

# YMCA of Greater Charlotte **Supplier Diversity:**

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Position the YMCA of Greater Charlotte as a supplier diversity advocate within the community and larger YMCA movement, and to provide equitable access to all suppliers of quality, cost effective products and services while improving the stewardship of our financial resources. We aim to create an inclusive sourcing environment by emphasizing procurement opportunities for minority- and woman-owned businesses, build strategic relationships and purchasing from diverse suppliers.

## **Key Terms:**

**Diverse Business**

A business enterprise is classified as a diverse business if the company is at least 51 percent owned, controlled and operated by one or more individuals from a minority group. The following groups are classified as minorities on the YOGC charter: Women, African American, Asian Pacific, Hispanic, Native American, Service Disabled Veteran, LGBT

**MWBE** = Minority & Woman Owned Business Enterprise

**BOM**= Business Opportunity Meeting

**YOGC**=YMCA of Greater Charlotte

## **Reporting Terms:**

**Total Purchases:**

Total spent with suppliers and vendors on goods and services. Includes restricted and unrestricted purchases.

**Restricted Purchases:**

Business transactions for goods and services in markets that do not allow for significant discretion in terms of vendor selection. Examples include Utility companies (Duke Energy, Piedmont Natural Gas, Charlotte Water), landlords, municipalities, etc.

**Unrestricted Purchases:**

Business transactions for goods and services in markets that allow for significant discretion in terms of vendor selection. Examples include general contractors, architects, engineers, signage, painters, office supplies, legal services, furniture, food services, etc.

### ADDITIONAL FYI:

\*For businesses that identify in more than one diverse business category, I.E. Woman owned & African American. Ethnic category will be reported on spend presentation summary instead of woman owned.

\* YOGC does not currently require businesses to provide proof of MWBE certification. The approach was created for transparency on reporting and to broaden relationship opportunities. This also enhances access for businesses facing barriers to certification costs and processing. This will remain subject to annual review and recommendations by the DIG supplier diversity sub-committee volunteers.

## Historical timeline/context:

### 2014:

DIG Committee volunteers request status report on supplier diversity initiatives. In 2014 there were no active strategies in place to track or report data on diverse spend. The first assessment of current state started with a focus of spending by the Facilities department. Supplier diversity sub-committee was established to drive recommendations and ensure accountability.

### 2015/2016:

Systems and data tracking installed through partnership with Finance Department by utilizing Great Plains accounting software. First vendor diversity update presented to DIG Committee December 2015. Sub-committee met consistently to verify data tracking and benchmarking of % goals. First annual MWBE spend report presentation (2016). First Business Opportunity Meeting (BOM) held in partnership with Balfour Beatty Construction (prior to Dowd construction project). Partnership established with Eric Watson and membership secured with Carolinas Virginia Minority Supplier Diversity Council.

### 2017/2018:

Became a member of the Latin American Chamber of Commerce Charlotte (LACCC). CVMSDC and LACC partnerships utilized hosted Business Opportunity Meeting at Dowd Y. Annual MWBE spend and data presented to DIG Committee. Facilities strengthens systems and processes such as education of supplier diversity initiatives to all Facility managers, addition of SD on performance reviews, requirements of all 10k+ bids to include at least one minority vendor. Supplier diversity sub-committee meetings held consistently with active volunteer engagement and accountability checks.

### 2019:

Marketing Department engaged per recommendation of sub-committee and need to extend focus beyond Facilities department. Deep dive into marketing data & processes including focus on contract with Symphonix. Marketing department led the MWBE report presentation March 2019.

## Current organizational structure:

- Primary documents: Supplier Diversity Charter and Major Construction Policy
- Governance accountability: Association DIG Committee is a standing Committee of the Association Board. Supplier Diversity sub-committee (2020 volunteers: Bob Woods, George Hanna, DeLisse Thomas, Sam Wazan, Ken Burton.)
- Staffing: YOGC does not have a full-time role solely responsible for managing supplier diversity sourcing and procurement. Responsibilities and implementation of strategies are collaboratively shared by: Association office (Candace Murray, Michael DeVaul), Facilities (Jalisia Davis, Jon Bontrager & Facilities team), Marketing (Mark Merner, Charla Muller).