



Supplier Diversity 2020 Annual Report and 2021 Annual Plan

Email: Kathy@CalChoice.org

Website: CaliforniaChoiceEnergyAuthority.com

Tel: 888-639-2411

44933 Fern Avenue
Lancaster, CA 93534

CalChoice

TABLE OF CONTENTS

INTRODUCTION.....	3
DESCRIPTION OF THE CALCHOICE CCAS.....	3
INTRODUCTION TO REPORT AND PLAN	4
2020 ANNUAL REPORT	5
9.1.1 DESCRIPTION OF WMDVLGBTBE ACTIVITIES IN 2020	5
9.1.2 SUMMARY OF WMDVLGBTBE ANNUAL PROCUREMENT	7
9.1.2 WMDVLGBTBE ANNUAL RESULTS BY ETHNICITY	8
9.1.2 WMDVLGBTBE DIRECT PROCUREMENT BY PRODUCT AND SERVICE CATEGORIES.....	9
9.1.2 WMDVLGBTBE SUBCONTRACTOR PROCUREMENT BY PRODUCT AND SERVICE CATEGORIES	10
9.1.2 WMDVLGBTBE PROCUREMENT BY STANDARD INDUSTRIAL CATEGORIES.....	11
9.1.2 WMDVLGBTBE SUPPLIERS AND REVENUE REPORTED TO THE CLEARINGHOUSE	11
9.1.2 DESCRIPTION OF WMDVLGBTBE WITH CA MAJORITY WORKFORCE.....	13
9.1.3 WMDVLGBTBE PROGRAM EXPENSES.....	13
9.1.5 DESCRIPTION OF PRIME CONTRACTOR UTILIZATION OF WMDVLGBTBE SUBCONTRACTORS.....	13
9.1.5 SUMMARY OF PRIME CONTRACTOR UTILIZATION OF WMDVLGBTBE SUBCONTRACTORS.....	14
9.1.6 A LIST OF WMDVLGBTBE COMPLAINTS RECEIVED AND CURRENT STATUS.....	15
9.1.11 WMDVLGBTBE FUEL PROCUREMENT	15
2021 ANNUAL PLAN	16
10.1.2 DESCRIPTION OF WMDVLGBTBE PLANNED PROGRAM ACTIVITIES FOR THE NEXT CALENDAR YEAR.....	16
SECTIONS NOT APPLICABLE TO CCAS.....	18
9.1.4 PROGRESS IN MEETING OR EXCEEDING SET GOALS	18
9.1.7 DESCRIPTION OF EFFORTS TO RECRUIT WMDVLGBTBE SUPPLIERS IN LOW UTILIZATION CATEGORIES	18
10.1.1 WMDVLGBTBE ANNUAL SHORT, MID, AND LONG TERM GOALS BY PRODUCE AND SERVICE CATEGORY	18
10.1.3 PLANS FOR RECRUITING WMDVLGBTBE SUPPLIERS IN LOW UTILIZATION AREAS	18
10.1.4 PLANS FOR RECRUITING WMDVLGBTBE SUPPLIERS WHERE UNAVAILABLE	18
10.1.5 PLANS FOR ENCOURAGING PRIME CONTRACTORS TO SUBCONTRACT WMDVLGBTBE SUPPLIERS.....	18
10.1.6 PLANS FOR COMPLYING WITH WMDVLGBTBE PROGRAM GUIDELINES	18
CALCHOICE MEMBER CITIES	19

INTRODUCTION

Description of the CalChoice CCAs

The California Choice Energy Authority (“CalChoice”) is a California Joint Powers Authority formed in 2012 by the City of Lancaster and the City of San Jacinto. CalChoice’s current membership includes the following cities, each of which operates its own Community Choice Aggregation (“CCA”) program:

- City of Lancaster (Lancaster Choice Energy);
- City of Pico Rivera (Pico Rivera Innovative Municipal Energy);
- City of San Jacinto (San Jacinto Power);
- City of Rancho Mirage (Rancho Mirage Energy Authority);
- City of Apple Valley (Apple Valley Choice Energy);
- City of Baldwin Park (Baldwin Park Resident Owned Utility District); and
- City of Pomona (Pomona Choice Energy)

CalChoice is a pioneering model for CCA programs. Each CalChoice member is a City government that operates its own independent CCA program and sets its own rates. However, through CalChoice, these CCAs are able to pool their resources and share a number of critical functions, including regulatory compliance and resource procurement. By joining together, CalChoice is able to cut costs for each City through the benefits of economy of scale. As more cities are added, each City’s share of the fixed costs goes down. This also allows smaller cities to start a CCA who might have been too small to successfully operate one on their own.

Because CalChoice is the entity that conducts the majority of its member CCAs’ resource procurement, and these resource procurements and contracting functions are performed on a collective basis, CalChoice is submitting this Supplier Diversity 2020 Report and 2021 Annual Plan on behalf of its members.

Introduction to Report and Plan

CalChoice and its member CCAs share the California Public Utilities Commission's ("Commission") commitment to the important goal of encouraging the development of small, local, and diverse business enterprises, including those owned by women, minorities, disabled veterans, and members of the LGBTQ community ("WMDVLGBTBE"). CalChoice recognizes the need to take steps to encourage greater WMDVLGBTBE access to, and participation in, its procurement activities.

The requirement that CCAs submit a Supplier Diversity Report and Plan is a new one, introduced into law in Senate Bill ("SB") 255 (Bradford 2019), and the Commission has not yet adopted formal requirements regarding the content of the CCAs' Reports and Plans. The content of CalChoice's Report and Plan reflects the newness of this requirement. As set forth below, while CalChoice and each of its members are fully committed to achieving the important goals of SB 255, many of CalChoice's efforts in this area are still in an exploratory stage.

These exploratory efforts, and future program design and implementation, are somewhat hindered by California Proposition 209, which prohibits CCAs from giving preferential treatment to bidders based on race, sex, color, ethnicity, or national origin. To comply with Proposition 209, CalChoice does not collect this information from vendors prior to selecting bids, and CalChoice does not consider otherwise available information regarding a vendor's WMDVLGBTBE status (including publicly available information collected by the Commission) in selecting and awarding contracts.

CalChoice looks forward to engaging with the Commission as it develops formal requirements for CCAs' Reports and Plans. CalChoice asks that these requirements recognize CCAs' status as programs of Local Government Agencies, and account for the limitations that Proposition 209 imposes on CCAs.



Jason Caudle
Executive Director
March 1, 2021

2020 ANNUAL REPORT

9.1.1 Description of WMDVLGBTBE Activities In 2020

Internal Actions In 2020

CalChoice does not have an official Supplier Diversity Engagement Program, but rather relied on compliance with its member Cities' polices and local vendor preferences in 2020. CalChoice did engage in procurement for non-energy products and services that included outreach to, and inclusion of, local small businesses, especially those listed in member service areas. Analysis of CalChoice's supplier list show that 37% of CalChoice's 2020 non-energy procurement efforts were from local in-state companies, and 42% were from other California companies.

CalChoice Supplier Summary		
Category	Total	Percent
Local In-State	7	37%
Other In-State*	8	42%
Out of State	4	21%
Out of US	0	0%
Total	19	

*In-State includes business in the neighboring counties of Los Angeles County and Orange County which could be classified as regional.

i. **Member City Policies**

CalChoice's membership includes cities with a diverse range of cultural, ethnic, and socioeconomic makeups. According to the US Census Bureau, its member cities collectively have a population of approximately 590,738. The demographics reveal a White population of approximately 58.4%. The ethnic distribution includes 16.5% Hispanic, 12.3% Black, 6.6% Asian, 4.6% Multi-race, .9% Native American or Alaskan Native, and 0.2% Native Hawaiian or Other Pacific Islander.

Many of CalChoice's member cities have internal policies that promote the interests of WMDVLGBTBE communities and individuals. These internal policies extend to the CCA programs

operated by these cities. For instance, Rancho Mirage continues to promote inclusiveness and as a member of the Human Rights Campaign Foundation, recently participated in the Municipal Equality Index program. The program examines how inclusive the City's municipal laws, policies, and services are of LGBTQ people who live and work there. Cities are rated based on non-discrimination laws, the municipality as an employer, municipal services, law enforcement and the city leadership's public position on equality. Rancho Mirage received a score of 100 on their 2020 Municipal Equality Index Scorecard, the highest score available.

ii. Bilingual and Multicultural Staff

Most of CalChoice's member cities have bilingual and multicultural staff members and some offer trainings and workshops in multiple languages. Many provide a vast array of services through partnership and sponsorship of events with local nonprofits and local Chambers of Commerce.

iii. Trainings and Workshops

Some member cities offer business trainings, workshops and services to benefit the diverse business community, including those considered disadvantaged. Some training topics offered have been social media, marketing, tax code and employee benefits.

External Actions In 2020

i. External Policy Advocacy

In 2020 CalChoice, on behalf of its member CCAs, engaged in advocacy at the Commission and elsewhere that promoted the interests of WMDVLGBTs, as well as WMDVLGBT individuals and communities. For instance, as a member of a joint CCA group in the Commission's De-Energization Rulemaking, Rulemaking18-12-005, CalChoice advocated for a range of modifications to the Commission's De-Energization guidelines that would reduce the health and safety risk that Public Safety Power Shutoff outages pose to vulnerable groups, including access and functional needs populations and Medical Baseline customers. In addition, CalChoice has submitted a joint advice letter to the Commission supporting the establishment and implementation of the Disadvantaged Communities Green Tariff program which will provide

participants a 20% discount on their total residential rates compared to their otherwise applicable rates.

ii. Member Programs' Language Accessibility Efforts

While Southern California Edison Company is the primary billing agent for each CalChoice member CCA, each CCA does maintain a customer service help line, and can be contacted via telephone or website request. Each member CCA offers multi-lingual customer service.



9.1.2 Summary of WMDVLGBTBE Annual Procurement

CalChoice has noted that limited procurement opportunities within its geographical area coupled with restrictions of Proposition 209 creates challenges and barriers to procurement diversity. CalChoice consulted the Commission's Supplier Clearinghouse which serves the private sector entities, but it does not support public agency local small business or micro business initiatives. As part of the General Order ("GO") 156 reporting exercise, CalChoice searched both the Supplier Clearinghouse and the California Department of General Services ("DGS") Small Business, Micro Business and Disabled Veterans databases for each vendor used during 2020. The DGS Small Business, Micro Business and Disabled Veterans databases are designed for use by public agencies consistent with Proposition 209. CalChoice completed the GO 156 template with the Clearinghouse information, and then prepared additional tables, with the vendors found in the DGS certified database, which are located within the report and below the tables in the template.

9.1.2 WMDVLGBTBE Annual Results by Ethnicity

			2020 of Report			
			Direct	Sub	Total \$	%
1	Minority Male	Asian Pacific American	\$0	\$0	\$0	0.00%
2		African American	\$0	\$0	\$0	0.00%
3		Hispanic American	\$0	\$0	\$0	0.00%
4		Native American	\$0	\$0	\$0	0.00%
5		Total Minority Male	\$0	\$0	\$0	0.00%
6	Minority Female	Asian Pacific American	\$0	\$0	\$0	0.00%
7		African American	\$0	\$0	\$0	0.00%
8		Hispanic American	\$0	\$0	\$0	0.00%
9		Native American	\$0	\$0	\$0	0.00%
10		Total Minority Female	\$0	\$0	\$0	0.00%
11	Total Minority Business Enterprise (MBE)		\$0	\$0	\$0	0.00%
12	Women Business Enterprise (WBE)		\$0	\$0	\$0	0.00%
13	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)		\$0	\$0	\$0	0.00%
14	Disabled Veteran Business Enterprise (DVBE)		\$0	\$0	\$0	0.00%
15	Other 8(a)* ¹		\$0	\$0	\$0	0.00%
16	TOTAL WMDVLGBTBE		\$0	\$0	\$0	0.00%
17	Net Procurement**		\$0			

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

¹ For line 15, CalChoice did contract with multiple, local, small businesses (SB) and micro businesses (MB) certified by the State of California, Department of General Services (DGS).

2020 of Report for CA Certified Small Businesses Percent of All Purchases (Including Power)					
		Direct	Sub	Total \$	%
1	Other 8(a)* ¹	\$0	\$0	\$0	0.00%
2	TOTAL WMDVLGBTBE	\$0	\$0	\$0	0.00%

2020 of Report for CA Certified Small Businesses Percent of Non-Power Purchases					
		Direct	Sub	Total \$	%
1	Other 8(a)* ¹	\$34468	\$0	\$34468	0.35%
2	TOTAL WMDVLGBTBE	\$34468	\$0	\$34468	0.35%

9.1.2 WMDVLGBTBE Direct Procurement by Product and Service Categories

			Products		Services		Total		
			\$	%	\$	%	\$	%	
1	Minority Male	Asian Pacific American	Direct	\$0	0.00%	\$0	0.00%	\$0	0.00%
2		African American	Direct	\$0	0.00%	\$0	0.00%	\$0	0.00%
3		Hispanic American	Direct	\$0	0.00%	\$0	0.00%	\$0	0.00%
4		Native American	Direct	\$0	0.00%	\$0	0.00%	\$0	0.00%
5		Total Minority Male	Direct	\$0	0.00%	\$0	0.00%	\$0	0.00%
6	Minority Female	Asian Pacific American	Direct	\$0	0.00%	\$0	0.00%	\$0	0.00%
7		African American	Direct	\$0	0.00%	\$0	0.00%	\$0	0.00%
8		Hispanic American	Direct	\$0	0.00%	\$0	0.00%	\$0	0.00%
9		Native American	Direct	\$0	0.00%	\$0	0.00%	\$0	0.00%
10		Total Minority Female	Direct	\$0	0.00%	\$0	0.00%	\$0	0.00%
11	Total Minority Business Enterprise (MBE)		Direct	\$0	0.00%	\$0	0.00%	\$0	0.00%
12	Women Business Enterprise (WBE)		Direct	\$0	0.00%	\$0	0.00%	\$0	0.00%
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	\$0	0.00%	\$0	0.00%	\$0	0.00%
15	Other 8(a)* ¹		Direct	\$0	0.00%	\$0	0.00%	\$0	0.00%
16	TOTAL WMDVLGBTBE		Direct	\$0	0.00%	\$0	0.00%	\$0	0.00%
17	Total Product Procurement	\$0							
18	Total Service Procurement	\$0							
19	Net Procurement**	\$0							
20	Total Number of WMDVLGBTBEs that Received Direct Spend	0							

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

¹ For line 15, CalChoice did contract with multiple, local, small businesses (SB) and micro businesses (MB) certified by the State of California, Department of General Services (DGS).

Direct Procurement Percentages by Product and Service Category (Including Power Procurement)

		Products		Services		Total		
1	Other 8(a)* ¹	Direct	\$0	0%	\$0	0%	\$0	0%
2	TOTAL WMDVLGBTBE	Direct	\$0	0%	\$0	0%	\$0	0%

Direct Procurement Percentages by Product and Service Category (Non-Power Procurement)

		Products		Services		Total		
1	Other 8(a)* ¹	Direct	\$0	0%	\$34468	0.81%	\$34468	0.81%
2	TOTAL WMDVLGBTBE	Direct	\$0	0%	\$0	0.00%	\$0	0.00%

9.1.2 WMDVLGBTBE Subcontractor Procurement by Product and Service Categories

				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%	\$0	0.00%	\$0	0.00%
4		Native American	Sub	\$0	0.00%	\$0	0.00%	\$0	0.00%
5		Total Minority Male	Sub	\$0	0.00%	\$0	0.00%	\$0	0.00%
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%	\$0	0.00%	\$0	0.00%
12	Women Business Enterprise (WBE)		Sub	\$0	0.00%	\$0	0.00%	\$0	0.00%
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	TOTAL WMDVLGBTBE¹		Sub	\$0	0.00%	\$0	0.00%	\$0	0.00%
17	Total Product Procurement							\$0	
18	Total Service Procurement							\$0	
19	Net Procurement**							\$0	

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

9.1.2 WMDVLGBTBE Procurement by Standard Industrial Categories

SIC Category	Asian Pacific American		African American		Hispanic American		Native American		MBE	WBE	LGBTBE	DVBE	Other 8(a)**	Total WMDVLGBTBE	Total Dollars	
	Male	Female	Male	Female	Male	Female	Male	Female								
Marketing Services ¹	\$ \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$500	\$0	\$0	0.00%	\$0	\$500	
	% 0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.00%	
MGMT Business Prof & Admin Services - Industrial management - Lobbying srvc ¹	\$ \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$33,968	\$0	\$33,968	
	% 0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.00%	
Category 3	\$ \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
	% 0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.00%	
Category 4	\$ \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
	% 0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.00%	
Category 5	\$ \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
	% 0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.00%	
Category 6	\$ \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
	% 0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.00%	
Category 7	\$ \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
	% 0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.00%	
Category 8	\$ \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
	% 0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.00%	
Category 9	\$ \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
	% 0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.00%	
Category 10	\$ \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
	% 0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.00%	
TOTAL	\$ \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0.00%	\$0	\$0
	% 0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.00%	

Total Product Procurement	\$0
Total Service Procurement	\$0

Net Procurement***	\$0
--------------------	-----

NOTE: FIRMS WITH MULT 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

As previously noted, limitations of the geographic area and the Proposition 209 restrictions create procurement diversity challenges. CalChoice, as part of the GO 156 reporting exercise, searched both the Supplier Clearinghouse and the California DGS Small Business, Micro Business and Disabled Veterans databases, *which are designed for use by public agencies consistent with Proposition 209*. CalChoice completed the GO 156 template table for procurement by Standard Industrial Categories with the Clearinghouse information. CalChoice then prepared an additional table, below, using the information on the certified vendors located in the DGS certified database to illustrate the success of local procurement strategies.

Procurement by Standard Industrial Categories Percentage for All Purchases (Including Power) ¹															
SIC Category	Asian Pacific American		African American		Hispanic American		Native American		MBE	WBE	LGBTBE	DVBE	Other 8(a)**	Total WMDVLGBTBE	Total Dollars
	Male	Female	Male	Female	Male	Female	Male	Female							
Marketing Services ¹	\$ \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$ -	\$ -	\$ -
	% 0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.00%	0.00%
MGMT Business Prof & Admin Services - Industrial management - Lobbying srvc ¹	\$ \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$ -	\$ -	\$ -
	% 0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.00%	0.00%
Total Product Procurement														\$0.00	
Total Service Procurement														\$0.00	
Net Procurement***														\$0.00	

Procurement by Standard Industrial Categories Percentage for Non Power Purchases ¹															
SIC Category	Asian Pacific American		African American		Hispanic American		Native American		MBE	WBE	LGBTBE	DVBE	Other 8(a)**	Total WMDVLGBTBE	Total Dollars
	Male	Female	Male	Female	Male	Female	Male	Female							
Marketing Services ¹	\$ \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$ 500.00	\$ -	\$ 500.00
	% 0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.00%	0.01%
MGMT Business Prof & Admin Services - Industrial management - Lobbying srvc ¹	\$ \$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$ 33,968.00	\$ -	\$ 33,968.00
	% 0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.00%	0.80%
Total Product Procurement														\$0.00	
Total Service Procurement														\$34,468.00	
Net Procurement***														\$34,468.00	

¹ CalChoice did use suppliers registered with the Department of General Services small business/micro business certification program.

9.1.2 WMDVLGBTBE Suppliers and Revenue Reported to the Clearinghouse

Data on Number of Suppliers												
# WMDVLGBTBEs	Revenue Reported to CHS						Utility-Specific 2020 Summary					
	MBE	WBE	LGBTBE	DVBE	Other 8(a)*	Grand Total	MBE	WBE	LGBTBE	DVBE	Other 8(a)*	Grand Total
Under \$1 million	0											
Under \$5 million												
Under \$10 million												
Above \$10 million												
TOTAL												

Revenue and Payment Data												
WMDVLGBTBE \$M	Revenue Reported to CHS						Utility-Specific 2020 Summary					
	MBE	WBE	LGBTBE	DVBE	Other 8(a)*	Grand Total	MBE	WBE	LGBTBE	DVBE	Other 8(a)*	Grand Total
Under \$1 million												
Under \$5 million												
Under \$10 million												
Above \$10 million												
TOTAL												

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

9.1.2 Description of WMDVLGBTBE with CA Majority Workforce

CalChoice acknowledges that few of its vendors fit within the Supplier Clearinghouse requirements. However, CalChoice notes that for the businesses with DGS Small Business and Micro Business certifications, 100% of their workforces are in California. CalChoice is committed to local procurement with 37% of its vendors being local (located within the boundaries of member counties), and an additional 42% of the vendors with which CalChoice procures having primary office locations in California.

9.1.3 WMDVLGBTBE Program Expenses

Expense Category	Year (Actual)
Wages	\$0
Other Employee Expenses	\$0
Program Expenses	\$0
Reporting Expenses	\$0
Training	\$0
Consultants	\$0
Other	\$0
TOTAL	\$0

9.1.5 Description of Prime Contractor Utilization of WMDVLGBTBE Subcontractors

CalChoice does not have information to report for this 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 Enterprise (DVBE)	Other 8(a)*	TOTAL WMDV LGBTBE
Direct \$	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Subcontracting \$	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total \$	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Direct %	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Subcontracting %	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Total %	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%

Net Procurement**	\$0
--------------------------	------------

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

Data on Number of Suppliers ¹											
Revenue Reported to CHS						Utility-Specific 2020 Summary					
MBE	WBE	LGBTBE	DVBE	Other 8(a)*	Grand Total	MBE	WBE	LGBTBE	DVBE	Other 8(a)*	Grand Total

¹ California Choice Energy Authority does not have the transparency necessary to provide information for this chart.

9.1.6 A List of WMDVLGBTBE Complaints Received and Current Status

CalChoice and its member CCAs have received no WMDVLGBTBE complaints in 2020.

9.1.11 WMDVLGBTBE Fuel Procurement

CalChoice interprets this section to apply to utilities that elect to report fuel procurement separately. The utilities must provide an explanation of how market conditions affect ability to meet or exceed goals for fuel. While this section is technically applicable to CCAs, it applies to liquid fuels (both for gen and retail), and CalChoice has no purchases to report for this section.

2021 ANNUAL PLAN

10.1.2 Description of WMDVLGBTBE Planned Program Activities for the Next Calendar Year

The Goal of CalChoice's 2021 WMDVLGBTBE Plan is to meet the requirements of SB 255 by increasing procurement from small, local, and diverse business enterprises, while also remaining in compliance with CalChoice members' other legal obligations, including the Proposition 209 prohibition against giving preferential treatment to bidders based on race, sex, color, or national origin.

Balancing the requirements of SB 255 and Proposition 209 presents a number of challenges that require careful consideration. As such, CalChoice has elected to take a careful, deliberative approach to implementing 2021 program activities. At a high level, this approach will focus on identifying steps that can be implemented in the short-term to encourage WMDVLGBTBE participation in CalChoice solicitations. Options that CalChoice may consider include:

1. Ensuring that all WMDVLGBTBE vendors identified by the Commission are included in CalChoice's appropriate solicitation distribution lists;
2. Including specific language in solicitations encouraging bids from WMDVLGBTBE vendors;
3. Improving CalChoice's post-contract collection of WMDVLGBTBE vendor data;
4. Improving CalChoice's post-contract collection of WMDVLGBTBE data for subcontractors used by vendors;
5. Providing successful vendors with surveys solicited consistent with Proposition 209 for the purpose of gathering data as required by GO 156; and
6. Expanding notification opportunities to bid for products and services procured by CalChoice.

CalChoice anticipates that the specifics of its 2021 efforts and long-term plans will in significant part be determined by the timing and substance of the Commission's adoption of formal requirements for CCAs and advice from CalChoice's counsel regarding whether various options comply with Proposition 209.

CalChoice plans on assessing these steps to improve WMDVLGBTE participation in its solicitations in all procurement categories, including Renewable Energy, Energy Storage, Smart Grid Investments, and all other procurement categories.

SECTIONS NOT APPLICABLE TO CCAS

9.1.4	Progress in Meeting or Exceeding Set Goals
9.1.7	Description of Efforts to Recruit WMDVLGBTBE Suppliers in Low Utilization Categories
10.1.1	WMDVLGBTBE Annual Short, Mid, and Long Term Goals by Produce and Service Category
10.1.3	Plans for Recruiting WMDVLGBTBE Suppliers in Low Utilization Areas
10.1.4	Plans for Recruiting WMDVLGBTBE Suppliers Where Unavailable
10.1.5	Plans for Encouraging Prime Contractors to Subcontract WMDVLGBTBE Suppliers
10.1.6	Plans for Complying with WMDVLGBTBE Program Guidelines

Current Operational Members



Launched April 2017/
Joined December 2018



May 2015



April 2018



September 2017



May 2018



October 2020



October 2020

