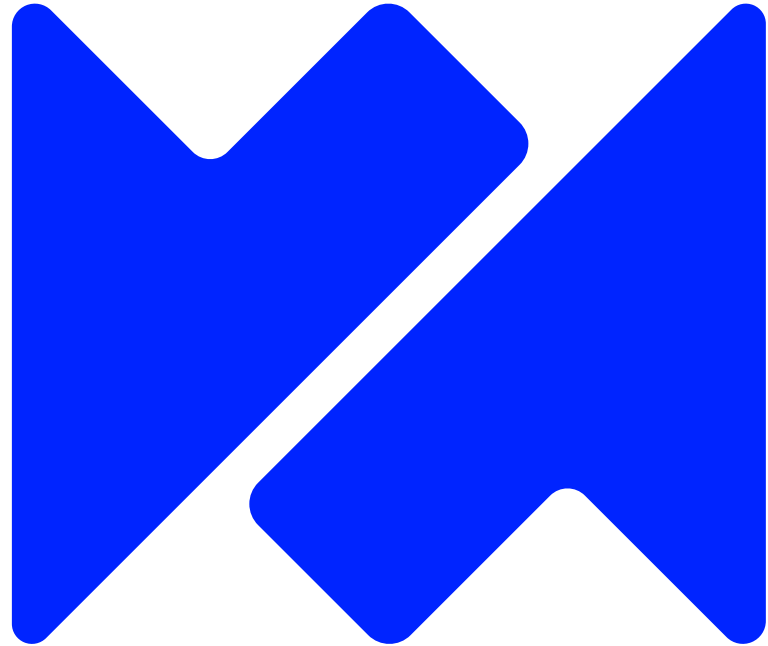




# 2<sup>nd</sup> Tier Reporting Guide

Prime Supplier Guide

July 2023



# Part 1:

What is 2nd Tier Spend Reporting?

## Definitions

- **Prime Supplier (First Tier)** - A supplier that provides and invoices Evergy for the goods and services rendered directly for our company.
- **2<sup>nd</sup> Tier Supplier (a subcontractor to a prime)** – a diverse supplier that provides products/services to a prime supplier for the fulfillment of an Evergy contract.

## 2<sup>nd</sup> Tier Spend Reporting

Evergy is committed to increasing opportunities for diverse suppliers and enhancing the competitiveness of the supply base. Evergy values diversity and our expectation is that our prime suppliers will do the same. Evergy requires its prime suppliers to provide equal opportunities to small and diverse businesses.

### What is 2<sup>nd</sup> Tier Spend Reporting?

- Prime Supplier reports spend with diverse subcontractors (2nd Tier) for goods or services that support the fulfillment of an Evergy contract.

### The two types of 2<sup>nd</sup> Tier spend:

- **Direct Spend** - Prime Supplier reports spend with diverse subcontractors (2nd Tier) for goods or services that directly support the fulfillment of an Evergy contract.
  - Ex: Evergy hires Large University. Large university hires diverse subcontractors to work on Evergy project. Large University pays the subcontractor, this is “2nd tier direct spend.”
- **Indirect spend** – Is the purchase of goods and/or services from a diverse company that are not directly incorporated into a product being manufactured.
  - Ex: Company A is hired by Evergy. Company A uses printers purchased from a diverse supplier to work on Evergy’s project.
  - Other examples of items that could be purchased from a diverse supplier as indirect spend: computers, safety goggles, printed forms, office suppliers, equipment, furniture, etc.

# Part 2:

## Inputting Spend into Evergy Portal

Note:

2<sup>nd</sup> Tier is due monthly on the 10th for the previous months spend. Example: January spend needs to be input by Feb 10th, etc.

# Logging In

## Company & User Setup

- Step 1
  - New users will receive a link to register a new Evergy account located in the PowerAdvocate tool
  - After completing the registration, simply log-in using your new credentials
  - Existing users should login to the Evergy account located in the PowerAdvocate tool.
- Please click on the following link to log into the platform: Click [here](#)

### Login

Username:  [Forgot Username](#)

Password:  [Forgot Password](#)

**LOGIN**

[Create a new supplier account](#)

By clicking on the "Login" button above in order to use this Site, you acknowledge that you have read, accept, and are bound by the Terms of Use.

# Dashboard Upon Logging In

- Step 2
  - Under the **Portals** panel, locate the **Evergy Monthly Tier II Spend Portal**
    - If this portal is not listed for you, please contact SupplyChain Technical Support at [Support@PowerAdvocate.com](mailto:Support@PowerAdvocate.com)

Wood Mackenzie

Dashboard Profile Company Logout

My Company

My Portals

Actions	Company	Portal Name	Portal Owner
	Wood Mackenzie Supply Chain	<a href="#">International Suppliers (outside US)</a>	Support Buyer
	Evergy	Evergy Monthly Tier II Spend	Valerie Coyazo

My Bid Events

Open (0) Pending (0) Closed (0) Saved (0)

Actions	Status	Event #	Event Title	Event Coordinator	Company	Close Time	Open Time
---------	--------	---------	-------------	-------------------	---------	------------	-----------

# Portal Main Page

- Initially Displays Document Page
  - Step 4 – Select the “Fill out Questionnaires” tab

Wood Mackenzie

1001 : Energy Monthly Tier II Spend  
Portal Owner: Valerie Coyazo

Energy

Dashboard Profile Company Logout

1. Upload & Download Documents 2. Enter Portal Requirements 3. Fill Out Questionnaires Messaging

Upload a Document  Upload a Link

File Location \* \* Required Field

Choose Files No file chosen

Add to Series (Optional)

(upload as new series)

Document Names \* Issue Date Reference ID

06/28/2023

Submit

Download Update Order

Energy Documents Filter Buyer Documents



# Accessing Questionnaires

- Tab Displays All Questionnaires in the Portal and Dates
  - Step 5 – Select the questionnaire “Diversity Tier 2 Direct (Monthly)” for **Direct Spend Submissions**

## 1001 : Everyg Monthly Tier II Spend

Everyg

Portal Owner: Valerie Coyazo

- 1. Upload & Download Documents
- 2. Enter Portal Requirements
- 3. Fill Out Questionnaires
- Messaging

Questionnaires			
Name	Reporting Frequency	Start Date	End Date
Diversity Tier 2 Direct (Monthly)	Annually	2021	
Diversity Tier 2 Indirect (Monthly)	Annually	2021	

# Direct Tier 2 Questionnaire

- Displays Fields for Prime Suppliers
  - Step 6 – Select the “Add Supplier” button to create rows to enter supplier data

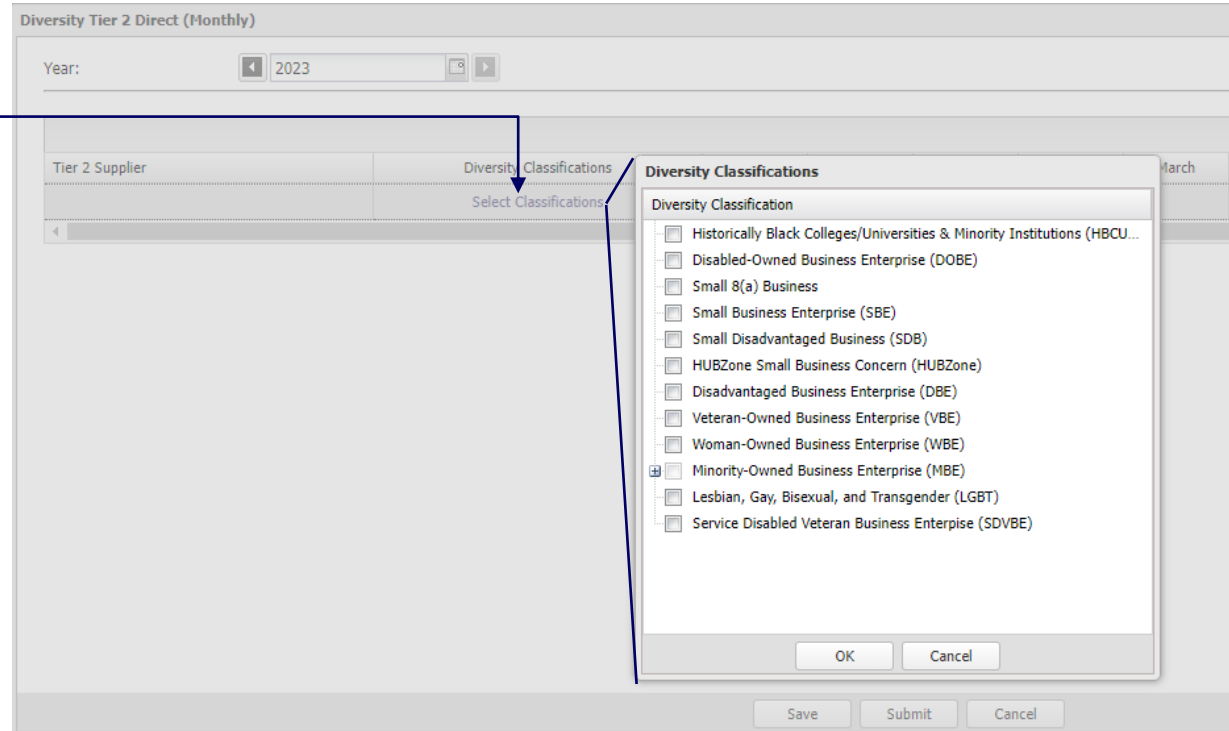
Diversity Tier 2 Direct (Monthly)

Year:

Tier 2 Supplier	Diversity Classifications	Business Unit	Everygy PO Num	January	February	March	April	May	June	
	Select Classifications	Select Value								

# Tier 2 Questionnaire

- Displays Fields for Prime Suppliers
  - Step 7 – Open the “Select Classifications” link in order to select one or more diversity classifications for your diverse supplier



# Direct Tier 2 Questionnaire

- Display Fields for Prime Suppliers
  - Step 8 –Indicate the Evergy Business Unit associated with the spend

**Diversity Tier 2 Direct (Monthly)**

Year:

Tier 2 Supplier	Diversity Classifications	Business Unit	Evergy PO Num	January
	Select Classifications	Select Value		

**Business Unit**

- Corporate
- Delivery
- Distribution
- GPE
- Generation
- IT
- N/A
- Nuclear
- Solar
- Transmission

Save Submit OK Cancel

# Direct Tier 2 Questionnaire

- Display Fields for Prime Suppliers
  - Step 9 – Indicate the Tier2 supplier name and Evergy PO Number associated with spend. If no PO Number, enter “N/A” (required)

Diversity Tier 2 Direct (Monthly)

Year:

Tier 2 Supplier	Diversity Classifications	Business Unit	Evergy PO Number(s)	January	February	March	April	May
ABC Construction	Select Classifications	Select Value	0000000004					


# Direct Tier 2 Questionnaire

- Display Fields for Prime Suppliers
  - Step 10 – Enter the Direct spend conducted with each diverse subcontractor by month in the appropriate columns

**Diversity Tier 2 Direct (Monthly)**

Year:

Tier 2 Supplier	Diversity Classifications	Business Unit	Every PO Number(s)	January	February ^	March	April
ABC Construction	Select Classifications	Select Value	0000000004	\$50,000.00	\$50,000.00	\$25,000.00	\$0.00



# Direct Tier 2 Questionnaire

- Display Fields for Prime Suppliers
  - Step 11 – Select the “Add Supplier” Button to add additional entry rows for additional diverse suppliers

Diversity Tier 2 Direct (Monthly)

Year:

Tier 2 Supplier	Diversity Classifications	Business Unit	Evergy PO Number(s)	January	February ^	March	April	May
ABC Construction	Woman-Owned Business Enterprise (WBE)	Select Value	0000000004	\$50,000.00	\$50,000.00	\$25,000.00	\$0.00	\$0.00
Havelcheck Co.	African American	Select Value						
Joe's Electric	Select Classifications	Select Value						
Kansas Consolidated Industries	Select Classifications	Select Value						

- Once you are done completing these entries, select “Submit” at the bottom of the page. If you would like to submit Tier 2 Indirect Spend Data, please continue

# Indirect Tier 2 Questionnaire

- Display Fields for Prime Suppliers
  - Step 12 – Select the next questionnaire “Tier 2 Indirect (Monthly)” for Indirect Spend Submissions

1. Upload & Download Documents   2. Enter Portal Requirements   3. Fill Out Questionnaires   Messaging

Questionnaires			
Name	Reporting Frequency	Start Date	End Date
Diversity Tier 2 Direct (Monthly)	Annually	2021	
Diversity Tier 2 Indirect (Monthly)	Annually	2021	



# Indirect Tier 2 Questionnaire

- Display Fields for Prime Suppliers
  - Step 13 – Enter your **Total Sales** by month and total **Sales to Buyer (Evergy)** by month in the appropriate fields. The Sales to Buyer field should indicate your company’s total sales to Evergy for the month. If this is not done accurately, your total spend to Evergy will not calculate correctly

**Diversity Tier 2 Indirect (Monthly)**

Year:

Revenues - Market Share	January	February	March	April	May	June
Total Company Sales	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Sales To Buyer	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00



  

Tier 2 Supplier/Supplier Group	Diversity Classifications	January	February	March	April	May	June
	Select Classifications						

# Indirect Tier 2 Questionnaire

- Display Fields for Prime Suppliers
  - Step 14 – Enter diverse suppliers or enter diversity classifications as a group in the first row of the “Tier 2 Supplier” filed by selecting the “Add Supplier” button.

**Diversity Tier 2 Indirect (Monthly)**

Year:   

Revenues - Market Share	January	February	March	April	May	June
Total Company Sales	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Sales To Buyer	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Tier 2 Supplier/Supplier Group	Diversity Classifications	January	February	March	April	May	June
Machine Tools Inc	Select Classifications	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

# Indirect Tier 2 Questionnaire

- Display Fields for Prime Suppliers
  - Step 15 – Select the classification for your previously entered supplier or diversity classification group by choosing “Select Classifications”. If you entered a diversity classification group instead of a single supplier, please only select one classification.

**Diversity Tier 2 Indirect (Monthly)**

Year:

Revenues - Market Share	January
Total Company Sales	\$0.00
Sales To Buyer	\$0.00

Tier 2 Supplier/Supplier Group	Diversity Classifications	January
Machine Tools Inc	Select Classifications	\$0.00

**Diversity Classifications**

Diversity Classification

- Historically Black Colleges/Universities & Minority Institutions (HBCU...)
- Disabled-Owned Business Enterprise (DOBE)
- Small 8(a) Business
- Small Business Enterprise (SBE)
- Small Disadvantaged Business (SDB)
- HUBZone Small Business Concern (HUBZone)
- Disadvantaged Business Enterprise (DBE)
- Veteran-Owned Business Enterprise (VBE)
- Woman-Owned Business Enterprise (WBE)
- Minority-Owned Business Enterprise (MBE)
- Lesbian, Gay, Bisexual, and Transgender (LGBT)
- Service Disabled Veteran Business Enterprise (SDVBE)

OK Cancel

# Indirect Tier 2 Questionnaire

- Display Fields for Prime Suppliers
  - Step 16 – Enter the spend conducted with each supplier or diversity classification group by month in the appropriate columns

**Diversity Tier 2 Indirect (Monthly)**

Year:

Revenues - Market Share	January	February	March	April	May	June	July
Total Company Sales	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Sales To Buyer	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Tier 2 Supplier/Supplier Group	Diversity Classifications	January	February	March	April	May	June	July
WBE	Woman-Owned Business Enterprise (WBE)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Example of alternative reporting by diversity classification group

# Indirect Tier 2 Questionnaire

- Display Fields for Prime Suppliers
  - Step 17 – Select the “Add Supplier” button to add additional blank rows to the form

**Diversity Tier 2 Indirect (Monthly)** ? Self Help

Year:

Revenues - Market Share	January	February	March	April	May	June	July
Total Company Sales	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Sales To Buyer	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Tier 2 Supplier/Supplier Group	Diversity Classifications	January	February	March	April	May	June	July
Machine Tools Inc	Woman-Owned Business Enterprise (WBE)	\$45,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
T&D Supply Co.	HUBZone Small Business Concern (HUBZone)	\$25,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Marshall's Inspection	Disadvantaged Business Enterprise (DBE)	\$30,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Mayberry Customer Fittings	Historically Black Colleges/Universities & Minor...	\$14,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
All America Rental	Service Disabled Veteran Business Enterprise (S...	\$12,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Select Classifications								

Once you are done completing these entries, select “Submit” at the bottom of the page. You are done!

## Things to know

- **Confirmation of Submission:** After you have selected Save or Submit at the end of each questionnaire, you will be returned the “Fill out Questionnaires” tab. Your responses were successfully received.
- **Corrections and Modifications:** Should you need to make a correction or update a previously submitted form, you can return to this questionnaire and make changes, and upon selecting Save or Submit your submission will be immediately updated/

### Need help?

General questions about Evergy’s 2<sup>nd</sup> Tier spend reporting – please contact  
[supplierdiversity@evergy.com](mailto:supplierdiversity@evergy.com) or 1 (800)-880-1952

# Diversity Categories

- **Disadvantaged Business Enterprise (DBE) –**
  - Must receive certification from the relevant state
  - DBEs are for-profit small business concerns where socially and economically disadvantaged individuals own at least a 51% interest and control management and daily business operations.
- **Hub Zone Small Business Concern (HUB Zone) –**
  - Must be certified by SBA as a Hub Zone small business
  - A small business must be located in a "historically underutilized business zone" that is owned and controlled by one or more United States citizens and at least 35% of its employees must reside in a HUB Zone to qualify for the HUB Zone program. To become HUB Zone certified, visit <http://www.sba.gov/category/navigation-structure/contracting/working-with-government/small-business-certifications-audiences/hubzone-certification>
- **Lesbian, Gay, Bisexual, and Transgender (LGBT) –**
  - Must be certified by the National Gay and Lesbian Chamber of Commerce
  - A for profit enterprise presently located in the United States or its trust territories, and is at least 51% owned, controlled, operated and managed by a LGBT individual(s) of U.S. citizenship

# Diversity Categories

- **Minority Business Enterprise (MBE) –**

Must be certified by one of the following 3rd party agencies: State or local (county, city) government agencies, federal agencies, National Minority Supplier Development Council or regional affiliates.

A for profit enterprise presently located in the United States or its trust territories, and is at least 51% owned and operated by a U.S. citizen(s) who is a member of one of the following groups:

- **African American:** Black racial groups of Africa
- **Hispanic American:** Spanish or Portuguese speaking areas of Latin America or the following regions: Mexico, Central America, South America, and the Caribbean basin
- **Native American:** American Indian, Eskimo, Aleut, and Native Hawaiian. Individuals must be regarded as such by the community of which the person claims to be a part. Native Americans must be documented members of a North American tribe, band, or otherwise organized group of native people who are indigenous to the continental United States or who otherwise have a special relationship with the United States or a state through treaty, agreement, or some other form of recognition.
- **Asian Pacific:** Japan, China, Indonesia, Malaysia, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Thailand, Samoa, Guam, the U.S. Trust Territories of the Pacific, or the Northern Marianas
- **Asian Indian:** India, Pakistan, and Bangladesh
- **Alaskan**



# Diversity Categories

- **Small Disadvantaged Business 8(a) – (SDB)**

Must be certified by SBA as a SDB

- A small business unconditionally owned and controlled by one or more socially and economically disadvantaged citizens of the United States and demonstrates potential for success. A small business that has received certification as a small disadvantaged business concern consistent with 13 CFR 124, Subpart B, and no material change in disadvantaged ownership and control has occurred since certification. To become SDB certified, visit <http://www.sba.gov/content/8a-business-development>
- Certificate is good for a period of 9 years.

- **Small Business – (SBE)**

Must Self Certify

- A for profit enterprise presently located in the United States or its trust territories, and is at least 51% owned, controlled, operated and managed by a socially and economically disadvantaged individual or individuals, who must have a net worth of less than \$750,000, excluding the equity of the business and primary residence and qualifies as a small business under the criteria and size standards in 13 CFR 121 (see FAR 19.1). The size of the subcontractors and suppliers is determined by the NAICS code of their subcontract.
- <http://www.sba.gov/contractingopportunities/officials/size/index.html>

# Diversity Categories

- **Service-Disabled Veteran Business Enterprise (SDVBE) –**
  - Self-Certification or Certificate from Veterans Resource Business Center
  - A for profit enterprise presently located in the United States or its trust territories and is at least 51% owned by an individual(s) who have performed active service in one of the United States armed services and has/have a disability (as defined in 38 USC 101(16). Individual(s) must be involved in the day-to-day management of the business. In the case of a permanent or severe disability, the spouse or caregiver of such a service-disabled veteran may control the management and daily operations. For additional information regarding the Service-Disabled Veteran-Owned Program, visit <http://www.sba.gov/content/veteran-service-disabled-veteran-owned>
- **Veteran-Owned Business – (VOB) –**
  - Self Certification or certificate from Veterans Business Resource Center
  - A business concern that is at least 51% owned by one or more veterans (as defined in 38 USC 101 (2)), or, in the case of any publicly owned business, at least 51% of the stock is owned by one or more veterans. In addition, one or more veterans must control the management and daily business operations. For additional information regarding the Veteran-Owned Program, visit <http://www.sba.gov/content/veteran-service-disabled-veteran-owned>

## Diversity Categories

- **Woman Business Enterprise (WBE) –**
  - Self Certification or 3rd party, city state, WBENC, NAWBO
  - A for profit enterprise presently located in the United States or its trust territories, and is at least 51% owned, controlled, and operated by a woman or women of U.S. citizenship. Individual(s) must be involved in the day-to-day management of the business. For information on the Women-Owned Small Business Program, visit <http://www.sba.gov/content/womens-business-ownership>

# Disclaimer

These materials, including any updates to them, are published by and remain subject to the copyright of the Wood Mackenzie group ("Wood Mackenzie"), or its third-party licensors ("Licensors") as relevant, and are made available to clients of Wood Mackenzie under terms agreed between Wood Mackenzie and those clients. The use of these materials is governed by the terms and conditions of the agreement under which they were provided. The content and conclusions contained are confidential and may not be disclosed to any other person without Wood Mackenzie's prior written permission. Wood Mackenzie makes no warranty or representation about the accuracy or completeness of the information and data contained in these materials, which are provided 'as is'. The opinions expressed in these materials are those of Wood Mackenzie, and do not necessarily represent our Licensors' position or views. Nothing contained in them constitutes an offer to buy or to sell securities, or investment advice. Wood Mackenzie's products do not provide a comprehensive analysis of the financial position or prospects of any company or entity and nothing in any such product should be taken as comment regarding the value of the securities of any entity. If, notwithstanding the foregoing, you or any other person relies upon these materials in any way, Wood Mackenzie does not accept, and hereby disclaims to the extent permitted by law, all liability for any loss and damage suffered arising in connection with such reliance.

Copyright © 2023, Wood Mackenzie Limited. All rights reserved.



Europe +44 131 243 4477  
Americas +1 713 470 1700  
Asia Pacific +65 6518 0888  
Email [contactus@woodmac.com](mailto:contactus@woodmac.com)  
Website [www.woodmac.com](http://www.woodmac.com)

Wood Mackenzie™ is a trusted intelligence provider, empowering decision-makers with unique insight on the world's natural resources. We are a leading research and consultancy business for the global energy, power and renewables, subsurface, chemicals, and metals and mining industries.

**For more information visit: [woodmac.com](http://woodmac.com)**

WOOD MACKENZIE is a trademark of Wood Mackenzie Limited and is the subject of trademark registrations and/or applications in the European Community, the USA and other countries around the world.

