

# Utility Supplier Diversity Program 2019 Annual Report and 2020 Plan







# Table of Contents

Message From Our President	2
G.O. #156 Section	2019 Annual Report
9.1.1 Description of WMDVLGBTBE Program Activities During the Previous Calendar Year	3
9.1.2 WMDVLGBTBE Annual Results by Ethnicity	12
9.1.2 WMDVLGBTBE Direct Procurement by Product and Service Categories	13
9.1.2 WMDVLGBTBE Subcontractor Procurement by Product and Service Categories	14
9.1.2 WMDVLGBTBE Procurement by Standard Industrial Classification Categories	15
9.1.2 Number of WMDVLGBTBE Suppliers and Revenue Reported to the Clearinghouse	17
9.1.2 Description of Number of WMDVLGBTBE Suppliers with CA Majority Workforce	18
9.1.3 WMDVLGBTBE Program Expenses	18
9.1.4 Description of Progress in Meeting or Exceeding Set Goals	19
9.1.4 WMDVLGBTBE Results and Goals	19
9.1.5 Description of Prime Contractors Utilization of WMDVLGBTBE Subcontractors	20
9.1.5 Summary of Prime Contractor Utilization of WMDVLGBTBE Subcontractors	20
9.1.6 A-List of WMDVLGBTBE Complaints Received and Current Status	20
9.1.7 Description of Efforts to Recruit WMDVLGBTBE Suppliers in Low Utilization Categories	21
	2020 Annual Plan
10.1.1 WMDVLGBTBE Annual SHORT, MID, AND LONG-TERM Goals	23
10.1.2 Description of WMDVLGBTBE Planned Program Activities for the Next Calendar Year	24
10.1.3 Plans for Recruiting WMDVLGBTBE Suppliers in Low Utilization Areas	24
10.1.4 Plans for Recruiting WMDVLGBTBE Suppliers Where Unavailable	24
10.1.5 Plans for Encouraging Prime Contractors to Subcontract to WMDVLGBTBE	25
10.1.6 Plans for Complying with WMDVLGBTBE Program Guidelines	25



## Message From Our President

“At Liberty Utilities, we recognize that our relationship with our customers goes beyond the sale and consumption of our product. We must also be an active, engaged member of the communities we serve.

This community engagement includes creating opportunities for businesses that represent and reflect the rich, diverse heritage and culture of the State of California. We believe the Utility Supplier Diversity Program (USDP) is one that we, as a company, should look to share with other Liberty Utilities operations across the country, carrying the spirit of this initiative beyond our California borders. In support of this, in late 2019, our parent company, Algonquin Power and Utilities Corporation, announced that a company-wide supplier[ST1] diversity policy and program will be developed and rolled out across the organization during the course of 2020 and 2021.



For over 15 years, we have participated in the California Public Utilities Commission's USDP with our two Southern California regulated water utilities—Liberty Utilities (Park Water) Corp. and Liberty Utilities (Apple Valley Ranchos) Corp. Liberty Park Water operates three water systems in southeast Los Angeles County, serving the communities of Norwalk, Bellflower, Compton, and Lynwood, among others, and added Mesa Crest in 2019. Liberty Apple Valley Ranchos serves about 50 square miles in the Town of Apple Valley, Victorville, and Yermo.

As part of the USDP, we continually develop ongoing business relationships with talented minority- and women-owned businesses, disabled veterans firms, as well as lesbian, gay, bisexual, and transgender business enterprises. We do this, not just because the CPUC has established this progressive and worthwhile program, but because it is merely good business. One of the pillars of this country has always been to provide opportunities for firms in underrepresented groups. To compete and succeed is what the USDP is all about.

We achieved success with our diversity efforts in 2019. I am proud to report that last year we achieved 27.24 percent spend with diverse businesses, exceeding the CPUC's target of 21.5 percent. We purchased about \$9.4 million in products and services from 37 diverse businesses.

I sincerely thank all who have contributed to Liberty Utilities' success with our supplier diversity program. We are committed to expanding and strengthening our relationships with our diverse suppliers in 2020 because our diverse suppliers help Liberty Utilities provide best-in-class customer service and strengthen the communities we serve.”

A blue ink signature of Chris Alario.

Chris Alario  
President, Liberty Utilities California

**27.24%**  
Diverse  
Business  
Spend

**\$9.4  
Million**  
Diverse  
Purchase

**37**  
Diverse  
Vendors







## 9.1.1

### Internal Program Activities

The Utility Supplier Diversity Program (USDP) aligns closely with Liberty Utilities' corporate and social responsibility philosophy related to diversity and inclusion and sustainability initiatives.



The USDP enhances Liberty Utilities' procurement efforts by broadening supply base, providing increased opportunity for current and potential suppliers, increasing competition to drive value for Liberty Utilities, identifying innovative solutions related to new products and services, and demonstrating commitment to develop value-based business relationships with diverse suppliers.

In 2019, Liberty Utilities continued to focus on supplier diversity in the procurement process, reviewing its approach to the market and identifying opportunities and communicating supplier diversity best practices to its operational, business support and procurement teams.

Liberty Utilities' engineering, human resources, supply chain, and operations departments have all contributed to this supplier diversity initiative through involvement in outreach events, resulting in growth in Liberty Utilities' diverse vendor pool. In 2019, Liberty Utilities took a more active role with greater participation in local and statewide outreach events, understanding the value of meeting and communicating with current and potential DBEs in person and meeting with local Community Based Organizations (CBOs) the communities served to discuss opportunities and build new and/or existing relationships.



### External Program Activities

Liberty Utilities participated and collaborated in a number of external outreach and development programs in 2019. The majority of this work was with fellow CWA member utilities to help identify, develop, and educate diverse business enterprises on how to do business with the utilities.

Additionally, Liberty Utilities had more collaboration with its electric utility on outreach activities, as all of the company's California utilities fall under the same internal supply chain department.



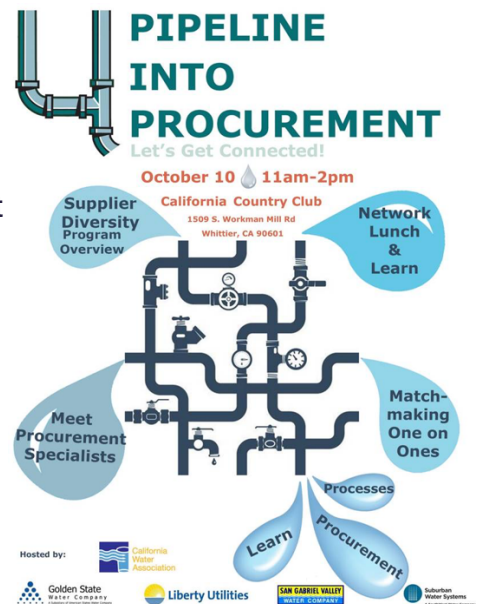
## CWA's Pipeline into Procurement

Liberty Utilities' membership and participation in the California Water Association have continued to prove worthwhile and bring success. The Pipeline into Procurement event, identified improvement opportunities.

By comparing its processes and practices with fellow CWA members and identifying industry best practice, Liberty Utilities has improved the onboarding of new diverse business enterprises and how second tier spend data is collected and used.

New processes and/or requirements have been implemented:

- Efficiency gains related to the onboarding process for new suppliers
- Standardization of required safety certifications and the evaluation and understanding of the certifications
- Improved data collection for second tier spend with technology and/or forms and increased frequency of collection







Meet the Primes is an annual event bringing together prime contractors and diverse business enterprises for discussions on subcontracting opportunities.



Although this event is focused on subcontracting, it also enables utilities to meet with diverse business enterprises who may be able to perform as a prime or potentially develop into a prime contractor.

In 2019, the CWA partnered with Southern California Gas Company and co-hosted an event at the Energy Resource Center in Downey, CA.



The event included 60-second capabilities presentations from diverse business enterprises, followed by project-focused discussions on current Tier-1 and Tier-2 needs. Each participating utility presented its upcoming projects and sourcing needs.





# CALIFORNIA WATER ASSOCIATION MEET THE PRIMES



The 2019 event was successful in several different areas:

**42**  
Diverse Suppliers

**36**  
DBE Presentations

**100**  
1:1 Meetings

**93**  
Net Promoter Score

**Forty-two** diverse business enterprises attended, representing a variety of industries, including construction, consulting services, and personnel training.

Prime contractors and decision-makers from the utilities received **36** presentations from diverse business enterprises.

Following the presentations, over **100** one-on-one meetings occurred between utilities or prime contractors and the diverse business enterprises to further understanding of diverse business enterprises' value propositions.

Post-event surveys captured a high net promoter score (NPS) of **93** (100). NPS is a measure of attendees' willingness to recommend the event to someone, and 93 reflects a high score for satisfaction.

# CWA's Water Acumen Training for Entrepreneurship Refinement (W.A.T.E.R.) Business Certification



The CWA's Supplier Diversity Committee, which includes Liberty Utilities and six other member-utilities, takes a collective approach to Capacity Building & Technical Assistance by pooling resources, and delivering a unified training program advancing suppliers through education and training.



In 2019, the CWA partnered with Melanie Rae (GUIDED™ Business Plan, Founder)\*, to develop a training program to better develop and enable participants.

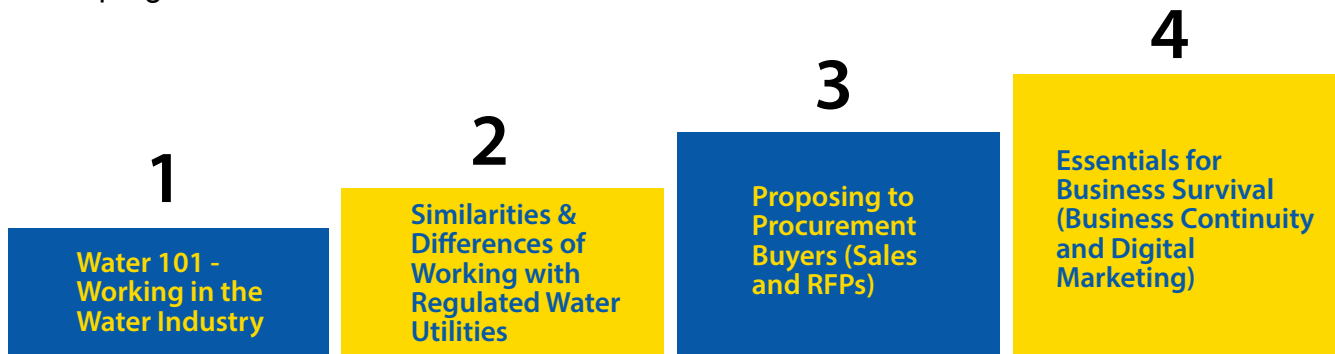
\*Rae, M. (2019). About Guided Business Plan. Retrieved November 26, 2019, from <https://guidedbusinessplan.com/pages/about-us>.





# CWA's Water Acumen Training for Entrepreneurship Refinement (W.A.T.E.R.) Business Certification

Using a building-block approach, a four-module study course was developed to support this program:



The training sessions called for collaboration among member-utilities, sharing best practices, and providing insights for engaging key decision-makers.



*Scenes from CWA W.A.T.E.R. Diverse Business Certification*

The CWA delivered 16 training hours to approximately 25 current and possible future diverse suppliers through quarterly workshops (March 8, June 6, September 6, November 22) at Suburban Water Systems in Covina, CA.



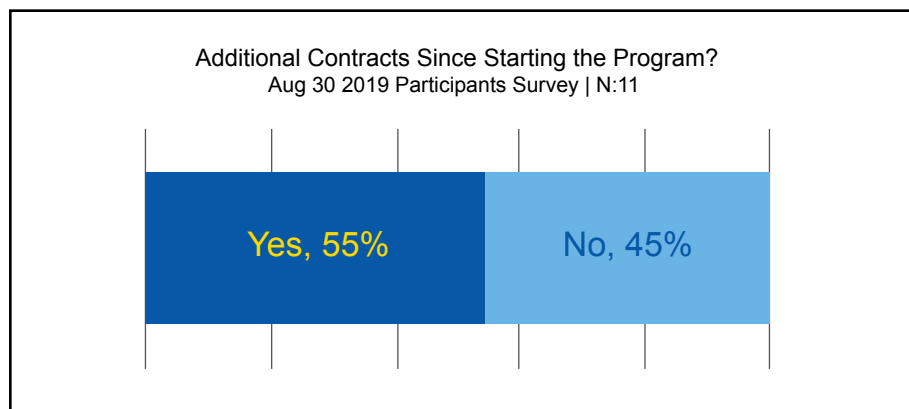
*Scenes from CWA W.A.T.E.R. Diverse Business Certification*

# CWA's Water Acumen Training for Entrepreneurship Refinement (W.A.T.E.R.) Business Certification

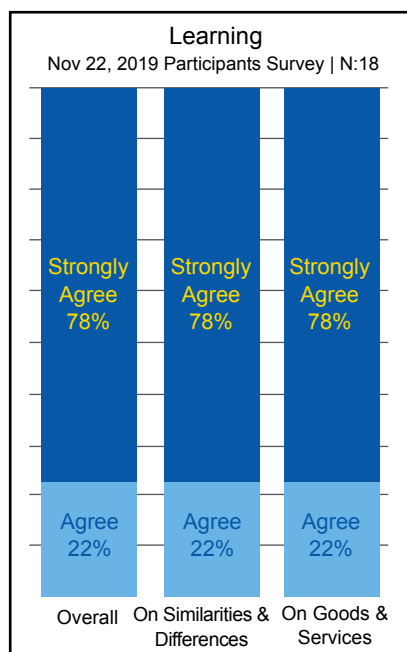


## Contractual Opportunities

The training program translated into new contracting opportunities for participants. Results of a mid-program survey showed that 55% of respondents received additional contracts from the CWA member utilities since starting the program.

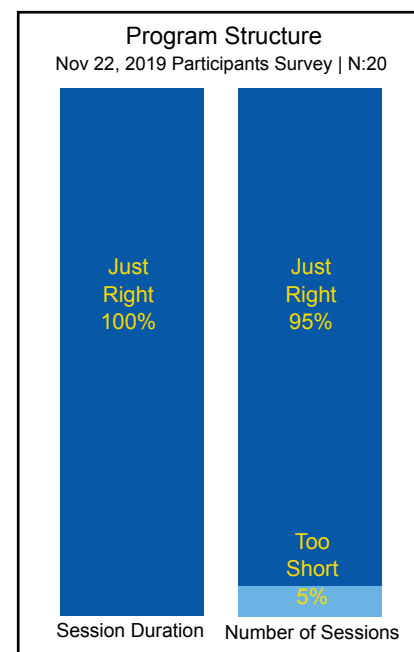


The CWA also surveyed participants' knowledge gains and their assessment of the program's design.



In terms of learning, the data supports the building-block approach.

The CWA found consistent responses in terms of overall learning, in specific areas such as similarities/differences of the member utilities, and goods/services we procured.



In terms of the program's structure, the metrics confirmed that the training format was effective.

Participants rated both the duration and the number of training sessions positively.





## CWA Committee Meeting pre En Banc

To encourage participation and ongoing discussions, the flyer below was sent out to CBOs in underused categories to build and strengthen relationships and communication with the water utilities.



Greetings,

The California Water Association Supplier Diversity (USD) Committee has enjoyed a long and steady partnership with many Community-Based Organizations to support advancing our Supplier Diversity Programs.

As part of our ongoing efforts, we'd like you to join us for a discussion of our initiatives and priorities for 2020, as these topics will shape our future collaborations.

We intend to discover ways to further leverage our partnership for advancing contracting opportunities for diverse suppliers.

We have scheduled this discussion the day before the California Public Utilities Commission's Public Hearing on Supplier Diversity (En Banc).

Please join us on:

October 2nd, 2 PM-4 PM

Fresno Metro Black Chamber of Commerce  
1444 Fulton Street, Suite 206  
Fresno, CA 93721



# 2019 Liberty Utilities Outreach Calendar



## JANUARY

- USDP Committee Meeting – Teleconference

## FEBRUARY

- USDP Committee Meeting – Teleconference

## MARCH

- USDP Committee Meeting – Teleconference
- CWA W.A.T.E.R. T/A Program #1 – Los Angeles, CA
- GLAAACC Diversity Economic Awards Event – Los Angeles, CA
- JU Q1 Meeting – Los Angeles, CA

## APRIL

- CPUC Diverse Business Expo – Pomona, CA
- USDP Committee Meeting – San Dimas, CA

## MAY

- USVBA Keeping the Promise Event – Temecula, CA
- CWA Annual Conference – Sacramento, CA
- USDP Committee Meeting – Sacramento, CA

## JUNE

- JU Meeting – Sacramento, CA
- CWA W.A.T.E.R. T/A Program #2 – Sacramento, CA
- USDP Committee Meeting – Sacramento, CA

## JULY

- AICOC Expo – Rancho Mirage, CA
- USDP Committee Meeting – Los Angeles, CA
- California Construction Expo – Anaheim, CA

## AUGUST

- USDP Committee Meeting – Los Angeles, CA
- CHCC Annual Convention – Stockton, CA

## SEPTEMBER

- JU Meeting Session #1 – San Ramon, CA
- JU Meeting Session #2 – San Ramon, CA
- USDP Meeting – Downey, CA
- CWA W.A.T.E.R. T/A Program #3 – Covina, CA

## OCTOBER

- CPUC EnBanc – Fresno, CA
- USDP Committee Meeting – Fresno, CA
- CWA “Pipeline into Procurement” – Whittier, CA
- VIB Annual Network Event – San Diego, CA
- CPUC Small Business Expo – Citrus Heights, CA
- CWA BOD Meeting – Fontana, CA

## NOVEMBER

- CWA W.A.T.E.R. T/A Program #4 – Covina, CA
- USDP Committee Meeting – Covina, CA

## DECEMBER

- USDP Committee Meeting Session #1 / #2 – Newport, CA
- JU Meeting – Thousand Oaks, CA





# WMDVLGBTBE Annual Results by Ethnicity

9.1.2

For 2019, Liberty Utilities achieved 27.24% Diverse Business Enterprise spend on \$34.6 million of spend.

			2019			
			Direct	Sub	Total \$	%
1	Minority Male	Asian Pacific American	\$773,526	\$0	\$773,526	2.24%
2		African American	\$0	\$0	\$0	0.00%
3		Hispanic American	\$1,768,891	\$68,007	\$1,836,898	5.31%
4		Native American	\$0	\$0	\$0	0.00%
5		Total Minority Male	\$2,542,417	\$68,007	\$2,610,424	7.55%
6	Minority Female	Asian Pacific American	\$1,692	\$0	\$1,692	0.00%
7		African American	\$26,762	\$0	\$26,762	0.08%
8		Hispanic American	\$115,799	\$182,816	\$298,615	0.86%
9		Native American	\$0	\$0	\$0	0.00%
10		Total Minority Female	\$144,254	\$182,816	\$327,070	0.95%
11	Total Minority Business Enterprise (MBE)		\$2,686,671	\$250,823	\$2,937,494	8.49%
12	Women Business Enterprise (WBE)		\$5,465,098	\$231,519	\$5,696,617	16.47%
13	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)		\$774,360	\$0	\$774,360	2.24%
14	Disabled Veteran Business Enterprise (DVBE)		\$2,625	\$6,807	\$9,432	0.03%
15	Other 8(a)*		\$0	\$0	\$0	0.00%
16	TOTAL WMDVLGBTBE		\$8,928,753	\$489,149	\$9,417,903	27.24%
17	Net Procurement**		\$34,580,097			

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 Direct Procurement by Product and Service Categories



## 9.1.2

The majority of the spend was direct with diverse business enterprises, comprising 25.82%.

				Products		Services		Total	
				\$	%	\$	%	\$	%
1	Minority Male	Asian Pacific American	Direct	\$383,817	1.11%	\$389,709	1.13%	\$773,526	2.24%
2		African American	Direct	\$0	0.00%	\$0	0.00%	\$0	0.00%
3		Hispanic American	Direct	\$5,083	0.01%	\$1,763,808	5.10%	\$1,768,891	5.12%
4		Native American	Direct	\$0	0.00%	\$0	0.00%	\$0	0.00%
5		Total Minority Male	Direct	\$388,900	1.12%	\$2,153,517	6.23%	\$2,542,417	7.35%
6	Minority Female	Asian Pacific American	Direct	\$0	0.00%	\$1,692	0.00%	\$1,692	0.00%
7		African American	Direct	\$8,497	0.02%	\$30,146	0.09%	\$38,643	0.11%
8		Hispanic American	Direct	\$60,488	0.17%	\$43,431	0.13%	\$103,918	0.30%
9		Native American	Direct	\$0	0.00%	\$0	0.00%	\$0	0.00%
10		Total Minority Female	Direct	\$68,985	0.20%	\$75,269	0.22%	\$144,254	0.42%
11	Total Minority Business Enterprise (MBE)		Direct	\$457,885	1.32%	\$2,228,786	6.45%	\$2,686,671	7.77%
12	Women Business Enterprise (WBE)		Direct	\$632,783	1.83%	\$4,832,314	13.97%	\$5,465,098	15.80%
13	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)		Direct	\$0	0.00%	\$774,360	2.24%	\$774,360	2.24%
14	Disabled Veteran Business Enterprise (DVBE)		Direct	\$0	0.00%	\$2,625	0.01%	\$2,625	0.01%
15	Other 8(a)*		Direct	\$0	0.00%	\$0	0.00%	\$0	0.00%
16	TOTAL WMDVLGBTBE		Direct	\$1,090,668	3.15%	\$7,838,085	22.67%	\$8,928,753	25.82%
17	Total Product Procurement			\$2,759,760					
18	Total Service Procurement			\$31,820,337					
19	Net Procurement**			\$34,580,097					
20	Total Number of WMDVLGBTBEs that Received Direct Spend			37					

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 Subcontractor Procurement by Product and Service Categories

9.1.2

Subcontracting increased from 0.04% in 2018 to 1.41% in 2019. This is attributed to the increased outreach work and internal education that took place during 2019.

				Products		Services		Total	
				\$	%	\$	%	\$	%
1	Minority Male	Asian Pacific American	Sub	\$0	0.00%		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%	\$68,007	0.20%	\$68,007	0.20%
4		Native American	Sub	\$0	0.00%	\$0	0.00%	\$0	0.00%
5		Total Minority Male	Sub	\$0	0.00%	\$68,007	0.20%	\$68,007	0.20%
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	\$182,816	0.53%	\$0	0.00%	\$182,816	0.53%
9		Native American	Sub	\$0	0.00%	\$0	0.00%	\$0	0.00%
10		Total Minority Female	Sub	\$182,816	0.53%	\$0	0.00%	\$182,816	0.53%
11	Total Minority Business Enterprise (MBE)		Sub	\$182,816	0.53%	\$68,007	0.20%	\$250,823	0.73%
12	Women Business Enterprise (WBE)		Sub	\$124,260	0.36%	\$107,259	0.31%	\$231,519	0.67%
13	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)		Sub	\$0	0%	\$0	0.00%	\$0	0.00%
14	Disabled Veteran Business Enterprise (DVBE)		Sub	\$0	0%	\$6,807	0.02%	\$6,807	0.02%
15	Other 8(a)*		Sub	\$0	0.00%	\$0	0.00%	\$0	0.00%
16	TOTAL WMDVLGBTBE		Sub	\$307,076	0.89%	\$182,073	0.57%	\$489,149	1.41%
17	Total Product Procurement		\$2,759,760						
18	Total Service Procurement		\$31,820,337						
19	Net Procurement**		\$34,580,097						

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

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Direct - DIRECT PROCUREMENT

Sub - SUBCONTRACTOR PROCUREMENT

% - PERCENTAGE OF NET PROCUREMENT



# WMDVLGBTBE Procurement by Standard Industrial Classification Categories



9.1.2

SIC Category	Asian Pacific American		African American		Hispanic American		Native American		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	Total Dollars
	Male	Female	Male	Female	Male	Female	Male	Female							
9.Fishing, Hunting, and Trapping	\$														139
%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
15.General Building Contractors	\$					\$25,405			25,405					25,405	1,871,161
%	0.0%	0.0%	0.0%	0.0%	0.0%	0.07%	0.0%	0.0%	0.07%	0.0%	0.0%	0.0%	0.0%	0.0%	
16. Heavy Construction	\$	0	0	0	0	920,721	0	0	920,721	4,757,980	0	0	0	5,678,701	8,251,674
%	0.0%	0.0%	0.0%	0.0%	0.0%	2.66%	0.0%	0.0%	2.66%	13.76%	0.0%	0.0%	0.0%	16.42%	
17.Special Trade Contractors	\$	0	0	0	0	294,025	1,605	0	295,630	6,090	0	2,400	0	304,120	1,360,126
%	0.0%	0.0%	0.0%	0.0%	0.0%	0.85%	0.00%	0.0%	0.85%	0.02%	0.0%	0.01%	0.0%	0.88%	
23. Apparel & Other Textile Products	\$	0	0	0	0	0	0	0	0	8,710	0	0	0	8,710	12,994
%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.03%	0.0%	0.0%	0.0%	0.03%	
26. Paper & Allied Products	\$	0	0	0	0	0	0	0	0	1,498	0	0	0	1,498	1,498
%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.0%	0.0%	0.00%	
27.Printing & Publishing	\$	0	0	0	0	81,657	0	0	81,657	0	0	0	0	81,657	86,117
%	0.0%	0.0%	0.0%	0.0%	0.0%	0.24%	0.0%	0.0%	0.24%	0.00%	0.0%	0.0%	0.0%	0.24%	
28.Chemicals and Allied Products	\$														168,273
%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
29.Petroleum & Coal Products	\$														2,705
%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
30.Rubber & Miscellaneous Plastics Products	\$														20,399
%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
34.Fabricated Metal Products	\$	0	0	0	8497	0	60488	0	68,985	0	0	0	0	68,985	134,055
%	0.0%	0.0%	0.0%	0.02%	0.0%	0.17%	0.0%	0.0%	0.20%	0.00%	0.0%	0.0%	0.0%	0.20%	
35.Industrial Machinery & Equipment	\$														15,387
%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.0%	0.0%	0.0%	
36.Electronic & Other Electric Equipment	\$	0	0	0	0	135	0	0	135	0	0	0	0	135	113,703
%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.0%	0.00%	0.0%	0.0%	0.0%	0.0%	0.00%	
38. Instruments & Related Products	\$	0	0	0	0	0	0	0	0	0	0	0	0	0	227,326
%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
39.Miscellaneous Manufacturing Industries	\$														89,408
%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
44.Water Transportation	\$	0	0	0	0	0	0	0	0	0	0	0	0	0	9,877
%	0.0%	0.0%	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	\$2,759,760
Total Service Procurement	\$31,820,337
Net Procurement***	\$34,580,097

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



# WMDVLGBTBE Procurement by Standard Industrial Classification Categories (Cont.)

9.1.2

SIC Category		Asian Pacific American		African American		Hispanic American		Native American		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	Total Dollars
		Male	Female	Male	Female	Male	Female	Male	Female							
46.Pipelines, Except Natural Gas	\$					\$3,664	\$182,816			186,480		\$774,360			960,840	\$1,341,672
	%	0.0%	0.0%	0.0%	0.0%	0.01%	0.53%	0.0%	0.0%	0.54%	0.0%	2.24%	0.0%	0.0%	2.78%	
48.Communications	\$															\$178,732
	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
49.Electric, Gas & Sanitary Services	\$															\$301,594
	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
50.Wholesale Trade-Durable Goods	\$										482,414				482,414	\$1,274,399
	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.40%	0.0%	0.0%	0.0%	1.40%	
51.Wholesale Trade-Nondurable Goods	\$										21,161				21,161	\$38,520
	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.1%	
52.Building Materials & Gardening Supplies	\$															\$32,410
	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
53.General Merchandise Stores	\$															\$20,368
	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
54.Food Stores	\$															\$27,951
	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
55.Automotive Dealers & Service Stations	\$	241,589	0	0	0	0	0	0	0	241,589	244,719	0	0	0	486,308	428,631
	%	0.70%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.70%	0.71%	0.0%	0.0%	0.0%	1.41%	
56.Apparel & Accessory Stores	\$															20,200
	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
57.Furniture & Homefurnishings Stores	\$															8,848
	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
58.Eating & Drinking Places	\$															1,709
	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
59.Miscellaneous Retail	\$	142,228	0	0	0	0	0	0	0	142,228	0	0	0	0	142,228	255,621
	%	0.41%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.41%	0.0%	0.0%	0.0%	0.0%	0.41%	
60.Depository Institutions	\$															5,248,538
	%	0.00%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.0%	0.0%	0.0%	0.0%	
61.Nondepository Institutions	\$															61,538
	%	0.00%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.0%	0.0%	0.0%	0.0%	
62.Security & Commodity Brokers	\$															1,271,840
	%	0.00%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.0%	0.0%	0.0%	0.0%	
63.Insurance Carriers	\$	0	0	0	0	0	0	0	0	0	99,596	0	0	0	99,596	15,783
	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.29%	0.0%	0.0%	0.0%	0.29%	
65.Real Estate	\$															39
	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
70.Hotels & Other Lodging Places	\$															214
	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
73.Business Services	\$	50,918	0	0	18,265	346,228	28,302	0	0	443,713	74,450	0	6,807	0	518,163	4,998,919
	%	0.15%	0.0%	0.0%	0.05%	1.00%	0.08%	0.0%	0.0%	1.28%	0.22%	0.0%	0.02%	0.0%	1.52%	
75.Auto Repair, Services, & Parking	\$															127,033
	%	0.0%	0.0%	0.0%	0.0%	0.00%	0.00%	0.0%	0.0%	0.00%	0.0%	0.0%	0.0%	0.0%	0.00%	
76.Miscellaneous Repair Services	\$	0	1,692	0	0	0	0	0	0	1,692	0	0	0	0	1,692	26,351
	%	0.0%	0.00%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.0%	0.0%	0.0%	0.00%	
79.Amusement & Recreation Services	\$															10,972
	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.0%	0.0%	0.0%	0.00%	
80.Health Services	\$															9,390
	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.0%	0.0%	0.0%	0.00%	
81.Legal Services	\$	338,791	0	0	0	0	0	0	0	338,791	0	0	0	0	338,791	4,758,189
	%	0.98%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.98%	0.0%	0.0%	0.0%	0.0%	0.98%	
82.Education Services	\$															48,711
	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.0%	0.0%	0.0%	0.00%	
83.Social Services	\$															33,005
	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.0%	0.0%	0.0%	0.00%	
84.Museums, Botanical, Zoological Gardens	\$															600
	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.0%	0.0%	0.0%	0.00%	
86.Membership Organizations	\$															1,480
	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.0%	0.0%	0.0%	0.00%	
87.Engineering & Management Services	\$	0	0	0	0	47,872	0	0	0	47,872	0	0	0	0	47,872	1,007,309
	%	0.0%	0.0%	0.0%	0.0%	0.14%	0.0%	0.0%	0.0%	0.14%	0.00%	0.0%	0.0%	0.0%	0.14%	
89.Services, Not Elsewhere Classified	\$	0	0	0	0	142,595	0	0	0	142,595	0	0	0	0	142,595	478,487
	%	0.0%	0.0%	0.0%	0.0%	0.41%	0.0%	0.0%	0.0%	0.41%	0.00%	0.0%	0.0%	0.0%	0.41%	
91.Executive, Legislative, & General	\$															156,753
	%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.0%	0.0%	0.00%	0.00%	0.0%	0.0%	0.0%	0.00%	
92. Justice, Public Order, & Safety	\$	0	0	0	0	0	0	0	0	0	0	0	225	0	225	8,913
	%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.0%	0.0%	0.00%	0.00%	0.0%	0.00%	0.0%	0.00%	
93.Finance, Taxation & Monetary Policy	\$															20,338
	%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.0%	0.0%	0.00%	0.00%	0.0%	0.0%	0.0%	0.00%	
Total	\$	773,526	1,692	0	26,762	1,836,898	298,616	0	0	2,937,494	5,696,617	774,360	9,432	0	9,417,903	34,580,097
	%	2.24%	0.00%	0.00%	0.08%	5.31%	0.86%	0.00%	0.00%	8.49%	16.47%	2.24%	0.03%	0.00%	27.24%	

Total Product Procurement	\$2,759,760
Total Service Procurement	\$31,820,337
Net Procurement***	\$34,580,097

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



# Number of WMDVLGBTBE Suppliers and Revenue Report to the Clearinghouse



Data on Number of Suppliers												
Revenue Reported to CHS							Utility-Specific 2019 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	8	7		3			19	12	1	3		35
Under \$5 million	4	3						2				2
Under \$10 million	3	3										0
Above \$10 million	3	1		1								0
<b>TOTAL</b>	<b>18</b>	<b>14</b>	<b>1</b>	<b>3</b>	<b>0</b>	<b>0</b>	<b>19</b>	<b>14</b>	<b>1</b>	<b>3</b>	<b>0</b>	<b>37</b>

Revenue and Payment Data												
Revenue Reported to CHS							Utility-Specific 2019 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	2,173,915.00	7,114,486.73				\$ 9,288,401.73	2,430,347.97	2,859,437.30	774,360.00	10,897.11		\$ 6,075,042.38
Under \$5 million	11,844,988.57	9,673,273.16				\$ 21,518,261.73		3,036,480.45				\$ 3,036,480.45
Under \$10 million	15,499,283.00	25,228,083.00				\$ 40,727,366.00						\$ -
Above \$10 million	2,137,367,884.00	165,000,000.00	12,000,000.00			\$ 2,314,367,884.00						\$ -
<b>TOTAL</b>	<b>\$2,166,886,070.57</b>	<b>\$ 207,015,842.89</b>	<b>\$12,000,000.00</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 2,385,901,913.46</b>	<b>\$ 2,430,347.97</b>	<b>\$ 5,895,917.75</b>	<b>\$ 774,360.00</b>	<b>\$ 10,897.11</b>	<b>\$ -</b>	<b>\$ 9,111,522.83</b>

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



## Description of Number of WMDVLGBTBE Suppliers with CA Majority

9.1.2

Thirty-six of our 37 paid diverse vendors are headquartered in California, capturing a total spend of \$9 million in 2019. This is an increase of 4 diverse vendors over 2018.



## WMDVLGBTBE Program Expenses

9.1.3

Expense Category	Year (Actual)
Wages	\$51,037
Other Employee Expenses	\$36,589
Program Expenses	\$25,951
Reporting Expenses	\$4,950
Training	\$0
Consultants	\$1,600
Other	\$10,160
<b>TOTAL</b>	<b>\$130,286</b>

## Description of Progress in Meeting or Exceeding Set Goals



### 9.1.3

Liberty Utilities continued to deliver above the G.O.156 goal of 21.5% achieving 27.24% and \$9.4 million spent with Diverse Suppliers in 2019.

Net procurement in 2019 increased to \$34.6 million, an increase of just over \$1 million on 2018 (\$33.5 million).



## WMDVLGBTBE Results and Goals

### 9.1.4

Liberty Utilities continues to perform well in the category of WBE and, in 2019, made good progress in supporting the LGBTBE category.

Category	2019 Year Results	2019 Year Goals
Minority Men	7.5%	12.00%
Minority Women	0.95%	3.00%
Minority Business Enterprises (MBE)	8.49%	15.00%
Women Business Enterprises (WBE)	16.47%	5.00%
Lesbian, Gay, Bisexual, Transgender Business Enterprises (LGBTBE)	2.24%	1.00%
Disabled Veteran Business Enterprises (DVBE)	0.03%	1.50%
<b>Total WMDVLGBTBE</b>	<b>27.24%</b>	<b>22.50%</b>

% PERCENTAGE OF NET PROCUREMENT





## Description of Prime Contractors Utilization of WMDVLGBTBE Subcontractors

9.1.5

Liberty Utilities recognized that subcontracting was an opportunity for improvement in 2019, and the improved results demonstrate that focus on this area delivered promising initial results.

In addition to improving communication with prime suppliers regarding the importance of the supplier diversity program and the need for them to embrace and support it, Liberty Utilities' active outreach program and work with CWA helped increase subcontracted spend from 0.04% to 1.41%. This higher percentage indicates that not only was Liberty Utilities successful in promoting its supplier diversity program, but also Liberty Utilities' prime contractors are understanding and supporting the program.

### Summary of Prime Contractor Utilization of WMDVLGBTBE Subcontractors

9.1.5

Prime contractors' business increased in revenue in 2019 and also increased subcontracting of work to DBEs, demonstrating these prime contractors' understanding of the supplier diversity program, which helps to expand Liberty Utilities' reach and the opportunities for DBEs to participate.

Prime contractors working alongside diverse business enterprises allows each prime contractor to utilize DBEs that have specific trades or skillsets that may not be in their own core business.

Liberty Utilities' support for diverse suppliers provides a broader vendor pool and the achievement of specific goals, including spend and increased contractor relationships. When a subcontractor partners with a prime, the added value is technical assistance for all involved - the utility, prime and subcontractor.

Prime and subcontractor relationships supported by the supplier diversity program will facilitate a collaborative and fruitful relationship resulting in successful projects.

### A List of WMDVLGBTBE Complaints Received and Current Status

9.1.6

Liberty Utilities received no complaints and is unaware of any filings in 2019 relative to its supplier diversity program.



# Description of Efforts to Recruit WMDVLGBTBE Suppliers in Low Utilization Categories



## 9.1.7

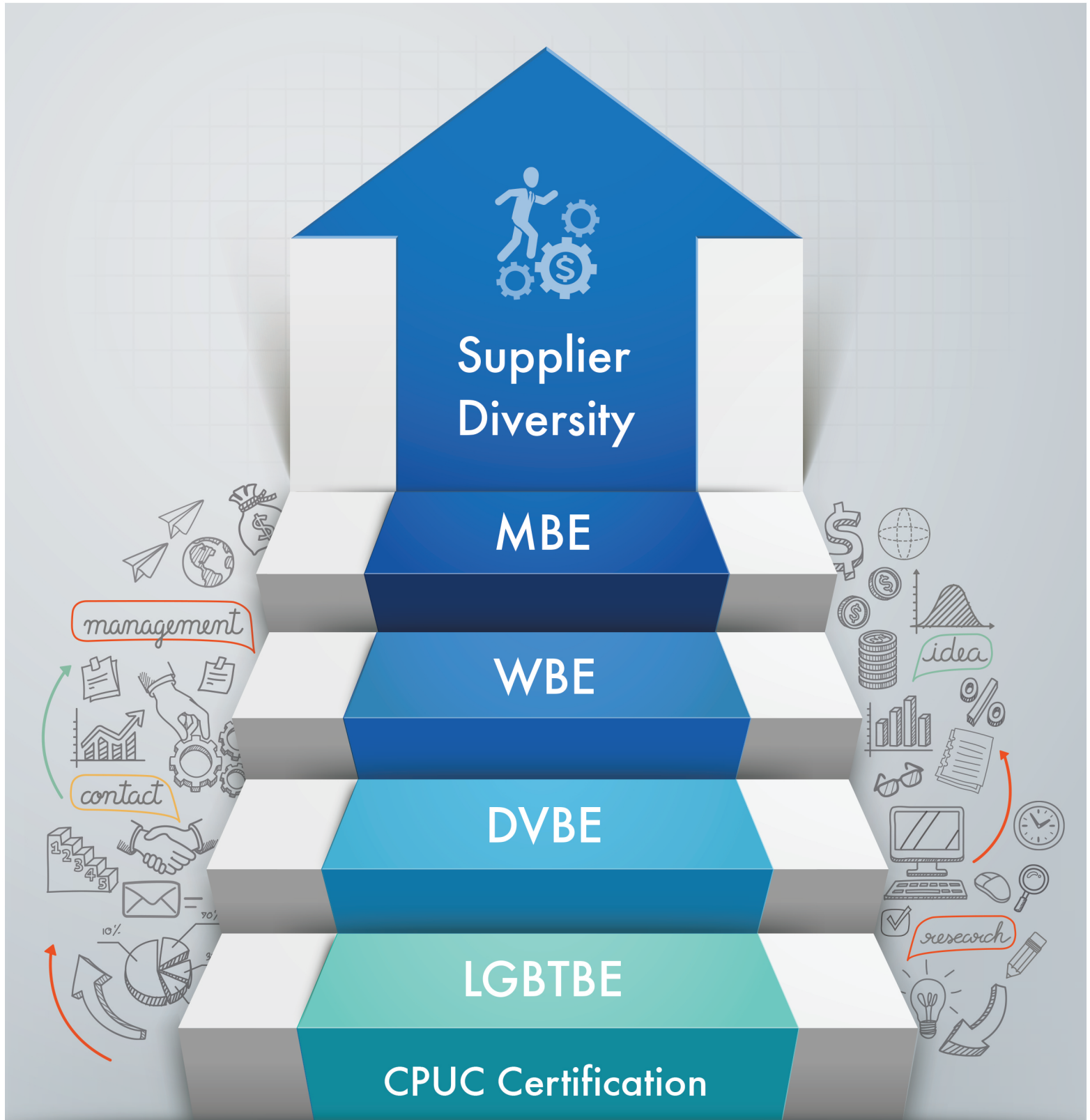
2019 proved to be a positive year for suppliers in low utilization categories, with improvement in minority, female and LGBT spend.

Liberty Utilities' internal understanding and teamwork helped lead to an increase in these categories by continuing to recognize the value of our supplier diversity program and understanding how internal support of the program carries over to the communities we served.

With executive support, Liberty Utilities will continue to champion and recruit diverse businesses enterprises in underutilized categories.



# 2020 PLAN





# WMDVLGBTBE Annual SHORT, MID, LONG-TERM Goals



## 10.1.1

Service	Short-Term 2019					Mid-Term 2020					Long-Term 2021				
	Minority Business Enterprise (MBE)	Women Business Enterprise (WBE)	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)	Disabled Veteran Business Enterprise (DVBE)	WMDVLGBTBE	Minority Business Enterprise (MBE)	Women Business Enterprise (WBE)	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)	Disabled Veteran Business Enterprise (DVBE)	WMDVLGBTBE	Minority Business Enterprise (MBE)	Women Business Enterprise (WBE)	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)	Disabled Veteran Business Enterprise (DVBE)	WMDVLGBTBE
15. General Bldg. Contractors	0.00%	0.00%	0.00%	0.96%	0.96%	0.00%	0.00%	0.00%	0.96%	0.96%	0.00%	0.00%	0.00%	0.96%	0.96%
16. Heavy Construction, Except Building	5.34%	12.01%	0.67%	0.00%	18.02%	5.34%	12.01%	0.67%	0.00%	18.02%	5.34%	12.01%	0.67%	0.00%	18.02%
17. Special Trade Contractors	1.21%	0.00%	0.00%	0.00%	1.21%	1.21%	0.00%	0.00%	0.00%	1.21%	1.21%	0.00%	0.00%	0.00%	1.21%
63. Insurance Carriers	0.00%	0.04%	0.00%	0.00%	0.04%	0.00%	0.04%	0.00%	0.00%	0.04%	0.00%	0.04%	0.00%	0.00%	0.04%
73. Business Services	0.90%	0.31%	0.00%	0.00%	1.21%	0.90%	0.31%	0.00%	0.00%	1.21%	0.90%	0.31%	0.00%	0.00%	1.21%
76. Miscellaneous Repair Services	0.01%	0.00%	0.00%	0.00%	0.01%	0.01%	0.00%	0.00%	0.00%	0.01%	0.01%	0.00%	0.01%	0.00%	0.01%
81. Legal Services	0.17%	0.00%	0.00%	0.00%	0.17%	0.17%	0.00%	0.00%	0.00%	0.17%	0.17%	0.00%	0.00%	0.00%	0.17%
87. Engineering and Management Services	0.18%	0.13%	0.00%	0.00%	0.32%	0.18%	0.13%	0.00%	0.00%	0.32%	0.18%	0.13%	0.00%	0.00%	0.32%
Subtotal	7.81%	12.50%	0.67%	0.96%	21.93%	7.81%	12.50%	0.67%	0.96%	21.93%	7.81%	12.50%	0.67%	0.96%	21.93%

Product	Minority Business Enterprise (MBE)	Women Business Enterprise (WBE)	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)	Disabled Veteran Business Enterprise (DVBE)	WMDVLGBTBE	Minority Business Enterprise (MBE)	Women Business Enterprise (WBE)	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)	Disabled Veteran Business Enterprise (DVBE)	WMDVLGBTBE	Minority Business Enterprise (MBE)	Women Business Enterprise (WBE)	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)	Disabled Veteran Business Enterprise (DVBE)	WMDVLGBTBE
	Minority Business Enterprise (MBE)	Women Business Enterprise (WBE)	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)	Disabled Veteran Business Enterprise (DVBE)	WMDVLGBTBE	Minority Business Enterprise (MBE)	Women Business Enterprise (WBE)	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)	Disabled Veteran Business Enterprise (DVBE)	WMDVLGBTBE	Minority Business Enterprise (MBE)	Women Business Enterprise (WBE)	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)	Disabled Veteran Business Enterprise (DVBE)	WMDVLGBTBE
27. Printing and Publishing	0.16%	0.00%	0.00%	0.00%	0.16%	0.16%	0.00%	0.00%	0.00%	0.16%	0.16%	0.00%	0.00%	0.00%	0.16%
35. Industrial Machinery and Equipment	0.00%	0.02%	0.00%	0.00%	0.02%	0.00%	0.02%	0.00%	0.00%	0.02%	0.00%	0.02%	0.00%	0.00%	0.02%
36. Electronic and Other Electric Equipment	0.36%	0.00%	0.00%	0.00%	0.36%	0.36%	0.00%	0.00%	0.00%	0.36%	0.36%	0.00%	0.00%	0.00%	0.36%
46. Pipelines, Except Natural Gas	0.02%	0.00%	0.00%	0.00%	0.02%	0.02%	0.00%	0.00%	0.00%	0.02%	0.02%	0.00%	0.00%	0.00%	0.02%
50. Wholesale Trade—Durable Goods	0.53%	3.93%	0.00%	0.00%	4.46%	0.53%	3.93%	0.00%	0.00%	4.46%	0.53%	3.93%	0.00%	0.00%	4.46%
55. Automotive Dealers and Service Stations	0.00%	0.36%	0.00%	0.00%	0.36%	0.00%	0.36%	0.00%	0.00%	0.36%	0.00%	0.36%	0.00%	0.00%	0.36%
Subtotal	1.07%	4.30%	0.00%	0.00%	5.38%	1.07%	4.30%	0.00%	0.00%	5.38%	1.07%	4.30%	0.00%	0.00%	5.38%



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

10.1.2

In 2019, Liberty Utilities increased combined supplier diversity efforts and raised awareness of the company throughout California via its regional supply chain department. The company will continue to share best practices, attend diversity events and collaborate on future goals to streamline company efforts.

Liberty Utilities will continue to attend outreach events, CWA workshops, Meet the Primes Events, and CPUC Workshops. These all contribute to increased participation by diverse suppliers and support supplier diversity goals.

### Plans for Recruiting WMDVLGBTBE Suppliers in Low Utilization Areas

10.1.3

While striving to surpass the CPUC goal of 21.5% continually can be a challenging endeavor, Liberty Utilities hopes to attract suppliers in under-utilized areas through continued collaboration across its California utilities, relationships and partnership with CWA, and continued focus on improving communications with CBOs to attract the right talent in the diverse business enterprise supplier pool to better partner with Liberty Utilities.

### Plans for Recruiting WMDVLGBTBE Suppliers Where Unavailable

10.1.4

Liberty Utilities continues to expand and extend its reach to the product and service providers within its service areas and beyond to provide information to those suppliers regarding available opportunities. Continued constructive communication with our CBOs related to Liberty Utilities' needs and potential matches to them should help identify diverse business enterprises that can both benefit from and provide benefit to the supplier diversity program.



## Plans for Encouraging Prime Contractors to Subcontract WMDVLGBTBE



### 10.1.5

Liberty Utilities plans to review current practices to substantially improve the engagement of second- and third-tier suppliers by prime contractors and improve understanding of supplier diversity goals and objectives.

In 2019, Liberty Utilities worked with our prime contractors to enhance efforts to partner with diverse business enterprises and will expand efforts to educate prime contractors on the positive economic impact that the program provides.

Liberty Utilities will be adding more specific forms to its RFP process to capture proposals that quantify the diverse business enterprise commitments from suppliers through the bid process.

## Plans for Complying with WMDVLGBTBE Program Guidelines

### 10.1.6

Liberty Utilities will continue to engage our executive and mid-manager levels in supporting supplier diversity strategies and goals. While actively engaging with its internal team to again exceed goals in 2020 and address any underutilized categories.

Support of external stakeholders will remain a key program element to help identify potential suppliers and support this program.

Liberty Utilities strives to provide the best products and services to its customers in the safest, most efficient way that provides the best possible value, and this execution includes the integration of our supplier diversity program to identify suppliers that can support these objectives.







# Liberty Utilities®

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