

Local Business Utilization Status Report

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Citizens Bond Oversight Committee



Small/Local Business Utilization (LBU) Program Overview

- Board of Education passed Local Business Utilization (LBU) Policy - December 2008
- Original goal to increase utilization on District contracts with required 20% LBU
 - Minimum 10% for Small, Local Business Enterprise (SLBE)
 - Maximum 10% for Local Business Enterprise (LBE)
- Policy has enabled District to increase use of small local businesses on District contracts
- City of Oakland is certifying agency for District's Local Business Program for LBE's and SLBE's

Small/Local Business Utilization (LBU) Program Revisions

- In 2014, Board of Education passed resolution to increase local business utilization on all Capital Program projects to 50%
 - 25% Minimum Small Local/Resident Business Enterprise
 - 25% Maximum Local Business Enterprise
- Based on the community's overwhelming support of Measure J, increase in LBU furthers District's commitment to reinvest in Oakland
- District's increase to 50% LBU coincides with City of Oakland's increase to the same percentage

How Is Local Defined?

- **LBE / Local Business Enterprise**
Oakland based business with substantial presence in City
Operational for 1 year with a valid business tax certificate
- **SLBE / Small Local Business Enterprise**
Oakland headquartered business
Operational for 1 year
Certified as a Small Local Business by the City of Oakland
- **SLRBE / Small Local Resident Business Enterprise**
Oakland headquartered business
Operational for 1 year
Certified as a Small Local Business by the City of Oakland
Owner of Business Certified as a Resident by 360 as OUSD LBU Compliance



Small, Local Resident Business Enterprise (SLRBE)

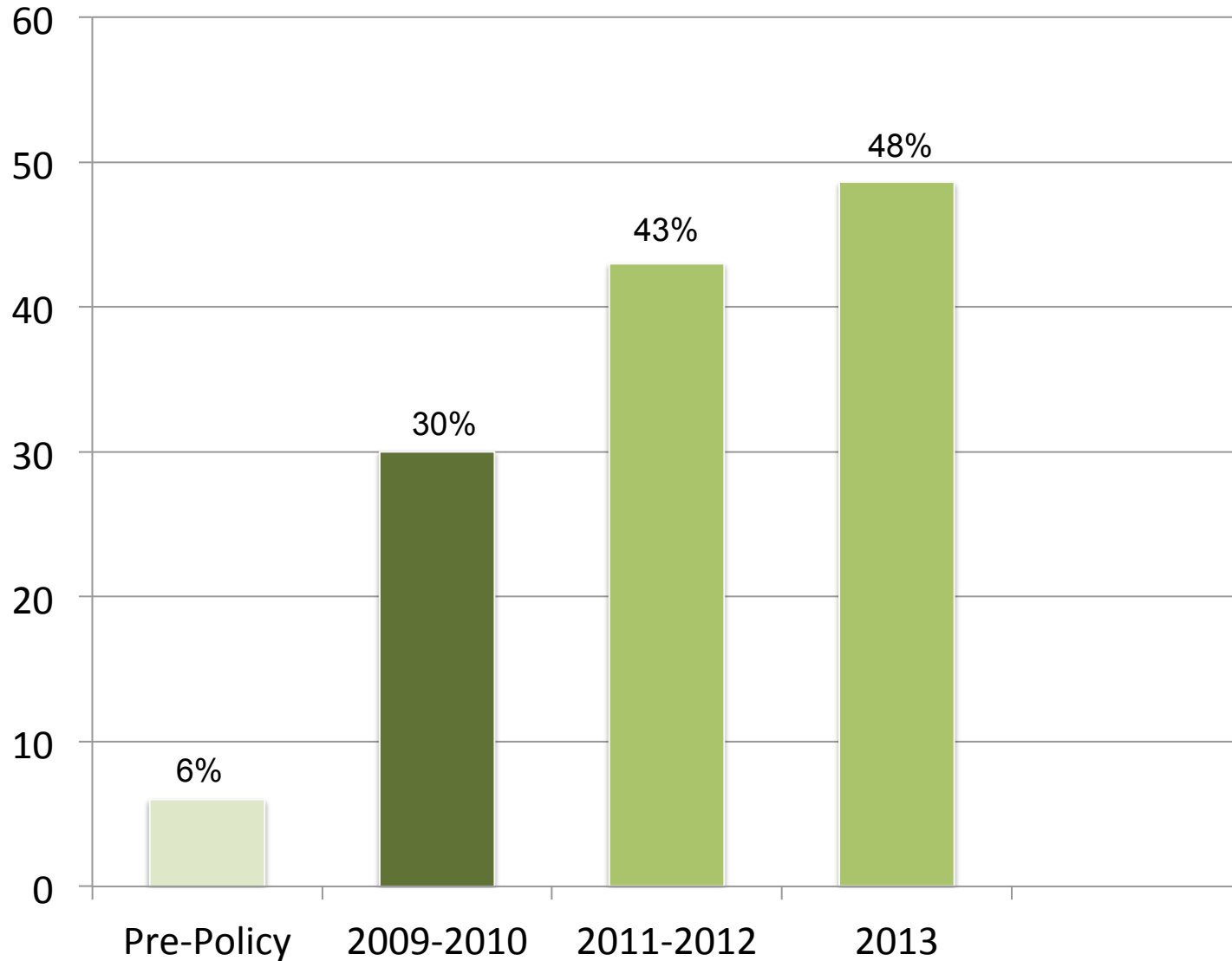
- Small Local *Resident* Business Enterprise is an SLBE that is owned/operated by a verifiable city of Oakland resident
- SLRBEs represent the homeowners funding Bond Measures, District requires proof of residency
- 360 certifies SLRBE's for District
 - Based on City of Oakland's SLBE Certification
- In the past year, District's certified SLRBE's has increased by 40%

LBU Contract Compliance

- 360 works on behalf of the District as a liaison to monitor the Local Business Program providing contract compliance services
 - Work with Associate Superintendent Facilities Team to ensure that all projects including Lease-Leasebacks (LLBs) have maximum local participation
 - Monitor projects to ensure LBU requirements are met
 - Collaborate with with Legal to ensure LBU language is included in pre-bid/proposal, front-end documents and contracts
 - Facilitate Technical Assistance support for local firms
 - Coordinate Legislative Tours as part of Outreach on Capital Program

Reinvesting in Oakland. Putting Locals to work.

Local Business Utilization Progression



Reinvesting in Oakland. **Putting Locals to work.**

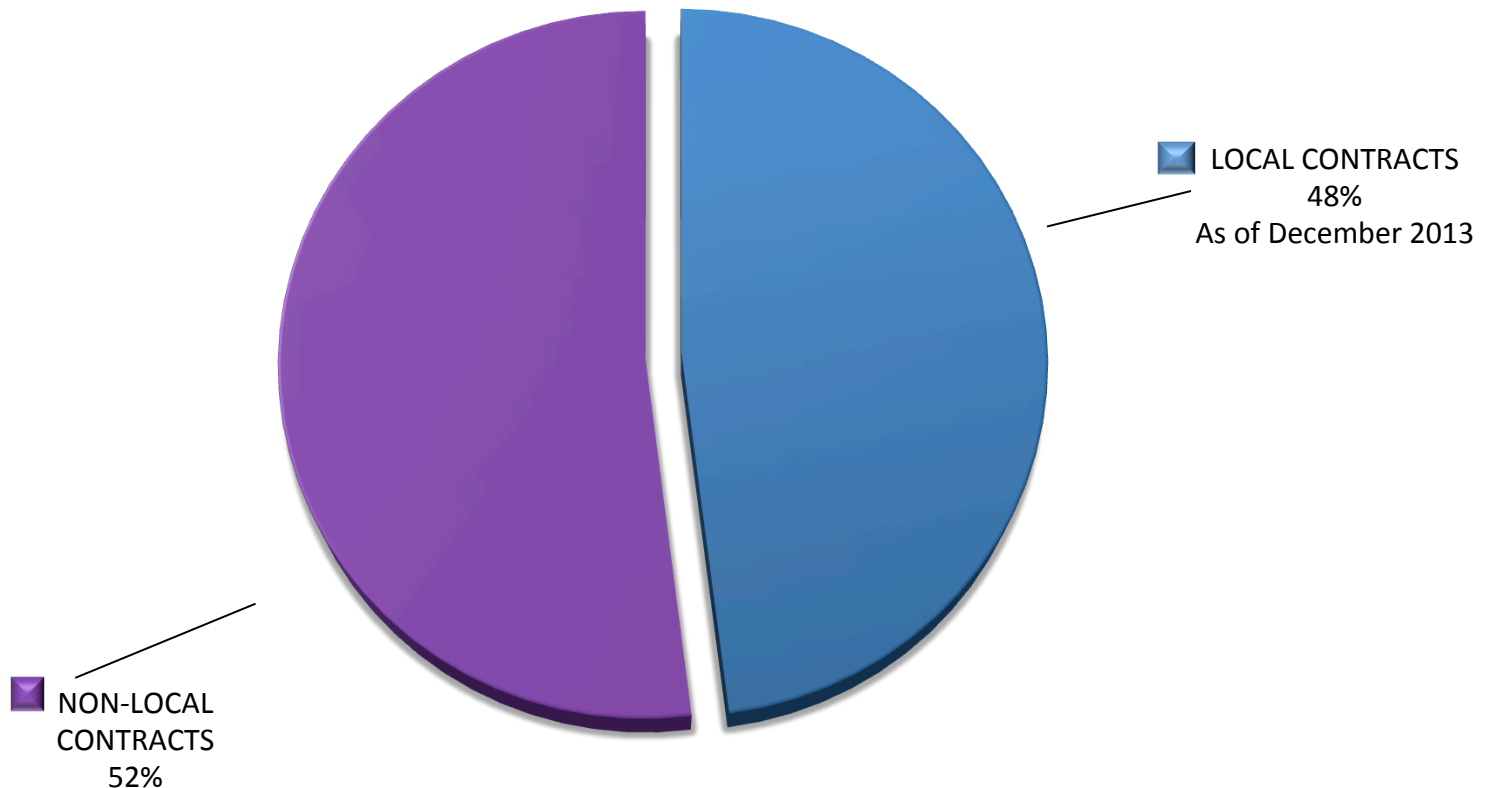
Facilities LBU

(Post-Monitoring)

ESTIMATED TOTAL CONTRACT DOLLARS: **\$228M**

CURRENT TOTAL **LBU** CONTRACT DOLLARS: **\$109M**

ONCE WORK IS COMPLETED, ESTIMATED TOTAL **LBU** CONTRACT DOLLARS: **\$112M**



Reinvesting in Oakland. Putting Locals to work.

Lease-Lease Back (LLB) Benefits

- Through Lease Lease Back negotiated process greater LBU obtained on LLB projects
- Calvin Simmons and Downtown La Escuelita LLB Projects 100% Local JV Team
- After completion of Lease-Leaseback projects, total LBP will exceed 50%
 - Calvin Simmons MS LLB
 - **Actual LBU = 76.69% (\$7.6M)**
 - Havenscourt MS LLB
 - **Actual LBU = 60 % (\$6.9M)**
 - Lowell MS LLB
 - **Actual LBU = 71% (\$9.7M)**
 - Other LLB Projects: Highland ES LLB, La Escuelita Education Complex, Montclair LLB, Washington LLB



Reinvesting in Oakland. Putting Locals to work.

Joint Venture Team Partners

Local Contractors

- ADCO (SLRBE)
- Cahill (LBE)
- CAS Financial (SLBE)
- Focon (SLRBE)
- Swinerton (LBE)
- Turner Group Construction (SLRBE)
- Turner Construction (LBE)

Non-Local Contractors

- Alten Construction
- Arntz Builders
- McCarthy
- Overaa
- West Bay Builders

Local Firms on District Lease-Leasebacks

| | | | |
|---------------------------------------|---|--|-------------------------------|
| AAP Concete | Cahill | Gallagher & Burk | P.G. Construction & Steel Fab |
| Acoustics by the Bay | Cal Pro Painting | Global Specialities | Pacific States Insulation |
| Adolph's Glass | CAS Financial | Golden Gate Signs | Paul's Plumbing |
| Air Systems | Cemex | Hartley Construction | Premium Roofing* |
| Airco Mechanical | Champion Scaffold | Inner City Demolition | Pro Spectra Contracting |
| Alan Dones Company (ADCO)* | Citywide | J & K Sheet Metal (Subcontractor to Kwan Wo) | RAM Engineering |
| Alarcon Bohm* | Comack Plumbing* | James Island Plastering | RCM |
| Alcal | Consolidated Partitions | JML Engineering & Construction | Rick West Plastering |
| Alcatraz Shade Shop | Contra Costa Electric | Jones Tile & Marble | RMT Landscape |
| Aliquot Associates, Inc. | Corbin Building | King Drywall | Service Metal Products |
| Allied Fire Protection | Demo Masters | Light-Frame Construction, Inc. | Silverado |
| Amber Flooring | Digital Design Communications* | Mag Trucking | Skyline Design (Supplier) |
| AMG Construction | Dixon's | Marshall Trucking (Subcontractor to Olson) | SMP |
| Anderson Carpet | DMS | Masterpiece Painting* | Spacetone Acoustics |
| Arrow Sign Company | DW Young Construction Company | Mauck Sheetmetal | Spencer Masonry |
| Astron Development Corporation | Eandi Metalworks (Subcontractor to Olson) | MAZ Glass | Stagecraft |
| Banton Scaffold | East Bay Glass | MCC Flooring | Sterling Environmental |
| Bay Cities Paving & Grading | East Bay Restaurant & Supply | McCarthy | Swinerton Builders |
| Bayview Environmental | Eclipse Electric* | McGuire & Hester | Tileworks |
| Beamans | Elite Services* | Mitsubishi Electric | Top Grade Construction |
| Beci Electric | Emerald Steel | Monterey Mechanical | Turner Construction |
| Bohm Environmental* | Ernst Mechanical | North American Fencing & Railing | Turner Group Construction* |
| Brite Painting | Fidelity Roofing | Old School Construction | Urata & Sons Concrete |
| Broadway Mechanical Contractors, Inc. | Focon, Inc.* | Old School Masonry | Walker's Plumbing |
| C. Rogers Plumbing* | Ford Wholesale | Olson | Westside Building Materials |

* Indicates a SLRBE

Local Firms Worked On District Projects (Since LBU 2008)

| | | | |
|-----------------------------------|--|------------------------------|------------------------------------|
| 360 Total Concept | CATCO | Gallagher & Burk | Monroe Trucking |
| A Squared Ventures | Central Concrete | General Supply Company | MVE Institutional |
| ABC Supply (Reinhardt) | CJC Trucking | George E. Masker, Inc | MYT Constr. Inc dba Delta Electric |
| ACC Environmental | Coliseum Steel Products, Inc. | Gill Electric | Ninyo & Moore |
| Acumen Building Enterprise | Colland Jang Architect | Global SDI | North American Fence & Supply |
| ADCO | Comack Plumbing | Gyroscope, Inc. | Oakley & Oakley |
| Adobe West Landscaping | Consolidated CM | H & M Mechanical Group | Pace Supply Corporation |
| Adrienne Wong Associates | Consolidated Partitions | Ho's Electric | PGA Design |
| AE3 Partners | Cordoba Engineering | HY Architects | Polk Communications |
| AEKO Consulting | Cumming Construction Mgmt. | Ingraham Associates | Premium Roofing |
| AJW Construction | D & B Painting | Inner City Demolition | Rays Electric |
| Alarcon Bohm | D B Painting | Integral Protection | Rick West Plastering |
| All-City Trucking | Dekay Demolition | Ironwood Commercial Builders | RMT Landscape Contractors |
| Allied Painters | Del Monte Electric | J.H. Fitzmaurice | Rockridge Builders |
| Alta/Westside | Dick's Carpet | Jones Tile & Marble | Sandis Civil Engineers |
| Amber Flooring | Digital Design | Jones Tiles | Service Metal |
| AMG Construction | Digital Electric | JUV Inc. | Skyline Design |
| Amman Environmental | DKS Engineering | KCP Surveyors | SMW Associates |
| Anderson Carpet & Linoleum | Dougherty & Dougherty Architects | Keller Mitchell | Sterling Environmental |
| Applied Materials and Engineering | Eagle Construction | KEMA Services | Summerhill Electric |
| Asbestos Management Group | East Bay Blueprint | Kifle Construction | Tileworks, Inc. |
| Baines Group | East Bay Restaurant Supply, Inc. | KPW Structural Engineers | TPS Electric |
| Bay Cities Paving | Eclipse Electric | Level Construction Supply | Turner Construction |
| Bay Construction | Economy Lumber | Lineation Markings | Turner Group Construction |
| Berkeley-Oakland Ready Mix | EJK Construction | Marshall Plumbing | UWA Electric |
| Bohm Environmental | Ernst Mechanical | Masker Painting | Vista Environmental |
| Byrens Engineering | Final Clean (Ultimate Kleen Solutions) | Masterpiece Painting | Watts Construction |
| Byrens Kim Design Works | Focon Inc. | MCC Flooring | Williams Trucking |
| C. Rogers Plumbing | FOVON | McGuire & Hester | YEI Engineers |
| Captain's Carpet | Gaines Construction | Michael Willis Architects | YHLA (Yui Hay Lee and Associates) |

Local Business Program Benefits

- Increase in the number of Oakland certified businesses participating on District projects
- Increase in the circulation of local dollars within the Oakland community to stimulate local economy
- Increase in the development and capacity enhancement of Oakland certified businesses
 - There are now **120** Local Businesses that have worked on OUSD projects since LBU Policy
- Solar CSI Project proposed 50% LBU



Thank You

