

2024 SUPPLIER DIVERSITY REPORT AND 2025 PLAN





PROCUREMENT WITH

**WOMEN
MINORITY
DISABLED VETERAN
LESBIAN
GAY
BISEXUAL
TRANSGENDERED
PERSONS WITH DISABILITIES**

BUSINESS ENTERPRISES

**Utility Supplier Diversity Report to the
California Public Utilities Commission (U-168-W)**

Prepared by:
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Director of Supplier Diversity
In response to CPUC General Order 156

This filing complies with the requirements of California Public Utilities Commission (CPUC) General Order 156 and contains the 2024 Annual Report and the 2025 Annual Plan of SJW's Utility Supplier Diversity Program (USDSP). The annual report describes the program activities and results achieved by SJW for the period of January 1, 2024 through December 31, 2024.



SAN JOSE WATER CON

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letter from our
**CHIEF
EXECUTIVE
OFFICER**
and
President



As we reflect on our supplier diversity progress for 2024, we are pleased to share both our accomplishments and areas of focus as we continue to strengthen our commitment to building an inclusive and resilient supply chain supporting the communities where we live, work, and serve. Our total diversity spend for 2024 was 32.7%, which serves as a clear indicator of our ongoing dedication to supplier diversity.

From 2023 to 2024, we experienced notable growth in several key areas. Total procurement spend increased by 22%, and total addressable spend grew by 18%. This growth reflects an expansion in our capital projects program while maintaining a strong focus on supplier diversity. Our overall spend with diverse suppliers rose by 10%, underscoring our continued efforts to engage diverse businesses in our supply chain.

A particularly noteworthy achievement for 2024 was a nearly 200% increase in spend with women-owned businesses, which highlights our commitment to supporting women entrepreneurs, particularly in our Smart Meter Program. Similarly, our spend with Disabled Veteran Business Enterprises (DVBES) grew by 11%, reinforcing our dedication to supporting disabled veteran-owned businesses.

While there were significant strides, we experienced a 27% decrease in spend with Minority Business Enterprises (MBEs), in part due to the re-classification of many minority-owned women businesses as women-owned rather than minority-owned. Additionally, subcontracting with diverse suppliers declined by 11%, and spend with LGBT suppliers remains a challenge. We are re-doubling our efforts to improve performance in these areas in the coming year.

While the total number of diverse suppliers remained relatively steady, we see opportunities to expand our direct relationships with diverse suppliers across all categories. This is a key area of focus for us as we move forward.

Looking ahead to 2025, we are committed to addressing the challenges identified and further enhancing our supplier diversity initiatives.

With a sustained and committed effort, we are confident in our ability to build on our progress and drive even more significant change in the future. We appreciate the opportunity to share this report and thank you for your ongoing support in helping us achieve our supplier diversity objectives.

Eric Thornburg
CEO, San Jose Water

Tanya Moniz-Witten
President, San Jose Water

2024 ANNUAL REPORT — SUMMARY OF PROGRAM AND HIGHLIGHTS

SJW is pleased to report that its dedication to the CPUC's Utility Supplier Diversity Program has made significant strides and yielded exceptional results in 2024. By prioritizing the supplier diversity program through executive leadership, Supplier Diversity Champions and our Prime Supplier Program, SJW has surpassed the CPUC's diverse spend goal of 23%, achieving a diverse business utilization percentage of 32.7%. This accomplishment highlights the company's ongoing commitment to fostering opportunities for diverse businesses and supporting the communities we serve.

From 2023 to 2024, we saw significant growth in key areas. Total procurement spend increased by 22%, and total addressable spend rose by 18%. This growth is a direct result of the expansion of our capital projects program, while still prioritizing supplier diversity. Our overall spend with diverse suppliers grew by 10%, highlighting our ongoing efforts to integrate diverse businesses into our supply chain.

One of the standout achievements for 2024 was a nearly 200% increase in spend with women-owned businesses, particularly in our Smart Meter Program, reflecting our strong commitment to supporting women entrepreneurs. Additionally, our spend with Disabled Veteran Business Enterprises (DVBEs) rose by 11%, underscoring our continued support for businesses owned by disabled veterans.

Despite these positive trends, we experienced a 27% decrease in spend with Minority Business Enterprises (MBEs). This decline can be partly attributed to the reclassification of many minority-owned women businesses as women-owned, rather than minority-owned. Additionally, subcontracting with diverse suppliers dropped by 11%, and spend with LGBT suppliers continues to present challenges. These are areas we recognize as needing improvement moving forward.

While the overall number of diverse suppliers remained stable, we see opportunities to strengthen our direct relationships with diverse suppliers across all categories. This will be a key focus area as we look to make further progress in the year ahead.

IN ADDITION TO EXCEEDING
THE CPUC DIVERSE SPEND
GOAL OF 23%, WE ARE VERY
PLEASED TO REPORT THAT
WE EXCEEDED THREE OF THE
CPUC SUB-GOALS:

13.8%	17.3%	1.6%
WBE SPEND	MBE SPEND	DVBE SPEND
\$25.4M	\$31.7M	\$3.0M

LGBT spend continued to be a challenge in 2024 and remains an area of focus in our 2025 supplier diversity plan.

WBE
Women-Owned
Business Enterprises

MBE
Minority-Owned
Business Enterprises

WMBE
Women, Minority-Owned
Business Enterprises

DVBE
Disabled Veteran-Owned
Business Enterprises

LGBTBE
Lesbian, Gay, Bisexual, Transgender
Business Enterprise

PDBE
Persons with Disabilities
Business Enterprises

2024 ANNUAL REPORT — SUMMARY OF PROGRAM AND HIGHLIGHTS *(cont'd)*

The positive results outlined in 2024 continue to be possible through intentional focus on our supplier diversity program in the following areas:



EXECUTIVE LEADERSHIP

From our CEO, our president, the entire **Executive Leadership Team (ELT)** and across all levels of management, supplier diversity remains a top priority. This strong focus on diversity continues to drive a cultural shift within the company. We are experiencing a notable increase in inquiries from our purchasing decision makers to identify diverse suppliers that meet their needs.



CHAMPION'S NETWORK

Business unit diversity champions proactively identify opportunities where diverse suppliers can compete. They serve as an extension of the supplier diversity program, helping to communicate the program's strategy across the business units.



PRIME SUPPLIER PROGRAM

The **Prime Supplier Program** continues to be an integral part of the SJW supplier diversity strategy. In 2024, the Prime Supplier Program contributed \$8.3M of diverse subcontracting, representing over 14% of SJW's overall supplier diversity results.

SJW continues its active participation in the California Water Association's (CWA) Utility Supplier Diversity Program (USDP). Under the CWA's USDP, we have maintained our Technical Assistance Program (TAP), Meet the Primes Program and supported numerous Community Business Organizations (CBOs) through participation in and/or sponsorship of events throughout California.

SUPPLIER DIVERSITY AT A GLANCE



\$183.6M

ADDRESSABLE SPEND



32.7%

TOTAL DIVERSE SPEND PERCENTAGE



5 YEARS

EXCEEDING CPUC GOALS
FOR MBE, WBE AND DVBE



\$51.7M

TOTAL AMOUNT
OF DIRECT SPEND



\$8.3M

TOTAL AMOUNT OF
SUBCONTRACTING SPEND



41

TOTAL NUMBER
OF DIRECT DIVERSE
SUPPLIERS



27

TOTAL AMOUNT
OF SUBCONTRACTING
DIVERSE SUPPLIERS



68

TOTAL UNIQUE DIVERSE
SUPPLIERS WITHIN THE
SUPPLIER DIVERSITY PROGRAM

SJW'S 2024 USDP HIGHLIGHTS

CPUC GOALS

For the fifth consecutive year, SJW exceeded CPUC goals in the following categories:

OVERALL
GOAL: 23%
SPEND: 32.7%

MBE
GOAL: 15%
SPEND: 17.3%

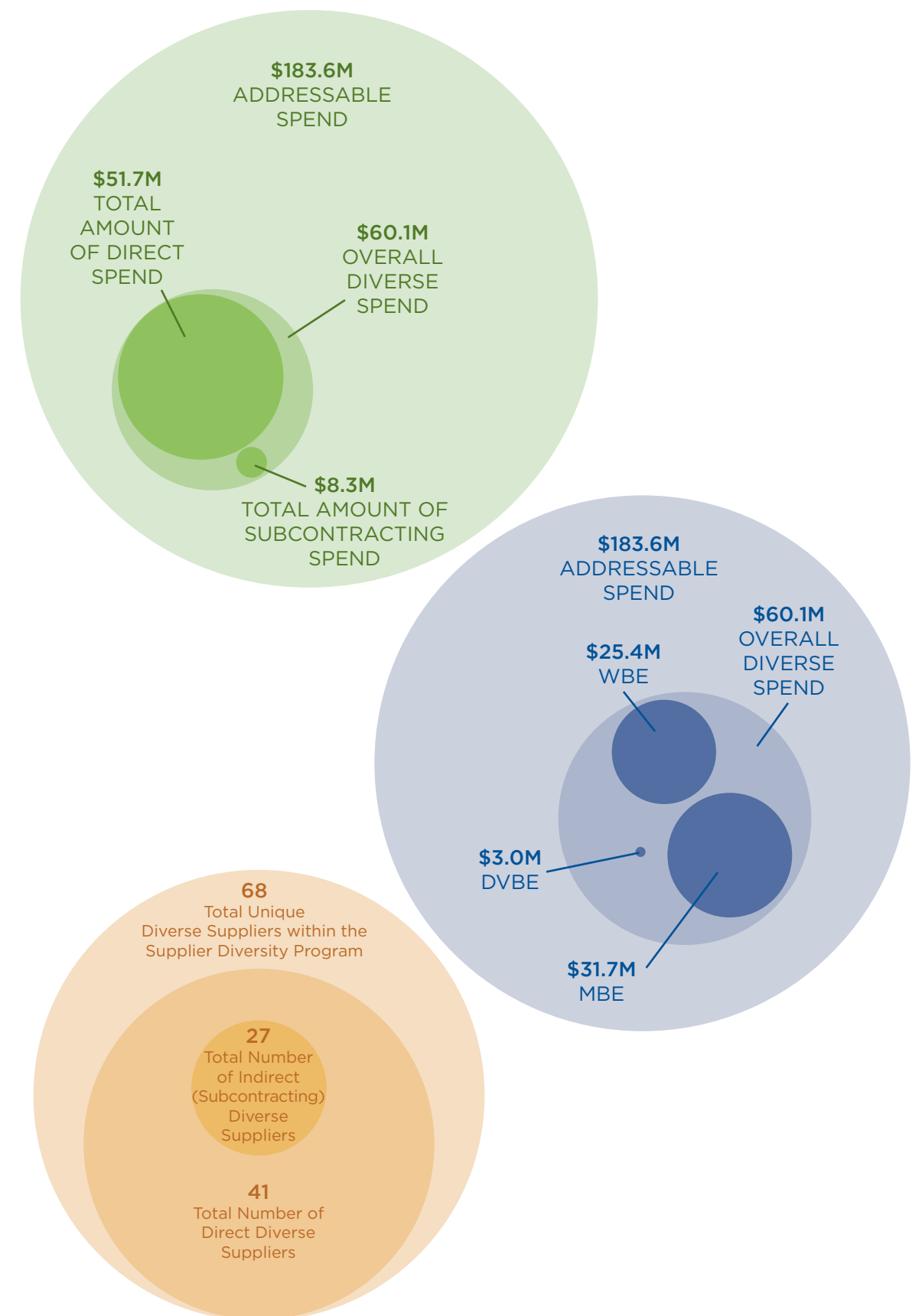
WBE
GOAL: 5%
SPEND: 13.8%

DVBE
GOAL: 1.5%
SPEND: 1.6%



Program Baseline Statistics

	2023	2024	'23-'24 Change
TOTAL PROCUREMENT SPEND	\$380M	\$462.8M	22%
Total addressable spend	\$156M	\$183.6M	18%
Overall spend with diverse suppliers	\$54.4M	\$60.1M	10%
Direct spend with diverse suppliers	\$45.1M	\$51.7M	15%
Prime Supplier Program, subcontracting with diverse suppliers	\$9.3M	\$8.3M	-11%
Total Minority Business Enterprise (MBE) Spend	\$43.2M	\$31.7M	-27%
Total Women Business Enterprise (WBE) Spend	\$8.5M	\$25.4M	199%
Total Disabled Veteran Business Enterprise (DVBE) Spend	\$2.7M	\$3.0M	11%
Total Lesbian, Gay, Bisexual, Transgendered Business Enterprise Spend (LGBTBE) Spend	-	-	-
Total number of unique diverse suppliers within the SJW Supplier Diversity Program	67	68	1%
Number of diverse suppliers doing business directly with SJW	52	41	-21%
Number of diverse suppliers doing business with SJW through subcontracting	20	27	35%



Description of Program Activities During the Previous Calendar Year

In 2024, SJW successfully adapted to the evolving business environment, which continues to include a remote work component and significant company growth. This adaptability contributed to a remarkable 22% increase in overall spending, alongside an 18% growth in addressable spend. This underscores not only our continued growth trajectory but also the stability and resilience of our supply chain as we increase spend, year over year.

Community Business Organization underwent a transition in 2024, balancing an increase of in-person events with hybrid and virtual events. These dynamics demanded resilience and steadfastness in our organization's approach to supplier diversity as we increased our presence at in-person events. In addition, we maintained our commitment to monitoring spend with Persons with Disabilities Business Enterprises and looked for opportunities with LGBT businesses, both requiring increased emphasis in 2025.

SJW consistently emphasizes the importance of supplier diversity as a key driver of our success. As a core component of our corporate strategy, we remain committed to addressing Environmental, Social, and Governance (ESG) issues. This includes goals such as reducing carbon emissions, ensuring the safety and well-being of individuals, promoting environmental sustainability, and championing supplier diversity.

Throughout 2024, we continued our commitment to supplier diversity at an SJW Group level with programs across sister utilities in Texas, Maine, and Connecticut.

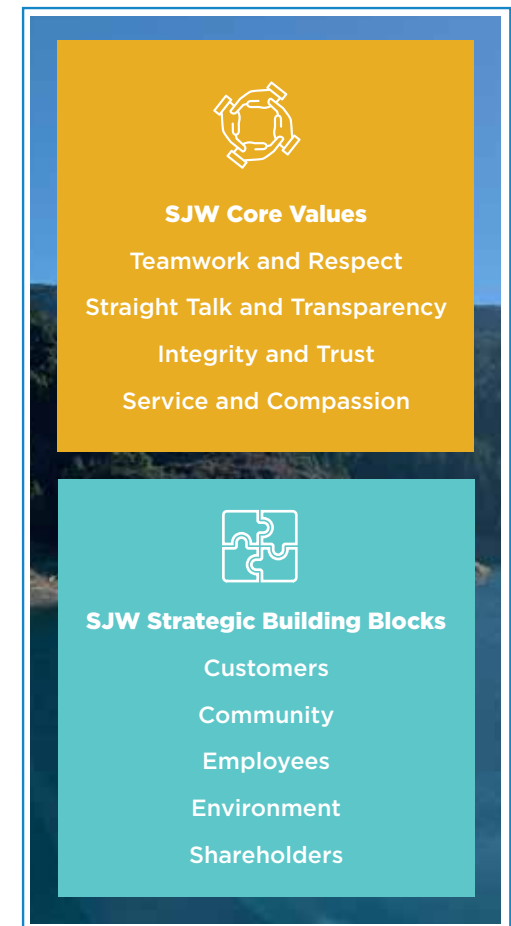
Diversity Equity and Inclusion

The SJW Group National Diversity, Equity & Inclusion Council (NDEIC) is consistent with our core values, will support, advise, empower and advocate for strengthening our commitment to diversity, equity and inclusion. The NDEIC serves as a liaison to the CEO and the Executive Leadership Team (ELT).

Board of Directors Data

Board of Directors data can be found in the San Jose Water Annual Report.

At SJW our Vision is to serve customers, communities, employees, shareholders, and the environment at world class levels. Our enduring mission is to be trusted professionals, passionate about delivering life-sustaining, high-quality water and exceptional service to families and communities, while protecting the environment and providing a fair return to shareholders. Our focus on core values remains unwavering as we cater to the needs of our stakeholders.



Description of Program Activities During the Previous Calendar Year (*cont'd*)

Internal Activities

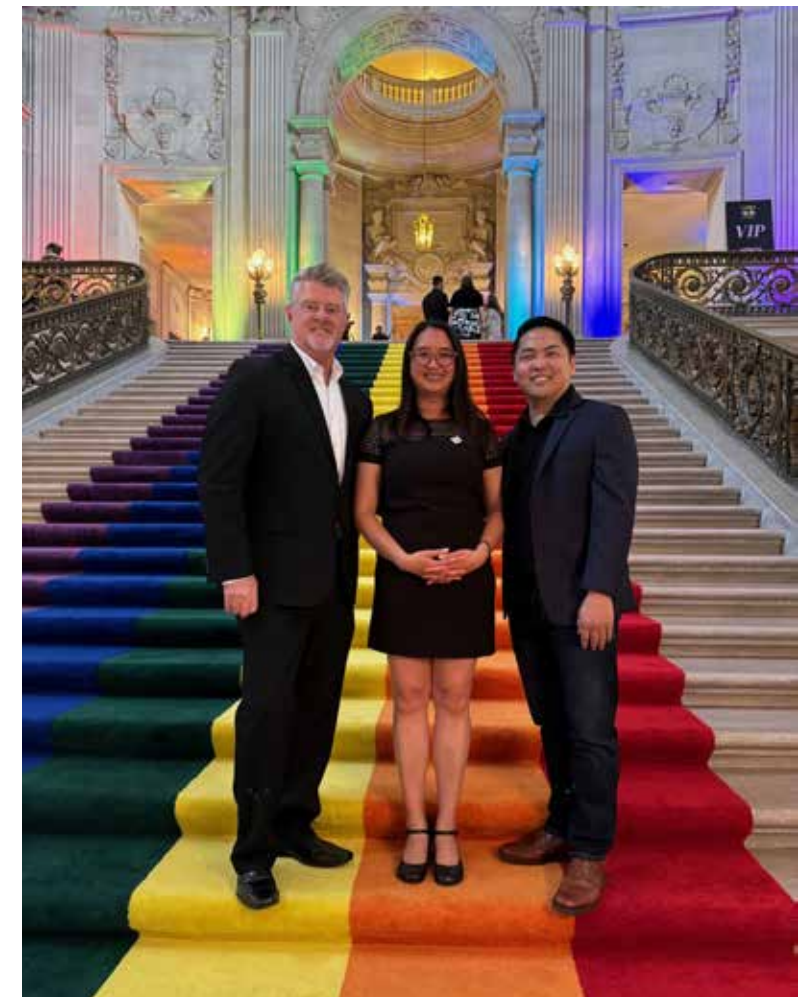
On October 3, 2023, SJW completed the CPUC Supplier Diversity Program Performance audit of our 2021 CPUC Annual Report and Plan, covering results from January 1, 2021, to December 31, 2021. The CPUC indicated that SJW results were generally reported accurately, properly reported, and in compliance with GO 156 requirements and guidance. There were 4 findings within the CPUC audit report, two of which were minor incidents of over-reporting and two instances of misclassification of reported spend. The CPUC audit recommendation for each finding was to strengthen SJW monitoring and review procedures over its reporting process.

In 2024, SJW continued our engagement with Astute Tax and Accounting Services, a minority and woman owned business, to perform the following:

- Deliver an automated tool that reduces report creation time and increases report accuracy
- Provide a new subcontracting reporting template for the SJW Prime Supplier Program
- Oversee and assist in preparing the Supplier Diversity Annual Report for 2023
- Ensure compliance with the requirements outlined in CPUC's GO 156 guidelines
- Recommend process improvements for the preparation of the Supplier Diversity Annual Report
- Establish internal controls for the Annual Reporting process for Supplier Diversity Program
- Document the process involved in preparing the Supplier Diversity Annual Report
- Provide advice and assistance on any relevant critical matters/processes such as the Vendor On-boarding process, process automation, etc.

Additional items of focus for 2024 included:

- Ongoing inclusion of supplier diversity as a crucial component in the RFP scoring process. This scoring system, implemented in 2021 for various RFPs, including those related to pipeline construction bids, remains a pivotal aspect of our approach.
- Collaborative efforts by local representatives from SJW with our central procurement group within the SJW Group, striking a balance between SJW Group's overall needs and the localized supplier diversity strategy.
- Continuous endeavors to integrate the supplier diversity strategy into the SJW Advanced Metering Infrastructure (AMI) project. SJW witnessed increased diverse spending in the AMI domain, indicating progress in implementing the supplier diversity strategy in this area.



Description of Program Activities During the Previous Calendar Year *(cont'd)*

External Activities

SJW's Director of Supplier Diversity, held the following leadership positions in 2024:

- Board of Directors for the Women's Business Enterprise Council (WBEC) – Pacific
- Board Chair for the United States Pan Asian American Chamber of Commerce (USPAACC) – Western Region
- Golf Committee Chair for the Western Regional Minority Supplier Development Council (WRMSDC)
- Golf Committee Chair for United States Pan Asian American Chamber of Commerce (USPAACC) – Western Region

CBO Outreach — Tradeshow, Conference, and other Outreach Events

SJW actively enhances its outreach efforts by participating in Community Business Organization (CBO) events that foster collaboration with Diverse Business Enterprises (DBEs) at the local, state, and national levels. Building and maintaining strong relationships while understanding the unique needs and capabilities of each CBO is crucial to advancing diverse spending at SJW. Additionally, SJW works closely with other members of the CWA and its USDP committee. Representing the CWA USDP, SJW regularly engages in a variety of events, including CBO meetings, tradeshows, and matchmaking events. The Director of Supplier Diversity at SJW plays an active role in these events, offering financial support or participating as a panelist, presenter, or attendee to share valuable insights.

Organizations Supported:

American Indian Chamber of Commerce (AICOC)
 CPUC (Small Business Expos)
 Disabled Veteran Business Alliance (DVBA)
 Elite Service Disabled Veteran Owned Business (SDVOB) Network
 Golden Gate Business Association (GGBA)
 Industry Council for Small Business Development (ICSBD)
 National Gay & Lesbian Chamber of Commerce (NGLCC)
 National Minority Supplier Development Council (NMSDC)
 National Utility Diversity Council (NUDC)
 Rainbow Chamber of Commerce Silicon Valley
 Silicon Valley Black Chamber of Commerce
 Silicon Valley Hispanic Chamber of Commerce
 Southern California Minority Supplier Development Council (SMSDC)
 The National Center for Native American Enterprise Development (NCAIED)
 Veterans in Business (VIB) Network
 Western Regional Minority Supplier Development Council (WRMSDC)
 Women's Business Enterprise Council — Pacific (WBEC-Pacific)
 Women's Business Enterprise Council — West (WBEC-West)
 Women's Business Enterprise National Council (WBENC)

SJW's Director of Supplier Diversity is also participant in the CPUC joint utilities organization.

Annual Results by Ethnicity

		DIRECT SPEND ¹	SUB SPEND ²	TOTAL \$	%
Minority Male	African American	\$11,253	\$0	\$11,253	0.01%
	Asian Pacific American	\$144,173	\$27,321	\$171,494	0.09%
	Hispanic American	\$29,346,256	\$2,105,365	\$31,451,621	17.13%
	Native American	\$0	\$44,735	\$44,735	0.02%
	Total Minority Male	\$29,501,682	\$2,177,421	\$31,679,103	17.25%
Minority Female	African American	\$0	\$0	\$0	0.00%
	Asian Pacific American	\$0	\$0	\$0	0.00%
	Hispanic American	\$0	\$0	\$0	0.00%
	Native American	\$0	\$0	\$0	0.00%
	Total Minority Female	\$0	\$0	\$0	0.00%
Total Minority Business Enterprise (MBE)		\$29,501,682	\$2,177,421	\$31,679,103	17.25%
Women Business Enterprise (WBE)		\$22,229,818	\$3,170,311	\$25,400,129	13.83%
Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)		\$0	\$0	\$0	0.00%
Disabled Veteran Business Enterprise (DVBE)		\$17,632	\$2,969,017	\$2,986,649	1.63%
Persons with Disabilities Business Enterprise (PDBE)		\$0	\$0	\$0	0.00%
8(a)*		\$0	\$0	\$0	0.00%
Total Supplier Diversity Spend		\$51,749,132	\$8,316,749	\$60,065,881	32.71%
Net Procurement**		\$183,609,276			

NOTES:

*Firms classified as 8(a) by the Small Business Administration include non-diverse.

**Net Procurement includes purchase orders, non-purchase orders, and credit card dollars.

1 Direct means Direct Procurement — when a utility directly procures from a supplier.

2 Sub means Subcontractor Procurement — when a prime contractor, in contract with a utility, procures from a subcontractor to fulfill its contractual obligation(s).

% = Percentage of Net Procurement.

Totals may not add due to rounding.

Direct Procurement by Product and Service Categories

		PRODUCT		SERVICE		TOTAL	
		\$	%	\$	%	\$	%
Minority Male	African American	\$0	0.00%	\$11,253	0.01%	\$11,253	0.01%
	Asian Pacific American	\$0	0.00%	\$144,173	0.08%	\$144,173	0.08%
	Hispanic American	\$12,911	0.01%	\$29,333,345	15.98%	\$29,346,256	15.98%
	Native American	\$0	0.00%	\$0	0.00%	\$0	0.00%
	Total Minority Male	\$12,911	0.01%	\$29,488,771	16.06%	\$29,501,682	16.07%
Minority Female	African American	\$0	0.00%	\$0	0.00%	\$0	0.00%
	Asian Pacific American	\$0	0.00%	\$0	0.00%	\$0	0.00%
	Hispanic American	\$0	0.00%	\$0	0.00%	\$0	0.00%
	Native American	\$0	0.00%	\$0	0.00%	\$0	0.00%
	Total Minority Female	\$0	0.00%	\$0	0.00%	\$0	0.00%
Total Minority Business Enterprise (MBE)		\$12,911	0.01%	\$29,488,771	16.06%	\$29,501,682	16.07%
Women Business Enterprise (WBE)		\$14,441,412	7.87%	\$7,788,406	4.24%	\$22,229,818	12.11%
Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)		\$0	0.00%	\$0	0.00%	\$0	0.00%
Disabled Veteran Business Enterprise (DVBE)		\$0	0.00%	\$17,632	0.01%	\$17,632	0.01%
Persons with Disabilities Business Enterprise (PDBE)		\$0	0.00%	\$0	0.00%	\$0	0.00%
8(a)*		\$0	0.00%	\$0	0.00%	\$0	0.00%
Total Supplier Diversity Spend		\$14,454,323	7.87%	\$37,294,809	20.31%	\$51,749,132	28.18%
Net Procurement**		\$183,609,276					
Net Product Procurement		\$14,454,323					
Net Service Procurement		\$37,294,809					
Total Number of Diverse Suppliers that Received Direct Spend		41					

NOTES:

*Firms classified as 8(a) by the Small Business Administration include non-diverse.

**Net Procurement includes purchase orders, non-purchase orders, and credit card dollars.

1 Direct means Direct Procurement — when a utility directly procures from a supplier.

2 Sub means Subcontractor Procurement — when a prime contractor, in contract with a utility, procures from a subcontractor to fulfill its contractual obligation(s).

% = Percentage of Net Procurement.

Totals may not add due to rounding.

Subcontractor Procurement by Product and Service Categories

		PRODUCT		SERVICE		TOTAL	
		\$	%	\$	%	\$	%
Minority Male	African American	\$0	0.00%	\$0	0.00%	\$0	0.00%
	Asian Pacific American	\$0	0.00%	\$27,321	0.01%	\$27,321	0.01%
	Hispanic American	\$227,902	0.12%	\$1,877,463	1.02%	\$2,105,365	1.15%
	Native American	\$0	0.00%	\$44,735	0.02%	\$44,735	0.02%
	Total Minority Male	\$227,902	0.12%	\$1,949,519	1.06%	\$2,177,421	1.19%
Minority Female	African American	\$0	0.00%	\$0	0.00%	\$0	0.00%
	Asian Pacific American	\$0	0.00%	\$0	0.00%	\$0	0.00%
	Hispanic American	\$0	0.00%	\$0	0.00%	\$0	0.00%
	Native American	\$0	0.00%	\$0	0.00%	\$0	0.00%
	Total Minority Female	\$0	0.00%	\$0	0.00%	\$0	0.00%
Total Minority Business Enterprise (MBE)		\$227,902	0.12%	\$1,949,519	1.06%	\$2,177,421	1.19%
Women Business Enterprise (WBE)		\$1,544,474	0.84%	\$1,625,837	0.89%	\$3,170,311	1.73%
Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)		\$0	0.00%	\$0	0.00%	\$0	0.00%
Disabled Veteran Business Enterprise (DVBE)		\$2,941,967	1.60%	\$27,050	0.01%	\$2,969,017	1.62%
Persons with Disabilities Business Enterprise (PDBE)		\$0	0.00%	\$0	0.00%	\$0	0.00%
8(a)*		\$0	0.00%	\$0	0.00%	\$0	0.00%
Total Supplier Diversity Spend		\$4,714,343	2.57%	\$3,602,406	1.96%	\$8,316,749	4.53%
Net Procurement**		\$183,609,276					
Net Product Procurement		\$4,714,343					
Net Service Procurement		\$3,602,406					
Total Number of Diverse Subcontractors		27					

NOTES:

*Firms classified as 8(a) by the Small Business Administration include non-diverse.

**Net Procurement includes purchase orders, non-purchase orders, and credit card dollars.

1 Direct means Direct Procurement — when a utility directly procures from a supplier.

2 Sub means Subcontractor Procurement — when a prime contractor, in contract with a utility, procures from a subcontractor to fulfill its contractual obligation(s).

% = Percentage of Net Procurement.

Totals may not add due to rounding.

9.1.2

Procurement by Standard Industrial Categories

SIC CODE*	AFRICAN AMERICAN		ASIAN PACIFIC AMERICAN		HISPANIC AMERICAN		NATIVE AMERICAN		MINORITY BUSINESS ENTERPRISE (MBE)	WOMEN BUSINESS ENTERPRISE (WBE)	LESBIAN, GAY, BISEXUAL, TRANSGENDER BUSINESS ENTERPRISE (LGBTBE)	DISABLED VETERAN BUSINESS ENTERPRISE (DVBE)	PERSONS WITH DISABILITIES BUSINESS ENTERPRISE (DBE)	8(a)**	TOTAL SUPPLIER DIVERSITY SPEND	TOTAL PROCUREMENT
	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE								
7	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0	\$0	\$0	\$385,408
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.21%
8	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0	\$0	\$0	\$0
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
13	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0	\$0	\$0	\$14,633
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.01%
14	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$315,543	\$0	\$0	0	\$0	\$315,543	\$335,961
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.17%	0.00%	0.00%	0.00%	0.00%	0.17%	0.18%
15	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0\$	\$0	\$0	\$0	0	\$0	\$0	\$6,012,581
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.27%
16	\$0	\$0	\$0	\$0	\$28,312,774	\$0	\$0	\$0	\$28,312,774	\$277,751	\$0	\$0	0	\$0	\$28,590,525	\$65,411,356
	0.00%	0.00%	0.00%	0.00%	15.42%	0.00%	0.00%	0.00%	15.42%	0.15%	0.00%	0.00%	0.00%	0.00%	15.57%	35.63%
17	\$0	\$0	\$27,321	\$0	\$1,889,380	\$0	\$44,735	\$0	\$1,961,436	\$5,655,071	\$0	\$27,050	\$0	\$0	\$7,643,557	\$11,963,764
	0.00%	0.00%	0.01%	0.00%	1.03%	0.00%	0.02%	0.00%	1.07%	3.08%	0.00%	0.01%	0.00%	0.00%	4.16%	6.52%
22	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0	\$0	\$0	\$36,830
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.02%
23	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0	\$0	\$0	\$16,741
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.01%
25	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0	\$0	\$0	\$0
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
26	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0	\$0	\$0	\$0
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
27	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$420,942	\$0	\$0	0	\$0	\$420,942	\$464,782
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.23%	0.00%	0.00%	0.00%	0.00%	0.23%	0.25%
28	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$72,189	\$0	\$0	0	\$0	\$72,189	\$122,930
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.04%	0.00%	0.00%	0.00%	0.00%	0.04%	0.07%
29	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0	\$0	\$0	\$60,530
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.03%
30	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0	\$0	\$0	\$34,328
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.02%
32	\$0	\$0	\$0	\$0	\$832,861	\$0	\$0	\$0	\$832,861	\$137,229	\$0	\$0	0	\$0	\$970,090	\$985,727
	0.00%	0.00%	0.00%	0.00%	0.45%	0.00%	0.00%	0.00%	0.45%	0.07%	0.00%	0.00%	0.00%	0.00%	0.53%	0.54%
33	\$0	\$0	\$0	\$0	\$7,442	\$0	\$0	\$0	\$7,442	\$0	\$0	\$2,941,967	\$0	\$0	\$2,949,409	\$7,649,273
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.60%	0.00%	0.00%	1.61%	4.17%
34	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0	\$0	\$0	\$433,129
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.24%
35	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0	\$0	\$0	\$12,142,325
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	6.61%
36	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0	\$0	\$0	\$207,440
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.11%
37	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0	\$0	\$0	\$0
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
38	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0	\$0	\$0	\$7,350,643
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	4.00%

9.1.2

Procurement by Standard Industrial Categories *(cont.)*

[illegible]

Procurement by Standard Industrial Categories (cont.)

SIC CODE*	AFRICAN AMERICAN		ASIAN PACIFIC AMERICAN		HISPANIC AMERICAN		NATIVE AMERICAN		MINORITY BUSINESS ENTERPRISE (MBE)	WOMEN BUSINESS ENTERPRISE (WBE)	LESBIAN, GAY, BISEXUAL, TRANSGENDER BUSINESS ENTERPRISE (LGBTBE))	DISABLED VETERAN BUSINESS ENTERPRISE (DVBE)	PERSONS WITH DISABILITIES BUSINESS ENTERPRISE (DBE)	8(a)**	TOTAL SUPPLIER DIVERSITY SPEND	TOTAL PROCUREMENT
	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE								
72	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
73	\$0	\$0	\$64,140	\$0	\$396,253	\$0	\$0	\$0	\$460,393	\$2,403,680	\$0	\$0	\$0	\$0	\$2,864,072	\$13,062,753
	0.00%	0.00%	0.03%	0.00%	0.22%	0.00%	0.00%	0.00%	0.25%	1.31%	0.00%	0.00%	0.00%	0.00%	1.56%	7.11%
75	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$332,943	\$0	\$0	\$0	\$0	\$332,943	\$343,144
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.18%	0.00%	0.00%	0.00%	0.00%	0.18%	0.19%
76	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$519,677	\$0	\$0	\$0	\$0	\$519,677	\$2,641,085
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.28%	0.00%	0.00%	0.00%	0.00%	0.28%	1.44%
79	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$28,271
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.02%
80	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
81	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$740,001
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.40%
82	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
83	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$8,500
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
86	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$25,000
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.01%
87	\$0	\$0	\$80,033	\$0	\$0	\$0	\$0	\$0	\$80,033	\$1,243,490	\$0	\$0	\$0	\$0	\$1,323,523	\$14,582,532
	0.00%	0.00%	0.04%	0.00%	0.00%	0.00%	0.00%	0.00%	0.04%	0.68%	0.00%	0.00%	0.00%	0.00%	0.72%	7.94%
88, 89	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$35,208	\$0	\$0	\$0	\$0	\$35,208	\$75,316
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.02%	0.00%	0.00%	0.00%	0.00%	0.02%	0.04%
92	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$7,398	\$0	\$0	\$7,398	\$159,576
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.09%
93	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
94	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$36,761
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.02%
95	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
96	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
OTHER	\$11,253	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$11,253	\$9,825,775	\$0	\$10,235	0	\$0	\$9,847,262	\$30,936,016
	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.01%	5.35%	0.00%	0.01%	0.00%	0.00%	5.36%	16.85%
TOTAL	\$11,253	\$0	\$171,494	\$0	\$31,451,621	\$0	\$44,735	\$0	\$31,679,103	\$25,400,129	\$0	\$2,986,649	\$0	\$0	\$60,065,881	\$183,609,276
	0.01%	0.00%	0.09%	0.00%	17.13%	0.00%	0.02%	0.00%	17.25%	13.83%	0.00%	1.63%	0.00%	0.00%	32.71%	100.00%

NET PROCUREMENT***	\$183,609,276
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NOTES:
*SIC (Standard Industrial Classification) Code Definitions are on page 34.
**Firms classified as 8(a) by the Small Business Administration include non-diverse.
***Net Procurement includes purchase orders, non-purchase orders, and credit card dollars.
1 Direct means Direct Procurement — when a utility directly procures from a supplier.
2 Sub means Subcontractor Procurement — when a prime contractor, in contract with a utility, procures from a subcontractor to fulfill its contractual obligation(s).
% = Percentage of Net Procurement.
Totals may not add due to rounding.

Number of Suppliers and Revenue Reported to the Clearinghouse

NUMBER OF DIVERSE SUPPLIERS DATA														
Revenue Reported to the Supplier Clearinghouse								Utility-Specific 2024 Summary						
Number of Diverse Suppliers	Minority Business Enterprise (MBE)	Women Business Enterprise (WBE)	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)	Disabled Veteran Business Enterprise (DVBE)	Persons with Disabilities Business Enterprise (DBE)	8(a)*	TOTAL	Minority Business Enterprise (MBE)	Women Business Enterprise (WBE)	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)	Disabled Veteran Business Enterprise (DVBE)	Persons with Disabilities Business Enterprise (DBE)	8(a)*	TOTAL
Under \$1 million	2	11	0	0	0	0	13	15	41	0	4	0	0	60
Under \$5 million	5	13	0	0	0	0	18	1	3	0	1	0	0	5
Under \$10 million	0	7	0	0	0	0	7	0	2	0	0	0	0	2
Above \$10 million	10	15	0	0	0	0	25	1	0	0	0	0	0	1
Total	17	46	0	0	0	0	63	17	46	0	5	0	0	68

REVENUE AND PAYMENT DATA														
Revenue Reported to the Supplier Clearinghouse								Utility-Specific 2024 Summary						
Number of Diverse Suppliers	Minority Business Enterprise (MBE)	Women Business Enterprise (WBE)	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)	Disabled Veteran Business Enterprise (DVBE)	Persons with Disabilities Business Enterprise (DBE)	8(a)*	TOTAL	Minority Business Enterprise (MBE)	Women Business Enterprise (WBE)	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)	Disabled Veteran Business Enterprise (DVBE)	Persons with Disabilities Business Enterprise (DBE)	8(a)*	TOTAL
Under \$1 million	\$350,000	\$4,589,434	\$0	\$0	\$0	\$0	\$4,939,434	\$1,713,136	\$5,145,574	\$0	\$462,104	\$0	\$0	\$7,320,814
Under \$5 million	\$13,263,555	\$26,967,060	\$0	\$0	\$0	\$0	\$40,230,615	\$1,821,941	\$5,509,271	\$0	\$2,524,545	\$0	\$0	\$9,855,757
Under \$10 million	\$0	\$47,524,390	\$0	\$0	\$0	\$0	\$47,524,390	\$0	\$14,745,284	\$0	\$0	\$0	\$0	\$14,745,284
Above \$10 million	\$818,180,878	\$27,410,188,617	\$0	\$0	\$0	\$0	\$28,228,369,495	\$28,144,026	\$0	\$0	\$0	\$0	\$0	\$28,144,026
Total	\$831,794,433	\$27,489,269,502	\$0	\$0	\$0	\$0	\$28,321,063,935	\$31,679,103	\$25,400,129	\$0	\$2,986,649	\$0	\$0	\$60,065,881

NOTES:
*Firms classified as 8(a) by the Small Business Administration include non-diverse.
**Net Procurement includes purchase orders, non-purchase orders, and credit card dollars.
The tables above represent data for direct spend only.
Totals may not add due to rounding.

9.1.2

Description of Number of Suppliers with California Majority Workforce

For additional information regarding suppliers with California majority workforce, please refer to section 9.1.5 - Summary of Prime Contractor Utilization of Subcontractors, table entitled “In-State Prime Contractor Utilization of Diverse Subcontractors (California Domiciled).”

9.1.3

Program Expenses

EXPENSE CATEGORY	YEAR (ACTUAL)
Wages	\$201,675
Other Employee Expenses	\$0
Program Expenses	\$102,000
Reporting Expenses	\$5,000
Training Expenses	\$0
Consultant Expenses	\$7,259
Other Expenses	\$24,010
Total	\$339,944

Description of Progress in Meeting or Exceeding Set Goals

SJW's diverse business utilization for 2024 was 32.7%, exceeding the 23% overall goal established by the CPUC. SJW also met the CPUC sub-goals for WBE, MBE and DVBE spend. There were several factors that affected our ability to meet the above mentioned goals, including:

- There continues to be a significant amount of spend with our largest diverse construction supplier, Lewis & Tibbitts.
- Our overall addressable spend increased by 17% in 2024, while our diverse spend grew by 10%.
- SJW reached 13.8% WBE spend against a CPUC goal of 5%.
- SJW reached 17.3% MBE spend against a CPUC goal of 15%.
- SJW reached 1.6% DVBE spend against a CPUC goal of 1.5%.
- Direct spend with diverse suppliers increased by 14.7%.
- Subcontracting contributed 13.8% toward SJW overall results.
- Overall spend with diverse suppliers increased by 10%.

Category	2024 Result %	2024 Goal %
Minority Male Business Enterprise	17.25%	7.5%
Minority Female Business Enterprise	0.00%	7.5%
Minority Business Enterprise (MBE)	17.25%	15.00%
Women Business Enterprise (WBE)	13.83%	5.00%
Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)	0.00%	1.50%
Disabled Veteran Business Enterprise (DVBE)	1.63%	1.50%
Persons with Disabilities Business Enterprise (DBE)	0.00%	n/a
Total	32.71%	23.00%

NOTES:
% = Percentage of Net Procurement.

Description of Prime Contractor Utilization of Subcontractors

In 2024, Prime Supplier subcontracting with diverse suppliers remained relatively stable, with a slight decrease from \$9.3M in 2023 to \$8.3M in 2024. This subcontracting represented 13.8% of our overall results. The Supplier Diversity Director, along with Champions and sourcing personnel, continues to collaborate with prime suppliers to enhance the utilization of diverse businesses. SJW actively encourages its prime suppliers to assess their operations and identify opportunities for increased participation from diverse suppliers.

Category	New Prime Contractors #	New Subcontractors #
Minority Male Business Enterprise	1	1
Minority Female Business Enterprise	0	0
Total Minority Business Enterprise (MBE)	1	1
Women Business Enterprise (WBE)	4	3
Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)	0	0
Disabled Veteran Business Enterprise (DVBE)	0	0
Persons with Disabilities Business Enterprise (DBE)	0	0
8(a)	0	0
Total	5	4

Summary of Prime Contractor Utilization of Subcontractors

	Minority Male	Minority Female	Minority Business Enterprise (MBE)	Women Business Enterprise (WBE)	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)	Disabled Veteran Business Enterprise (DVBE)	Persons with Disabilities Business Enterprise (DBE)	8(a)*	TOTAL Supplier Diversity Spend
Direct \$	\$29,501,682	\$0	\$29,501,682	\$22,229,818	\$0	\$17,632	\$0	\$0	\$51,749,132
Sub \$	\$2,177,421	\$0	\$2,177,421	\$3,170,311	\$0	\$2,969,017	\$0	\$0	\$8,316,749
TOTAL \$	\$31,679,103	\$0	\$31,679,103	\$25,400,129	\$0	\$2,986,649	\$0	\$0	\$60,065,881
Direct %	16.07%	0.00%	16.07%	12.11%	0.00%	0.01%	0.00%	0.00%	28.18%
Sub %	1.19%	0.00%	1.19%	1.73%	0.00%	1.62%	0.00%	0.00%	4.53%
TOTAL %	17.25%	0.00%	17.25%	13.83%	0.00%	1.63%	0.00%	0.00%	32.71%
Net Procurement **			\$183,609,276						

In-State Prime Contractor Utilization of Diverse Subcontractors (California Domiciled)									
	Minority Male	Minority Female	Minority Business Enterprise (MBE)	Women Business Enterprise (WBE)	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)	Disabled Veteran Business Enterprise (DVBE)	Persons with Disabilities Business Enterprise (DBE)	8(a)*	TOTAL Supplier Diversity Spend
Direct \$	\$29,437,542	-	\$29,437,542	\$19,416,165	\$0	\$7,398	-	-	\$48,861,104
Sub \$	\$2,177,421	-	\$2,177,421	\$3,156,071	\$0	-	-	-	\$5,333,492
TOTAL \$	\$31,614,963	-	\$31,614,963	\$22,572,235	-	\$7,398	-	-	\$54,194,596
Direct %	16.03%	0.00%	16.03%	10.57%	0.00%	0.00%	0.00%	0.00%	26.61%
Sub %	1.19%	0.00%	1.19%	1.72%	0.00%	0.00%	0.00%	0.00%	2.90%
TOTAL %	17.22%	0.00%	17.22%	12.29%	0.00%	0.00%	0.00%	0.00%	29.52%
Net Procurement **			\$183,609,276						

NOTES:
*8(a) - Firms classified as 8(a) by the Small Business Administration include non-WMDVLGBTPDBE.
Businesses owned and controlled by persons found to be disadvantaged by the U.S. Small Business Administration pursuant to Section 8(a) of the Small Business Act, as amended (15 U.S.C. 637 (a)) or the U.S. Secretary of Commerce, pursuant to Section 5 of Executive Order 11625 (GO 156 Section 1.3.13).
** Net Procurement includes purchase orders, non-purchase orders, and credit card dollars.
Direct - Means Direct Procurement: when a utility directly procures from a supplier.
Sub - Means Subcontractor Procurement: when a prime contractor, in contract with a utility, procures from a subcontractor to fulfil its contractual obligation(s).

9.1.6

A List of Complaints Received and Current Status

SJW did not receive any formal complaints about the USDP in 2024.

9.1.7

Description of Efforts to Recruit Suppliers in Low Utilization Categories

SJW is committed to recruiting Women, Minority, Disabled Veteran, Lesbian, Gay, Bisexual, and Transgender Business Enterprises (WMDVLGBTBE) suppliers in low utilization categories. To address this, we have implemented targeted outreach efforts and initiatives aimed at increasing representation across these sectors.

- Identifying Gaps and Opportunities: We continuously analyze our supply chain to identify categories with low utilization of WMDVLGBTBE suppliers. Once identified, we work to create specific opportunities that align with the capabilities of these businesses.
- Targeted Outreach and Engagement: SJW actively participates in networking events, trade shows, and matchmaking opportunities designed specifically for WMDVLGBTBE suppliers. We attend industry-specific conferences and collaborate with local, regional, and national organizations that focus on connecting diverse suppliers with businesses.
- Supplier Development and Support: We provide mentoring and support to WMDVLGBTBE suppliers in low-utilization areas through the CWA W.A.T.E.R. 1.0 and W.A.T.E.R. 2.0 programs. By offering guidance on how to navigate the procurement process, SJW aims to strengthen their capacity to compete for contracts and grow within our supply chain.
- Collaborating with External Partners: SJW works closely with Community Business Organizations (CBOs).

9.1.8

Retention of All Documents / Data

SJW has preserved all documents and data required for the preparation of the Utility Supplier Diversity Report to the CPUC. These documents and data are retained for a minimum of three years or in accordance with SJW's document retention policies, whichever is longer. They are available upon request by the CPUC.

9.1.11

Fuel Procurement

Not applicable.

CAPACITY BUILDING AND TECHNICAL ASSISTANCE:

CWA W.A.T.E.R. 1.0 | Fall 2024

W.A.T.E.R. 1.0 | Fall 2024

Objective

To mentor selected businesses to compete for contracts within the water industry (and beyond) with a hybrid live and virtual accelerator.

Vendors who are being considered for water industry projects or currently have one are invited to learn how to navigate procurement through a short accelerator.

Outcomes

W.A.T.E.R. 1.0 vendors will learn best practices on how to research CWA utilities and look for opportunities. They will learn how to improve their Capabilities Statement. They will create a 60-Second Intro Video tailored to water industry buyers. They will pitch their value to the CWA USDP, Buyers and Primes at an onsite event.

Session 1 – August 2024 (onsite – 9:00 – 12:00 pm PST)

Water Industry 101 | Buying Decisions
The CWA 7 | Similarities & Differences
60-Second Intro | Tailor Your Message to Water

Session 2 – September 2024 (onsite – 9:00 – 12:00 pm PST)

Capabilities Statements | Communicate Your Value
Finding Opportunities | GUIDED's 4 Winning Words
Rate Case | Search and Apply
60-Second Intro | Tailor Your Message to Water

Session 3 – September 2024 (onsite – 9:00 – 12:00 pm PST)

Safety, Hiring, and Emergency Plans
Pitching to Buyers and Primes (Vendor Showcase)



At the California Water Association, we collaborate with diverse groups of vendors from across the state which leads to numerous benefits and ultimately improves services for rate payers. The CWA Utility Supplier Diversity Program (USDP) is at the forefront of the extensive diverse vendor outreach. They host a variety of events throughout the year to connect vendors to opportunities and prepare them to meet with decision makers within the water industry.

One of the capacity building programs they offer is CWA W.A.T.E.R. 1.0 – Water Acumen Training Entrepreneur Refinement. Now in its fourth year, the highly-successful program convened 13 vendors who offered services that ranged from construction site brush clearing to water conservation enforcement to cybersecurity and data protection specialists.

In just three sessions, W.A.T.E.R. 1.0 graduates experienced BEFORE and AFTER transformations as they learned how to tailor their messaging to industry buyers. They learned how to discover forecasted opportunities by reading rate cases and annual reports. Melanie Rae, founder of Guided Business Plan, designed and facilitated the cohort which was held at the Suburban Water Systems' corporate office.

It's not just about accessing industry insights. The CWA USDP team wanted to make sure vendors were introduced to decision makers. The W.A.T.E.R. 1.0 cohort culminated with a vendor showcase with buyers from California Water Service, Suburban Water, California American Water, San Gabriel Valley Water, Liberty Utilities and Golden State Water. The vendors refined their 60-second introductions which made a tremendous difference because the 10 buyers could see how the vendors could add value to their specific projects.

Alumni of the CWA W.A.T.E.R. have collectively earned millions in contracts within the utility industry.

CWA Meet the Primes

The 2024 CWA Meet The Primes (MTP) session took place on October 3rd from 10:00 a.m. to 1:00 p.m. PST at the WRD Albert Robles Center for Water Recycling and Environmental Learning (ARC). The event attracted nearly 160 attendees, including supplier diversity professionals, diverse suppliers, prime contractors, and leaders from all CWA member companies.



Melanie Rae
CEO – Guided Business Plan

Many regarded it as the most successful MTP event in CWA's history, and this achievement wouldn't have been possible without the contributions of Melanie Rae, CEO of Guided Business Plan, who sadly passed away on October 15th, 2024.

Melanie Rae was the founder of GUIDED Business Plan™, an educational platform dedicated to helping entrepreneurs, especially those from disadvantaged backgrounds, develop effective business plans. Her mission was to empower individuals to achieve economic independence through entrepreneurship. Melanie authored several award-winning books and created training materials that have become essential resources for business development centers across the U.S.

Beyond her work with GUIDED Business Plan™, Melanie served as the Director of the WOVEN program at the California Association for Micro Enterprise Opportunity (CAMEO). This program supports military-connected women entrepreneurs through meetups, workshops, and online resources.

With over 1,100 business development and software training sessions for adults, Melanie's professional background included collaborations with organizations like the Women's Business Development Center (WBDC) and the National Association of Women Business Owners (NAWBO). She developed curriculum to help consumer goods producers prepare for engagement with mass retailers.

Her impact on the entrepreneurial community was profound, guiding over 15,000 businesses in crafting and executing successful growth strategies. Through her work, Melanie Rae promoted economic empowerment and diversity within the business sector.

More than just an accomplished entrepreneur, Melanie was a radiant presence to all who knew her. Her infectious personality and enduring spirit will continue to inspire those fortunate enough to have crossed paths with her. She will be deeply missed.

A promotional poster for the 2024 CWA Meet The Primes event. The top section features a photograph of the Albert Robles Center for Water Recycling and Environmental Learning (ARC) building. Below this, the text "MEET THE PRIMES" is written in large, bold, blue letters, with "CALIFORNIA WATER ASSOCIATION" in smaller blue text underneath. To the right of the text is a stylized blue and white graphic of a water drop. Below the main title, the date and time "October 3, 2024 | 10:00 - 1:00 pm" are displayed in white text on a dark blue background, followed by the location "Pico Rivera, CA" in white text on a dark blue background. A QR code is located to the right of the date and time. Below the QR code, the hashtag "#GetVisible in front of Primes and Water Industry Decision Makers" is written in blue text. To the right of the hashtag is a circular photograph of a group of people standing behind a table with a CWA logo. Below the hashtag, the text "Ideal for diverse suppliers looking to grow!" is written in blue text. At the bottom, the website "mtp.cwawater.com" is displayed in white text on a dark blue background. The bottom right corner features a stylized blue and white graphic of a water drop.

A high-angle, top-down photograph of a diverse group of approximately 20 people of various ages and ethnicities. They are all leaning inward, with their hands stacked on top of each other in the center, forming a tight circle. They are standing on a grey, textured floor. The image is framed by a thin orange border. The text "2025 Plan" is overlaid in the center in a white, sans-serif font.

2025 Plan

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

SJW has instituted tracking and reporting of PDBEs but has not yet established a goal for PDBE spend. It is expected to take several years of tracking before a formal goal is put in place.

Short-term, mid-term and long-term goals are identified at the level called out by GO 156, and are subject to change from year to year. Although breaking down goals by SIC code is not practical, SJW has shown a consistent profile of nearly 50% of spend in the construction, engineering, and construction services categories. For a detailed view of current and future purchase profiles by SIC code, please refer to tables contained within section 9.1.2.

Category	2024 RESULTS	SHORT-TERM GOALS*	MID-TERM GOALS*	LONG-TERM GOALS*
Minority Men	17.3%	7.5%	7.5%	7.5%
Minority Women**	0.0%	7.5%	7.5%	7.5%
Minority Business Enterprise (MBE)	17.3%	15.0%	15.0%	15.0%
Women Business Enterprise (WBE)	13.8%	5.0%	5.0%	5.0%
Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)	0.0%	1.5%	1.5%	1.5%
Disabled Veteran Business Enterprise (DVBE)	1.6%	1.5%	1.5%	1.5%
Persons with Disabilities Business Enterprise (DBE)	0.0%			
Total WMDVLGBTBE	32.7%	23.0%	23.0%	23.0%

NOTES:

*Target goals each year are to meet the CPUC defined goals. Stretch goals are still being defined as of the date of this publication.

**All WMBE's were counted as WBE's for purposes of this report.

% = Percentage of Net Procurement.

Description of Planned Program Activities for the Next Calendar Year

Internal Activities

Major areas of focus for the 2025 Supplier Diversity Program include:

- Refine use of automated reporting template created by 3rd party consultant.
- Increased training of Prime Suppliers, including use of new Prime Supplier subcontracting reporting template.
- Internal training on Supplier Diversity Program to all business units as there has been significant turnover within the past two years.
- Restructuring the Supplier Diversity Champions Program.
- Increased focus on low spend categories, particularly LGBT and PDBE spend.
- Complete annual review of supplier diversity website and make appropriate changes/updates.
- Increase buyer participation at various CBO events.

External Activities

- In alignment with Ordering Paragraph No. 4 of CPUC D.11-05-019 (in R.09-07-027), SJW will maintain close collaboration with the CWA and its members to engage in Tier 1 capacity building and technical assistance initiatives. Support for past graduates of the CWA W.A.T.E.R. program will continue through 2025.
- In 2025, SJW will maintain its partnership with the CWA and its member organizations to host Business Opportunity Fair events, aiming to encourage prime suppliers to boost subcontracting involvement.
- SJW will enhance its outreach efforts toward Community Business Organizations (CBOs) focused on supplier diversity. Consideration will also be given to funding CBOs outside the scope of the CWA Utility Supplier Diversity Program (USDP) Committee.
- SJW will remain active in attending and participating in various outreach activities, including CBO tradeshows, conferences, and matchmaker events.

Plans for Recruiting Suppliers in Low Utilization Areas

SJW will prioritize strengthening communication and partnerships with local organizations across the following categories:

MBEs

The primary Community Business Organization (CBO) will be the Western Regional Minority Supplier Development Council (WRMSDC).

WBEs

We will continue our collaboration with the Women's Business Enterprise Council – Pacific (WBEC-Pacific). Notably, SJW's Supplier Diversity Program Manager, Tim McLaughlin, serves on the Board of WBEC-Pacific.

DVBES

SJW will partner with the Veterans in Business (VIB) Network and the Elite Service-Disabled Veteran-Owned Business (SDVOB) Network.

LGBTs

SJW will enhance its involvement with the Rainbow Chamber – Silicon Valley, the Golden Gate Business Association (GGBA), and Buildout California. This effort is vital for increasing LGBT spend and achieving the 2025 CPUC LGBT goal of 1.5%.

We will maintain our participation in outreach to CBOs through matchmaking events, panels, technical assistance, and mentoring, including organizations listed in section 9.1.1.

Throughout 2025, SJW will continue working to boost diverse spending in areas where supplier utilization has historically been lower.

10.1.4

Plans for Recruiting Suppliers Where Unavailable

SJW's primary focus is on attracting diverse suppliers in categories where they are readily available. However, we remain dedicated to identifying diverse suppliers in areas where such representation has historically been limited or nonexistent. The outreach approach will continue as described in section 10.1.3.

10.1.5

Plans for Encouraging Prime Contractors to Subcontract Suppliers

In 2025, we will strive to maximize the number of prime suppliers reporting subcontracting. We will continue our work to ensure policy and procedure documents are included in the new, centralized supply chain organization. This includes contract and RFP supplier diversity language standards, prime supplier diversity tracking and reporting requirements, standard supplier diversity weighting on all RFP bid evaluation forms, and SJW-specific supplier diversity requirements for centralized purchasing.

Based upon lessons learned in 2024, we will increase our communication with prime suppliers around reporting rules and requirements. This includes revising standard Prime Supplier reporting templates for easier reporting. SJW will require prime suppliers to submit subcontracting reports on a quarterly basis, at a minimum. Some suppliers will continue to report on a monthly basis.

10.1.6

Plans for Complying with Program Guidelines

SJW will comply with all provisions and revisions of General Order 156. SJW works cooperatively with the Commission and its staff in the implementation of program objectives.

The USDP Program Director will continue to pro-actively work with USDP Champions to review, streamline, and improve policies that implement department goals and contract language to include diverse suppliers in all procurement.

GO 156 Section 1.3 Definitions

ACRONYM	TERM	DEFINITION	CERTIFICATION
MBE	Minority-Owned Business Enterprises	Minority-owned business means (1) a business enterprise (a) that is at least 51% owned by a minority individual or group(s) or (b) if a publicly owned business, at least 51 % of the stock of which is owned by one or more minority groups, and (2) whose management and daily business operations are controlled by one or more of those individuals. The contracting utility shall presume that minority includes, but is not limited to, Black Americans, Hispanic Americans, Native Americans, Asian Pacific Americans, and other groups, as defined in the GO 156.	Supplier Clearinghouse
WBE	Women-Owned Business Enterprises	Women-owned business means (1) a business enterprise (a) that is at least 51% owned by a woman or women or (b) if a publicly owned business, at least 51% of the stock of which is owned by one or more women; and (2) whose management and daily business operations are controlled by one or more of those individuals.	Supplier Clearinghouse
WMBE	Women, Minority-Owned Business Enterprises	WMBE means a women-owned and/or minority-owned business enterprise	Supplier Clearinghouse
LGBTBE	Lesbian, Gay, Bisexual, Transgender (LGBT) Business Enterprise	LGBT-owned business means (1) a business enterprise (a) that is at least 51% owned by a lesbian, gay, bisexual, or transgender person or persons or (b) if a publicly owned business, at least 51% of the stock of which is owned by one or more lesbian, gay, bisexual, or transgender persons; and (2) whose management and daily business operations are controlled by one or more of those individuals.	Supplier Clearinghouse
WMLGBTBE	Women, Minority, and/or LGBT-Owned Business Enterprises	WMLGBTBE means a women-owned, minority-owned and/or LGBT-owned business enterprise. Under these rules, a woman, a minority and/or an LGBT person owning such an enterprise must be either U.S. citizens or legal aliens with permanent residence status in the United States.	Supplier Clearinghouse
PDBE	People with Disabilities Business Enterprise	PDBE means (1) a business enterprise (a) that is at least 51% owned by a person or persons with a disability or (b) if a publicly owned business, at least 51 % of the stock of which is owned by one or more persons with a disability; and (2) whose management and daily business operations are controlled by one or more of those individuals.	Supplier Clearinghouse
DVBE	Disabled Veteran-Owned Business Enterprises	Disabled Veteran-owned Business (1) is a sole proprietorship at least 51% owned by one or more disabled veterans or, in the case of a publicly owned business, at least 51% of its stock is owned by one or more disabled veterans; a subsidiary which is wholly owned by a parent corporation, but only if at least 51% of the voting stock of the parent corporation is owned by one or more disabled veterans; or a joint venture in which at least 51% of the joint venture's management and control and earnings are held by one or more disabled veterans. (2) the management and control of the daily business operations are by one or more disabled veterans. And (3) it is a sole proprietorship, corporation, or partnership with its home office located in the United States, which is not a branch or subsidiary of a foreign corporation, foreign firm, or other foreign-based business. Disabled veteran refers to a veteran of the military, naval or air service of the United States with a service connected disability and who is a resident of the State of California.	DGS
MBE	Asian Pacific American	Asian Pacific Americans-persons having origins in Asia or the Indian subcontinent, including, but not limited to, persons from Japan, China, the Philippines, Vietnam, Korea, Samoa, Guam, the U.S. Trust Territories of the Pacific, Northern Marianas, Laos, Cambodia, Taiwan, India, Pakistan, and Bangladesh.	Supplier Clearinghouse
MBE	African American	Black Americans-persons having origins in any black racial groups of Africa.	Supplier Clearinghouse
MBE	Hispanic American	Hispanic Americans-all persons of Mexican, Puerto Rican, Cuban, South or Central American, Caribbean, and other Spanish culture or origin.	Supplier Clearinghouse
MBE	Native American	Native Americans-persons having origin in any of the original peoples of North America or the Hawaiian Islands, in particular, American Indians, Eskimos, Aleuts, and Native Hawaiians.	Supplier Clearinghouse
8(a)	Other 8(a)	Other groups, or individuals, found to be disadvantaged by the Small Business Administration pursuant to Section 8(a) of Small Business Act as amended (15 U.S.C. 637(a)), or the Secretary of Commerce pursuant to Section 5 of Executive Order 11625. May include non-WMDVLGBTBEs firms.	U.S. Small Business Administration
Tier 2 (Tier 3, etc. when applicable)	Subcontracting	“Subcontract” means any agreement or arrangement between a contractor and any party or person (in which the parties do not stand in the relationship of an employer and an employee): 1. For the furnishing of supplies or services for the use of real or personal property, including lease arrangements, which, in whole or in part, is necessary to the performance of any one or more contracts; or 2. Under which any portion of the contractor's obligation under any one or more contracts is performed, undertaken or assumed.	Supplier Clearinghouse, DGS & U.S. Small Business Administration

SIC (Standard Industrial Classification) Code Definitions

A. Agriculture, Forestry, & Fishing

- 01 Agricultural Production — Crops
- 02 Agricultural Production — Livestock
- 07 Agricultural Services
- 08 Forestry
- 09 Fishing, Hunting, & Trapping

B. Mining

- 10 Metal, Mining
- 12 Coal Mining
- 13 Oil & Gas Extraction
- 14 Nonmetallic Minerals, Except Fuels

C. Construction

- 15 General Building Contractors
- 16 Heavy Construction, Except Building
- 17 Special Trade Contractors

D. Manufacturing

- 20 Food & Kindred Products
- 21 Tobacco Products
- 22 Textile Mill Products
- 23 Apparel & Other Textile Products
- 24 Lumber & Wood Products
- 25 Furniture & Fixtures
- 26 Paper & Allied Products
- 27 Printing & Publishing
- 28 Chemical & Allied Products
- 29 Petroleum & Coal Products
- 30 Rubber & Miscellaneous Plastics Products
- 31 Leather & Leather Products
- 32 Stone, Clay, & Glass Products
- 33 Primary Metal Industries
- 34 Fabricated Metal Products
- 35 Industrial Machinery & Equipment
- 36 Electronic & Other Electric Equipment
- 37 Transportation Equipment
- 38 Instruments & Related Products
- 39 Miscellaneous Manufacturing Industries

E. Transportation & Public Utilities

- 40 Railroad Transportation
- 41 Local & Interurban Passenger Transit
- 42 Trucking & Warehousing
- 43 U.S. Postal Service
- 44 Water Transportation
- 45 Transportation by Air
- 46 Pipelines, Except Natural Gas
- 47 Transportation Services
- 48 Communications
- 49 Electric, Gas, & Sanitary Services

F. Wholesale Trade

- 50 Wholesale Trade — Durable Goods
- 51 Wholesale Trade — Nondurable Goods

G. Retail Trade

- 52 Building Materials & Gardening Supplies
- 53 General Merchandise Stores
- 54 Food Stores
- 55 Automotive Dealers & Service Stations
- 56 Apparel & Accessory Stores
- 57 Furniture & Homefurnishings Stores
- 58 Eating & Drinking Places
- 59 Miscellaneous Retail

H. Finance, Insurance, & Real Estate

- 60 Depository Institutions
- 61 Nondepository Institutions
- 62 Security & Commodity Brokers
- 63 Insurance Carriers
- 64 Insurance Agents, Brokers, & Service
- 65 Real Estate
- 67 Holding & Other Investment Offices

I. Services

- 70 Hotels & Other Lodging Places
- 72 Personal Services
- 73 Business Services
- 75 Auto Repair, Services, & Parking
- 76 Miscellaneous Repair Services
- 78 Motion Pictures
- 79 Amusement & Recreation Services
- 80 Health Services
- 81 Legal Services
- 82 Educational Services
- 83 Social Services
- 84 Museums, Botanical, Zoological Gardens
- 86 Membership Organizations
- 87 Engineering & Management Services
- 88 Private Households
- 89 Services, Not Elsewhere Classified

J. Public Administration

- 91 Executive, Legislative, & General
- 92 Justice, Public Order, & Safety
- 93 Finance, Taxation, & Monetary Policy
- 94 Administration of Human Resources
- 95 Environmental Quality & Housing
- 96 Administration of Economic Programs
- 97 National Security & International Affairs
- 98 Zoological Gardens

K. Nonclassifiable Establishments

- 99 Non-Classifiable Establishments



OUR
STRENGTH
IS IN OUR
DIVERSITY