



## Supplier Diversity 2021 Annual Report and 2022 Annual Plan

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# TABLE OF CONTENTS

INTRODUCTION	3
Description of the CalChoice CCAs _____	3
Introduction to Report and Plan _____	4
2021 ANNUAL REPORT	5
9.1.1 Description of WMDVLGBTBE Program Activities in 2021 _____	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 Number of WMDVLGBTBE Suppliers and Revenue Reported to the Clearinghouse	12
9.1.2 Description of Number of WMDVLGBTBE Suppliers with California 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
2022 ANNUAL PLAN	16
10.1.2 Description of WMDVLGBTBE Internal and External Activities for 2022 _____	16
SECTIONS NOT APPLICABLE TO CCAs	18
9.1.4 Progress in Meeting or Exceeding Goals _____	18
9.1.7 Description of Efforts to Recruit WMDVLGBTBE Suppliers in Low Utilization Categories	18
10.1.1 WMDVLGBTBE Annual Short, Mid, Long Term Goals 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)<sup>1</sup>
- City of Pomona (Pomona Choice Energy)
- City of Santa Barbara (Santa Barbara Clean 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 Community Choice Aggregators are able to pool their resources and share a number of critical functions, including regulatory compliance and resource procurement. By joining together, CalChoice can provide reduced costs for each City through the benefits of economies 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 program 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 Community Choice Aggregators’ resource procurement, and these resource procurements and contracting functions are performed on a collective basis, CalChoice is submitting this Supplier Diversity 2021 Report

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<sup>1</sup> On November 29, 2021, the City of Baldwin Park submitted a letter to the Commission’s Energy Division providing notice of the City of Baldwin Park’s deregistration as a CCA. The City of Baldwin Park began returning customers to bundled service on January 28, 2022, and transitioned throughout the month of February 2022.

and 2022 Annual Plan on behalf of its members.

## Introduction to Report and Plan

CalChoice and its member Community Choice Aggregators 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.

2021 was the first year requiring Community Choice Aggregators to submit a Supplier Diversity Report and Plan in accordance with Senate Bill ("SB") 255 (Bradford 2019). Similar to last year, the Commission has not yet adopted formal requirements regarding the content of the Community Choice Aggregators' Reports and Plans. CalChoice and each of its members remain committed to achieving the goals of SB 255 and continue to explore opportunities to support such efforts.

As stated in our 2020 Report, CalChoice's program design and implementation remains hindered by California Proposition 209, which prohibits Community Choice Aggregators 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 appreciates the Commission acknowledging the limitations of smaller CCA programs. As many CCA programs are considered programs of Local Government Agencies, CalChoice requests that the Commission consider the limitations that Proposition 209 imposes on Community Choice Aggregators as the Commission continues to develop the formal requirements for Supplier Diversity Reports and Plans.



**Jason Caudle**  
**Executive Director**  
**March 1, 2022**

# 2021 ANNUAL REPORT

## 9.1.1 Description of WMDVLGBTBE Activities In 2021

### Internal Actions In 2021

CalChoice does not have an official Supplier Diversity Engagement Program, but rather relies on compliance with its member cities' polices and local vendor preferences. In 2021, 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 32% of CalChoice's 2021 non-energy procurement efforts were from local in-state companies, and 36% were from other California companies.

CalChoice Supplier Summary		
Category	Total	Percent
Local In-State	7	32%
Other In State*	8	36%
Out of State	7	32%
Out of US	0	0%
<b>Total</b>	<b>22</b>	

\*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 879,629. The demographics reveal a White population of approximately 41%, and ethnic distribution of 6% Black, 1% American Indian and Alaska Native, 4% Asian, 1% Native Hawaiian and Pacific Islander, 33% Hispanic or Latino, and 15% of Two or More Races.

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. One such program is offered by CalChoice's newest member Santa Barbara Clean Energy. Championing its local, small businesses, Santa Barbara Clean Energy

has partnered with a local company that produces 20-year cobalt-free batteries, offering discounts of up to \$6,840 on the purchase of energy storage resources. Lancaster is yet another great example of local support for small and disadvantaged businesses. The Lancaster City Council recently approved a measure to forgive all Stand Strong Business Recovery loans awarded to businesses deemed “non-essential” by the State and County health orders during the Covid-19 pandemic to help keep local restaurants, bars, gyms, and hair salons open into 2022. The program was originally launched within one week of California declaring a state emergency in 2020. With the City Council’s decision, 28 loans were forgiven, totaling \$557,267.

## **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 include social media, marketing, tax code and employee benefits.

## **External Actions In 2021**

### **i. External Policy Advocacy**

This past year, CalChoice, on behalf of its member CCA programs, engaged in advocacy at the Commission and elsewhere that promoted the interests of WMDVLGBTEs, as well as WMDVLGBT individuals and communities. In September 2021, CalChoice received approval from the California Public Utilities Commission to implement a Joint CCA Disadvantaged Communities Green Tariff (“DAC-GT”) program which will provide participants residing in disadvantaged communities with 100% renewable energy and a 20% bill discount on their total residential rates compared to their otherwise applicable rates. CalChoice released its first solicitation in January 2022 for the construction of a new renewable energy resource for the DAC-GT program and plans to serve approximately 1,590 customers in the fall of 2022. In addition, beginning in 2021, CalChoice members have partnered with Southern California Edison to offer several customer payment assistance programs for at-risk customers. Programs include the California Arrearage Payment Program, which offers financial assistance that helps customers reduce past due energy bill balances accrued during the coronavirus pandemic, and the Percentage of Income Payment Plan (“PIPP”) pilot. The PIPP pilot, currently in development, will

allow participants to pay a predetermined affordable percentage of their monthly income towards their electricity bill. Participants will receive a monthly bill cap for current charges set certain percentage of their household's monthly income.

## ii. Member Programs' Language Accessibility Efforts

While SCE is the primary billing agent for each CalChoice member CCA program, each CCA program does maintain a customer service help line, and can be contacted via telephone or website request. Each member CCA program 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 the Clearinghouse 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 that CalChoice member CCA programs used during 2021. The DGS Small Business, Micro Business and Disabled Veteran databases are designed for use by public agencies consistent with Proposition 209.

## 9.1.2 WMDVLGBTBE Annual Results by Ethnicity

			2021 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) <sup>1</sup>		\$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

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

## 2021 Report for CA Certified Small Businesses Percent of All Purchases (Including Power)

			Direct	Sub	Total \$	%
1	Other 8(a) <sup>1</sup>		\$0	\$0	\$0	0.000%
2	TOTAL WMDVLGBTBE		\$0	\$0	\$0	0.000%

## 2021 Report for CA Certified Small Businesses Percent of Non-Power Purchases

			Direct	Sub	Total \$	%
1	Other 8(a) <sup>1</sup>		\$87,015	\$0	\$87,015	1.35%
2	TOTAL WMDVLGBTBE		\$87,015	\$0	\$87,015	1.35%



### 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) <sup>1</sup>		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 <sup>2,3</sup>			\$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

<sup>1</sup> 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) <sup>1</sup>	Direct	\$0	0.00%	\$0	0.00%	\$0	0.00%
2	TOTAL WMDVLGBTBE	Direct	\$0	0.00%	\$0	0.00%	\$0	0.00%

Direct Procurement Percentages by Product and Service Category (Non-Power Procurement)								
			Products		Services		Total	
			\$	%	\$	%	\$	%
1	Other 8(a) <sup>1</sup>	Direct	\$0	0.00%	\$87,015	1.35%	\$87,015	1.35%
2	TOTAL WMDVLGBTBE	Direct	\$0	0.00%	\$87,015	1.35%	\$87,015	1.35%

## 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) <sup>*</sup>		Sub	\$0	0.00%	\$0	0.00%	\$0	0.00%
16	TOTAL WMDVLGBTBE <sup>1</sup>		Sub	\$0	0.00%	\$0	0.00%	\$0	0.00%
17	Total Product Procurement			\$0					
18	Total Service Procurement			\$0					
19	Net Procurement <sup>2*</sup>			\$0					

NOTE: \* FIRMS CLASSIFIED AS 8(a) OF SMALL BUSINESS ADMINISTRATION INCLUDES NON-WMDVLGBTBE  
<sup>1</sup> 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		NBE	WBE	LGBTBE	DVBE	Other (a)**	Total WMDVLGBTBE	Total Dollars
	Male	Female	Male	Female	Male	Female	Male	Female							
Marketing Services <sup>1</sup>	\$ 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%	0.0%	0.0%	0.0%
MGMT Business Prof & Admin Services - Industrial management - Lobbying srvc <sup>1</sup>	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 33,960	0.00%	\$ 0	\$ 33,960
%	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%
Category 3	\$ 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%	0.0%	0.0%	0.0%
Category 4	\$ 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%	0.0%	0.0%	0.0%
Category 5	\$ 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%	0.0%	0.0%	0.0%
Category 6	\$ 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%	0.0%	0.0%	0.0%
Category 7	\$ 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%	0.0%	0.0%	0.0%
Category 8	\$ 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%	0.0%	0.0%	0.0%
Category 9	\$ 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%	0.0%	0.0%	0.0%
Category 10	\$ 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%	0.0%	0.0%	0.0%
<b>TOTAL</b>	\$ 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%	0.0%	0.0%	0.0%

Total Product Procurement	\$ 0
Total Service Procurement	\$ 0
Net Procurement***	\$ 0

NOTE: FIRMS WITH MULT MINORITY OWNERSHIP STATUS  
 \*\*FIRM CLASSIFIED AS (S) 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

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

Procurement by Standard Industrial Categories Percentage for Non Power Purchases <sup>1</sup>															
SIC Category	Asian Pacific American		African American		Hispanic American		Native American		NBE	WBE	LGBTBE	DVBE	Other (a)**	Total WMDVLGBTBE	Total Dollars
	Male	Female	Male	Female	Male	Female	Male	Female							
Marketing Services <sup>1</sup>	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 7,375.00	\$ -	\$ 7,375.00	
%	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%	0.01%	
MGMT Business Prof & Admin Services - Industrial management - Lobbying srvc <sup>1</sup>	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 79,840.00	\$ -	\$ 79,840.00	
%	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%	1.30%	
														Total Product Procurement	\$ 0.00
														Total Service Procurement	\$ 67,015.00
														Net Procurement***	\$ 67,015.00

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

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 Department of General Services (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 using the information on the certified vendors located in the DGS certified database to illustrate the success of local procurement strategies.

### 9.1.2 WMDVLGBTBE Suppliers and Revenue Reported to the Clearinghouse

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	0											
Under \$5 million												
Under \$10 million												
Above \$10 million												
<b>TOTAL</b>												

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												
Under \$5 million												
Under \$10 million												
Above \$10 million												
<b>TOTAL</b>												

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

According to Energy Division instruction, Community Choice Aggregators are not required to submit the number of WMDVLGBTBE Suppliers and Revenue Reported to the Clearinghouse for the 2021 Report.

### 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 32% of its vendors being local (located within the boundaries of member cities and counties), and an additional 36% 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
<b>TOTAL</b>	<b>\$0</b>

### 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 WMDVLGBTBE
Direct \$	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Subcontracting \$	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total \$</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

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%
<b>Total %</b>	<b>0.00%</b>	<b>0.00%</b>	<b>0.00%</b>	<b>0.00%</b>	<b>0.00%</b>	<b>0.00%</b>	<b>0.00%</b>	<b>0.00%</b>

Net Procurement**	\$0
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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 <sup>1</sup>											
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

<sup>1</sup> 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 CCA programs have received no WMDVLGBTBE complaints in 2021.

### **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 Community Choice Aggregators, it applies to liquid fuels (both for gen and retail), and CalChoice has no purchases to report for this section.

# 2022 ANNUAL PLAN

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

The Goal of CalChoice's 2022 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 2022 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. Building relationships and enhancing community outreach to help educate organizations and stakeholders about opportunities and lessen misinformation;
2. Receiving Commission training on the Supplier Clearinghouse certification process and encouraging vendors to become certified with the Supplier Clearinghouse;
3. Promoting Marin Clean Energy's annual Certify and Amplify workshops;
4. Ensuring that all WMDVLGBTBE vendors identified by the Commission are included in CalChoice's appropriate solicitation distribution lists;
5. Including specific language in solicitations encouraging bids from WMDVLGBTBE vendors;
6. Improving CalChoice's post-contract collection of WMDVLGBTBE vendor data;
7. Improving CalChoice's post-contract collection of WMDVLGBTBE data for subcontractors used by vendors;
8. Providing successful vendors with surveys solicited consistent with Proposition 209 for the purpose of gathering data as required by GO 156;
9. In the survey sent to vendors to collect diversity information as required by GO 156, including the link to the Supplier Clearinghouse webpage; and



10. Expanding notification opportunities to bid for products and services procured by CalChoice.

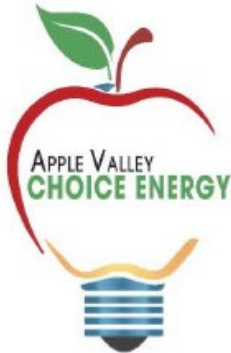
CalChoice's anticipates that the specifics of its 2022 efforts and long-term plans will in significant part be determined by the timing and substance of the Commission's adoption of formal requirements for CCAs, and advice from CalChoice's counsel regarding whether various options comply with Proposition 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



October 2020



May 2015



April 2018



October 2021



September 2017



May 2018



October 2020