET PROCUREMENT

Direct - DIRECT PROCUREMENT

Sub - SUBCONTRACTOR PROCUREMENT



# 2022 PLAN

## WMDVLGBTBE Annual Short, Mid, and Long-Term Goals

10.1.1

Category	2021 Results	2021 Goals	2022 Goals	2023 Goals	2024 Goals	2025 Goals
Minority Men	18.28%	12.00%	12.00%	12.00%	12.00%	12.00%
Minority Women	0.69%	4.00%	4.00%	4.00%	4.00%	4.00%
Minority Business Enterprise (MBE)	18.98%	16.00%	16.00%	16.00%	16.00%	16.00%
Women Business Enterprise (WBE)	6.72%	6.00%	6.00%	6.00%	6.00%	6.00%
Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)	0.00%	1.00%	1.00%	1.00%	1.00%	1.00%
Disabled Veteran Business (DVBE)	2.03%	1.50%	1.50%	1.50%	1.50%	1.50%
<b>TOTAL WMDVLGBTBE</b>	<b>27.73%</b>	<b>24.50%</b>	<b>24.50%</b>	<b>24.50%</b>	<b>24.50%</b>	<b>24.50%</b>

% - PERCENTAGE OF NET PROCUREMENT

## WMDVLGBTBE Planned Program Activities for the Next Calendar Year

10.1.2

Internally, Liberty plans to continue to build on its current procurement processes and approach.

Improvements will be put in place for the following:

1. Contractual templates for requirement of Supplier Diversity support
2. Subcontract spend reporting template updates and incorporation into contracts
3. Subcontract spend tracking – add more structure and KPIs to track spend
4. RFP planning improvements
  - a. Earlier assessment and qualification of potential suppliers (including diverse businesses)
  - b. Reinforcement of Supplier Diversity goals and expected support through the RFP process
5. Improved data tracking of supplier diversity performance throughout the year

In addition, continued education of internal stakeholders will be put in place as follows:

1. “Brown Bag” events to provide an overview to all staff
2. Quarterly review with Liberty Management Team of the Supplier Diversity Program including
  - a. Current spend and trend status
  - b. Upcoming external events needing support
  - c. Major projects/opportunities to bid and commitment to provide opportunities to diverse suppliers

## WMDVLGBTBE Planned Program Activities for the Next Calendar Year (cont.)

10.1.2

With changes in the organization, it is likely that a “supplier diversity champion” approach will be implemented to recruit and encourage non-procurement stakeholders to engage and support the overall program through participation in events.

Externally, Liberty will continue to support and drive activities:

1. Collaborate with the Joint Utilities and engage with peers on driving supplier diversity policy and support
2. Continue to support the CPUC Supplier Expos and Annual En Banc
3. Participate in other relevant exhibitions, expos, and events where Liberty can engage with qualified diverse suppliers
4. Outreach to potential suppliers to discuss their capabilities with relevant internal business stakeholders
5. Improved liaison, communication, and collaboration with Community Business Organizations (CBOs) and trade associations that provide access to qualified diverse businesses that meet Liberty’s needs

## Plans for Recruiting WMDVLGBTBE Suppliers in Low Utilization Areas

10.1.3

As per the activities outlined in the previous section, Liberty will look to engage with CBOs and qualified diverse suppliers in the minority women, Native American, and LGBTQ communities specifically, but continue to work to improve results in the other areas.

Once potential qualified suppliers from those areas have been identified, Liberty will engage them for RFPs when suitable bids arise to provide the diverse suppliers with opportunities to win Liberty’s business.

## Plans for Recruiting WMDVLGBTBE Suppliers Where Unavailable

10.1.4

Liberty will continue to evaluate diverse suppliers or opportunities to help suppliers get certified where possible in those areas where Liberty sees challenges to recruiting qualified diverse suppliers.

Liberty will continually communicate with new suppliers to see if opportunities for certification are possible. From the fledgling subcontractor program in 2021, there are two or three suppliers who have been identified as potentially diverse but are not certified, so Liberty will follow up on these opportunities.



## Plans for Encouraging Prime Contractors to Subcontract WMDVLGBTBE

10.1.5

Liberty will build upon the platform established in 2021 with its first reporting of subcontract spend in over four years.

Continued discussions and meeting with prime contractors as well as increased formalization of Liberty's requirements in the RFP and contracting process will help drive improvement in this area. The following three activities will underpin this approach:

1. Contractual templates for requirement of Supplier Diversity support
2. Subcontract spend reporting template updates and incorporation into contracts
3. Subcontract spend tracking – add more structure and KPIs to the internal buyers to track spend

## Plans for Complying with WMDVLGBTBE Program Guidelines

10.1.6

Liberty has successfully met the CPUC goal for the past three years and continues to develop the program and opportunities provided to the diverse supplier community through improved utilization of its procurement processes and approach.

In 2022, Liberty will continue to develop that work but will focus more on internal education and external outreach to take the program to the next level. Liberty anticipates that this next step in the evolution of Liberty's Supplier Diversity Program will provide improved opportunities for diverse suppliers to engage with Liberty and win work that is being bid out.

Liberty will continue to strive to meet and exceed the CPUC goals as defined in General Order 156.



**Liberty**<sup>TM</sup>

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