



## ISD – 2013 Report Form A:

Pursuant to California Insurance Code Section 927(b), the information provided below will be made available to the public.

**Company NAIC/GROUP Number:**

**Company/Group Name:**

**SUBMISSION TYPE:**

**GROUP:**  Yes

**INDIVIDUAL COMPANY:**  Yes

**Please provide the requested information below:**

1. Does your company have a supplier diversity policy statement?  Yes  No

If **yes**, please provide the supplier diversity policy statement below. Additionally, if the statement is available online, please provide the link below.

If **no**, please explain below. Additionally, please include if the company plans to have a supplier diversity policy statement in the next 12 months.

2. Please explain/discuss the outreach and communications of your company/group to minority, women, and disabled veteran business enterprises, including:

- a. Explain/discuss how the insurer encourages and seeks minority, women, and disabled veteran owned business enterprises to become potential suppliers.



**ISD – 2013 Report Form A:**

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b. Explain/discuss how the insurer encourages its employees involved in procurement to seek out minority, women, and disabled veteran-owned business enterprises to become potential suppliers.

c. Explain/discuss how the insurer conducts outreach and communication to minority, women, and disabled veteran business enterprises.



## **ISD – 2013 Report Form A:**

Pursuant to California Insurance Code Section 927(b), the information provided below will be made available to the public.

- d. Explain/discuss how the insurer supports organizations that promote or certify minority, women, and disabled veteran-owned business enterprises.

3. Complete ISD-2013 Workbook A. ISD- 2013 Workbook A consists of two worksheets. The worksheets are called "ColInfo" and "ColInfo-Part II".

- a. ColInfo: Please provide your company information and whether you will be reporting as a group or individual company.
- b. ColInfo-Part II: If you are reporting as a group, please provide details on which companies or affiliates are part of the group.

4. Complete Forms A1 and A2

- a. Provide on **Form A1** information about which procurements are made from minority, women, and disabled veteran business enterprises with at least a majority of the enterprise's workforce in California, with each category aggregated separately (to the extent that information is readily accessible).
- b. OPTIONAL: An insurer may also include other relevant information in **Form A2** for those enterprises outside of California ("Non-California") or that do not fall under any category in Form A1.

There is also a text box on the bottom of both Forms A1 and A2 where you may include other relevant information.



**ISD – 2013 Report Form A:**

Pursuant to California Insurance Code Section 927(b), the information provided below will be made available to the public.

5. Provide information regarding appropriate contacts at the insurer for interested business enterprises.

a. Contact Name (Optional): \_\_\_\_\_

b. Title (Optional): \_\_\_\_\_

c. Phone Number: \_\_\_\_\_

d. E-mail Address: \_\_\_\_\_

e. Mailing Address:  
\_\_\_\_\_

f. Website (Optional): \_\_\_\_\_

**If not reporting:**

If your company does not enter into contracts to procure goods or services in California, please file a statement in the area below attesting that your company does not enter into procurement contracts in California. This would satisfy the requirements of California Insurance Code Section 927 et al.

**Insurer Supplier Diversity Data Call  
Form A1  
CALIFORNIA DIVERSE SUPPLIERS**

Please Note: For each of the following tables, if you have California diverse supplier contract(s) valued at less than \$50,000 each and would like to report that information, please do so in the text box on the bottom of Form A1.

If the requested information is not readily available for any of the following tables, please also note this in the text box of Form A1.

CDI may request additional information to verify reported data.

**Table 1: Number (#) of Diverse Suppliers (California) by Certification Type**

| (a) Procurement Spend by Dollar Range | Certification Type |         |         |                             |                       |                      |  | (h) Total |
|---------------------------------------|--------------------|---------|---------|-----------------------------|-----------------------|----------------------|--|-----------|
|                                       | (b) WBE            | (c) MBE | (d) DBE | (e) Multiple Certifications | (f) LGBQBE (Optional) | (g) Other (Optional) |  |           |
| ≥ \$50k but <\$100k                   |                    |         |         |                             |                       |                      |  |           |
| ≥ \$100k but <\$500k                  |                    |         |         |                             |                       |                      |  |           |
| ≥ \$500k but <\$1M                    |                    |         |         |                             |                       |                      |  |           |
| ≥ \$1M but <\$5M                      |                    |         |         |                             |                       |                      |  |           |
| ≥\$5M but < \$10M                     |                    |         |         |                             |                       |                      |  |           |
| ≥\$10M                                |                    |         |         |                             |                       |                      |  |           |
| Total                                 |                    |         |         |                             |                       |                      |  |           |

**Table 2: Number (#) of Diverse Suppliers (California) by Ethnicity**

| (a) Procurement Spend by Dollar Range | Ethnicity            |                            |                     |                     |                  |                   | (h) Total |
|---------------------------------------|----------------------|----------------------------|---------------------|---------------------|------------------|-------------------|-----------|
|                                       | (b) African American | (c) Asian/Pacific Islander | (d) Latino/Hispanic | (e) Native American | (f) Multi-Ethnic | (g) Other/Unknown |           |
| ≥ \$50k but <\$100k                   |                      |                            |                     |                     |                  |                   |           |
| ≥ \$100k but <\$500k                  |                      |                            |                     |                     |                  |                   |           |
| ≥ \$500k but <\$1M                    |                      |                            |                     |                     |                  |                   |           |
| ≥ \$1M but <\$5M                      |                      |                            |                     |                     |                  |                   |           |
| ≥\$5M but < \$10M                     |                      |                            |                     |                     |                  |                   |           |
| ≥\$10M                                |                      |                            |                     |                     |                  |                   |           |
| Total                                 |                      |                            |                     |                     |                  |                   |           |

**Table 3: Number (#) of Diverse Suppliers (California) by Industry Category**

| (a) Procurement Spend by Dollar Range | Industry Categories       |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |  |  | (m) Other |  |
|---------------------------------------|---------------------------|-----------------------------------|---------------------|----------------|---------------------|----------------------------|---------------------|--------------------|---------------------------|-------------|-----------------|--------------------------|--|--|-----------|--|
|                                       | (b) Advertising/Marketing | (c) Financial/Investment Services | (d) Claims Services | (e) Facilities | (f) Human Resources | (g) Information Technology | (h) Office Supplies | (i) Print Services | (j) Professional Services | (k) Telecom | (l) Real Estate | (m) Travel/Entertainment |  |  |           |  |
| ≥ \$50k but <\$100k                   |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |  |  |           |  |
| ≥ \$100k but <\$500k                  |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |  |  |           |  |
| ≥ \$500k but <\$1M                    |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |  |  |           |  |
| ≥ \$1M but <\$5M                      |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |  |  |           |  |
| ≥\$5M but < \$10M                     |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |  |  |           |  |
| ≥\$10M                                |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |  |  |           |  |
| Total                                 |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |  |  |           |  |

**Insurer Supplier Diversity Data Call  
Form A1  
CALIFORNIA DIVERSE SUPPLIERS**

**Table 4: Diverse Procurement Spend (\$) by Certification Type (California)**

| (a) Procurement Spend by Dollar Range | Certification Type |         |          |                             |                       |                      |  | (h) Total |
|---------------------------------------|--------------------|---------|----------|-----------------------------|-----------------------|----------------------|--|-----------|
|                                       | (b) WBE            | (c) MBE | (d) DVBE | (e) Multiple Certifications | (f) LGBTBE (Optional) | (g) Other (Optional) |  |           |
| ≥ \$50k but <\$100k                   |                    |         |          |                             |                       |                      |  |           |
| ≥ \$100k but <\$500k                  |                    |         |          |                             |                       |                      |  |           |
| ≥ \$500k but <\$1M                    |                    |         |          |                             |                       |                      |  |           |
| ≥ \$1M but <\$5M                      |                    |         |          |                             |                       |                      |  |           |
| ≥\$5M but < \$10M                     |                    |         |          |                             |                       |                      |  |           |
| ≥\$10M                                |                    |         |          |                             |                       |                      |  |           |
| <b>Total</b>                          |                    |         |          |                             |                       |                      |  |           |

**Table 5: Diverse Procurement Spend (\$) by Industry Category (California)**

| (a) Procurement Spend by Dollar Range | Industry Categories       |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |           |  |
|---------------------------------------|---------------------------|-----------------------------------|---------------------|----------------|---------------------|----------------------------|---------------------|--------------------|---------------------------|-------------|-----------------|--------------------------|-----------|--|
|                                       | (b) Advertising/Marketing | (c) Financial/Investment Services | (d) Claims Services | (e) Facilities | (f) Human Resources | (g) Information Technology | (h) Office Supplies | (i) Print Services | (j) Professional Services | (k) Telecom | (l) Real Estate | (m) Travel/Entertainment | (n) Other |  |
| ≥ \$50k but <\$100k                   |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |           |  |
| ≥ \$100k but <\$500k                  |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |           |  |
| ≥ \$500k but <\$1M                    |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |           |  |
| ≥ \$1M but <\$5M                      |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |           |  |
| ≥\$5M but < \$10M                     |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |           |  |
| ≥\$10M                                |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |           |  |
| <b>Total</b>                          |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |           |  |

**Table 6: Total Procurement Spend (Goods and Services)**

|                   |  |
|-------------------|--|
| Total Amount (\$) |  |
|-------------------|--|

**Legend**

- |   |   |
|---|---|
| 1. WBE: Women business enterprise   | 5. LGBTBE: Lesbian, Gay, Bisexual, Transgender business enterprise            |
| 2. MBE: Minority business enterprise  | 6. Multi-Ethnic: Diverse Supplier represents more than one ethnicity          |
| 3. DVBE: Disabled veteran business enterprise<br>(Certified by California Department of General Services) | 7. Other: Diverse certification type not listed or uncertified diverse vendor |
| 4. Multiple Certifications: Diverse Supplier has more than one certification type                         |   |

**Additional information**

If there is other relevant information you wish to provide, please include this in the text box below.

**Insurer Supplier Diversity Data Call  
Form A2 - OPTIONAL  
NON-CALIFORNIA DIVERSE SUPPLIERS**

Please Note: For each of the following tables, if you have non-California diverse supplier contract(s) valued at less than \$50,000 each and would like to report that information, please do so in the text box on the bottom of Form A2.

If the requested information is not readily available for any of the following tables, please also note this in the text box of Form A2.

CDI may request additional information to verify reported data.

**Table 1: Number (#) of Diverse Suppliers (Non-California) by Certification Type**

| (a) Procurement Spend by Dollar Range | Certification Type |         |         |                             |             |           |  | (n) Total |
|---------------------------------------|--------------------|---------|---------|-----------------------------|-------------|-----------|--|-----------|
|                                       | (b) WBE            | (c) MBE | (d) DBE | (e) Multiple Certifications | (f) LGSBDBE | (g) Other |  |           |
| ≥ \$50k but <\$100k                   |                    |         |         |                             |             |           |  |           |
| ≥ \$100k but <\$500k                  |                    |         |         |                             |             |           |  |           |
| ≥ \$500k but <\$1M                    |                    |         |         |                             |             |           |  |           |
| ≥ \$1M but <\$5M                      |                    |         |         |                             |             |           |  |           |
| ≥\$5M but < \$10M                     |                    |         |         |                             |             |           |  |           |
| ≥\$10M                                |                    |         |         |                             |             |           |  |           |
| Total                                 |                    |         |         |                             |             |           |  |           |

**Table 2: Number (#) of Diverse Suppliers (Non-California) by Ethnicity**

| (a) Procurement Spend by Dollar Range | Ethnicity            |                            |                     |                     |                  |                   | (n) Total |
|---------------------------------------|----------------------|----------------------------|---------------------|---------------------|------------------|-------------------|-----------|
|                                       | (b) African American | (c) Asian/Pacific Islander | (d) Latino/Hispanic | (e) Native American | (f) Multi-Ethnic | (g) Other/Unknown |           |
| ≥ \$50k but <\$100k                   |                      |                            |                     |                     |                  |                   |           |
| ≥ \$100k but <\$500k                  |                      |                            |                     |                     |                  |                   |           |
| ≥ \$500k but <\$1M                    |                      |                            |                     |                     |                  |                   |           |
| ≥ \$1M but <\$5M                      |                      |                            |                     |                     |                  |                   |           |
| ≥\$5M but < \$10M                     |                      |                            |                     |                     |                  |                   |           |
| ≥\$10M                                |                      |                            |                     |                     |                  |                   |           |
| Total                                 |                      |                            |                     |                     |                  |                   |           |

**Table 3: Number (#) of Diverse Suppliers (Non-California) by Industry Category**

| (a) Procurement Spend by Dollar Range | Industry Categories       |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |           |  |
|---------------------------------------|---------------------------|-----------------------------------|---------------------|----------------|---------------------|----------------------------|---------------------|--------------------|---------------------------|-------------|-----------------|--------------------------|-----------|--|
|                                       | (b) Advertising/Marketing | (c) Financial/Investment Services | (d) Claims Services | (e) Facilities | (f) Human Resources | (g) Information Technology | (h) Office Supplies | (i) Print Services | (j) Professional Services | (k) Telecom | (l) Real Estate | (m) Travel/Entertainment | (n) Other |  |
| ≥ \$50k but <\$100k                   |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |           |  |
| ≥ \$100k but <\$500k                  |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |           |  |
| ≥ \$500k but <\$1M                    |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |           |  |
| ≥ \$1M but <\$5M                      |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |           |  |
| ≥\$5M but < \$10M                     |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |           |  |
| ≥\$10M                                |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |           |  |
| Total                                 |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |           |  |

**Insurer Supplier Diversity Data Call  
Form A2 - OPTIONAL  
NON-CALIFORNIA DIVERSE SUPPLIERS**

**Table 4: Diverse Procurement Spend (\$) by Certification Type (Non-California)**

| (a) Procurement Spend by Dollar Range | Certification Type |         |          |                             |            |           |  | (h) Total |
|---------------------------------------|--------------------|---------|----------|-----------------------------|------------|-----------|--|-----------|
|                                       | (b) WBE            | (c) MBE | (d) DVBE | (e) Multiple Certifications | (f) LGBTBE | (g) Other |  |           |
| ≥ \$50k but <\$100k                   |                    |         |          |                             |            |           |  |           |
| ≥ \$100k but <\$500k                  |                    |         |          |                             |            |           |  |           |
| ≥ \$500k but <\$1M                    |                    |         |          |                             |            |           |  |           |
| ≥ \$1M but <\$5M                      |                    |         |          |                             |            |           |  |           |
| ≥\$5M but < \$10M                     |                    |         |          |                             |            |           |  |           |
| ≥\$10M                                |                    |         |          |                             |            |           |  |           |
| <b>Total</b>                          |                    |         |          |                             |            |           |  |           |

**Table 5: Diverse Procurement Spend (\$) by Industry Category (Non-California)**

| (a) Procurement Spend by Dollar Range | Industry Categories       |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |  |  | (n) Other |  |
|---------------------------------------|---------------------------|-----------------------------------|---------------------|----------------|---------------------|----------------------------|---------------------|--------------------|---------------------------|-------------|-----------------|--------------------------|--|--|-----------|--|
|                                       | (b) Advertising/Marketing | (c) Financial/Investment Services | (d) Claims Services | (e) Facilities | (f) Human Resources | (g) Information Technology | (h) Office Supplies | (i) Print Services | (j) Professional Services | (k) Telecom | (l) Real Estate | (m) Travel/Entertainment |  |  |           |  |
| ≥ \$50k but <\$100k                   |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |  |  |           |  |
| ≥ \$100k but <\$500k                  |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |  |  |           |  |
| ≥ \$500k but <\$1M                    |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |  |  |           |  |
| ≥ \$1M but <\$5M                      |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |  |  |           |  |
| ≥\$5M but < \$10M                     |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |  |  |           |  |
| ≥\$10M                                |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |  |  |           |  |
| <b>Total</b>                          |                           |                                   |                     |                |                     |                            |                     |                    |                           |             |                 |                          |  |  |           |  |

**Legend**

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>1. WBE: Women business enterprise</li> <li>2. MBE: Minority business enterprise</li> <li>3. DVBE: Disabled veteran business enterprise<br/>(Certified by California Department of General Services)</li> <li>4. Multiple Certifications: Diverse Supplier has more than one certification type</li> </ul> | <ul style="list-style-type: none"> <li>5. LGBTBE: Lesbian, Gay, Bisexual, Transgender business enterprise</li> <li>6. Multi-Ethnic: Diverse Supplier represents more than one ethnicity</li> <li>7. Other: Diverse certification type not listed or uncertified diverse vendor</li> </ul> |
|--|---|

**Additional information**

If there is other relevant information you wish to provide, please include this in the text box below.