Guidance Note to Vendors
Tier 2 Supplier Diversity Reporting Exercise for Fiscal Year 2024
Overview

Through your vendor engagement with the World Bank Group (WBG) over the past fiscal year, we request your participation in WBG Tier 2 Supplier Diversity Reporting Exercise for Fiscal Year 2024 (FY24). Your participation is crucial in supporting our Supplier Diversity & Inclusion program, and we thank you for your contribution to this initiative.

The information you provide through this reporting exercise, namely on (i) your initiatives and achievements on supplier diversity & inclusion and (ii) spend with diverse businesses over the recently concluded fiscal year, will help us:

- account for WBG diverse tier 2 spend during FY24.
- recognize WBG vendors’ inclusive sourcing efforts and commitment to supplier diversity.

This guidance note provides instructions for completing your submission to the tier 2 reporting exercise for FY24.
Instructions

What is the scope: This exercise covers the reporting period from July 1, 2023, to June 30, 2024, (i.e. WBG’s Fiscal Year 2024). If you are not able to align your reporting to WBG Fiscal Year 2024, you may report information on supplier diversity & inclusion pertaining to the closest 12-month period for which you have available data. Please note that the WBG reserves the right to perform validation of the Tier 2 expenditure reported.

Note: If you do not implement any supplier diversity initiatives and/or are unable to track or report to the WBG your expenditure with diverse suppliers, we ask that you indicate this information via the online reporting form.

How to report: The online form to complete your reporting can be found at: https://forms.office.com/r/URvpEVwb98. In case of access issues and/or restrictions to submit your reporting online, please contact Corporate Procurement for an offline version.

What is the deadline: September 6, 2024 at 6:00 PM EDT

Who completes it: The reporting should be completed by your company’s supplier diversity lead or someone with an equivalent level of knowledge.

How long it will take: We estimate that it will take 15-20 minutes to answer all questions.

Who to contact: For any question and/or assistance in completing this reporting exercise, please contact Corporate Procurement via email at: corporateprocurement@worldbank.org, attention to Environmental and Social Governance (ESG) Program.

How data will be use: Information and data collected from this survey will only be made public in an aggregate, anonymized form. All individual responses are considered confidential, as defined in the World Bank policy on access to information and the contractual terms that bind your relationship with the WBG as a WBG vendor.
Supplier diversity & inclusion is a highly valued strategic initiative at the WBG. We are committed to promoting, increasing, and improving the business participation of underrepresented diverse business enterprises in our procurement processes and across our supply chain. Adopting a phased approach, the WBG’s program efforts concentrate on women-owned businesses (globally) and businesses owned by minority groups (US) or ethnically and/or racially disadvantaged individuals in specific countries (currently: Australia, Brazil, Canada, China, UK, South Africa).

As part of the tier 2 program objectives, the WBG actively motivates prime vendors to support its supplier diversity & inclusion commitments and encourages them to directly contract with diverse suppliers to broaden their participation in the WBG’s business. In compliance with the WBG Vendors Code of Conduct requirements, we expect our vendors to provide annual reporting detailing their contribution to supplier diversity and inclusion.

It is important to note that the WBG subscribes to the globally recognized definition of a diverse business, defined as one that is at least 51% owned, operated, and controlled (all three conditions must apply) by one or more individuals of a diverse background. WBG currently requests our prime vendors to provide spend data with regards to the below diverse supplier groups only:

<table>
<thead>
<tr>
<th>Diverse Supplier Group</th>
<th>Geographic Scope</th>
</tr>
</thead>
<tbody>
<tr>
<td>Women-Owned Business Enterprises (WBEs)</td>
<td>Global</td>
</tr>
<tr>
<td>Minority-Owned Business Enterprises (MBEs)</td>
<td>USA</td>
</tr>
<tr>
<td>Minority-Owned Business Enterprises (MBEs)/Ethnically or Racially Disadvantaged Business Enterprises outside the US</td>
<td>Australia, Brazil, Canada, China, UK, South Africa</td>
</tr>
<tr>
<td>Disability-Owned Business Enterprises (DOBEs)</td>
<td>Global</td>
</tr>
<tr>
<td>LGBT Business Enterprises (LGBTBEs)</td>
<td>Global</td>
</tr>
<tr>
<td>Micro-, small- and medium-sized enterprises (MSMEs)</td>
<td>Global</td>
</tr>
</tbody>
</table>

*Groups of suppliers that qualify as Minority-owned Businesses/Ethnically or Racially Disadvantaged Business Enterprises are defined in each country context. Currently, this umbrella definition includes the following diverse classification groups in each targeted country: minority-owned businesses (USA); aboriginal and minority-owned businesses (Canada); ethnic minority-owned businesses (UK, China); Indigenous-owned businesses (Australia), black-owned businesses (South Africa), Afro-descendants and indigenous-owned businesses (Brazil).

For more information about WBG Supplier Diversity & Inclusion program initiatives and goals, visit our website.
How to complete the online reporting form
To better support you in completing the survey and reporting your Company’s spend with diverse businesses, we encourage you to review the following section carefully.
Part I. Contact Details

Provide the **first and last name, position title, email address, and phone number**, including country code, of the person in your company responsible for completing this reporting in case any clarification is required.

By clicking "Next", you confirm you have the authority to respond on behalf of your company and to provide the required information.
Part II. General Information

Indicate the **full name of your company** as stated in official records and provided to the WBG during the registration process so we may match your response accurately with our records.

Provide the **unique vendor identification number** (maximum 6 digits) assigned to your company upon completion of the vendor registration process with the WBG.

Type in the **name of the country** where your company is registered.

**Tip:** Should you have trouble identifying your Company’s vendor identification number with the WBG, reach out to corporateprocurement@worldbank.org, and we can help you retrieve it.
Part III. Supplier Diversity & Inclusion Activities

Select from the listed options, the one that is relevant to your company’s situation. If ‘Other’ specify.

Depending on your selection (if you indicated “Yes”), you will be asked to answer questions #10 - #14 as relevant or skip directly to question #15 (if you indicated “No”/“Not at the moment”).

Note:
Supplier diversity is a business strategy that emphasizes the creation of a diverse supplier base in the procurement of goods and services for a business/organization. It includes the adoption of inclusive procurement practices and initiatives that intentionally seek out and provide opportunities to underrepresented or disadvantaged groups of suppliers, such as minority-owned, women-owned, LGBT-owned, disability-owned, and small and medium size businesses.
Part III. Supplier Diversity & Inclusion Activities (continued)

This is a multiple-select option question. From the listed options select all those that are true to your company's situation when it comes to supplier diversity and inclusion. If "Other" please specify.

Under this open field, indicate any measurable goals/targets that your company has set to track progress on supplier diversity & inclusion efforts. Targets can include procurement spend or share with diverse-owned businesses, number of diverse-owned businesses contracted, participation of diverse-owned businesses in solicitations, economic impact created, etc.

Choose between Global/International or Country/Region specific, based on the geographies that your supplier diversity & inclusion activities extend to.
Part III. Supplier Diversity & Inclusion Activities (continued)

This is a multiple-select option question. From the listed options, select all diverse business categories that are targeted by your company’s supplier diversity & inclusion program.

If your program targets additional diverse business categories, you can select “Other” and specify which those are.

Use this section to briefly describe the overall progress your company has made on supplier diversity & inclusion during the reporting period (e.g. any goals set or achieved, additional diverse categories or geographies targeted, etc.).
Part IV. Spend with Diverse Businesses - Fiscal Year 2024

This is a Yes or No answer.

Select Yes, if you are able to track and report to the WBG your company’s spend with diverse businesses.

If you select yes, it will trigger a field to confirm the reporting period for the diverse spend data to be provided through this exercise.

If your reporting aligns to the WBG fiscal year 2024 (the period covering from July 1, 2023 to June 30, 2024), leave this section blank; otherwise, note the start and end date of your reporting period, that should refer to the most recent and closest 12-month period to WBG fiscal year 2024.

Select No, if you are not able to report to the WBG your company’s spend with diverse businesses.

Then, use the next section - Part V. For Suppliers who are not able to report on tier 2 spend - to indicate:

- **Why** you are unable to report this data
- **What** could help your company in start contributing to the WBG tier 2 Supplier Diversity & Inclusion program and reporting its spend with diverse businesses
- **When** you anticipate being able to report supplier diversity spend to the WBG.
Part VI. Diverse Spend Data: Direct Spend

This is a Yes or No answer to indicate whether your company engaged any subcontractor(s) or contract supplier(s) in general - not necessarily diverse-owned businesses only - for supporting your WBG contract(s).

If any subcontractors/contract suppliers used for your WBG contract(s) during the reporting period were women-, disability-, LGBT-, US based minority-owned businesses or MSMEs, select Yes.

Then, use the next set of questions to indicate the total dollar amount (to the nearest dollar, in USD) of expenditure with each such category of diverse businesses.

Please note:

- If you did not have spend with a specific diverse business category, indicate "0" in the respective field.
- 100% of this spend should be reported to the WBG.

Example:
During the reporting period in question, WBG vendor A utilizes subcontractors X and Y and pays them $60,000 and $60,000 respectively, to help carry out their WBG contract obligations. Company X and Y are women-owned businesses. Company A should indicate $120,000 under women-owned business field.
Direct Spend: Minority-owned/Ethnically or Racially Disadvantaged Business Enterprises (outside USA)

Select the option that best describes your company’s situation. Indicate Yes, if any subcontractors/contract suppliers used for your WBG contract(s) during the reporting period were ethnically or racially disadvantaged business enterprises from Australia, Brazil, Canada, China, UK, South Africa.

Then, use the next set of questions to report the total dollar amount (to the nearest dollar, in USD) of expenditure with each such category of diverse businesses.

Reminders:
• If you did not have spend with a specific diverse business category, indicate "0" in the respective field.
• This is spend that is 100% attributable to your contract(s) with the WBG.
Part VII. Diverse Spend Data: Indirect Spend

This is a multiple-choice answer, select the option that best describes your company's situation. Depending on your selection you will be asked to respond to the next set of questions (below) referring to reporting your spend with each category of women-, disability-, LGBT-, US based minority-owned businesses and MSMEs ...

Indirect spend is spend with diverse-owned businesses that is not directly attributable to your contract(s) with the WBG. By reporting this information, the WBG will allocate a portion of this spend to our supplier diversity and inclusion spend.

... or skip directly to the next section.
Indirect Spend: Minority-owned/Ethnically or Racially Disadvantaged Business Enterprises (outside USA)

Select the option that best describes your company's situation. Indicate Yes, if during the reporting period your Company had spend (for goods/services not directly related to performing work under your WBG contract) with ethnically or racially disadvantaged business enterprises from Australia, Brazil, Canada, China, UK, South Africa.

Then, use the next set of questions to report the total dollar amount (to the nearest dollar, in USD) of expenditure with each such category of diverse businesses.

Reminder:
- If you did not have spend with a specific diverse business category, indicate "0" in the respective field.
Your Company's Annual Revenue

Indicate your Company’s **annual revenue** (to the nearest dollar, in USD) during the reporting period or the most recently available fiscal year.

Note:

- Information on your company’s annual revenue will help us calculate the portion of your total diverse spend that can be allocated to WBG and reported as your indirect diverse spend according to the below formula:

  \[
  \text{WBG Allocation Factor} = \frac{\text{Total annual sales to WBG}}{\text{Total annual company Sales Revenue}}
  \]

  \[
  \text{Indirect diverse spend allocated to WBG} = \text{Total annual diverse Spend} \times \text{WBG Allocation Factor}
  \]

 Please do not calculate the allocation yourself, we will take care of the calculation based on your company’s total dollar amount expenditure with diverse businesses.
Part VIII. Supplier Diversity & Inclusion Learning

46. Would you be interested in accessing learning resources/training for strengthening (or initiating) your supplier diversity & inclusion efforts?

- Yes
- No

This is a Yes or No question. Select that option that is relevant to your Company with regards to interest in participating in training initiatives and/or accessing learning to support your organizational efforts on supplier diversity and inclusion. This will enable the WBG to focus capacity building efforts for our vendors.

47. Indicate the learning/training topics that would be of most benefit for your organization’s efforts on supplier diversity & inclusion:

- Communicating the business case for supplier diversity & inclusion.
- Developing a supplier diversity & inclusion policy and program with measurable goals.
- Integrating supplier diversity & inclusion considerations along the procurement cycle.
- Identifying/recruiting diverse businesses for your procurement needs and tracking diverse spend.
- Engaging with prime suppliers to support their supplier diversity efforts.
- Best practices on supplier development to enhance skills/capacities of diverse businesses.
- Other

If the answer to the above question is Yes, select from the list and/or specify under ‘Other’, the learning/training topics that would be of interest to your company.
Part IX. End of Survey Attestation

Confirm by signing that all the information reported in this form is accurate and complete to the best of your knowledge and belief.

By attesting to the information provided and clicking the SUBMIT button, your company’s submission to the WBG Tier 2 Supplier Diversity reporting exercise for fiscal year 2024 is complete and your responses submitted to WBG Corporate Procurement.

No further action is necessary.

Click Submit to complete your reporting.
Thank you for your response!

Click ‘Save my response’ for a copy of your submission

Thank you for your contribution to the WBG Tier 2 Supplier Diversity Reporting Exercise for Fiscal Year 2024 (FY24).

Your response was submitted.

Important thing you can do next

Save my response

Submit another response