

# LOCAL BUSINESS SPOTLIGHT (VIDEO)



OAKLAND UNIFIED  
SCHOOL DISTRICT

*Community Schools, Thriving Students*



**OAKLAND UNIFIED  
SCHOOL DISTRICT**  
*Community Schools, Thriving Students*



# OAKLAND UNIFIED SCHOOL DISTRICT'S **LOCAL BUSINESS POLICY**

## Annual Report (2026)



Prepared by 360 Total Concept

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# LOCAL BUSINESS COMPLIANCE

## ANNUAL REVIEW

### INTRODUCTION TO LOCAL BUSINESS COMPLIANCE

In collaboration with the Oakland Unified School District's Facilities Planning and Management Department, 360 Total Concept leads a dynamic and comprehensive program designed to support and promote local business engagement. This program includes targeted outreach and engagement events, technical assistance initiatives, compliance monitoring, and detailed quarterly reporting for both internal and external stakeholders. Guided by the District's local business policy and backed by multiple years of partnership with the District, 360 Total Concept consistently enforces local business requirements, provides strategic recommendations to strengthen and evolve the policy, and prioritizes small and local firms as vital stakeholders in all decision-making processes.



# LOCAL BUSINESS COMPLIANCE TEAM

360 Total Concept



**SHONDA SCOTT**  
CHIEF EXECUTIVE OFFICER  
PRINCIPLE-IN-CHARGE



**SHONNELL FROST-GIBBS**  
CHIEF OPERATIONS OFFICER  
OUSD - LBU COMPLIANCE  
PROJECT MANAGER



**TIFFANY KNUCKLES**  
COMMUNITY RELATIONS MANAGER  
OUSD - LBU COMPLIANCE PROJECT LEAD



**RAMASSES HEAD**  
VICE PRESIDENT OF MEDIA  
PRODUCTIONS AND TECHNOLOGY



**BLAKE BROWN**  
COMMUNITY RELATIONS LIAISON

# Meet 360 Total Concept

OAKLAND UNIFIED SCHOOL DISTRICT'S LOCAL BUSINESS COMPLIANCE TEAM

## The 360 impact

360 Total Concept brings an extensive amount of compliance and management consulting expertise to the District, and has partnered with the OUSD Facilities Department for several years



### Program Leadership

Led the development, administration, and monitoring of the District's Local Business Utilization (LBU) Program



### End-to-End Oversight:

Ensures local business participation is prioritized across all phases of capital improvement projects



### Expanded Support:

Provides outreach, contractor matchmaking, and technical assistance to local and small businesses



### Program Advancement:

Collaborates with OUSD to continuously strengthen and evolve local business policies and practices



### Economic Impact:

Supported reinvestment of \$160M+ into the local economy, advancing equity and community development



# **INTRO TO THE LBU POLICY**

**6%**

**Pre 2007**

Prior to the Local Business Program, the District's local spend was 6%.



**2008**

Local Business Policy Program Launch

**2010**

After the program was instituted, local business participation increased to 20% ...

**2011**

Local Business Participation continues to track above 50% requirement.

**2014**

LBU Program changed from 30% requirement to 50% requirement.

**2021**

LBU Program expanded to include recognition of additional certifying agencies to increase pool of eligible firms.

**50%**

**2025**

Local Business Utilization consistently tracking near 50% with expected projections to exceed 60% LBU.



2014 - Present  
**(After Local Business Utilization Increase)**

# PROGRAM HISTORY

Prior to the Local Business Program, the District's local spend was 6%. After the program was instituted, local business participation increased to 20% and then over 50% once policy changed to requirement of 50% Local Business Utilization.

The Local Business Program is how the District is directly reinvesting voter approved bond dollars back into to the local economy.

OVER  
**\$500M**

INVESTED IN LOCAL PROGRAM SINCE  
2008 THROUGH  
**LOCAL BUSINESS UTILIZATION**

BP7115 is a race and gender neutral program model.



# KEY TERMS & DEFINITIONS

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## **SLRBE**

Oakland based, Small Local Business Entity certified by an eligible agency, where the owner is an Oakland resident.



## **SLBE**

Oakland based, Small Local Business Entity certified by an eligible agency.



## **LBE**

Oakland based, Local Business Entity certified by an eligible agency.



## **LBU**

Local Business Utilization: The tracked usage and progress toward the District's local business requirement.



## **LBP**

Local Business Participation: The proposed local business participation plan as outlined by Prime firms at the time of bid.



## **Prime Firm**

Prime contractors work directly with the project owner (the District). They manage any subcontractors and are responsible for ensuring that the work is completed as defined in the contract.



## **Subcontractor (Sub) Firm**

Unlike prime contractors, subcontractors do not work directly with the project owner, but instead work for the prime contractors.

To support transparency and consistency, the following section highlights key terms frequently used in Oakland Unified School District's Small and Local Business Enterprise (SLBE) Program, to promote shared understanding across all stakeholders.



# Local Business Policy Requirement

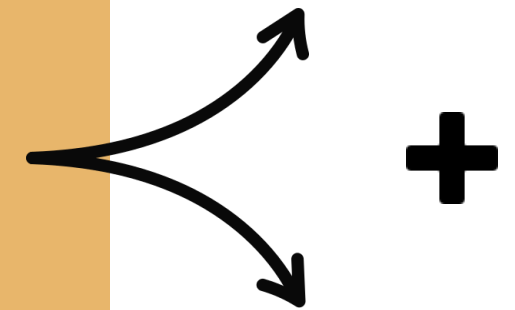
**LBU Requirements:** 50% Local Business inclusion requirement comprised of:

- 25% Local business (LBE) +
  - 25% (or greater) small local (SLBE)/small local resident business (SLRBE)
- The District honors Oakland-based firms certified by the following agencies:
    - Alameda County
    - Alameda County Transportation Commission
    - California Public Utilities Commission
    - Caltrans
    - City of Oakland
    - Port of Oakland

\*\* Designation as a “small” business remains in alignment with the City of Oakland size standards.



**25% or More**  
SLRBE or SLBE



**25%**  
SLRBE, SLBE, LBE



# **BENEFITS**

## **OF THE LOCAL BUSINESS PROGRAM**

- **Encourages small and local businesses to locate to and remain in Oakland**
- **Provides employment opportunities for residents of Oakland**
- **Generates revenue that converts to local taxes feeding the local economy**
- **Creates incentive and opportunities for small and diverse businesses to partner with other local and/or non-local businesses**

# **MYTHS**

## **OF THE LOCAL BUSINESS PROGRAM**

- **Local firms can't handle large or complex projects.**  
Suggests smaller firms lack capacity, when in reality many successfully deliver as primes or subs - often in partnership models that scale effectively.
- **These programs drive up project costs.**  
Assumes local participation = inefficiency, despite evidence that competitive local markets and reduced mobilization/logistics can help control costs.
- **Local firms are riskier to work with.**  
Assumes higher risk without evidence; risk is typically managed through standard contracting tools (bonding, insurance, past performance).
- **The market should be purely 'low bid' without policy intervention.**  
Ignores that public agencies often pursue best-value frameworks that include equity, economic impact, and long-term community return.



# **PROGRAM HIGHLIGHTS**

# Annual Priorities

Each year 360 Total Concept reflects on the success and challenges of the previous year to determine goals and priorities for the following year. Based on feedback from District Leadership, Staff, and the local community, 360 prioritized the following key areas to focus on for the 2025 calendar year.



1

## **LBU Audit & LBU Document Control Protocols**

Conduct an audit of Board-approved contracts to identify LBU procurement documentation gaps, refine protocols, and reinforce expectations through targeted training with Facilities project teams.

2

## **Revised LBU Policy Recommendations (2025)**

Advance updates to BP 7115 by integrating recommended policy enhancements and facilitating a collaborative review process with District leadership and the local business community to shape a modernized L/SLBE/SLRBE framework.

3

## **Clarifying & Streamlining L/SLBE/SLRBE Verification Process**

Implement a streamlined L/SLBE verification process for non-City of Oakland certified firms to expand access while maintaining compliance and eligibility standards.

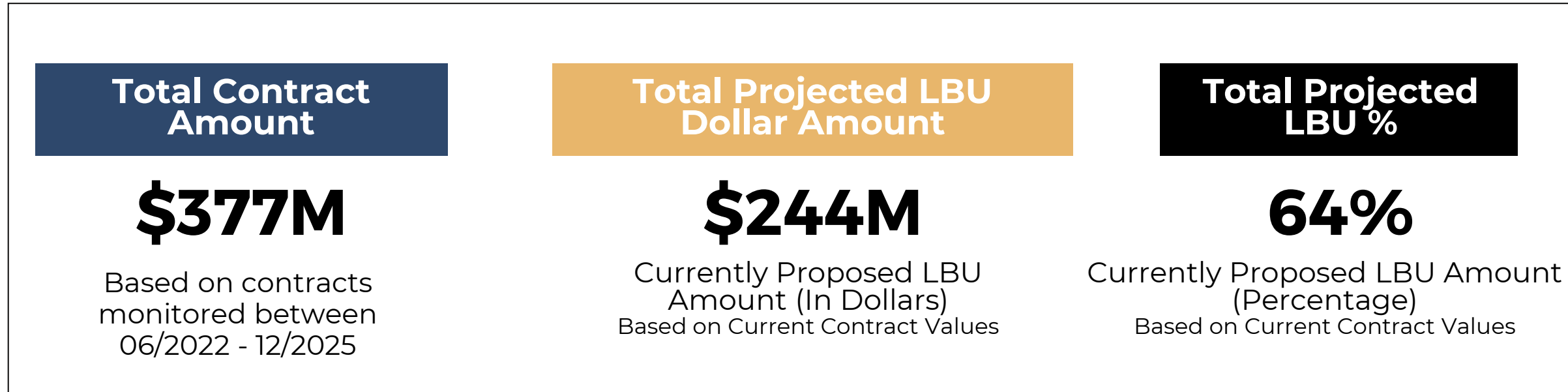
4

## **Timely LBU Reporting Internally and Externally**

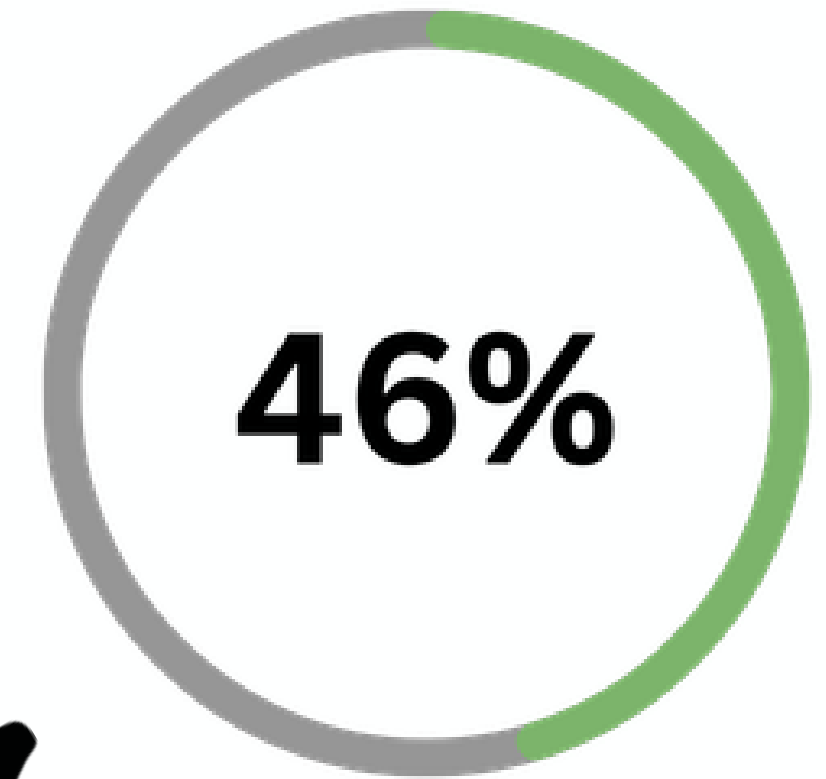
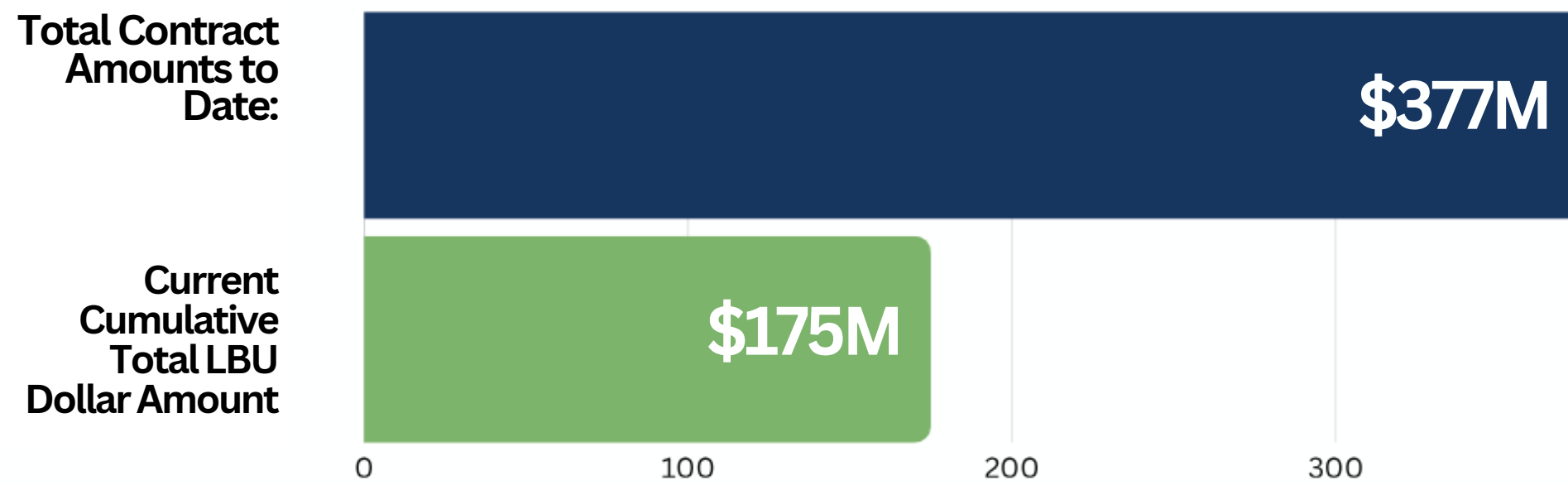
Ensure consistent, transparent reporting to track progress toward the District's 50% local participation goal and maintain accountability—currently projected at 64% local participation.

# LOCAL BUSINESS MONITORING

Quarterly Reporting track contracts, contract amendments, shifts in local business participation, cumulative local business expenditures and percentages over the course of the year. The information below details the end of year outcomes as tracked by the District's local business compliance team.



Reporting based on available data through Q4, 2025. Note: LBU Monitoring Report tracks bond funded projects where LBU is monitored.



**Current LBU %**

CURRENT CUMULATIVE LBU% (CONTRACT AMOUNT) AS OF DECEMBER 2025

REPORTING AS OF AUGUST 2025  
REPORT PREPARED BY 360 TOTAL CONCEPT  
LOCAL BUSINESS COMPLIANCE



# MAJOR PROJECT PROGRESS

The Facilities Planning and Management Department has multiple major capital projects that are currently in progress or approaching completion. These projects have budgets of over \$5M in bond funds.

## Claremont Middle School

Current Overall Contract Value	Cumulative Projected LBU \$ Amount (Dollar Amount)	Current LBU Dollar Amount (To Date)
<b>\$18.1M</b>	<b>\$12M</b>	<b>\$9.6M</b>



## Roosevelt Middle School

Current Overall Contract Value	Cumulative Projected LBU \$ Amount (Dollar Amount)	Current LBU Dollar Amount Paid Out (To Date)
<b>\$63.8M</b>	<b>\$35M</b>	<b>\$13.5M</b>



**Note:** Based on Contract Award, all projects are anticipated to meet or exceed 50% LBU Requirement.

## Cole Administrative Center

Current Overall Contract Value	Cumulative Projected LBU \$ Amount (Dollar Amount)	Current LBU Dollar Amount Paid Out (To Date)
<b>\$50.1M</b>	<b>\$33M</b>	<b>\$34M</b>



## McClymonds High School

Current Overall Contract Value	Cumulative Projected LBU \$ Amount (Dollar Amount)	Current LBU Dollar Amount Paid Out (To Date)
<b>\$12.4M</b>	<b>\$9.9M</b>	<b>\$4.3M</b>



## Fremont High School

Current Overall Contract Value	Cumulative Projected LBU \$ Amount (Dollar Amount)	Current LBU Dollar Amount Paid Out (To Date)
<b>\$11.7M</b>	<b>\$7.7M</b>	<b>\$4.6M</b>



# OUTREACH AND ENGAGEMENT

Outreach and engagement presentations are an opportunity for District Leadership and the local business compliance team to engage with a variety of stakeholders, and to provide the most up to date information on District projects, policy, and available resources.

## Spring Matchmaking - April 04, 2025



On **April 04, 2025** - The Oakland Unified School District Facilities Planning and Management Department, partnering with 360 Total Concept, hosted the Spring Business Outreach Matchmaking Event featuring the Melrose Leadership Academy Modernization project (Lease-Leaseback.) The overall objective of the outreach event was to update the business community on this projects, provide local and small local contractors with an opportunity to meet with the GC from this project, and to reach a diverse contractor pool.

**THIS WAS A TERRIFIC OPPORTUNITY TO GET TO KNOW SMALL BUSINESSES.**

*C. Overaa & Co.*

## Summer LBU Refresher Course Jun. 12, 2025

On **June 12, 2025** - 360 Total Concept hosted an in-person workshop designed to strengthen the understanding and implementation of the Oakland Unified School District's Local Business Policy. Tailored specifically for Project Managers and Project Engineers, the session provided essential tools, practical resources, and a comprehensive policy review to support compliance and promote intentional engagement with local businesses.



**THANK YOU 360! THESE SESSIONS ARE VERY IMPORTANT! YOU GUYS ARE DOING EXCELLENT WORK.**

*Digital Design Communications*

### KEY FOCUS AREAS

- The purpose and key goals of Board of Education Approved Local Business Utilization (LBU) Policy
- Eligibility criteria for local businesses
- How to incorporate LBU requirements into project planning and procurement
- Common compliance challenges and how to avoid them
- Tools and resources available to project teams
- Reporting expectations and documentation requirements for Board submittals



# OUTREACH EVENT GALLERY



A group of people are seated around a table in a meeting room. In the background, a sign reads "Community Schools, The Students BUILDINGS & GROUNDS SKILLED TRADES CARPENTRY - PLUMBING - ELECTRICAL - PAINTING & SIGNAGE - ROOFING - HVAC - GENERAL LABOR - SHEETMETAL - HEATING & A/C". The scene is overlaid with a semi-transparent blue filter and a white arrow graphic pointing right.

# NEXT STEPS

# NEXT STEP RECOMMENDATIONS



## OUSD Career Development Program

- **Workforce Pipeline:** Co-developed program placing high school students on active District projects
- **Hands-On Experience:** Provides real-world exposure across construction and facilities careers
- **Career Pathways:** Builds early entry points into the construction industry
- **Academic Integration:** Students earn course credit while gaining practical skills

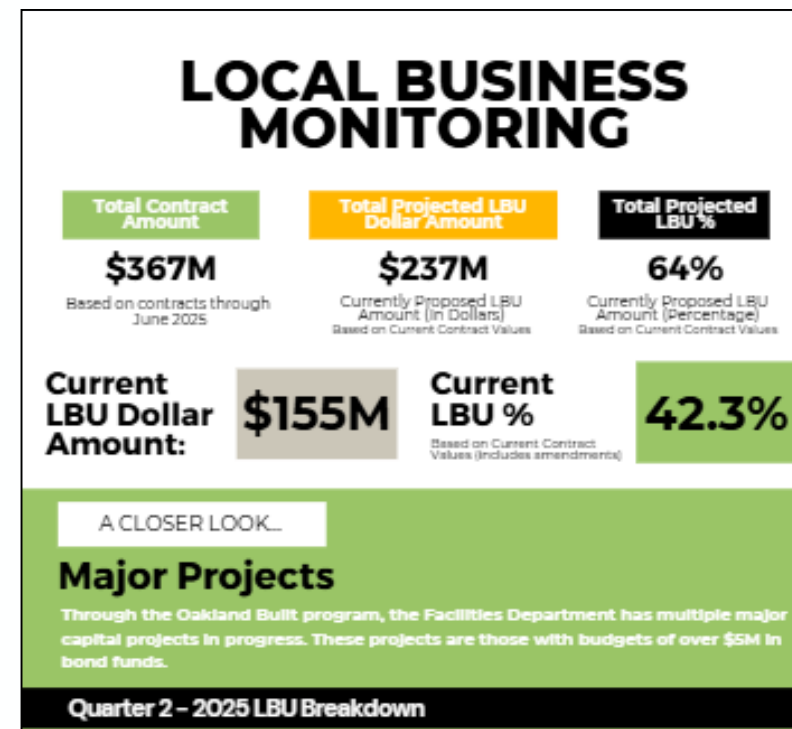


## LBU Policy Recommendations

- **Ongoing Evaluation:** Continually assesses the District's L/SLBE Policy
- **Targeted Improvements:** Recommends strategies to strengthen compliance and effectiveness
- **Best Practice Alignment:** Ensures policy reflects evolving industry and regulatory standards
- **Enhanced Impact:** Focuses on increasing participation and community benefit

## Quarterly Briefings with OUSD Leadership

- **Regular Updates:** Facilitates quarterly LBU progress briefings for leadership
- **Data-Driven Insights:** Shares performance metrics and participation outcomes
- **Transparency:** Highlights key achievements and program milestones
- **Continuous Improvement:** Identifies opportunities to strengthen program impact



## SLBE Technical Assistance Trainings & Workshops

- **Capacity Building:** Delivers trainings for SLBEs working on or pursuing District projects
- **Compliance Support:** Educates firms on program requirements and expectations
- **Competitive Readiness:** Provides guidance on bidding strategies and project success
- **Business Growth:** Strengthens local firms' ability to compete and perform



# OUSD Career Development Program

## Key Features:

- **Purpose:** Hands on, experiential learning and career development opportunity for HS youth
- **Two Pilot Schools Identified:** Fremont High + McClymond's High School
- **Paid Internship** that starts during the Summer w/ recruitment in the Fall Season, 2 Year Program
- **2 Days (Week):** At partner site + Facilities Headquarters



**OUSD Facilities Planning & Management Department**  
**Career Development PROGRAM 2025**

**PROGRAM MISSION**  
To provide Oakland youth with hands-on experience and career development in construction-related services. This program is designed to empower young people with the skills and knowledge needed to build a successful future in the industry.

**10 STUDENTS**  
5 FREMONT HIGH SCHOOL | 5 MCCLYMONDS HIGH SCHOOL

**1%** Contract Value | **150K** Program Costs Per Year

Program Cost covers expenses for Instructors, Youth Stipends, Transportation, Kick Off and Closing Ceremony.

**PROGRAM DETAILS**  
Students are recruited from McClymonds and Fremont High School during the spring and invited to participate in a two year internship program that kicks off each summer, as a part of the Facilities Career Development Program.  
Interns are matched with a partnering firm working on site one day a week, and at the District Office one day a week during the school year. During the summer, Interns receive ongoing support and are paid for their participation.

**PROGRAM BENEFITS**  
Paid Summer Internship | Class Credit | Clipper Cards  
Hands On Experience | 2 Year Program | Mentor Support

[CLICK HERE](#)



# CONTACT US



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**LBU WEBPAGE**

[ousd.org/domain/1302](https://ousd.org/domain/1302)