The quarterly report provides an overview of the general tasks performed by the LBU Consultant team in support of implementing and monitoring the District’s Local Business Enterprise (LBE) policy. The report is broken out into the main service areas for the contract.

In summary, during the report period, July 1 through September 30, 2020, the team members focused on the following tasks:

- Continuing connections with contractors to inform them of OUSD contract opportunities, the LBU Program, and to encourage them to complete City of Oakland certifications and OUSD prequalification process
- Posting relevant and interesting OUSD Facilities-related stories and content on social media platforms
- Referring contractors to available technical assistance resources
- Monitoring compliance with the LBU policy 50% utilization goal

I. BUSINESS OUTREACH & COMPLIANCE MONITORING—To increase the pool of local and small local resident contractors interested in bidding OUSD projects, team members performed the following tasks:

General

- Continued direct telephone outreach to 5,000 contractors headquartered in Oakland, as identified via the State of California Licensing Board
- Promoted OUSD contracting opportunities through email notifications and phone calls to firms certified by the City of Oakland and to Local Business, Small Local Business and Small Local Resident Businesses already working with OUSD
- Continued reviewing and processing SLRBE certifications

Project Specific Outreach—Team members identified firms certified in the trade areas associated with each project and conducted targeted/direct outreach for the following projects:

- None for this Quarter.

Compliance Monitoring and Reporting

1. In support of new bids, team members reviewed proposed contractor participation and approved or made recommendations for additional LBU engagement on the following projects:
   - Glenview Video Surveillance Project

2. Team members collected data from the Local Business Enterprise Participation Monthly Tracking
Worksheets submitted by prime contractors performing work on active construction projects. This quarter, the team received data for the active projects listed below. A summary of LBU attainment for each project in the Capital Program is attached to this report.

- Emerson Elementary School
- Fremont High School
- Glenview Elementary School
- Madison Park Academy
- Sankofa Academy

As of September 30, 2020, Cumulative LBU Participation = 55.04%:

TOTAL PROJECT DOLLARS AWARDED $592,739,054
CUMMULATIVE TOTAL DOLLARS TO LBES $326,271,247

Meeting Participation – To support direct communication with Project Managers, provide updates on LBU reporting and issues, and respond to inquiries, team members participated in the following meetings:

- Weekly OUSD Project Management Meetings
- Weekly Owner, Architect & Contractor (OAC)AC Meetings:
  - Emerson Girls Softball Field
  - Fremont High School

II. COMMUNICATIONS & COMMUNITY ENGAGEMENT – To increase communication with the larger community regarding the LBU program, provide technical assistance & resources to existing LBU firms,
collaborate with other local jurisdiction that have business inclusion initiatives and provide support
general community/government relations strategies, team members completed the following:

- Drafted and submitted 4th newsletter in September to SLBE/SLRBE firms. Content included:
  - OUSD Upcoming Bids
  - LBU Policy
  - Technical Assistance & Resources
    - Women Owned Small Business Certification Webinar
    - Caltrans Bonding Workshop Webinar
    - 10 Week Project Management Course
  - Bid Opportunity – BART HQ Tenant Improvement Project
  - Community Meetings – OUSD: Attend a Board Meeting
  - Feedback
  - Other agency Bid opportunities: BART & SFO Caltrans Contractor’s Bootcamp, CA DOT Bonding Workshop, Construction Resource Center 10-week Project Mgmt course

SEPTEMBER NEWSLETTER

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**Contractors Newsletter | September 2020**

**OAKLAND UNIFIED SCHOOL DISTRICT**

**Community Schools, Lynn Students**

**Recent Updates and Opportunities for OUSD Contractors**

**At The District**

**Local Business Utilization**

The Oakland Unified School District maintains a 50% local business utilization (LBU) requirement on all District construction contracts and renewals. The 50% requirement offers a 25% local business participation and a 25% total local and small local minority business participation.

**Project Updates**

- OUSD Procurement
- Local Business Utilization
- 10 Week Project Management Course

**Facilities**

Welcome to the Facilities Planning & Management Division. Our primary goal is to improve the quality of Oakland schools and school facilities to better prepare students for their future. By providing students with a positive learning environment, we are working to ensure all students feel respected and included.

- Local OUSD Facilities: Facilities Newsletter

**Technical Assistance & Resources**

- Working Solutions
- SFO

**BART & Turner Construction’s**

"Virtual” Matchmaking Events to support Small Business Participation on the BART Headquarters Tenant Improvement Project

BART’s Office of Business Opportunities (BOO) will be facilitating additional “virtual” matchmaking sessions for interested firms to meet with Turner decision makers. These virtual sessions will focus on integration of small businesses.

**Schedule**

- September 7 and 8: Trade Package: Minor Outfitting
- September 7 and 10: Trade Package: Demolition/Reconfiguration/Steel, Architecture
- September 10 and 11: Trade Package: Acoustical Ceiling/Drywall, Framing, and Hardware
- September 16 and 17: Trade Package: Painting/Flooring/Ceramic Tiles

**Contact**

Registered firms need to RSVP with Turner directly via Janell Evers from Turner Construction Company: Janell.evers@turner.com

For more information, please contact:

- Bay Area Business Advancement (BABA)
- APWA Bay Area-Midcalif Chapter
- UC Berkeley Community Training Resource Center

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SEPTEMBER NEWSLETTER
Continued compiling and distributing positive facilities related content via Facebook, LinkedIn & Twitter for under the hashtag #OUSD100

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Sample Posting – OUSD Graduates BART Mural Unveiling – 08/28/20
Sample Posting – OUSD Spotlight of Board member Shanthi Gonzales
Other Meetings/Engagements

- Interview local contractors to spotlight firms on weekly social media posts
- Interviews with District staff regarding sustainability efforts, Linked Learning regarding summer programming, project communications team, and two school board members to highlight on social media
- Provide support for multiple SLBEs during negotiations with general contractors regarding work performance, scope and payments timelines
- Convene meeting with local contractors to introduce new Chief Business Officer, Lisa Grant-Dawson and discuss various District and board initiatives
- Prepare LBE program update during upcoming facilities committee meeting and general board meeting in October
- Provide LBE program highlights and talking points for Madison Park, Glenview press releases