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, October 1 through December 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:

- Howard Elementary School Exterior Painting Project
- Rudsdale Middle School – Exterior Painting 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

As of December 31st, 2020, Cumulative LBU Participation = 55.86%:

- TOTAL PROJECT DOLLARS AWARDED $594,407,626
- CUMMULATIVE TOTAL DOLLARS TO LBES $329,196,048.81

**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 December to SLBE/SRLBE firms. Content included:
  - OUSD Upcoming Bids
  - LBU Policy
  - Announcement
    - About Measure Y – Measure Y Bond Project List
    - Technical Assistance & Resources
      - Construction Assistance Program: Tips for Submitting Better Bids Workshop
      - Caltrans: Disadvantaged Business Enterprise (DBE) Construction and Supplier Roundtable
      - Caltrans & DGS: Steps to Successful Contracting with the State of California and Caltrans Web series
      - CPM Logistics: Kiewit Bonding Assistance Program Webinar
  - Bid Opportunities
    - OUSD: Request for qualifications and proposals (RFQ/P) lease-leaseback construction services
    - OUSD: Request for qualifications/proposals program management services
  - Community Meetings – OUSD: Attend a Board Meeting
  - Feedback

DECEMBER NEWSLETTER

Courses & Events

**TIPS FOR SUBMITTING BETTER BIDS WORKSHOP**

Construction Assistance Program

- **Date:** December 17, 2020
- **Time:** 4:30 AM – 5:30 PM UTC
- **Register:** Available

**Disadvantaged Business Enterprise (DBE) Construction and Supplier Roundtable**

- **Purpose:** Combining with the California Business Enterprise Roundtable and Governmental Roundtable.
- **Date:** December 11, 2020
- **Time:** 1:00 PM – 2:00 PM
- **Register:** Available

**Steps to Successful Contracting with the State of California and Caltrans Webinar**

- **Date:** January 19, 2023
- **Time:** 10:00 AM – 11:30 AM
- **Register:** Available
Continued compiling and distributing positive facilities related content via Facebook, LinkedIn & Twitter for under the hashtag #OUSD100

<table>
<thead>
<tr>
<th>Date</th>
<th>Post Details</th>
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<tbody>
<tr>
<td>10/26/2020</td>
<td>Climate Core Fellowship, collaboration with PG&amp;E and OUSD</td>
</tr>
<tr>
<td>11/3/2020</td>
<td>Meet the OUSD School Board Candidates</td>
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**Other Meetings/Engagements**

- Interviewed local contractors to spotlight firms on weekly social media posts.
- Conducted four-part virtual Contractors Academy in partnership with ACPWA. Provided the small local firms the opportunity to network and gain knowledge from local prime contractors.
- Attended ribbon cutting ceremonies for Glenview Elementary, Madison Park, Fremont High School and The Central Kitchen to document work performed by local businesses and interview contractors and workers to highlight local impact.
- Coordinated 2 meet & greet virtual meetings with new school board members and small local businesses.
- Presented local business utilization updates to facilities committee, citizens bond oversight committee and full board.
- Supported local businesses with project close out process.