

OAKLAND UNIFIED SCHOOL DISTRICT
FACILITIES PLANNING AND MANAGEMENT DEPARTMENT



LOCAL BUSINESS (LBU) Compliance

Annual Report (2023)



Prepared by 360 Total Concept

Overview

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LOCAL BUSINESS COMPLIANCE TEAM

360 Total Concept



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PRODUCTIONS AND TECHNOLOGY



BLAKE BROWN
COMMUNITY RELATIONS LIAISON

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 30% 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.



Definitions



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.



Local Business Utilization Program Overview

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.

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

360 Goals & Priorities (2022 – 2023)



1

Program Analysis

Conduct an initial analysis of the District's LBU Program identifying key areas for improvement including (1) Local Business Reporting Protocol and Systems (2) Procurement Support and Contractor Outreach, and (3) Communication of LBU Program Requirements and Expectations

2

LBU Compliance

Develop tools and protocol practices to support overall LBU Management, including: LBU Tracking Report, LBU Affirmation Worksheet, LBU Waiver Request Form, and PM/PEs LBU Submission Tracker System

3

Contractor Outreach & Engagement

Distribute procurement advertisements and host business outreach events to share upcoming District projects with a diverse group of local and small local companies

4

Innovation

Develop and introduce new tools and systems that propel the local business program to the next level – streamlining process, reporting, and tracking for front and end users. Ex: Development of online payment verification portal

LBU Program Highlights



LBU Portal Development

360 developed and introduced the electronic L/SLBE Payment Verification Portal to assist the District with accurate and timely payments to small and local sub firms.



Events & Outreach

To reach a diverse group of local and small firms, 360 hosted two Local Business Matchmaking Events for the District, in addition to various virtual opportunities meant to engage local and small firms with current and active District projects.



Applicability Reference Guide

Referencing Oakland Unified School District's 2021/2022 budget, 360 worked with the District Facilities Planning and Management Department to identify LBU applicability by funding source.



Availability Analysis

360 developed and introduced the Availability Analysis + Waiver Request form which streamlines the process for PM/PE's and the LBU Compliance Team during the procurement process, ensuring relevant details and key information is shared to conduct firm availability analysis.



Monitoring Report

360 developed the LBU Quarterly Monitoring Report which tracks current and recently closed projects where Local Business participation occurred. The report provides insight into how individual companies are performing over the course of their contracts in relation to their local business participation.

Castlemont High School (Close Out)

Cumulative Overall LBU % to Date	Cumulative Projected LBU \$ Amount to Date (Dollar Amount)	Current LBU Dollar Amount (To Date)
63%	\$6.6M	\$4.2M

Cole Administrative Center (Construction)

Cumulative Overall LBU % to Date	Cumulative Projected LBU \$ Amount to Date (Dollar Amount)	Current LBU Dollar Amount (To Date)
58%	\$31.5M	\$18.4M

Claremont Middle School (Construction)

Cumulative Overall LBU % to Date	Cumulative Projected LBU \$ Amount to Date (Dollar Amount)	Current LBU Dollar Amount (To Date)
65%	\$11.8M	\$7.8M

Laurel Child Development Center (Construction)

Cumulative Overall LBU % to Date	Cumulative Projected LBU \$ Amount to Date (Dollar Amount)	Current LBU Dollar Amount (To Date)
64%	\$9.8M	\$6.3M

Roosevelt Middle School - Increment 1

Cumulative Overall LBU % to Date	Cumulative Projected LBU \$ Amount to Date (Dollar Amount)	Current LBU Dollar Amount (To Date)
42%	\$6.7M	\$2.8

McClymonds High School (Pre-Construction)

Cumulative Overall LBU % to Date	Cumulative Projected LBU \$ Amount to Date (Dollar Amount)	Current LBU Dollar Amount (To Date)
9%	\$4.3M	\$300K

Current Local Business Utilization

Total Proposed LBU Amounts at Bid Time

\$113,851,239

Current Cumulative Total LBU Dollar Amount

\$84,760,985

\$200M

CURRENT CUMULATIVE CONTRACT DOLLAR AMOUNT TO DATE

\$84M

CURRENT CUMULATIVE TOTAL LBU DOLLAR AMOUNT

68%

LBU AWARDED AT BID TIME

42%

CURRENT CUMULATIVE LBU% (CONTRACT AMOUNT)

System and Tool Development

[PROJECT NAME] [PROJECT NUMBER]			LOCAL BUSINESS UTILIZATION (LBU) MONTHLY TRACKING WORKSHEET									
Project Start Date: Month/Year			Firm Name:		Pay Application No.		Pay Application (Month/Year):		For Services Performed (Month(s)):			
Projected Completion: Month/Year												
Prime/Sub Company Name	L/SL/SLBE Type	Trade	Proposed LBU Dollar Amount At Bid Time	Previous Cumulative LBU Dollar Amount	Local Business Enterprise Dollar Amount (LBE)	Small Local Business Enterprise Dollar Amount (SLBE)	Small Local Resident Business Enterprise Dollar Amount (SLRBE)	Current Cumulative LBU Dollar Amount	Remaining LBU Participation (Bid Time vs. Current Cumulative)	Current Cumulative LBU %		
Subcontractor 1	SLRBE	Scope of Work	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%		
Subcontractor 2	SLBE	Scope of Work	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%		
Subcontractor 3	LBE	Scope of Work	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%		
Subcontractor 4	SLRBE	Scope of Work	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%		
Subcontractor 5	SLBE	Scope of Work	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%		
Subcontractor 6	LBE	Scope of Work	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%		
Subcontractor 7	SLRBE	Scope of Work	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%		
Subcontractor 8	SLBE	Scope of Work	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%		
Subcontractor 9	LBE	Scope of Work	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%		
Subcontractor 10	SLRBE	Scope of Work	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%		
TOTALS			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%		

Total Bid Dollar Amount:	\$	1,000.00
Total Bid Allowance Amount:	\$	-
Total LBU Dollar Amount at Bid Time:	\$	-
Total LBU % at Bid Time:		0.0%

Previous Cumulative Total LBU Dollar Amount:	\$	-
L/SL/SLBE Dollar Amount for This Invoice:	\$	-
Current Cumulative Total LBU Dollar Amount:	\$	-
Current Cumulative Total LBU %:		0.0%

Project Status (% of Project Complete):	
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Revised 05/2018

LBU TRACKING REPORT


The Local Business Tracker is completed monthly by prime firms, included with their invoices, and shared with the local business compliance team to track local business utilization over the duration of the contract.

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Done

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AA



Oakland Unified School District

Local/Small Local Business Compliance

Facilities Planning and Management Department | 360 Total Concept

OUSD - Local Business Payment Verification Portal

User Email

PIN #

Continue

LBU PAYMENT VERIFICATION PORTAL

An electronic Payment Verification Portal, accessible by small and local sub firms is used to track and verify reported payments on a monthly basis.

[illegible]

LBU MONITORING (BY QUARTER)

LBU Reports, as shared by Prime firms, are compiled into a Quarterly Report and presented to the District providing a comprehensive view of local business utilization per quarter, to date.

Outreach Events

Virtual & In Person Opportunities

09. 28. 2022

McClymonds High School
Matchmaking Outreach Event (Virtual)

03. 15. 2023

Roosevelt Middle School - LLB
Outreach Event (Virtual)

07. 19. 2023

Roosevelt Matchmaking Outreach
Event (In Person)

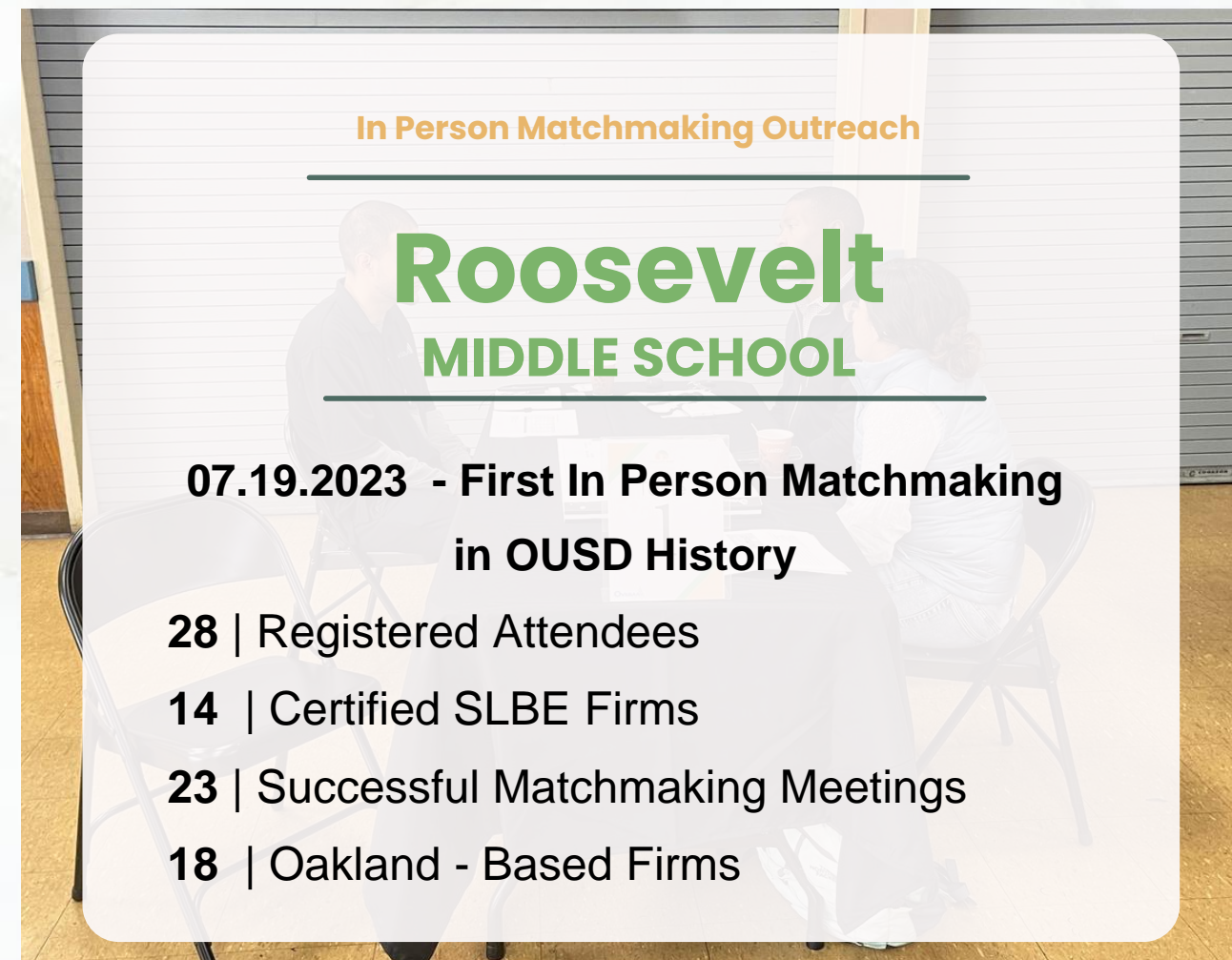
11. 1. 2023

6 Month Project Look Ahead
(Virtual)

UPCOMING:

Roosevelt Middle School -
Matchmaking #2 (Spring 2024)

McClymonds High School -
Matchmaking #2 (Fall 2024)



Next Steps



LBU Portal Development

Develop L/SLBE Payment Verification Portal to support with accurate and timely payments for local companies



Assessment & Recommendations

Monitor LBU Program and Policy implementation for gaps and opportunities for efficiency and optimization



Outreach & Awareness

Host Virtual 6 Month Look Ahead Outreach Event, and in person Matchmaking Events to share upcoming District projects and opportunities



Education

Host quarterly Technical Assistance Trainings and resource opportunities for firms Interested in and/or currently working with District



Expand LBU Program

Collaborate with District Leadership on strategies and solutions to expand the Local Business Policy creating a more inclusive, expansive, and diverse pool of small/local firms

CONTACT US



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