



My community.
My choice.

**CONNECT YOUR BUSINESS TO
California's Contracting Clearinghouse**

Certify & Amplify Virtual Workshop

POST-EVENT MATERIALS

6.3.2020



My community.
My choice.

**CONNECT YOUR BUSINESS TO
California's Contracting Clearinghouse
Certify & Amplify Virtual Workshop**

Welcome

Housekeeping

- This workshop will be recorded. Please use your audio and video controls accordingly.
- We will have an open Q&A after our speaker's presentations. In the meantime, please add your questions in the chat box.
- The speaker presentations, workshop recording, and a short survey will be emailed to you after.
- Please stay for a group "photo" at conclusion.

Agenda

Agenda

- 1) Welcome & Introductions by MCE
- 2) G.O. 156 Overview by CPUC
- 3) Panel Discussion (PG&E, Veteran Launch, Lamb Consulting)
- 4) Q&A



Photo from Certify & Amplify on March 7, 2019



Statewide perspective

Bezawit Dilgassa

Small Business Advocate and Liaison
California Public Utilities Commission (CPUC)

Previously: CPUC's Utility Enforcement Branch



Electric utility perspective

Lili Kwan

Manager of Supply Chain Responsibility
Pacific Gas and Electric Company (PG&E)

Previously: MedAssets



Merging State and Business Perspectives

Teresa Davies

Advisory Board Member
Veteran Launch

Previously: PG&E, San Diego Gas & Electric,
Ecova, Inc., The Elite SDVOB Network



Local business perspective

Debbie Lamb

Owner & Operator
Lamb Consulting

Previously: Comcast Spotlight, Griffin
Technology Academies, The Stride Center

34 Member Communities

Marin County
+ 11 cities

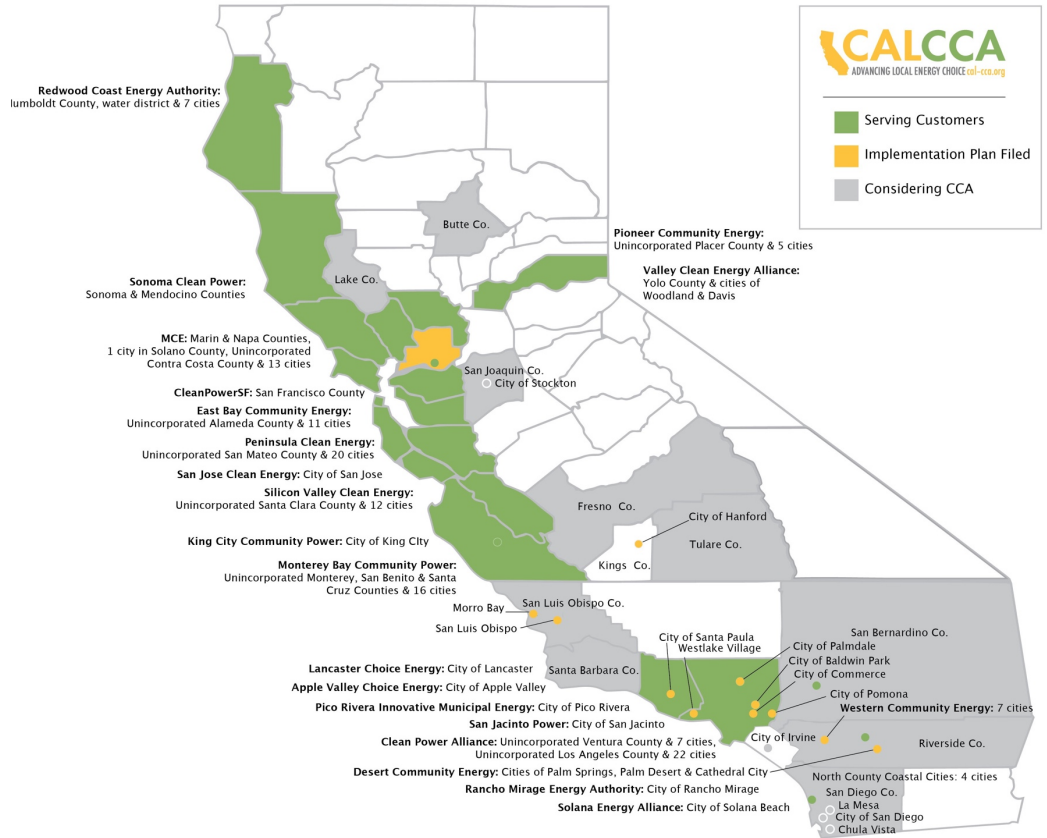
Solano County
+ 1 city

Napa County
+ 5 cities

Contra Costa County
+ 13 cities



CCAs in California



MCE & Supplier Diversity

Supporting and Seeking Opportunities for Our Local Businesses

- SB 255 & Prop 209
- Connect qualified businesses to CPUC Supplier Diversity Clearinghouse
- Partner with local business community



MCE's Solicitation Page

- Procurement across all departments and functions of MCE
- Current RFP and RFQs listed here
- Sign up for interest forms to be notified of future solicitations



Questions?
We want to hear from you!
1 (888) 632-3674

- Our Board
- Board & Committee Meetings
- Our Team
- Careers
- RFPs and Solicitations**
- MCE News
- Documents >
- Contact Us

RFPs and Solicitations

At MCE, we work with a variety of service partners to accomplish our mission in providing renewable energy, reducing greenhouse gas emissions, and investing in clean energy projects and programs across 34 member communities in four Bay Area counties.

Requests for Proposals / Qualifications & Other Solicitations

Legal Services as Municipal, Energy, and Bond Counsel – Request for Offers

- [RFO \(pdf\)](#)
- [MCE Standard Short Form Contract Agreement \(pdf\)](#)

Heat Pump Participating Contractors – Request for Qualifications

- [RFQ \(pdf\)](#)

Residential Pay-for-Performance – Request for Proposals

- [RFP \(pdf\)](#)
- [MCE Responses to Questions Submitted \(pdf\)](#)

Interest Forms

If you are interested in working with MCE and would like to receive notifications regarding future solicitations, we invite you to fill out the form(s) in the toggles below so we can learn more about your services.

Marketing and Creative, Public Affairs, Event Production, or Data Management

Energy Efficiency, Demand Response, Workforce Development, Electric Vehicles, or EV Charging

Internal Operations, Non-Energy Related Services, Construction, Information Technology, Finance, Human Resources, or Software

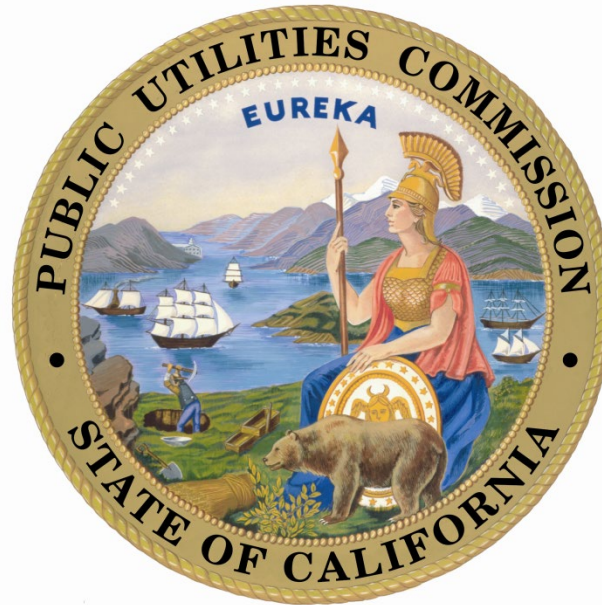
Energy Industry or Procurement

California Public Utilities Commission

Bezawit Dilgassa



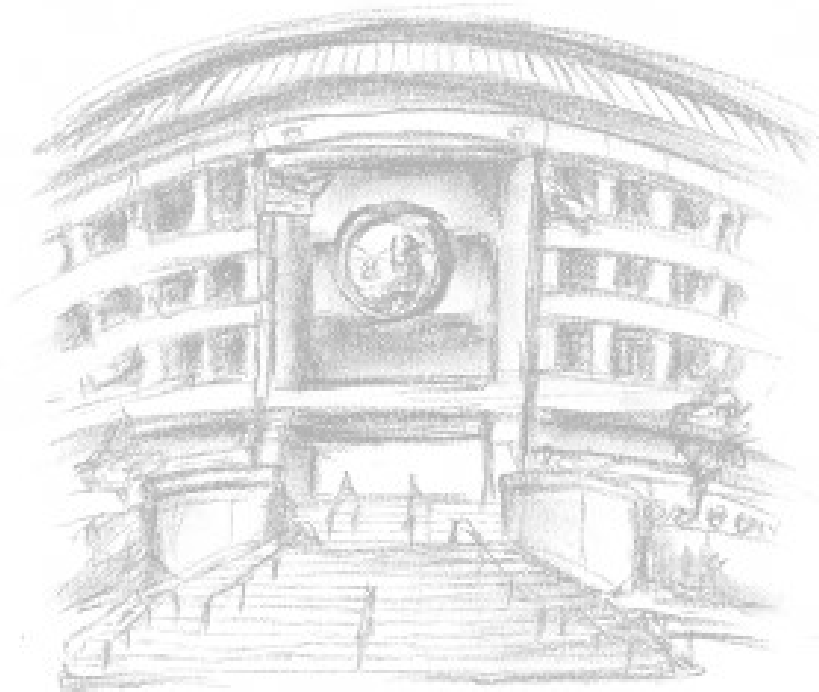
California Public Utilities Commission Utility Supplier Diversity Program





About the California Public Utilities Commission (CPUC)

- Regulates privately-owned electric, natural gas, telecommunications, water, railroad, rail transit, and passenger transportation companies
- Ensures access to safe, clean, and reliable utility services and infrastructure at reasonable rates
- Protects consumers against fraud
- Promotes the health of California's economy





CPUC Utility Supplier Diversity Program

CA Public Utilities Code Sections 8281 - 8286:

- Requires utility companies with annual gross California revenues greater than \$25 million to establish a program that aims to increase procurement from women, minority, disabled veteran, and LGBT business enterprises (WMDVLGBTBE) directly and through their prime contractors
 - Annually submit detailed and verifiable plan
 - Annually submit program implementation report
- Requires utility companies with annual gross California revenues greater than \$15 million, but less than \$25 million to annually submit data on procurements from WMDVLGBTBEs

Currently, voluntary overall program goal is 21.5%: 15% minority, 5% women, and 1.5% disabled veteran business enterprises

**No goal for LGBT businesses





CPUC Utility Supplier Diversity Program

CA Public Utilities Code Sections 366.2 and 8283:

- Requires community choice aggregators (CCA) with gross annual revenues exceeding \$15 million to annually submit a detailed and verifiable plan for increasing procurement from small, local, and diverse business enterprises; and a report regarding procurement from WMDVLGBTBEs
- Encourages exempt wholesale generators selling electricity to retail sellers, distributed energy resource contractors, energy storage system companies, and exempt CCAs to voluntarily adopt a plan for increasing WMDVLGBTBE procurement and to voluntarily report activity in this area





CPUC Utility Supplier Diversity Program

Subcontracting Program:

- Each utility company shall establish and maintain a subcontracting program for the purpose of encouraging its prime contractors to utilize WMDVLGBTBE subcontractors
- Each utility company shall include in its annual report to the CPUC a summary of prime contractors' progress in increasing the participation of WMDVLGBTBE subcontractors





CPUC Utility Supplier Diversity Program

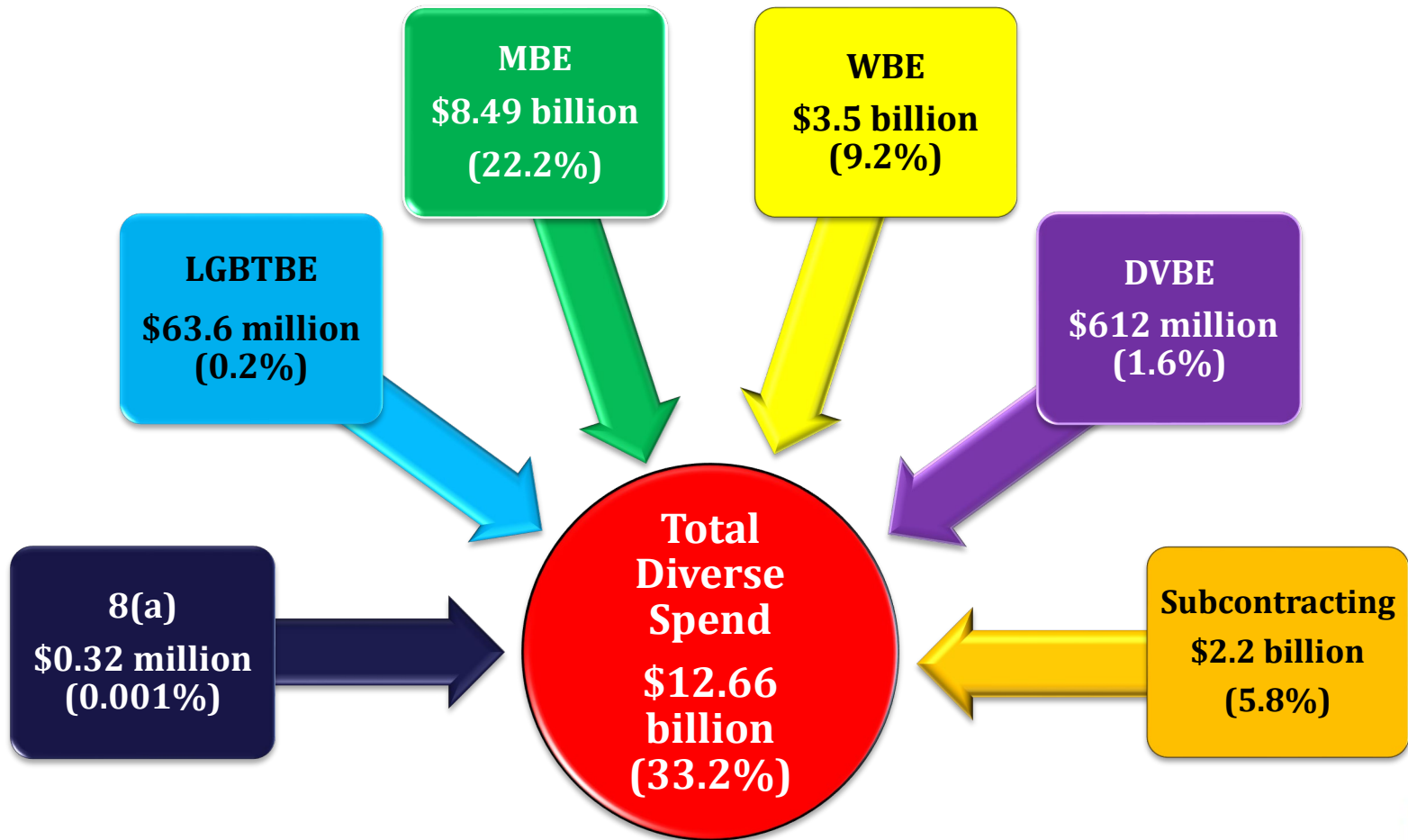
General Order (GO) 156 expects the utilities:

- Internal activities:
 - To establish a supplier diversity program with adequate resources
 - To provide guidance and direction
 - To train employees
 - To assist prime contractors with their supplier diversity programs
 - To submit an annual report of progress and plans
- External activities:
 - To conduct outreach
 - To support the efforts of organizations who promote the interests of WMDVLGBTBEs
 - To provide technical assistance and capacity building programs





2018 Utilities WMDVLGBTBE Procurement Overview





Supplier Clearinghouse

- A program that verifies WMLGBTBE status
- The CPUC Utility Supplier Diversity Program supervises this program
- DGS establishes the eligibility of disabled veteran business enterprises (DVBE) and provides the information to the Clearinghouse
- The Clearinghouse maintains a WMDVLGBTBE database





Supplier Clearinghouse

How to get certified:

- Business owned, at least, 51% by minority, woman, or LGBT person or persons and whose management and daily business operations are controlled by one or more of those persons
- Certification is free
- Application reviewed within four weeks
- Certification renewed every three years





Supplier Clearinghouse

How to get certified:

- Go to www.thesupplierclearinghouse.com

THE SUPPLIER CLEARINGHOUSE

Apply Search Directory News / Events Contact Login

JOIN OUR SUPPLIER DIVERSITY PROGRAM
Open to women, minority, disabled veteran and LGBT-owned firms

Apply

Welcome to the Supplier Clearinghouse. Our new website and system includes a full online application for new and renewing firms, a comprehensive directory search function, and relevant news and events for the MBE, WBE, DVBE, and LGBTBE community.





Supplier Clearinghouse



THE SUPPLIER CLEARINGHOUSE

[Apply](#) [Search Directory](#) [News / Events](#) [Contact](#)

[Login](#)

[Apply for Certification](#)

Why Apply?

What You Gain by Being Certified

- **Official recognition** of your Women, Minority, Service Disabled Veteran, or LGBT-owned business enterprise status
- Promotion and **visibility to the CPUC** and 16 major utility companies
- Inclusion in pertinent **marketing and bid announcement** events
- **Faster contracting processes**

It is through this registration and certification process, as well as numerous marketing activities, events and bid announcements, that participating utilities are able to actively select firms from a Certified Suppliers List in order to meet procurement goals established by the California Public Utilities Commission (CPUC)-issued General Order 156 (GO 156):

- 15% goal for minority-owned businesses
- 5% goal for woman-owned businesses
- 1.5% goal for service-disabled veteran-owned businesses
- [No goals have been set](#) for LGBTBE firms





Supplier Clearinghouse

How Do I Know if My Firm Qualifies for Certification?

Eligibility Standards

Do you meet the following requirements for certification?

Is your firm majority-owned by minorities, women, and/or LGBT individuals?

[Show Details](#)

Is your firm managed and controlled on a daily basis by minorities, women, and/or LGBT individuals?

[Show Details](#)

Is your firm an independent business?

[Show Details](#)

If you answered **YES** to all of the questions above, you may be qualified for certification with The Supplier Clearinghouse! Please select the applicable option below to start the online application process.

Need more information about the program or the process?

[View Questions](#)





Supplier Clearinghouse

To start the application process, please select an option below.

Renewing Applicants

Your firm's account has already been created for you!

I don't know my username and password.

[Lookup Account](#)

I am ready to log in and I know my username and password.

[Login](#)

New Applicants

I'm not sure if I have an account.

[Lookup Account](#)

I looked, but I don't have an account in the system.

[Create an Account](#)

I have an account and I know my username and password.

[Login](#)

Returning Applicants

I already started an online application and need to complete and submit it.

[Login](#)

Note: Once you log in, your incomplete application can be found on your dashboard as "Pending Submission".

Unable to submit online and need accommodation?

[Contact the Supplier Clearinghouse](#)

Email:
info@thesupplierclearinghouse.com

Phone:
(800) 359-7998





Supplier Clearinghouse

Documents required for certification:

- Notarized Affidavit
- Federal Tax Returns
- Articles of Incorporation
- By-Laws and amendments
- Copy of stock ledgers
- Evidence of personal capital contributions
- Business bank account information
- Resume and work history of all principals and key employees
- Proof of qualifying owner(s) US Citizenship or legal, permanent US Resident Alien Status
- Proof of qualifying owner(s) gender (required for firms applying for WBE or WMBE)
- Proof of qualifying owner(s) LGBT status (required for firms applying for LGBTBE)
- Proof of qualifying owner(s) ethnicity/minority status (required for firms applying for MBE or WMBE)
- Copies of business card from all owners





Supplier Clearinghouse

Accepted certifications:

- The National Minority Supplier Development Council (NMSDC)
- The Women's Business Enterprise National Council (WBENC)
- National Gay & Lesbian Chamber of Commerce (NGLCC)
- The United States Small Business Administration (SBA 8(a))





Benefits of Certification

- Official recognition of your business diverse status
- Sets your business apart in the marketplace
- Your business will be part of the database utilities use
- Increases your business visibility
- In their annual reports, utilities only include purchases from certified diverse businesses
- Your business will be included in CPUC and utilities related event marketing





Recommendations

- Register your company by going to each utility supplier web portal
- Keep your contact information up-to date
- Make sure you have a business website that describes what your company does
- Use resources available
- Do research on the utilities and prepare a plan for business
- Make sure you read and understand the requirements set forth in solicitations
- Make sure you are properly licensed, insured, and meet the safety requirements
- Make sure you have the financial capacity to perform the work
- Partner with other businesses
- Attend networking events
- Read the annual GO 156 reports





California Public Utilities Commission

Contact Information

Bezawit Dilgassa, Small/Diverse Business Advocate

Email: bezawit.dilgassa@cpuc.ca.gov

415-703-5269

For more information:

www.cpuc.ca.gov/smbus/

www.cpuc.ca.gov/supplierdiversity/

Once Certified – Don'ts:

- Use CPUC as a marketing agent.
- Work individually.
- Set unreasonable expectations.
- Meet utilities without preparation.
- Be overly persistent.

Typical Bid Selection Criteria

- Responsiveness to request for proposals.
- Competitive pricing and values added capabilities.
- Good references and financial stability.
- Core competency in the supplier's line of business.
- Quality processes.
- EDI and E-Commerce functionality.
- Clean Occupational Safety and Health Records.
- Certification by diversity or small business organization.

Note: CPUC does not engage in the utilities' bid selection process and general contract-related disputes.

CPUC Utility Supplier Contacts
Drisha Melton | Bezawit Dilgassa
(800) 253-0500
supplierdiversity@cpuc.ca.gov
smallbiz@cpuc.ca.gov

UTILITY SUPPLIER DIVERSITY CONTACTS

Communications Companies

AT&T

Lisa Castillo lc3142@att.com

Sprint

Joyce Christianio (913) 439-4867
Joyce.Christiano@sprint.com

Comcast

Lisa Roben (925) 424-0998
Lisa_Roben@comcast.com

Cox

Esther Northrup (858) 836-7308
esther.northrup@cox.com

T-Mobile

Chi Pak (425) 383-5529
Chi.Pak@t-mobile.com

Charter

Darretta Whitfield (720) 518-2657
Darretta.Whitfield@charter.com

Frontier

Dawn Gilbert (805) 375-5300
dawn.gilbert@ftr.com

Energy Companies

Liberty Utilities

Leslie Lakin (530) 546-1710
Leslie.Lakin@libertyutilities.com

PG&E

Lili L. Kwan (415) 973-7422
LLKE@pge.com

SDG&E

Sydney Furbush (858) 654-6391
sfurbush@semprautilities.com

SoCalGas

Yolanda Padilla (213) 244-5627
YPadilla@semprautilities.com

Southern California Edison

Dennis Thurston (626) 302-8932
dennis.thurston@sce.com

Pacific Power/PacifiCorp

Monte Mendenhall (541) 840-4237
Monte.Mendenhall@pacificcorp.com

Water Companies

California American Water Company

Edward Simon (619) 446-4764
Edward.Simon@amwater.com

California Water Service Company

Jose G. Espinoza (408) 367-8295
jespinoza@calwater.com

Golden State Water Company

Joy Holley (909) 394-3600 x662
Holley.Joy@gswater.com

San Gabriel Valley Water Company

Jeannette Diaz (909) 201-7383
jdiaz@sgvwater.com

Suburban Water Systems

Lauren James (626) 543-2531
ljames@swwc.com

San Jose Water Company

Timothy McLaughlin (408) 918-7226
Timothy.McLaughlin@sjwater.com

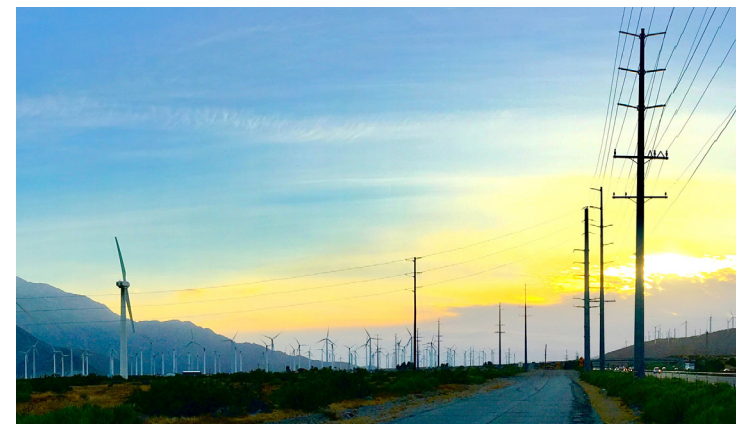
Liberty Utilities - Park Water & Apple Valley

Danny Rodriguez (562) 299-5118
danny.rodriguez@libertyutilities.com



CALIFORNIA PUBLIC UTILITIES COMMISSION

DOING BUSINESS WITH
**INVESTOR-OWNED
UTILITIES**



CPUC Utility Supplier Diversity Program: Helping Diverse Businesses Sell to Utilities

The California Public Utilities Commission's (CPUC) General Order (GO) 156 encourages investor-owned utilities (utilities) and their prime contractors to purchase at least 21.5% of goods and services from women; minority; lesbian, gay, bisexual and transgender (LGBT); and disabled veteran owned businesses. Currently, more than 30 investor-owned utilities such as AT&T, California Water Association, Comcast, Frontier, PG&E, SDG&E, Southern California Edison, SoCalGas, and Verizon participate in this program.

Getting Started - Get Certified

Businesses must be certified to participate in the Utility Supplier Diversity Program.

If your business is at least 51 percent owned by one or more women, minorities, or LGBT individuals whose management and daily business operations are controlled by one of those individuals, apply to the CPUC's third-party certifier and get certified for free:

The Supplier Clearinghouse
10100 Pioneer Blvd, Suite 103
Santa Fe Springs, CA 90670
Toll Free: (800) 359-7998
Los Angeles Area Phone: (562) 325-8685
Fax: (562) 278-0153 and (888) 549-3803
E-mail: info@thesupplierclearinghouse.com
Website: www.thesupplierclearinghouse.com

Disabled Veteran-Owned Businesses are certified by the Department of General Services:

Office of Small Business & Disabled Veteran Business
Enterprise Services Department of General Services,
Procurement Division
707 3rd Street
West Sacramento, CA 95605
Phone: 916-375-4940
Email: OSDSHelp@dgs.ca.gov
www.caleprocure.ca.gov/pages/sbdvbe-index.aspx

The following are comparable certifying agencies accepted by the Supplier Clearinghouse:

- The National Minority Supplier Development Council (NMSDC)
- The Women's Business Enterprise National Council (WBENC)
- National Gay & Lesbian Chamber of Commerce (NGLCC)
- The United States Small Business Administration (SBA)

Qualified applicants enter a supplier database accessed by participating utilities, their prime contractors, and other businesses: <https://sch.thesupplierclearinghouse.com/FrontEnd/SearchCertifiedDirectory.asp>

Certification is valid for three years except for the certifications from the comparable certifying agencies. These certifications are valid for the duration they are current with the comparable certifying agency.

Note: certification and inclusion in the database does not guarantee business with utilities. For more information on CPUC's Utility Supplier Diversity Program, please visit www.cpuc.ca.gov/supplierdiversity

Once Certified – Dos:

Identify and research the utilities you are interested in working with.

- Does the utility buy the products/services you provide?
- Does your business offer a solution to the utility?
- How can your business add value to the utility?
- How does the utility procure products/services?
- What are the utility's buying cycles and strategies?
- Who are the utility's prime contractors for subcontracting opportunities?
- Who are the businesses already working with the utility?
- Who are your business competitors in the market you are in?

Register your business in the utilities' supplier database portals and update your business profile, at least, annually.

Build relationships.

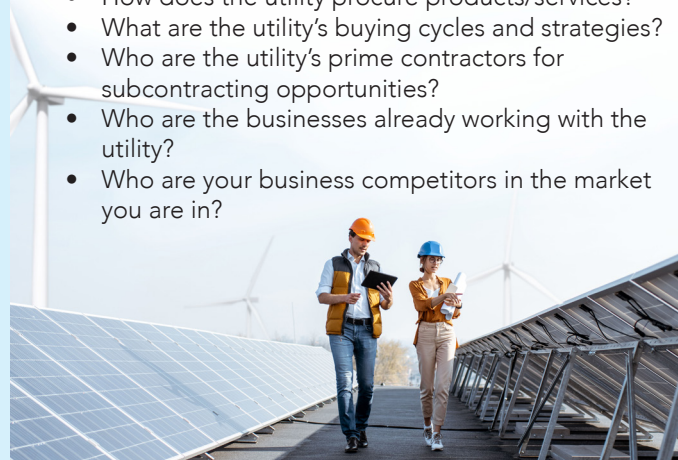
- Be proactive.
- Build your network.
- Attend events your target utility hosts, sponsors, or participates in.
- Prepare well before networking or meeting the utilities.
- Research common grounds with the utilities for engaging conversations.
- Find speaking engagement opportunities for strategic business presentations.
- Develop a professional "Follow-up" system.
- Ask for referrals.
- Network with other compatible businesses for partnerships, referrals, information on best practices etc.
- Work proactively with affinity groups and trade organizations.

Market your business.

- Develop a marketing strategy focused on sharing solutions.
- Attend business events.
- Connect with the utilities' supplier diversity representatives.
- Articulate the value of your business succinctly verbally and in all marketing materials.
- Be visible, especially to your target utilities.
- Develop a business website that is easy to navigate and has current information.
- Use technologies such as social medias and video marketing.
- Maintain a current certification status.

Bid on contracts.

- Respond to all bid questions and provide all required documents.
- Check for clerical and grammatical errors.
- Be different.
- Be persistent but patient.
- Partner with other businesses to increase your business competitiveness.



PG&E

Lili Kwan

Supplier Diversity Program

Lili Kwan
Manager, Supply Chain Responsibility



“PG&E” refers to Pacific Gas and Electric Company, a subsidiary of PG&E Corporation. © 2020 Pacific Gas and Electric Company. All rights reserved.



Supply Chain Responsibility at PG&E

Supplier Code of Conduct

Responsible & Accountable

Foster supplier awareness and compliance with the principles and standards of conduct PG&E expects

Supply Chain Environmental Sustainability

Clean & Efficient

Reduce environmental footprint of product and service selections and drive supplier environmental performance improvement

Supplier Diversity

Diverse & Inclusive

Promote an inclusive supply chain that supports company goals and reflects the diversity of our local communities

A commitment to supplier diversity

Why we do it

- Supply chain competitiveness
- Innovation and business value
- Community engagement
- Local economic vitality
- Regulatory compliance

How we do it

- Leadership commitment
- Proactive integration into business and sourcing operations
- Primes engagement
- Community partnerships
- Outreach and training

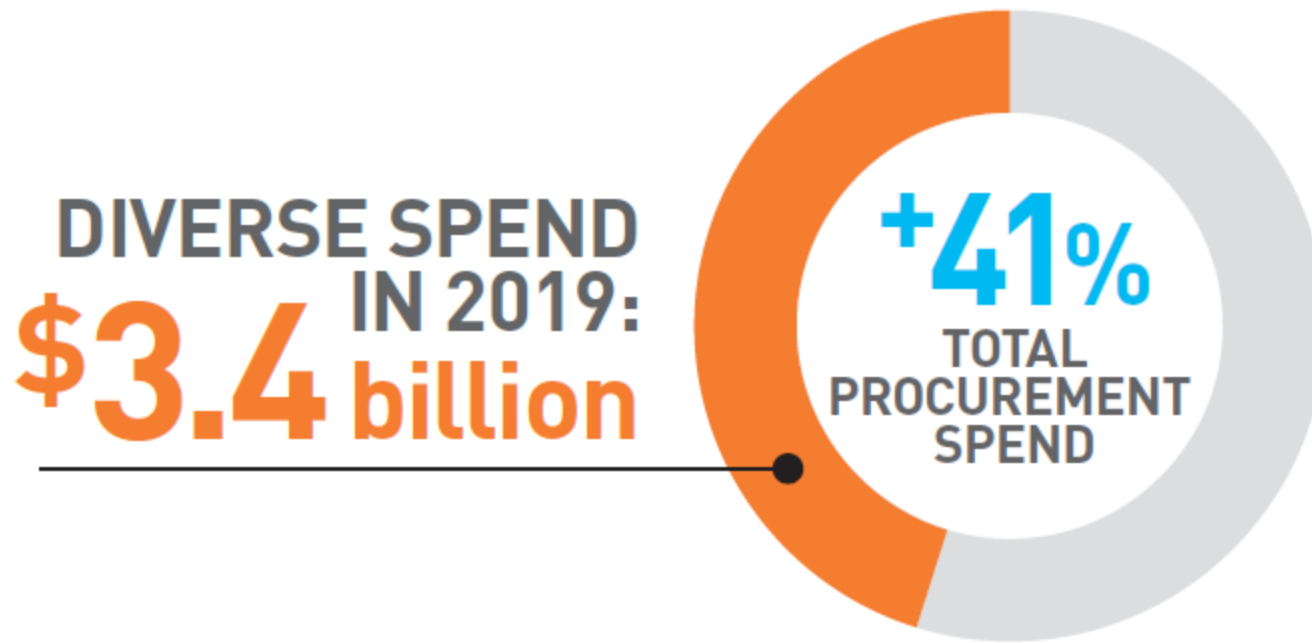
Results

- Published annual report with verified Clearinghouse spend
- Competitive supply chain reflective of PG&E customers and CA business population

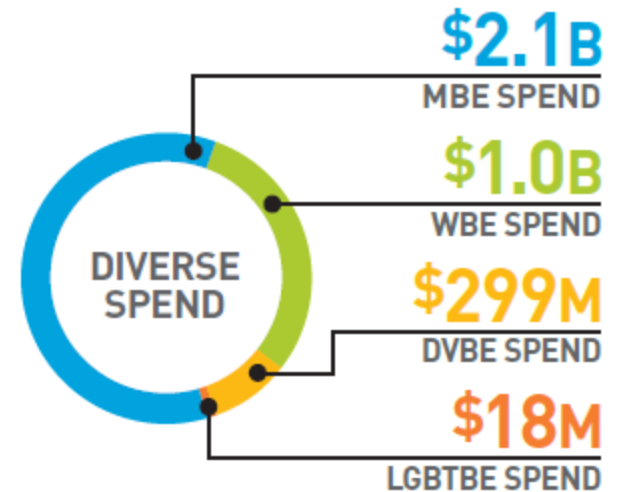
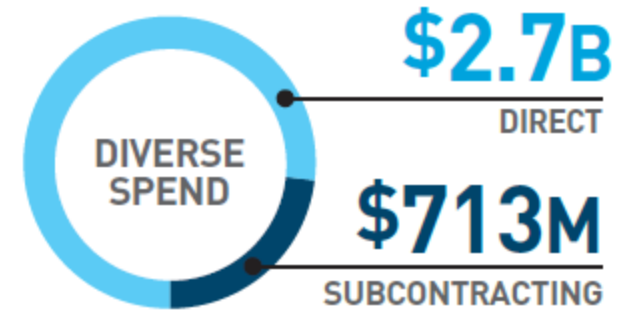
Diverse suppliers are helping us to
safely and **reliably deliver**
affordable and **clean energy**



Our 2019 diverse spend performance



CHAMPIONING SUPPLIER DIVERSITY FOR **39 YEARS**



707 ACTIVE DIVERSE SUPPLIERS



44% OF TOP 25 SUPPLIERS ARE DIVERSE



Diverse suppliers in all areas of our business

Electric Operations	<ul style="list-style-type: none">• Electrical and Civil Construction• Engineering Services• Transformers• Vegetation Management• Materials• Safety	Gas Operations	<ul style="list-style-type: none">• Pipeline and Civil Construction• Engineering Services• Strength Testing• Gas Line Inspection• Data Integrity• Materials• Safety	Corporate Services	<ul style="list-style-type: none">• Business Consulting• Finance and Risk• HR / Staffing Services• Legal• Marketing• Office Supplies• Travel
Generation	<ul style="list-style-type: none">• Materials and Services to generate:<ul style="list-style-type: none">- Hydro Power- Fossil Power- Renewable Power• Engineering Services• Civil Construction	Customer Care	<ul style="list-style-type: none">• Energy Efficiency Products and Services• Clean Energy Products and Services• Customer Service Products and Services	Other Shared Services	<ul style="list-style-type: none">• Transportation Services• Environmental (Permits, Licensing, Remediation)• Facilities Management• Corporate Security
Diablo Canyon Power Plant	<ul style="list-style-type: none">• DCPN Nuclear Procurement• DCPN Warehousing and Logistics	Information Technology	<ul style="list-style-type: none">• Computer Hardware and Software• Telecom Equipment• IT Consulting Services• Security Products and Services	Quality	<ul style="list-style-type: none">• Product Inspections• Field Material Problem Reporting• Management of Vendor Quality Programs

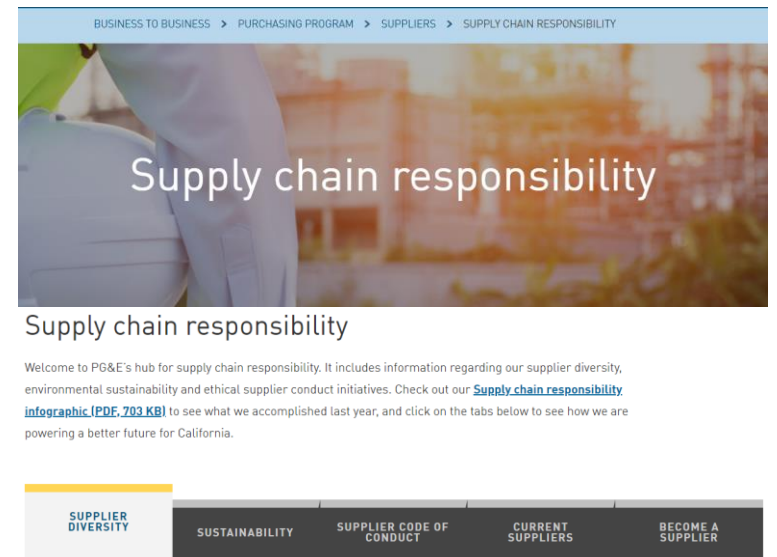
70+ The icon depicts a person sitting at a desk with a computer monitor, representing technical assistance or outreach events.

**TECHNICAL ASSISTANCE
AND OUTREACH EVENTS**

How to prepare for an opportunity

1. Outline your capabilities
2. Do your research
3. Consider certification as a diverse or small business
4. Check industry requirements
5. Attend training and outreach events

More info available at:
www.pge.com/supplychainresponsibility



Veteran Launch

Teresa Davies

Navigating

1. Explore client insights¹
2. Seek alignment with objectives²
3. Ensure you meet requirements³
4. Build your network⁴
5. Grow performance history
6. Ready to Deliver

¹ Annual Plan, Annual Reports: <https://www.cpuc.ca.gov/supplierdiversity/> ; CCA Efforts Report: <https://cal-cca.org/wp-content/uploads/2018/10/CalCCA-Beyond-Supplier-Diversity-Report.pdf>

² CPUC Report 2019, Program Challenges: https://www.cpuc.ca.gov/uploadedFiles/CPUCWebsite/Content/About_Us/Organization/Divisions/Office_of_Governmental_Affairs/Legislation/2019/2018%20GO%20156%20Leg%20Report%20Sept%201.pdf

³ 3rd Party Energy Efficiency Solicitations: <https://www.caeecc.org/third-party-solicitation-process> Referenced Purchase Order Terms: https://www.pge.com/pge_global/common/pdfs/for-our-business-partners/purchasing-program/suppliers/Exhibits-Cited-By-Reference-in-Purchase-Orders.pdf

⁴ PG&E List of Qualified Suppliers: https://www.pge.com/pge_global/common/word_xls/for-our-business-partners/purchasing-



Lamb Consulting

Debbie Lamb



Lamb
Consulting[™]

DebbieLamb.com



***SUPPLIER CLEARINGHOUSE
CERTIFICATE OF ELIGIBILITY***

CERTIFICATION EXPIRATION DATE: **March 10, 2023**

The Supplier Clearinghouse for the Utility Supplier Diversity Program of the California Public Utilities Commission hereby certifies that it has audited and verified the eligibility of:

***Lamb Consulting
Women Business Enterprise (WBE)***

pursuant to Commission General Order 156, and the terms and conditions stipulated in the Verification Application Package. This Certificate shall be valid only with the Clearinghouse seal affixed hereto.

Eligibility must be maintained at all times, and renewed within 30 days of any changes in ownership or control. Failure to comply may result in a denial of eligibility. The Clearinghouse may reconsider certification if it is determined that such status was obtained by false, misleading or incorrect information. Decertification may occur if any verification criterion under which eligibility was awarded later becomes invalid due to Commission ruling. The Clearinghouse may request additional information or conduct on- site visits during the term of verification to verify eligibility.

This certification is valid only for the period that the above firm remains eligible as determined by the Clearinghouse. Utility companies may direct inquiries concerning this Certificate to the Clearinghouse at (800) 359-7998 in Los Angeles.

VON: 19001489

DETERMINATION DATE: March 10, 2020

Q&A

Thank You!

mceCleanEnergy.org

engagement@mceCleanEnergy.org

@mceCleanEnergy    

