



**CALIFORNIA DEPARTMENT OF INSURANCE
2015 INSURER SUPPLIER DIVERSITY SURVEY**

Report Type: **Individual**

Group / NAIC Code:

65676

Group / Company Name: **Lincoln National Life Insurance Co**

Our company / group enters into contracts to procure goods or services in California.

1. Does your company / group have a supplier diversity policy statement?

YES

A supplier diversity policy statement is any language that refers to the company's / group's policies in regards to supplier diversity, with the goal of procuring goods and services from diverse businesses

If yes, provide the supplier diversity policy statement below:

At Lincoln Financial Group, we believe diversity of thought, background, experience and people drive innovation, support our growth objectives, and produce results that differentiate us in today's marketplace. The principles of diversity and inclusion are essential to our ability to help customers take charge of their financial futures. Proactively sourcing products and services from businesses that reflect the demographics of our markets contributes to the sustainability of communities, customers and our company. Lincoln Financial operates on the ideals of courage, strength and integrity that we adopted from our namesake. We expect our suppliers to value these ideals as well. Our Procurement organization works diligently to identify, evaluate and qualify potential suppliers to support the ongoing needs of our business. We seek suppliers that provide the goods and services we need at the highest level of quality and best total cost, while also being proactive in offering innovative ideas and solutions for our consideration. Having a diverse and inclusive supplier base provides the additional benefits of enhancing our brand and reputation, supports our long-standing commitment to the communities where we live and work, and expands the breadth of our supplier talent, capabilities and perspectives.

- Provide a list of all documents in which the statement can be found (i.e. website, co. / group report, board charter, etc.):

Company website (LFG.com); Supplier Diversity & Inclusion Resource Guide; Supplier Diversity & Inclusion brochure (condensed statement); company intranet

- If the state is available online, provide link here:

<https://www.lfg.com/LincolnPageServer?LFGPage=/lfg/lfgclient/abt/div/supplier/index.html>

If no, but will be creating one within the next 12 months, provide a timeline for when your co. / group expects the policy statement to be completed and any other details available at this time (i.e. policy language, policy creation team, etc.):

n/a

If no, please explain why:

n/a

2. Does your company / group have a supplier diversity program?

YES

A supplier diversity program is any formal plan and / or structure that has been setup specifically for the company / group to implement its supplier diversity policy statements.

If yes, provide an overview of the program:

Lincoln's Supplier Diversity & Inclusion (SD&I) program is aligned with our Diversity & Inclusion strategy , structured to recognize the value of a diverse supply base, led by Procurement and designed to identify and provide diverse suppliers opportunities to compete for our business. The program includes a supplier registration portal on LFG.com, membership with MSDC and WBEC, a Standard Operating Procedure (SOP), external marketing materials, an internal resource guide, access to internal and external databases of diverse suppliers and metrics to track and report accomplishments.

If no, but will be creating one within the next 12 months, provide a timeline for when your company / group expects the program to begin and any other details available at this time (i.e. program plan, program director, etc.):

If no, please explain why:

3. Does your company / group conduct outreach specifically to diverse businesses? **YES**

If yes, respond to parts a, b, c, d, and e below.

a. Share all company / group outreach and communication strategies and practices that are conducted specifically to diverse businesses. Specify what outreach is conducted specifically to California diverse businesses:

Our Supplier Diversity & Inclusion SOP (standard operating procedure) requires Procurement personnel to attend supplier diversity outreach events designed to connect diverse suppliers with Procurement decision makers. Lincoln's outreach events are not specifically targeted to CA or any other state-specific diverse businesses.

b. Share any outreach and communication strategies and practices about supplier diversity conducted internally to company / group employees:

Internal outreach and communication strategies include SD&I education and awareness through a variety of materials including a Supplier Diversity & Inclusion SOP, Resource Guide, brochure, D&I web site, metrics, business updates, Town Hall meetings, and engagements with senior management, committees and other internal stakeholders.

c. Check below all outreach and communication practices in which your company / group engages:

EVENT – seminars, meet-and-greets, summits, etc.

- Host matchmaking
- Host supplier diversity events
- Internal Awards Program
- Participate in matchmaking
- Participate in supplier diversity events
- Sponsor matchmaking
- Sponsor supplier diversity events

Share the name of an event you attended / hosted that has best guided and / or influenced growth of your Supplier Diversity efforts:

WBEC PA-DE-sNJ Awards Luncheon in Philadelphia

MEDIA – advertising, announcements, interviews, webinars, etc.

- Traditional media (newspaper, television commercial, etc.)
- Ethnic media outlets
- Social media; please specify: **Facebook, Twitter, LinkedIn, internet**
- Trade publications

Share the name of a media group or outlet that has best guided and / or influenced growth of your Supplier Diversity efforts:

Lincoln's supplier diversity registration portal on LFG.com

ORGANIZATIONS – membership, affiliation, sponsorship, etc.

- Member of a certification agency
- Member of ethnic chamber of commerce
- Member/affiliate of other organization, please specify:

Share the name of an organization that has best guided and / or influenced growth of your Supplier Diversity efforts:

WBEC PA-DE-sNJ

PROGRAMS – mentorship, training, locator, etc.

- Diverse supplier registration portal
- Manage and run a supplier diversity mentorship program (in-house)
- Participate in a supplier diversity mentorship program
- Subscriber to a supplier locator program (or 3rd party service that identifies diverse suppliers)
- Operate a website dedicated to a Supplier Diversity Program

<https://www.lfg.com/LincolnPageServer?LFGPage=/lfg/lfgclient/abt/div/supplier/index.html>

- Technical assistance / training program for diverse suppliers

Share the name of a program that has best guided and / or influenced growth of your Supplier Diversity efforts:

WBEC PA-DE-sNJ

- d. Explain how, and to what extent, these strategies and practices have been successful in establishing relationships with diverse businesses:

Strategies and practices have been successful by helping Lincoln identify small and diverse suppliers across multiple categories of spend to participate in bids to compete for our business.

4. Does your co. / group require and/or encourage its primary suppliers to subcontract with diverse businesses? **NO**

If yes:

- a. Do you track procurement spend with Tier 2 diverse suppliers? **NO**

b. Please explain:

We do not currently track Tier 2 spend

5. Does your co. / group set internal targets or goals in regards to its supplier diversity statement and / or program? **YES**

If yes, please explain:

Our goal is to increase spend with small and diverse suppliers.

6. Describe in detail any updates, progress, and / or best practices established by your company / group in the two years since the 2013 Insurer Supplier Diversity Survey was administered; include any awards or recognition received for Supplier Diversity work:

Refined our supplier registration portal, created an internal database to house supplier registrations, secured access to MSDC and WBEC databases of minority and women-owned suppliers, expanded communications and marketing materials to increase awareness and education, expanded outreach, developed an e-learning module and improved data capture and reporting.

7. Additional Comments:

Regarding the data/charts: "California Only" spend corresponds to spend with suppliers who self-reported a main address in California. Our company does not currently track/report Total \$s in contracts signed (B tables), MBE ethnicity (table 2D), Disabled Vet spend (Table 3), LGBT spend (table 4), Multi-certified spend (Table 5) or Total Dollars of Contracts signed.

8. Points of contact for the company's / group's supplier diversity operations for diverse business enterprises:

PRIMARY CONTACT

Contact Name: **John Hendrick**
Title: **AVP, Procurement Strategy & Performance Excellence**
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SECONDARY CONTACT

Contact Name: **Christopher Swenson**
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GENERAL CONTACT

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