

BUSINESS OUTREACH NARRATIVE
FIRST QUARTER, 2015

Emerging Business Enterprise (EBE) Awards for Capital Bonds Projects

To date, EBE construction bid awards for 2015 total \$6,973,516 or 49.08% of total construction awards. Please refer to the Business Outreach Report, Construction, 2015, 1st Quarter table for further detail.

	Construction Bid Yearly EBE Awards		Construction Bid Cumulative EBE Awards (from commencement of Capital Bonds projects)	
1Q 2015	\$6,973,516	49.08%	\$212,883,403	40.26%
1Q 2014	\$5,284,162	85.38%	\$166,123,233	39.15%

Cumulative EBE professional services awards since commencement of Capital Bonds projects through March 2015 are \$72,602,715 or 46.14% of total professional services awards.

Emerging Business Enterprise (EBE) Meetings

During this reporting period SDUSD conducted one-on-one meetings with 4 small and emerging contractors. These meetings provide detailed understanding of the bidding process and methods for staying informed of SDUSD bids.

Participation in Public Agency Business Outreach Events & Meetings

SDUSD Business Outreach Program staff attended a total of 9 major procurement events and outreach meetings this quarter, including CMAA Owners' Night (complete lists of all events and meetings attended are provided to the ICOC Construction Subcommittee monthly).

SDUSD Business Outreach Database

The District received 15 new/updated Self-Certification forms for the reported quarter. SDUSD database members receive ongoing project information relative to upcoming construction bids and site walks. The database currently has a total of 2247 entries (total entries for the last reporting period were 2314).

Ownership / Size	Self-Reported	Confirmed Certification	Self-Reported	Confirmed Certification
Disabled Veteran	230	151	238	155
Minority	670	119	690	123
Woman	471	84	479	86
Small Business	1747	595	1795	614
	Database Entries As Of March 31, 2015		Database Entries As Of December 30, 2014	

Business Outreach Newsletter

Volume 21 of the Business Outreach Newsletter was distributed November 2014. Volume 22 will be distributed April 2015.

Micro-Project Program (MPP)

A total of 40 MPP contracts have been awarded in FY 2014-2015. All MPP contracts have been awarded to Small Business Enterprises (SBEs). MPP awardees also include:

- 9 Disabled Veteran Business Enterprises (DVBE)
- 9 Women Business Enterprises (WBE)
- 7 Minority Business Enterprises (MBE)

**Proposition S/Z Outreach Program
Outreach Events Overview
March 2015 Report**

Events Attended

- Disabled Veteran Business Alliance (DVBA) quarterly super meeting (03/03)
- NCTD Industry Day (03/05)
- Site walk for the Remove and Replace Main Electrical Service at Penn Elementary School project (03/06)
- Site walk for the Remove and Replace Main Electrical Service at Dailard Elementary School project (03/06)
- Site walk for Remove and Replace Main Electrical Service at Penn Elementary School project (03/18)
- Meet and greet with American Modular regarding SDUSD modular specifications (03/19)

Events Scheduled

- US Hispanic Contractors and Professionals quarterly meeting (03/25)
- American Indian Chamber of Commerce, Southern California Chapter meeting (03/26)
- Elite SDVOB Network monthly meeting (04/07)
- San Diego Supplier Development Council (SDSDC) quarterly meeting (04/08)
- Associated Subcontractors Alliance (ASA) monthly meeting (04/08)
- DVBA San Diego Chapter quarterly meeting (04/09)
- National Association of Women in Construction (NAWIC) monthly meeting (04/14)
- CPUC/Verizon San Diego Small Business Expo (04/21)
- The Bluebook Network Showcase (04/30)
- Operation Opportunity (05/27)
- North San Diego SBDC 15th Anniversary Celebration, Small Business Procurement Showcase and Matchmaking Event (05/29)
- San Diego Unified School District annual Construction Expo (07/22)
- Doing Business with UCSD & Public Agency Partners (08/TBD)
- Caltrans District 11 Procurement & Resource Fair (10/28)
- Council for Supplier Diversity Category Sourcing event (TBD)
- Central San Diego Black Chamber of Commerce monthly meeting (04/15)

Micro-Projects Program

- 40 micro-projects awarded in FY 2014-2015
- 100% Small Business Enterprises (SBEs), and also: 9 DVBE, 9 WBE and 7 MBE



**Business Outreach Report
 CONSTRUCTION
 2015, 1st Quarter**

Total Bond Dollars Awarded in 2015	\$14,209,231.00
Number of Bond Projects Awarded in 2015	8

	Dollar	%
Emerging Business Enterprise (EBE) Awards	\$6,973,516.00	49.08%
Non-EBE Awards	\$7,235,715.00	50.92%

EBE Categories

Disabled Veteran Business Enterprise/ Service-Disabled Veteran-Owned Business Enterprise (DVBE/SDVOB)	\$759,960.00	5.35%
Minority Business Enterprise (MBE)	\$1,781,557.00	12.54%
Woman Business Enterprise (WBE)	\$885,446.00	6.23%
Small Business Enterprise (SBE)	\$6,983,516.00	49.15%

Local	Dollar	%
Local (SD County)	\$5,574,451.00	39.23%
Outside of SD County	\$8,634,780.00	60.77%



Business Outreach Report
PROFESSIONAL SERVICES
2015, 1st Quarter

Total Bond Dollars Awarded to date	\$157,355,482.00
Number of Bond Contracts Awarded to date	20

	Dollar	%
Emerging Business Enterprise (EBE) Awards	\$72,602,715.00	46.14%
Non-EBE Awards	\$84,752,767.00	53.86%

EBE Categories

Disabled Veteran Business Enterprise/ Service-Disabled Veteran-Owned Business Enterprise (DVBE/SDVOB)	\$3,863,853.00	2.46%
Minority Business Enterprise (MBE)	\$11,854,943.00	7.53%
Woman Business Enterprise (WBE)	\$49,894,446.00	31.71%
Small Business Enterprise (SBE)	\$19,359,330.00	12.30%

Local	Dollar	%
Local (SD County)	\$143,895,350.00	91.45%
Outside of SD County	\$13,460,132.00	8.55%



SAN DIEGO UNIFIED SCHOOL DISTRICT
FACILITIES PLANNING & CONSTRUCTION
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BUSINESS OUTREACH AND ENGAGEMENT PLAN

FOR PROJECTS THAT REPAIR, RENOVATE
AND REVITALIZE OUR SCHOOLS

Update No. 5
FINAL

FEBRUARY 2015

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BUSINESS OUTREACH AND ENGAGEMENT PLAN

FOR PROJECTS THAT REPAIR, RENOVATE AND REVITALIZE OUR SCHOOLS

EXECUTIVE SUMMARY

This Business Outreach and Engagement Plan provides a guide for the Facilities Planning and Construction business outreach team as it conducts ongoing outreach and engagement among individuals, businesses and organizations within specific target communities in the San Diego Unified School District and the broader district, county and beyond, as appropriate. The plan provides an outline for the superintendent, Board of Education, Independent Citizens' Oversight Committee, stakeholders, general public and others of the outreach and engagement efforts being planned as part of the Propositions S/Z capital improvement bond program.

The goals and objectives of the business outreach program include ensuring San Diego Unified's capital bond projects benefit local communities and that a significant portion of construction dollars are spent on small and emerging businesses.

This Business Outreach and Engagement Plan details specific communication tools, activities and collateral materials that will be used to support the outreach and engagement efforts. Generally, groups such as labor and construction, economic, cultural, political, faith- and community-based organizations are the target stakeholders of this plan. The outreach budget in 2015 is \$86,495.

ABBREVIATIONS

A-A	African-American
ACS	U.S. Census Bureau, American Community Survey
CNV	<i>Contractor News & Views</i>
DBE	Disadvantaged Business Enterprise
DVBE	Disabled Veteran-Owned Business Enterprise
EBE	Emerging Business Enterprise
FPC	Facilities Planning and Construction
ICOC	Independent Citizens Oversight Committee
MBE	Minority-Owned Business Enterprise
NAWIC	National Association of Women in Construction
NECA	National Electrical Contractors Association
PAC	Public Agency Consortium
Props. S/Z	Propositions S and Z
PSA	Project Stabilization Agreement
SBA	Small Business Administration
SBE	Small Business Enterprise
SDVOB	Service-Disabled Veteran-Owned Business Enterprise
WBE	Women-Owned Business Enterprise

TABLE OF CONTENTS

SECTIONS

Executive Summary.....2

Abbreviations.....3

Table of Contents.....4

Business Outreach and Engagement Program.....7

Program Goals.....7

Program Objectives.....7

Messages.....8

Stakeholders.....8

Local Market Assessment.....9

 A. Goal Setting.....12

Program Elements.....13

1. Resource Center.....13

2. Database.....13

3. Email Blast/Bid Notification.....13

4. Online Resources.....13

 A. Business Outreach WebPage.....14

 B. LinkedIn.....14

 C. Twitter.....15

5. Traditional Advertising.....15

 A. Contractor News & Views.....15

 B. San Diego Monitor News.....15

 C. Other Media.....16

6. Outreach and Engagement Events.....16

 A. Speakers Bureau.....16

B. Monthly Business Meetings.....	16
C. Large-scale outreach Events.....	17
7. Outreach Areas of Special Focus.....	19
A. Women-Owned Businesses.....	19
B. African-American-Owned Businesses.....	19
8. Outreach Ad Hoc Committee.....	20
9. Project Stabilization Agreement Support.....	20
A. PSA Trainings.....	20
B. Union Outreach.....	20
10. Reporting.....	21
A. Current Data.....	21
11. Annual Contractor Survey.....	21
Engagement Collateral.....	23
1. Presentations.....	23
2. Quarterly Newsletter.....	23
3. Traveling Exhibit.....	23
4. Award Submittals.....	23
5. Plan Update.....	23
Lessons Learned.....	24
1. Changes to Program.....	24
Metrics.....	25
1. Props. S/Z Project-Level Tracking.....	25
2. Props. S/Z Program-Level tracking.....	25
Schedule.....	26
1. Specific Tasks.....	26
2. Regular Activities.....	26

Appendix A – Key Stakeholder List.....27

Non-governmental Organizations, Faith-based & Community Organizations.....27

Contractor Associations & Labor Groups.....27

Business/Emerging Business Organizations.....27

KEY BIDDING Prime Contractors.....28

PSA Signatories.....29

Internship, Pre-apprenticeship, Apprenticeship & Work Training Programs.....29

High Schools & Adult Education Centers.....30

Appendix B – Demographic Assessment.....31

Appendix C – Annual Contractor Survey Questions.....33

Appendix D – Business Outreach and Engagement Budget Detail.....37

TABLES

Table 1 – 2015 San Diego Construction Market EBE Capacity..... 9

Table 2 – U.S. Census Bureau’s 2012 County Business Patterns (CBP) Report..... 10

Table 3 – U.S. Census Bureau’s 2007 Survey of Business Owners 10

Table 4 – Caltrans Office of Business and Economic Opportunity, Certification Unit..... 10

Table 5 – U.S. Census Bureau, American Community Survey (ACS), Equal Employment Opportunity (EEO) Special Tabulation 2006-2010 (5-year ACS data) San Diego County 10

Table 6 – 2015 EBE Outreach Goals 11

Table 7 – Annual Outreach Events 18

Table 8 – Program EBE Participation 21

FIGURES

Figure 1 – EEO Tabulation of Employees by Race and Ethnicity for Construction Industry, American Community Survey, Five Year Average 2006 – 2010.....11

Figure 2 – EEO Tabulation of Employees by Race and Ethnicity for Construction Industry, American Community Survey, Five Year Average 2006 – 2010.....11

BUSINESS OUTREACH AND ENGAGEMENT PROGRAM

This Business Outreach and Engagement Plan provides a guide for the Facilities Planning and Construction (FPC) business outreach team in its outreach and engagement efforts. These efforts are conducted among individuals, businesses and organizations within specific target communities in San Diego Unified School District, the broader district overall and San Diego County. The primary objective of the Business Outreach and Engagement Program is to target and engage local businesses in district bid opportunities so that tax dollars from voter-approved bond measures (Prop. S and Prop. Z) benefit local communities, specifically, communities in which district schoolchildren live. A secondary objective is to ensure a significant portion of construction dollars are spent on small and emerging businesses by reaching out to, and engaging with, women, minority and disabled veteran business owners. Together, these objectives should also increase the competitive pool of bidders and, therefore, lower project costs.

This section outlines the specific goals and objectives of the Business Outreach and Engagement Program, states key messages, lists target stakeholders and describes the construction market in San Diego County.

PROGRAM GOALS

Business outreach and engagement efforts are designed to meet four broad goals related to local contractor and business development:

1. Enhance and broaden efforts to reach out to local construction and construction-related businesses and engage them in the school district's construction bond program. This will ensure a robust and competitive bidding environment which in turn drives down project costs.
2. Enhance and broaden efforts to reach out to local construction and construction-related businesses based in communities where district schoolchildren live and engage them in the school district's construction bond program.
3. Enhance and broaden existing efforts to reach out to and engage with those who are traditionally underrepresented, Emerging Business Enterprises (EBEs) and related stakeholders who have not yet been involved in the district's construction program.

EBE is defined as contractors and/or businesses eligible for the following certifications: Disadvantaged Business Enterprise (DBE), Minority Business Enterprise (MBE), Women Business Enterprise (WBE), Disabled Veteran Business Enterprise/ Service-Disabled Veteran-Owned Business (DVBE/SDVOB), and/or Small Business Enterprise (SBE).

4. Maintain the current Business Outreach Program through ongoing communication and engagement with current EBEs and stakeholders.

PROGRAM OBJECTIVES

This Business Outreach and Engagement Plan describes communication tools, activities and collateral materials needed to support the above goals. These tools enable San Diego Unified to initiate and manage a successful, sustainable program that meets the following objectives:

1. Achieve a minimum of 44 percent EBE participation on all construction projects.
2. Achieve a minimum of 6 percent DVBE/SDVOB participation on all construction projects.

3. Achieve program-level EBE participation that, at a minimum, reflects each year's market capacity.
4. Identify and engage EBE contractors, vendors and suppliers and connect them with the district's current prime contractors and subcontractors to ensure they have the opportunity to compete for Props. S/Z projects.
5. Provide ready resources and support to prime contractors and subcontractors that enable their ability to achieve a high percentage of EBE participation on district construction projects.
6. Identify and engage new prime contractors, large and small; instill a commitment to the district's EBE participation goals; and ensure they have access to local EBE contractors, vendors and suppliers and the opportunity to compete for bond-funded construction projects.
7. Measure and report the effectiveness and results of the outreach program.

MESSAGES

Targeted messaging is an important element in building the communications foundation for an effective engagement plan. Listed below are the key messages to be used in oral communication and written materials developed as part of this program.

1. San Diego Unified has a programmatic participation goal of 44 percent for EBE contractors, vendors and suppliers.
2. The school district aims to spend funding for local projects in the local communities where our students live.
3. Small businesses make up a significant share of the local economy and the district is committed to supporting them.
4. San Diego Unified is committed to assisting relevant emerging businesses with development that leads to the ability to bid on district projects.
5. The district proudly supports disabled veterans and requires 3 percent DVBE participation on all construction projects.

STAKEHOLDERS

A list of stakeholder categories to be included in the district's outreach and engagement efforts includes, but is not limited to, the following:

- Apprenticeship and training organizations
- Business associations
- Construction associations
- Cultural and faith-based organizations
- Elected officials
- Emerging Business Enterprise (EBE) organizations
- Neighborhood and community groups
- Non-profit organizations

- Prime and subcontractors
- Surety bonding and insurance organizations
- Unions and labor organizations
- Women, disabled veterans, minorities and other traditionally underrepresented contractors and business owners

This engagement program will require a concerted effort on various fronts to succeed in reaching the greatest number of stakeholders. This will include engaging with governmental, community, faith-based and other grassroots entities as well as with those from labor groups and the construction industry. Therefore, stakeholders include more than those being specifically targeted to compete for and work on district construction projects. A specific list of key stakeholders is provided in Appendix A.

A multilingual program may be necessary to engage traditionally underrepresented stakeholders and those not previously engaged in district construction projects. Translation and interpretation resources will be assessed and utilized throughout this program, as needed, to maximize engagement of target stakeholders. Since 2009, bilingual services (Spanish-English) have been provided when required.

LOCAL MARKET ASSESSMENT

A driving objective of the outreach program involves achieving a general EBE participation level on all construction projects. In addition, the program strives to achieve participation levels for each EBE category that reflect the San Diego region, including at least 3 percent DVBE participation. The outreach team conducts a market capacity assessment each year to better estimate those levels and adjust the program.

The internally-conducted annual market capacity assessment provided data that informed goal setting and tactics development for this 2015 Plan. The 2015 market capacity assessment is presented below.

Table 1 – 2015 San Diego Construction Market EBE Capacity

Business Classification	San Diego County*	Certified Businesses**	Estimated Capacity
Total Number of San Diego County Construction Businesses (large and small)	6,199		
Disabled Veteran-Owned Business Enterprise (DVBE)		129	2.08%
Minority-Owned Business Enterprise (MBE)		106	1.71%
Women-Owned Business Enterprise (WBE)		34	0.55%
Small Business Enterprise (SBE)		934	15.07%
* San Diego County Census Data, http://censtats.census.gov/ ** CA Dept. General Services, http://www.pd.dgs.ca.gov/smbus/default.htm and Caltrans Office of Business & Economic Opportunity, http://www.dot.ca.gov/hq/bep/find_certified.htm As of December 16, 2014			

In June 2013, the first formal demographic assessment was commissioned from third-party, non-profit organization San Diego Contracting Opportunities Center to examine census data and drill deeper into the demographics of local construction industry business ownership and workers, specifically for women and minorities. This assessment will be commissioned annually.

The tables and figures presented below provide a broad summary of the 2014 report, *Demographic Analysis of the Ownership of Construction Firms in San Diego County*. The full report is included as Appendix B to this Plan.

Table 2 – U.S. Census Bureau’s 2012 County Business Patterns Report:

<i>Most San Diego construction firms are Small Business Enterprises</i>	
Most San Diego construction companies are specialty contractors	
Total construction services establishments	6,199
Total construction services establishments w/ 1-4 paid employees	4,056

Table 3 – U.S. Census Bureau’s 2007 Survey of Business Owners:

<i>Makeup of San Diego construction firms</i>	
African-American-Owned	1.5%
Woman-Owned	7.4%
Minority-Owned	24%

Table 4 – Caltrans Office of Business and Economic Opportunity, Certification Unit:

<i>There are only 129 Caltrans-certified Disadvantaged Business Enterprise (DBE) construction companies in San Diego</i>	
African-American-Owned	18
Woman-Owned	34

Table 5 – U.S. Census Bureau, American Community Survey (ACS), Equal Employment Opportunity (EEO) Special Tabulation 2006-2010 (5-year ACS data) San Diego County:

The *Demographic Analysis* also included an examination of local construction worker demographics. Local growth in the number of firms owned by women and minorities will be somewhat tied to workforce participation because prior experience as an employee in an industry is an important success factor in launching a new company.

<i>Construction employees in San Diego</i>	
African-American	2%
Woman	11%
Hispanic	42%

African-American (A-A) participation in San Diego Unified’s construction program can be expected to reflect local demographic statistics. With only 1.5 percent African-American-owned construction firms and 2 percent A-A construction employees in San Diego County, outreach efforts to business owners should be supplemented by the construction industry’s targeted focus on A-A construction worker and student-level engagement (outside the scope of this business outreach program). Figures 1 and 2 below are excerpted from the Appendix B *Demographic Analysis*.

Figure 1 – EEO Tabulation of Employees by Race and Ethnicity for Construction Industry, American Community Survey, Five Year Average 2006 - 2010

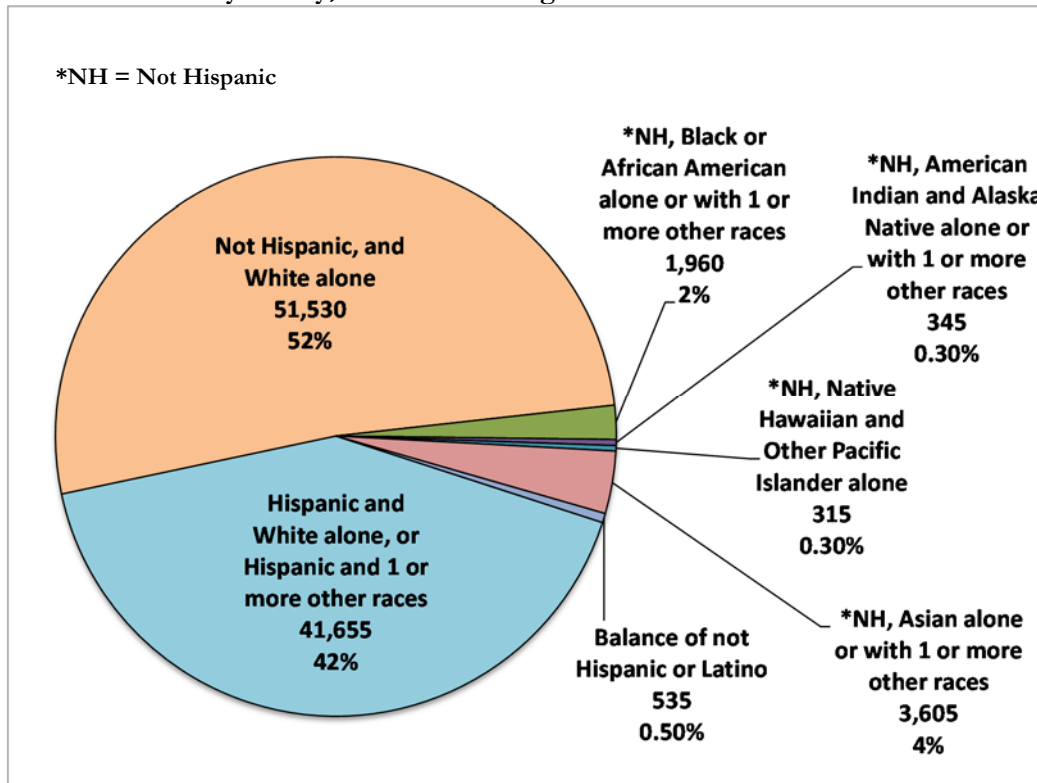


Figure 2 – EEO Tabulation of Employees by Race and Ethnicity for Construction Industry, American Community Survey, Five Year Average 2006 - 2010

EEO Tabulation of Employees by Race and Ethnicity for Construction Industry, American Community Survey, Five Year Average 2006 - 2010								
	TOTAL, all ehtnicities and races	HISPANIC and white alone, or HISPANIC and 1 or more other races	NOT HISPANIC					
			White alone	Black or African American alone or with 1 or more other races	American Indian and Alaska Native alone or with 1 or more other races	Native Hawaiian and Other Pacific Islander alone	Asian alone or with 1 or more other races	Balance of not Hispanic or Latino
Total	99,945	41,655	51,530	1,960	345	315	3,605	535
Percent	99.98%	41.68%	51.60%	2.00%	0.30%	0.30%	3.60%	0.50%

A. GOAL SETTING

The market assessment, *Demographic Analysis* and the previous year's EBE participation achievements, provided the data that helped to establish achievable goals for 2015. This year, the programmatic EBE goal is 44 percent, an increase of 7 percent from 2014. The economy is recovering and new construction businesses have been emerging. As a result, the new goals reflect the increased participation by DVBEs, MBEs and WBEs that San Diego Unified has seen.

Table 6 presents the 2015 goals by EBE category. San Diego Unified reports participation within all EBE certification categories held by each contractor and the data for each stands alone. Therefore, the sum of the EBE Business Classifications is not additive.

Table 6 – 2015 EBE Outreach Goals

EBE Business Classification	EBE Participation Goals
2014 EBE Participation Goals	44%
Disabled Veteran Business (DVBE/SDVOB)	6.0%
Minority-Owned Business Enterprise (MBE)	5.0%
Women-Owned Business Enterprise (WBE)	2.0%
Small Business Enterprise (SBE)	38%

The specific communication tools, activities and collateral materials that make up the Business Outreach and Engagement Program are described in the following sections.

PROGRAM ELEMENTS

The Business Outreach and Engagement Program involves maintaining existing and generating new communication and engagement with stakeholders, and continually assessing and adjusting these efforts to ensure a fully-inclusive program that meets San Diego Unified’s annual EBE participation goals. The budget for this effort is \$86,495 (detail provided in Appendix D). The elements that support these efforts are listed below.

1. RESOURCE CENTER

The business outreach team provides a variety of resources to contractors, the most beneficial of which is the database (described below). Prior to being entered into the database, contractors are vetted based on licensure and certification. The database allows for filtering contractors by many categories, including trade and EBE classification. These queries are used to provide prospective general and prime contractors with customized listings of EBE subcontractors eager to work on district projects. As an added benefit, contractors can use the database, via the outreach team, to advertise their own outreach activities and events to local EBEs.

In addition to bidding support via the database, the business outreach team provides ongoing daily assistance to contractors through telephone calls, email and post-event activities. The team also serves as the initial point of contact for contractor concerns by directing inquiries to appropriate district staff (i.e., Strategic Sourcing and Contracts, Physical Plant Operations, Project Stabilization Agreement [PSA] team, etc.). Furthermore, the business outreach team advocates internally for small business concerns, when appropriate, to ensure fair treatment and accessibility.

2. DATABASE

The business outreach database consists of contractors that have expressed interest in doing business with the district. The database includes updated contractor business information such as license number, scope of work/trades, public agency/EBE certifications, addresses, and phone/fax numbers. This information is largely obtained from district self-certification applications. Currently, there are more than 2,000 businesses in the database. The business outreach team uses the database for a variety of purposes, including mailing bid notices and other information, and providing query support services upon request. This is especially evident at bid time when contractors request lists of subcontractors of various trades and EBE categories.

3. EMAIL BLAST/BID NOTIFICATION

Specialized bid notifications for all advertised construction bids are emailed via e-blast to relevant firms on the business outreach database, as well as to San Diego area chambers of commerce, construction organizations and other associations. Each notification consists of identified scopes of work, site visit information, bid due dates and information on how to obtain plans and points of contact. These notices provide more tailored information than that of the legal notices placed in the San Diego *Daily Transcript* by the district’s Strategic Sourcing and Contracts Department. This effort is designed to better convey project needs to target recipients in a more time-efficient and reader-friendly manner. All resulting inquiries are tracked and answered, as appropriate.

4. ONLINE RESOURCES

Online resources are used to ensure stakeholders have multiple avenues for readily accessing information about district construction projects. This includes a business outreach webpage, Twitter and LinkedIn.

A. BUSINESS OUTREACH WEBPAGE

A *Doing Business with Facilities Planning & Construction* website was established to provide a one-stop resource for learning about the district’s capital projects department. The site has seven regularly updated subpages, including the following relevant to outreach and bidding:

- *Prequalification* provides information for contractors to understand legislation (AB 1565) signed into law (CAPCC Section 20111.6) requiring general contractors and certain subcontractors to be prequalified before they may bid on projects over \$1 million. The page provides a link to the online prequalification portal and a list of prequalified contractors.
- *Bids, Proposals and Contracts* includes a link to DemandStar, the district’s free procurement site, a link to the online prequalification portal and a list of prequalified contractors, an overview of the DVBE participation requirement and link to the DVBE Tip Sheet, and contact information for appropriate Contracts and Outreach staff.
- *Prop S & Z Ads, Site Walk & Low Bidder Info* provides valuable information for marketing and strategic bidding. This page lists the bid notice, pre-construction site walk sign-in sheet and bid tabulation sheet, including the low bidder’s subcontractor list, for each bond-funded project. It’s the perfect place for contractors to conduct market research and pre-bid due diligence. Also provides a link to the online prequalification portal and a list of prequalified contractors.
- *Business Outreach* provides an overview of the business outreach program; information about contractor prequalification, the DVBE requirement and small and emerging business self-certification; instructions on how to sign up for the outreach database; and a link to DemandStar. The web address is <http://sandi.net/page/934>. *Business Outreach* also offers a subpage—a repository of *Business Outreach Newsletters*.
- *Contracting Information* features a link to DemandStar and information about prequalification, the DVBE requirement, pre- and post-award contracts, the construction bid process and contacts for the Construction and Professional Services contracting and procurement staff.

B. LINKEDIN

LinkedIn’s mission is to “connect the world’s professionals to make them more productive and successful.” The outreach program manager posts information nearly every day about construction bids, procurement news and outreach events to encourage connections among existing and potential district contractors, vendors and suppliers. More than 2,200 “connections” follow these posts (<http://www.linkedin.com/in/karenlinehan>) where they view daily posts, contacts and industry groups and access “shared” news articles, blogs and websites that can help contractors increase their company’s visibility, productivity and success. New contacts are added to the LinkedIn account following each outreach event. LinkedIn has been instrumental in increasing the volume of daily calls and email inquiries, as well as the level of bids received by prime contractors.

C. TWITTER

Twitter is a free online social networking and micro-blogging service that allows users to send and read real-time text-based posts of up to 140 characters (the length of a short sentence), known as "tweets." It is similar to LinkedIn, but much easier and less time consuming. The business outreach coordinator tweets about construction bids and live tweets from site walks and outreach events to encourage participation. Twitter continues to slowly gain popularity among the construction community, and "followers" of [@sdusd_outrch](#) increase each month. The Twitter account is advertised via the quarterly *Business Outreach Newsletter*, LinkedIn and other outreach materials.

5. TRADITIONAL ADVERTISING

Traditional advertising has been useful in issuing information about upcoming bids, PSA workshops and other relevant news about the construction program to specific communities of interest. These media outlets are described here.

A. CONTRACTOR NEWS & VIEWS

The *Contractor News & Views* (CNV) is a widely-read publication that presents important information and issues affecting San Diego contractors and the local construction industry. The monthly trade magazine is circulated to more than 40,000 construction firms and professionals throughout San Diego County via supply houses, job sites, large construction firms, trade associations, public agencies, mail, website, new media, etc.

Each year, a CNV media schedule is prepared to meet the annual outreach goals. In 2014-15, three types of advertising are being used: 1) CNV ads announcing general outreach opportunities (speakers bureau, meet and greets, prequalification, and PSA workshops); DVBE bid requirements; and construction bids; 2) similar ads in CNV's NECA (National Electrical Contractors Association) Quarterly publication; and 3) e-blasts for urgent notices and announcements, like the district's Construction Expo. The CNV will continue to be used as the lead media outlet for the business outreach program.

B. SAN DIEGO MONITOR NEWS

The San Diego *Monitor News & Business Journal* (*Monitor*) is a weekly newspaper geared for the local African-American community. The newspaper is made available at a variety of high traffic in-community and faith-based locations. The *Monitor* worked with the business outreach team to develop a cost-effective media schedule and an ad design that appeals to its readers. Weekly ads announce upcoming construction projects. The 2014 Construction Expo was advertised in this publication.

In addition to the weekly advertisements, the *Monitor* hosts its annual Holiday & Business Bazaar for local businesses to show and sell their goods and services and holds a regular Black Business Bootcamps where "campers" are encouraged to "pull themselves up by their bootstraps," and take steps toward successful entrepreneurship. The business outreach team has been a featured bootcamp speaker, and will continue to do so in the future to build and maintain relationships with contractors, construction-related suppliers and vendors in this key demographic.

C. OTHER MEDIA

In addition to the main media listed above, San Diego Unified utilizes several other outlets sporadically for special projects and events. They are listed here with information about media type, audience, frequency and purpose.

<i>Media/Organization</i>	<i>Type</i>	<i>Audience</i>	<i>Use</i>
DiversityComm, Inc.	Quarterly print media (4 different mags.)	Veteran, minority, women, African-American businesses	Supplemental advertising and special outreach
Elite SDVOB Network	Monthly e-Newsletter and Website	Veteran businesses	Daily: notices, bids and announcements
DVBE Alliance	Weekly e-Newsletter	Veteran businesses	Weekly bids and as-needed notices
San Diego <i>Daily Transcript</i>	Daily print media Website	Contractors, suppliers, A&E	Print/web: Construction Week and special notices
<i>Voice & Viewpoint</i>	Weekly print media	Regional African-American community	As-needed supplemental and special outreach

It should be noted that, in 2014, the district’s Strategic Sourcing and Contracts Department began advertising legal ads for bids and solicitations in a variety of other publications targeting underserved communities. These include *Asian Journal*, *LGBT Weekly*, *Voice & Viewpoint* and *La Prensa*.

6. OUTREACH AND ENGAGEMENT EVENTS

A. SPEAKERS BUREAU

District staff will continue to identify appropriate professional and business associations, community groups and other organizations to coordinate speaking opportunities. These allow the business outreach team to provide information about a number of topics, including voter-approved bond measures, the construction bid process, upcoming opportunities (bond and non-bond projects, and professional services), the PSA, prequalification, etc. These engagements include participation in standing meetings; breakfast, lunch and dinner events; and specially scheduled meetings and workshops, conferences and expos, expert panel participation, etc. Speaking functions also allow the business outreach team to answer any pertinent questions that attendees may have. Relevant collateral materials are developed and distributed as appropriate. This effort often includes coordination with other departmental staff members.

B. MONTHLY BUSINESS MEETINGS

District staff will continue to participate regularly in monthly meetings hosted by relevant organizations and groups, namely those on the key stakeholder list (Appendix A). An important role of the business outreach team is to continually provide detailed information about voter-approved bond measures, the district’s construction bid process, the PSA, prequalification, as well as training, networking and bid opportunities. Participation level is based on need and request, and ranges from simple attendance to regular updates, formal presentations, and special speaker appearances. Relevant collateral materials are developed and distributed at each meeting as needed. This effort often includes coordination with the PSA team and other staff.

C. LARGE-SCALE OUTREACH EVENTS

District staff will continue to participate in annual and special large-scale events, such as procurement, trade and job fairs, matchmaking sessions, business roundtables and panels. Additional venues include community events such as street, health and multicultural fairs, and major events hosted by key stakeholders. Generally, these events require staffing an information booth and sometimes call for panel discussions, training sessions or speaking engagements. Participation in these events often requires paying booth fees and developing tailored informational materials, presentations and other collateral. PSA and other staff are involved as appropriate. Participation level is scrutinized to evaluate return on investment. Financial frugality is key in decision-making pertaining to this activity.

As part of the ongoing stakeholder assessment, the district's participation in the variety of available outreach and special events is continuously evaluated. At times, attendance may be based solely on recommendations and advice from community members, key stakeholders or other public agencies. Participating in these types of local community events allows the district to reach out to and engage stakeholders that do not normally participate in, or know about, other meetings. A more detailed overview of large-scale events is presented below.

a. Public Agency Consortium (PAC)

San Diego Unified is a member of San Diego County's PAC, a partnership organization of 14 San Diego regional public agencies and two contracting centers focused on increasing bidding opportunities on public agency contracts for small businesses. The district is involved with the PAC at the strategic and planning levels, as well as attending all outreach events. The district's business outreach coordinator is the current PAC president. Websites containing information about the PAC are as follows:

- http://www.dot.ca.gov/dist11/small_business.htm (see bottom of page)
- http://www.dot.ca.gov/dist11/small_business/PacInfoBrochure111814.pdf
- http://www.dot.ca.gov/dist11/small_business/PACflowchart1.pdf

The district participates in PAC events to engage with small business contractors, consultants and vendors, and encourage self-certification/applying to the business outreach database. Contractors are provided with important information about the district's bidding process, upcoming bids (construction and professional services), plan rooms, points of contact and the *Business Outreach Newsletter*. A list of regional business outreach events denoting PAC events is provided in Table 7 below.

Table 7 – Annual Outreach Events

Annual Event	Sponsor Organization/Agency	PAC Event
Annual Conference	National Association of Minority Contractors	
Annual Procurement & Resource Fair	Caltrans	X
Blue Book Building and Construction Network's Annual GC Showcase	The Blue Book	
Business Matchmaking Event	Elite SDVOB Network	
Business Summit	San Diego North Economic Development Council (SDNEDC)	
Category Sourcing Exchanges	Council for Supplier Diversity (CSD)	
Construction Expo	San Diego Unified School District	X
Doing Business with UCSD & Public Agency Partners	University of California, San Diego	X
GC Showcase	American Subcontractors Association	
Gold Coast	US Navy	
Keeping The Promise	California DVBE Alliance	
Meet the Buyers Matchmaking for Businesses	Small Business Development Center/ Business & Entrepreneurship Center	X
Operation Opportunity	San Diego Supplier Development Council	X
Owners' Night	Construction Management Association of America (CMAA)	
PAC Night at Turner School of Construction	San Diego County Regional Airport Authority/Turner Construction	X
Paths to Partnership	San Diego County Water Authority & North County SBDC	X
Supplier Diversity Summit	CSD	
Turning Contacts Into Contracts Procurement Conference	Elite SDVOB Network	
WIC Week	National Association of Women in Construction (NAWIC)	

b. Construction Expo

A construction expo is held on an annual basis at San Diego Unified's Kearny High School's Stanley E. Foster School of Engineering, Innovation and Design (formerly Construction Tech Academy). The goals of this event are to reach out to the local construction industry and provide a venue for engaging with small and emerging construction company owners and related suppliers and vendors, and allow for direct connections with district staff and prime contractors and consultants.

The annual expo is held in an information fair format featuring many booths sponsored by contractors (prime and sub), key stakeholder organizations, construction trade unions and FPC staff, including contracts, labor compliance, project management, construction management, and PSA, and offering informative materials and tailored resources. Prime contractors provide information about upcoming opportunities and encourage applying to their prequalification registries. Unions provide information about apprenticeship programs,

membership and labor availability. Business organizations bring information about the various resources they offer small and emerging businesses. In 2014, the expo provided a venue for making connections among general contractors and must-needed DVBs.

The effort to host this event requires extensive coordination with booth sponsors, stakeholder participants and other FPC staff. Announcements are distributed via local advertisements and via the media described above, social media, in-community fliers and postings, blasted email and faxes, and other methods. Participants are called upon for in-kind and financial support.

District staff will continue to participate in the above and other high-profile outreach events, such as local small business roundtables hosted by local organizations and elected officials. In an effort to create a more significant impact, participation includes sponsorship and advertising (as necessary), and involving the PSA team and other staff when feasible.

7. OUTREACH AREAS OF SPECIAL FOCUS

A. WOMEN-OWNED BUSINESSES

Entering 2014, the annual market assessment estimated Women-Owned Business Enterprise (WBE) capacity in San Diego County was 0.46% and an optimistic WBE participation goal was set at 2.0%. 2014 began slowly, but closed out at 4.21%.

District outreach efforts to WBEs were boosted during the first quarter of 2013 and continued throughout 2014. Efforts included increased participation in Women's Construction Coalition (WCC), reaching out to PAC member agencies to share their WBEs, contacting WBEs personally, specialized advertisements and newsletter articles encouraging WBE participation. These efforts will be maintained in 2015.

B. AFRICAN-AMERICAN-OWNED BUSINESSES

African-American (A-A) participation is included in San Diego Unified's Minority-Owned Business Enterprise (MBE) category. However, A-A participation is difficult to track for a number of reasons.

1. In 1996, Prop. 209 (also known as the California Civil Rights Initiative) was passed, prohibiting state government institutions from considering race, sex or ethnicity, specifically in the areas of public employment, public contracting or public education. The elimination of the California's MBE minority certification, which had identified race and ethnicity, greatly reduced the ability to confirm A-A ownership, or that of any other race within the MBE category.
2. The federal Disadvantaged Business Enterprise (DBE) certification which also includes race, gender and disadvantaged status is extremely time consuming to prepare and difficult to obtain. As a result, very few minority business owners go to the trouble to become DBE certified. Furthermore, because a DBE must be 1) a small business, 2) owned and controlled by a socially disadvantaged individual, and 3) owned and controlled by an *economically* disadvantaged individual, the certification does not capture all minority/A-A business owners.
3. Additionally, of the agencies and organizations with which San Diego Unified reciprocates business ownership certifications, not all ask or track race and ethnicity. Many, including San Diego Unified, also distribute questionnaires on the topic, but, because they are voluntary, responses are not complete or reliable.

The 2014 demographic assessment (see above and Appendix B below) was conducted to address the issue of parity that continued to be discussed at Independent Citizens Oversight Committee (ICOC)

meetings. The findings helped better understand low A-A business and worker participation in district construction projects: local A-A construction companies (1.5%) and construction workers (2%) are the local minority. Increased outreach efforts to A-A contractors will continue and the demographic assessment is now conducted annually.

8. OUTREACH AD HOC COMMITTEE

The ICOC's Construction Subcommittee formed an Outreach Ad Hoc Committee in fall 2013 to better focus on issues related to business and PSA outreach. As committee efforts pertain to the business outreach program, members assist with reviewing and shaping its outreach and engagement efforts; conduct regular interviews with small, emerging and historically disadvantaged construction business owners; report findings to the construction subcommittee; and review this plan annually. Their efforts are also directed toward historically disadvantaged individuals, worker engagement, and identifying ways to improve the pipeline from awareness of the construction industry and available construction-related educational opportunities, to working on district bond and non-bond funded construction projects.

A formal committee schedule was agreed upon in 2014. It was decided that the committee would hold two meetings in the beginning of the year to 1) receive a presentation on the annual plan update and 2) to have an interactive meeting to discuss comments on the plan with the outreach team. Throughout the year, meetings will be convened to hold informal interviews with EBE contractors about their experiences, successes and challenges in working on district projects.

9. PROJECT STABILIZATION AGREEMENT SUPPORT

On July 28, 2009, the San Diego Unified School District Board of Education entered into a Project Stabilization Agreement (PSA) with local construction unions to establish a common set of work rules and goals that apply to projects funded by Props. S/Z and state school construction bonds with a value of \$1 million or more. The outreach team supports the PSA in a number of ways; they are described here.

A. PSA TRAININGS

The PSA administrator offers one-on-one trainings upon request throughout the year. Trainings provide a detailed understanding of the PSA and the tools to assist in bidding and performing PSA projects. The sessions include an overview of the scope of the agreement; contractor, union and district roles and responsibilities; and grievance/jurisdictional dispute procedures. Core collateral materials include a folder that serves as a companion reference piece containing a union workforce dispatch form, zip code list, letter of assent and full copy of the final signed PSA.

The business outreach team will continue to support the PSA team and track and engage trainee contractors in the overarching outreach program. Session announcements will continue to be made in the form of advertisements in *Contractor News & Views* and *Monitor*, *Business Outreach Newsletter*, email blasts, faxes, and via coordination with key stakeholders as appropriate.

B. UNION OUTREACH

Outreach to local unions is conducted on a variety of levels. In addition to PSA workshop collaboration, pre-construction site walks and pre-job conferences, the business outreach team strives to understand union functions to better inform stakeholders. This has been achieved through meeting with union leaders, touring local union halls and apprenticeship training facilities, and participating in the same outreach events. These collaborate efforts will be continued as appropriate.

10. REPORTING

The annual EBE participation goals are tracked carefully and reported often. Raw contract award data from the district’s Strategic Sourcing and Contracts Department are calculated after contracts are approved by the Board of Education. Subcontractor participation is calculated based on percentage of contract amount awarded. EBE status is confirmed and tallied by DVBE, MBE, WBE and SBE category. Reports are provided to the Board of Education tri-annually, the ICOC quarterly and the ICOC construction subcommittee monthly. They are discussed in detail at the Outreach Ad Hoc Committee (see above).

An audit binder is maintained throughout the year to document all activities conducted by the business outreach team. The binder includes:

- handouts created
- events attended
- emails blasted
- ads placed
- reports issued (including backup data)
- newsletters published
- annual Business Outreach and Engagement Plan update

A. CURRENT DATA

EBE participation percentages (based on dollars awarded) each year from 2009 to 2014 are presented in Table 8 below.

Table 8 – Program EBE Participation

Business Classification	EBE Awarded 2009	EBE Awarded 2010	EBE Awarded 2011	EBE Awarded 2012	EBE Awarded 2013	EBE Awarded 2014
DVBE*	3.3%	3.8%	4.3%	5.4%	6.84%	10.46%
MBE	1.3%	5.8%	4.3%	10.6%	11.96%	4.99%
WBE	1.6%	2.3%	3.7%	2.1%	1.54%	4.21%
SBE	29.6%	28.2%	39%	20.6%	33.55%	43.85%
Total EBE Awards**	35.8%	40.1%	51.3%	38.7%	36.95%	46.75%
* In May 2010, San Diego Unified passed a resolution requiring 3% DVBE participation on all construction contracts						
** Many businesses have multiple certifications, and the total EBE award may differ from the sum of the EBE categories						

11. ANNUAL CONTRACTOR SURVEY

Each year in January a (non-scientific) survey is conducted among San Diego Unified’s previous year’s prime and subcontractors and issued each March. The survey is noticed via email and conducted online through SurveyMonkey. The primary goal of the survey is to assess the makeup of the contractor pool in a manner that goes beyond the EBE categories tracked as part of this outreach and engagement program. Survey findings offer another method for gauging contractor recruitment efforts and to steer program

improvement. Survey results will continue to be reported to the ICOC construction subcommittee, and included in annual metrics.

Results for the 2014 survey (of contractors working on district projects in 2013) generally reflect what was expected by the outreach team: most companies were small, male-owned and one-third did not hold any emerging business certifications. Of note, eight subcontractors indicated that their surety bond was held by the general contractor. A list of the questions is provided as Appendix C.

ENGAGEMENT COLLATERAL

The support materials that enhance efforts of the Business Outreach and Engagement Program and convey its messages are described in this section.

PRESENTATIONS

A PowerPoint presentation has been developed to provide an overview of the business outreach program, including program and goals, capital improvement projects, PSA, prequalification, etc. It is refreshed annually and used for the speakers bureau, workshops, monthly business meetings and, when appropriate, special events.

QUARTERLY NEWSLETTER

On a quarterly basis, the *Business Outreach Newsletter* is issued to those listed in the business database, San Diego area chambers of commerce, construction and contractor organizations, and to mailing lists of other public agencies through the PAC. The newsletter is designed to keep contractors and subcontractors informed of current project and contracting developments and provides general information to promote doing business with the district. Special features such as bond sales and funding, DVBE requirements, surety bonding, contracting resources and procurement news make the newsletter an important part of the outreach program.

TRAVELING EXHIBIT

A traveling tabletop exhibit is used at events where space allows. The exhibit consists of replaceable components, namely photographs, maps and brief information bites. It is updated as needed.

AWARD SUBMITTALS

Each year the outreach team will monitor opportunities and, when appropriate, submit applications for professional and industry recognition. Recognition will be sought in such areas as outreach efforts, outreach program, newsletter, EBE participation, etc. Costs associated with professional and industry award submittals are included in the outreach budget (Appendix D). In May 2014, the outreach team received the following awards:

- Small Business Administration (SBA) Small Business Award for Veteran Small Business Champion of the Year
- Disabled Veteran Business Alliance Keeping the Promise Special Recognition Award for Best DVBE Program in the State

PLAN UPDATE

This Business Outreach and Engagement Plan is updated on an annual basis to ensure its effectiveness. Updates include elimination or addition of some activities and collateral and/or enhancing or supplementing others. The Lessons Learned section provides context and justification for any changes.

LESSONS LEARNED

This 2015 Business Outreach and Engagement Plan Update No. 5 includes three changed items and no new or deleted item based on lessons learned over the course of the last year. Each, described in detail in the above plan, is listed below.

1. CHANGES TO PROGRAM

- **Outreach Goals** – EBE outreach goals for 2015 have been increased to 44 percent based on the 2014 EBE participation achieved, the 2015 *Demographic Analysis of the Ownership and Workforce of Construction Firms in San Diego County* report and the 2015 San Diego Construction Market Assessment.
- **DVBE Goal** – DVBE participation goals for 2015 have been increased to 6 percent based on exceeding 2014 goal of 4.5 percent, new efforts across the country to increase DVBE participation to a uniform 6 percent, and the increasing interest by DVBEs in bidding district projects.
- **Outreach Ad Hoc Committee** – The ICOC Construction Subcommittee’s Outreach Ad Hoc Committee formalized a meeting scheduled that includes two formal meetings and as-needed informal meetings with district EBE contractors.

METRICS

Evaluation of the Business Outreach and Engagement Program will be accomplished by looking at both the engagement process and the outcomes. The outreach and engagement tracking, reporting and data compilation will continue and be reported in the current manner, as follows:

1. PROPS. S/Z PROJECT-LEVEL TRACKING

1. Number of site walk attendees, including EBE contractors
2. Number of bidding prime contractors, including EBE contractors
3. Number of EBE subcontractors

2. PROPS. S/Z PROGRAM-LEVEL TRACKING

1. All EBE category participation
2. Total dollars awarded to EBEs by category
3. Percentage of dollars awarded to EBEs by category
4. Local business participation
5. Database entries and changes
6. Resource center usage

It is also necessary to assess the results of the program qualitatively. An evaluation of whether all the elements of the engagement plan were implemented, and how this implementation contributed to the overarching outcome is assessed each year during plan updates. This includes evaluating the types of stakeholder engagement points (i.e., events, meetings, etc.) utilized and their usefulness in leading to participation on district construction projects. It is this analysis that most informs the lessons learned section.

SCHEDULE

This section presents a timeline of the engagement activities and tools described in this plan. This is a general schedule. Each specific task will have a lead assigned as well as its own schedule or program developed as needed. The purpose of this section is to ensure each item is included.

1. SPECIFIC TASKS

January	Launch 2014 Contractor Survey
Jan/Feb	Hold two Outreach Ad Hoc Committee meetings
July	Hold Fifth Annual San Diego Unified Construction Expo
October	Begin Annual Demographic Analysis of Construction Firms Ownership in San Diego County
November	Conduct annual market assessment Begin Business Outreach and Engagement Plan Update No. 6

2. REGULAR ACTIVITIES

Ongoing	Interviews with district EBE contractors
Ongoing	Responding to contractors
Ongoing	Database updates
Ongoing	E-blasts/bid notifications
Ongoing	Webpage updates
Ongoing	LinkedIn postings
Ongoing	Traditional media advertising
Ongoing	PSA support
Ongoing	Award submittals
Monthly	Business meeting attendance/participation
Monthly	ICOC Construction Subcommittee reporting
Quarterly	Full ICOC reporting
Quarterly	<i>Business Outreach Newsletter</i>
Annually	Construction Expo
Annually in Q-1	Contractor Survey
Annually in Q-1	Finalize Business Outreach and Engagement Plan Update No. 4
Annually in Q-1	Outreach Ad Hoc Committee Meetings
Annually in Q-4	Annual Demographic Analysis of Construction Firms Ownership in San Diego County
Annually in Q-4	Conduct Annual Market Assessment
Annually in Q-4	Business Outreach and Engagement Plan Update No. 5
As requested	PSA Contractor Orientation Workshops
As requested	Speakers Bureau Appearances
As requested	ICOC Construction Subcommittee Outreach Ad Hoc Committee Reporting
As Appropriate	Community Events

APPENDIX A – KEY STAKEHOLDER LIST

NON-GOVERNMENTAL ORGANIZATIONS, FAITH-BASED & COMMUNITY ORGANIZATIONS

- Center on Policy Initiatives
- Cesar Chavez Service Clubs
- Chicano Federation of San Diego County, Inc.
- MAAC Project
- Rotary Club of Southeast San Diego
- San Diego County Affordable Housing Coalition
- San Diego County Interdenominational Ministerial Alliance
- San Diego Organizing Project
- Urban League of San Diego County

CONTRACTOR ASSOCIATIONS & LABOR GROUPS

- American Building Council (ABC)
- American Society of Heating, Refrigerating & Air Conditioning Engineers, Inc., San Diego Chapter
- Associated Subcontractor's Alliance (ASA), San Diego Chapter [formerly American Subcontractors Association]
- Associated Builders & Contractors
- Association of General Contractors (AGC), San Diego Chapter, Inc.
- Building Industry Association of San Diego County
- California Landscape Contractors Association, San Diego Chapter
- Construction Management Association of America (CMAA), San Diego Chapter
- NECA, San Diego County Chapter
- Piping Industry Progress Education & Trust Fund
- Plumbing, Heating, Cooling Contractors, San Diego Chapter
- San Diego & Imperial Counties Labor Council
- San Diego County Building & Construction Trades Council (BCTC)
- Sheet Metal & Air Conditioning Contractors' National Association of San Diego
- Southwest Carpenters Training Fund

BUSINESS/EMERGING BUSINESS ORGANIZATIONS

- American Indian Chamber of Commerce
- American Society of Professional Estimators, San Diego

- Black Contractors Association
- California Disabled Veteran Business Alliance (DVBA)
- Central San Diego Black Chamber of Commerce
- Council for Supplier Diversity [formerly San Diego Minority Supplier Development Council (MSDC)]
- Elite Service-Disabled Veteran-Owned Business (SDVOB) Network
- Pacific Southwest Minority Supplier Development Council (MSDC) [new local regional chapter]
- Greater San Diego Chamber of Commerce
- Independent Brokers Association West San Diego Chapter
- Latin Business Association Institute
- Latino Builders Industry Association
- National Association of Women in Construction (San Diego Chapter #21)
- San Diego Contracting Opportunities Center
- San Diego County Hispanic Chamber of Commerce
- San Diego North Economic Development Council
- San Diego Supplier Development Council
- San Diego Surety Association
- Small Business Development Centers (SBDCs)
- SCORE San Diego Chapter
- Society of Hispanic Professional Engineers
- U.S. Department of Commerce, Minority Business Development
- U.S. Hispanic Contractors and Professionals Association
- Women’s Construction Coalition

KEY BIDDING PRIME CONTRACTORS

1. Soltek Pacific Construction Co
2. Straight Line General Contractors, Inc.
3. AJ Fistes Corporation
4. TB Penick & Sons, Inc.
5. Triton Structural Concrete, Inc.
6. MA Stevens Construction, Inc.
7. IO Environmental and Infrastructure, Inc.
8. Cox Construction
9. K Whillock Services, Inc.
10. St. Thomas Enterprises, Inc.

PSA SIGNATORIES

- Asbestos Workers' Local 5
- Boilermakers Local 92
- Bricklayer & Allied Crafts Local 4
- Cement Masons Local 500/Area 744
- Elevator Constructors Local 18
- Glaziers & Floor Coverers Local 1399
- International Association Sheet Metal Workers Local 206
- International Brotherhood of Electrical Workers Local 569
- Iron Workers Local 229
- Laborers Local 89
- Operating Engineers Local 12
- Painters & Allied Trades District Council 36
- Painters & Tapers Local 333
- Plasterers Local 200
- Road Sprinkler Fitters Local 669
- Southwest Regional Council of Carpenters, Local 1506 and 547
- Steamfitters & Pipefitters Local 250
- Teamsters Local 36
- Tile, Marble & Terrazzo Local 18
- Tradeshow & Sign Crafts Local 831
- United Association of Landscape and Irrigation Local 345
- United Association of Plumbers & Pipefitters Local 230

INTERNSHIP, PRE-APPRENTICESHIP, APPRENTICESHIP & WORK TRAINING PROGRAMS

- Associated Builders Contractors (ABC; Electrical, Plumbing/Pipefitting, Sheet Metal, Electronic Systems, Technician [Low-Voltage], HVAC Service Tech [Craft Training Only]).
- Associated General Contractors (AGC; Carpenter, Cement Mason, Drywall Lather, Drywall Finisher, Heavy Equipment Operator, Painter, Laborer)
- Black Contractors Association (BCA; carpenters, drywall, lathers)
- MAAC Project (Healthy Homes Department's Weatherization Trainee Program)
- NAWIC (Camp NAWIC, [formerly Magic Camp - Mentoring A Girl In Construction])
- San Diego and Imperial Counties Labor Council (Workforce Development Department's YouthBuild Program, Career & Apprenticeship Preparation Program [CAPP])

- San Diego County Building and Construction Trades Council (Allied Workers, Boilermakers, Bricklayers/Stonemasons, Carpenter, Carpenter/Acoustic Installer, Cement Mason, Drywall Finisher, Drywall Lather, Electrical, Floor Covering, Glazing, Ironworker, Laborers, Landscape and Irrigation Fitters, Millwright, Operating Engineer, Painter, Pile Driver, Plasterer, Plaster Tender, Roofing and Waterproofing, Sheet Metal, Sprinkler Fitters, Surveyor, Teamsters, Telecommunication Installer, Tile Setters)
- San Diego Job Corps (Brick Masonry, Carpentry, Cement Masonry, Electrical, Floor Covering, Painting, Plastering, Plumbing, Tile Setting, Welding)
- San Diego Workforce Partnership (One-Stop Career Centers, Earn and Learn Committee)
- Urban Corps (Corps-to-Career Program)

HIGH SCHOOLS & ADULT EDUCATION CENTERS

- Clairemont High School Construction Technology and Wood Working
- Hoover High School Cabinetry and Fine Wood Working Program
- Kearny High School's Science, Connections & Technology: Introduction to Green Technology program (electrical, plumbing, solar, alternative fuel, design, construction, etc.)
- Kearny High School's Stanley E. Foster School of Engineering, Innovation and Design (EID)
- La Jolla High School woodshop classes
- Lincoln High School Introduction to Arts, Media and Entertainment (set design and construction, including electrical and trades)
- Mann Middle School Gateway to Technology and Wood Working programs
- Marston Middle School Wood Working Program
- Project Lead the Way (architecture, civil and electronic engineering programs) at Crawford High Educational Complex, Patrick Henry, Lincoln, Madison, Mira Mesa, Mission Bay, Morse and San Diego high schools, and High Tech High
- San Diego Community College District
- San Diego County Office of Education Regional Occupational Program
- San Diego High School EC SciTech Solar Boat program
- San Diego School of Creative and Performing Arts Fabrication and Design Program
- San Diego Unified School District Office of College, Career & Technical Education
- Scripps Ranch High School woodshop classes, and Sustainable Technologies Program
- University City High School Fabrication and Design Program
- Wangenheim Middle School Wood Working Program

APPENDIX B – DEMOGRAPHIC ASSESSMENT

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2014 Demographic Analysis on the Ownership of Construction Firms in San Diego County

Prepared for
Business Outreach Program
San Diego Unified School District
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Table of Contents

I.	Introduction	3
II.	Executive Summary	4
	About the Data Sources.....	4
	FIGURE 1. Data Sources Used in This Report.....	6
	Key Findings	7
	FIGURE 2: Summary of Estimates of Construction Industry Capacity in San Diego County.....	8
III.	Owners of Construction Firms Located in San Diego County	9
	1. DATA SOURCE: U.S. Census Bureau, Table: CB1200A13 - 2012 County Business Patterns: Geography Area Series: County Business Patterns by Employment Size Class	
	FIGURE 3. Number of Construction Industry Establishments with Paid Employees, By Size, Located In San Diego County	10
	2. DATA SOURCES: U.S. Census Bureau, Data Set: Economic Planning and Coordination Division, TABLE: 2012 Nonemployer Statistics (NS): San Diego County	
	FIGURE 4. Comparison of Construction Entities With and Without Paid Employees, by NAICS Subsector.....	11
	FIGURE 5. Construction Entities by NAICS Subsector, With and Without Paid Employees in 2012.....	12
	3. DATA SOURCE: U.S. Census Bureau Data Set: 2007 Survey of Business Owners (SBO), Table: SB0700CSA01. Statistics for All U.S. Firms by Industry, Gender, Ethnicity, and Race for the U.S., States, Metro Areas, Counties, and Places: 2007	
	FIGURE 6. Owners of Construction Firms in San Diego County, by Race, Ethnicity, and Gender	14

4.	DATA SOURCE: CALTRANS Office of Business and Economic Opportunity, Certification Unit	
	FIGURE 7. Disadvantaged Business Enterprises Located in San Diego County and Providing Construction Services	15
	FIGURE 8. Pie Chart of Caltrans Certified DBEs by Race and Ethnicity	16
IV.	Construction Employees In San Diego County	17
5.	DATA SOURCE: U.S. Census Bureau, American Community Equal Employment Opportunity Special Tabulation 2006-2010 (5-year ACS data) San Diego County	
	FIGURE 9. Pie Chart of EEO Tabulation of Employees by Race and Ethnicity for Construction Industry, American Community Survey, Five Year Average 2006 - 2010	18
	FIGURE 10. EEO Tabulation of Employees by Race and Ethnicity for Construction Industry, American Community Survey, Five Year Average 2006 - 2010	18
	FIGURE 11. EEO Tabulation of Employees by Race, Ethnicity, and Gender for Construction Industry, American Community Survey, Five Year Average 2006 – 2010	19
V.	Bibliography	21

I. Introduction

This report is prepared for the San Diego Unified School District (SDUSD), Facilities Planning and Construction (FPC) Department, for its Business Outreach Program, in support of its goals to increase participation of Emerging Business Enterprises (EBEs), especially Woman-owned and African-American-owned firms, in SDUSD's construction projects. For 2014, SDUSD encourages 37 percent EBE participation on all construction projects.¹

SDUSD uses the umbrella term, EBEs, to include Woman-owned, Minority-owned, Disabled Veteran-owned, and Small Business Enterprises. This "Demographic Analysis on the Ownership of Construction Firms in San Diego County" provides an independent demographic assessment of the race, ethnicity, and gender of construction firm owners in San Diego County.

Appreciation is expressed to Karen A. Linehan, Outreach Program Manager, for initiating the development of this report, in support of SDUSD's continuing commitment to increase opportunities for EBE participation in SDUSD projects.

¹ Source: SDUSD Facilities Planning & Construction 2014 Outreach and Engagement Plan Update

II. Executive Summary

About the Data Sources

To generate a comprehensive picture of the ownership of construction firms in San Diego County, it was necessary to extract data from four different sources, which are summarized on the next page, in FIGURE 1, “Data Sources Used in the Report.” Although sample size and methodologies vary substantially among these data sources, these data represent the best available and most current information on business ownership, with estimates of numbers by race, ethnicity, and gender for San Diego County.

A fifth data source was also used to assess local construction industry employment because, typically, a natural prerequisite for owning a construction firm is to have had some work experience in construction services.

It is important to note that because each data source and data set uses a variety of different methods and timeframes to collect, analyze, and generate reports, each table and chart in this report “stands alone.” Also, numbers within some data sets are not precisely additive because the U.S. Census Bureau will suppress some data, and use various statistical techniques to protect the identity of individuals and firms. Since the U.S. Census Bureau’s more detailed data, regarding race, ethnicity, and gender of owners, is derived from survey samples and estimates of each population, rather than a census, there are margins of error and non-sampling errors as well. More detail about the methodologies used to generate each of these data sets can be found in the “Survey Methodology” links provided in the Bibliography for this report.

Only publicly available data is used in this report. Most of this data is extracted from data sets provided at the website of the U.S. Census Bureau. This includes: 1) the 2012 San Diego County Business Patterns report, 2) the 2012 San Diego County Nonemployer Statistics report (which incorporates data provided by the Internal Revenue Service), 3) the 2007 Survey of Small Business Owners (part of the U.S. Census Bureau’s five year Economic Survey), and 4) a new Equal Employment Opportunity Tabulation published in December, 2012.

The numbers and types of certified Disadvantaged Business Enterprises is drawn from the California Department of Transportation (CALTRANS) website which is updated continuously. All data sources used in this report are summarized in FIGURE 1, “Data Sources Used in the Report.”

Each of these data sources represents the most currently available data release. The most recently derived data source used in this report is the 2012 San Diego County Business Patterns, and the 2012 San Diego County Nonemployer Statistics reports, both of which were released in May, 2014.

The Survey of Business Owners (SBO), conducted in 2007, but just published in 2012, is the first-ever and only publication by the U.S. Census Bureau to offer a detailed breakdown of business ownership at the county level, by race, ethnicity, and gender, and by industry NAICS codes. The delay in releasing this dataset was due to the enormous complexity of developing, for the first time, “Public Use

Microdata Sets” for all levels of geography, down to and including the county level. The Survey of Business Owners is conducted every five years. In late 2015, the U.S. Census Bureau will publish results of the 2012 Survey of Business Owners.

FIGURE 1

Data Sources Used in This Report	
1. Data Source:	U.S. Census Bureau, Table: CB1200A13 - 2012 County Business Patterns: Geography Area Series: San Diego County Business Patterns by Employment Size Class
Relevance:	The County Business Patterns (CBP) report is the Census Bureau's most complete, current, and consistent data for business establishments with paid employees. Each establishment represents a single business location. The CBP report summarizes the number of businesses by NAICS code subsector and by size, as classified by number of employees. The CBP shows that the great majority of construction firms in San Diego County are very small, 65% have fewer than 4 employees.
Publication Schedule:	Published annually, 18 months after the reference year. Most recent publication: May 26, 2014. Next release: May 30, 2015.
2. Data Source:	U.S. Census Bureau, Data Set: Economic Planning and Coordination Division, TABLE: 2012 Nonemployer Statistics (NS): San Diego County
Relevance:	This report completes the profile of construction firms located in San Diego County, using data from the Internal Revenue Service to describe the number and type (by NAICS code subsector) of construction firms that do not have paid employees.
Publication Schedule:	Published annually. Most recent publication: May 30, 2013. Next release: May 30, 2015.
3. Data Source:	U.S. Census Bureau Data Set: 2007 Survey of Business Owners (SBO), Table: SB0700CSA01. Statistics for All U.S. Firms by Industry, Gender, Ethnicity, and Race for the U.S., States, Metro Areas, Counties, and Places: 2007
Relevance:	The Survey of Business Owners (SBO) is part of the Census Bureau's Economic Census, and the 2007 SBO is the first-ever report published by the U.S. Census that provides detailed information at the county level on race, ethnicity, and gender of the 51% ownership of firms by NAICS. It includes firms with and without paid employees, that earned a minimum of \$1,000 in gross revenues in 2007. The data is presented as "estimates" rather than a "census" because it includes results of a survey mailed to a random sample of firms, in addition to data collected by the Census Bureau.
Publication Schedule:	Data is collected every five years for years ending in "2" and "7". Most recent publication: May 30, 2013. Next release: in phases, June - December 2015.
4. Data Source:	CALTRANS Office of Business and Economic Opportunity, Certification Unit
Relevance:	The CALTRANS database provides a listing of Disadvantaged Business Enterprises that have been certified as financially and socially disadvantaged, and therefore eligible to be counted toward CALTRAN's contracting goal of 13.25% for DBEs. For this program, African American, Asian, Pacific Islander, Native American, Hispanic and Women-owned firms are presumed to be socially disadvantaged.
Publication Schedule:	Updated continuously
5. Data Source:	U.S. Census Bureau, American Community Equal Employment Opportunity Special Tabulation 2006-2010 (5-year ACS data) San Diego County
Relevance:	This data shows the participation by race and ethnicity, of paid employees working for construction firms in San Diego County. This data is a custom data tabulation designed to measure the effects of and compliance with Equal Employment Opportunity laws. The growth in the number of firms owned by women and minorities will be somewhat tied to workforce participation, because prior experience as an employee is an important success factor in launching a new company.
Publication Schedule:	This report was published for the first time on December 12, 2012, and there are no plans at this time, for this custom tabulation to be repeated.

Key Findings

First, a caveat, applicable to every socio-economic category of Emerging Business Enterprise (EBE), is that many do not have the financial and bonding capacity, past performance record, and/or the desire to pursue work with public agencies such as the San Diego Unified School District. It appears, nonetheless, that SDUSD has strong rationale for seeking to increase the participation of EBEs, including African-American and Woman-owned firms, in SDUSD projects.

The vast majority of construction companies are small firms. According to the U.S. Census Bureau's 2012 County Business Patterns report, which includes only establishments with paid employees, there was a total of 6,199 establishments located within, and providing construction services within San Diego County. Of this group, 90% (5,577) had 19 or fewer paid employees and 65% (4,056) had four or fewer paid employees. Although many such firms may not be interested, or if interested, may not yet be ready to pursue public projects, this represents a large pool from which to attract and develop new EBE contractors for SDUSD projects.

Another source, the U.S. Census Bureau's 2007 Survey of Business Owners (SBO), which includes businesses with and without paid employees, found 24,110 construction firms located in San Diego, of which a large majority, 67% (16,266), had no paid employees. That a firm has no paid employees is not necessarily a disqualifier for performing on projects. Many successful construction firms, large and small, operate with a fluctuating workforce of independent contractors and subcontractors. For firms with and without paid employees, the 2007 SBO found that 24% (5,798) were minority-owned (by race and/or Hispanic ethnicity), 1.5% (360) were African-American-owned, and 7.4% (1,777), woman-owned.

CALTRANS maintains a database of certified Disadvantaged Business Enterprises (DBEs). Eligibility for this certification requires that 51% of a firm is owned and controlled by one of more socially disadvantaged individuals, defined as minority (by race or Hispanic ethnicity) and/or female.

Only 129 DBEs are listed in the CALTRANS database as currently located and providing construction services within San Diego County. Of these 129 companies, 14% (18) are African-American-owned, and 26% (34), female-owned. Although the number of firms is small, relative to the population of firms that could be certified, DBE certified firms may be regarded as highly interested and motivated to seek government contracts, given that the application for certification involves a considerable amount of preparation, documentation and time. Many qualified and eligible firms do not pursue the DBE certification because, in addition to extensive paperwork, CALTRANS requires a site visit and in depth interview with every applicant.

The demographic composition of the construction industry workforce is also of interest, because a natural prerequisite for owning a construction firm is to have had some work experience in construction services. The U.S. Census Bureau's "Equal Employment Opportunity Tabulation of Employees by Race and Ethnicity for Construction Industry" drawn from five years' of American Community Survey data for San Diego County (2006 – 2010), analyzed data for a total of 99,945 construction industry employees, and found nearly half, 48% (48,415) of these employees to be of

Hispanic ethnicity, or of a Minority race, of which 2% (1,960) were Black or African-American. For the total of all construction industry employees, 11% (10,910) were female.

FIGURE 2, “Summary of Estimates of Construction Industry Capacity in San Diego County,” summarizes the best available, most current information on business ownership and workforce, with estimates of numbers and percentages, by race, ethnicity, and gender.

FIGURE 2

SUMMARY OF ESTIMATES OF CONSTRUCTION INDUSTRY CAPACITY IN SAN DIEGO COUNTY							
Data Source	Estimated Capacity, Number of Entities					Number of Employees	
	Estimated Capacity	% of Data Set	African-American	% of Data Set	Female	% of Data Set	Employed in Construction Industry
1. County Business Patterns, Construction Services Establishments with Paid Employees, 2012							
Total Construction Services Establishments	6,199	100%					
1 - 4 paid employees	4,056	65%					
1 - 19 paid employees (includes 1 - 4 paid employees above)	5,577	90%					
Specialty Trade Contractors	3,891	63%					
2. Nonemployer Statistics 2012							
Nonemployer Construction Firms	17,236	100%					
Specialty Trade Contractors	11,845	69%					
3. Survey of Business Owners, 2007							
Total Number of Business Owners	24,110	100%					
With paid employees	7,844	33%					
Without paid employees	16,266	67%					
Total Sample Classifiable by race, ethnicity and gender	23,525	98%					
Minority (by race and/or ethnicity)	5,798	24%					
Hispanic of any race	4,543	19%					
African-American			360	1.5%			
Female					1,777	7.4%	
4. CALTRANS Disadvantaged Business Enterprises, October 2014							
Minority and/or Female-owned Firms	129	100%					
African-American			18	14%			
Female					34	26%	
5. EEO Special Tabulation of Employees by Race, Ethnicity, and Gender, 2006 - 2010							
Total employees tabulated							99,945 100%
Minority Race and/or Hispanic							48,415 48%
Black or African-American, Not Hispanic							1,960 2%
Female							10,910 11%

III. Owners of Construction Firms Located in San Diego County

This section provides more detail on each of the data sources and findings relating to the characteristics of the ownership of construction firms, as summarized in FIGURE 2, “Summary of Estimates of Construction Industry Capacity in San Diego County.”

1. DATA SOURCE: U.S. Census Bureau, Table: CB1200A13 - 2012 County Business Patterns: Geography Area Series: County Business Patterns by Employment Size Class

The U.S. Census Bureau’s 2012 County Business Patterns (CBP) report is the most complete, current, and consistent data source for business establishments with paid employees. An establishment is defined as a single physical location where business transactions take place and for which payroll and employment records are kept. Groups of one or more establishments under common ownership or control are defined as firms. A single-unit firm owns or operates only one establishment. The CBP report includes only those establishments with paid employees.

The County Business Patterns report summarizes the number of establishments by size, as classified by number of employees, and by each of three NAICS code subsectors for construction:

- 236 - Construction of Buildings
- 237 - Heavy and Civil Engineering Construction
- 238 - Specialty Trade Contractors

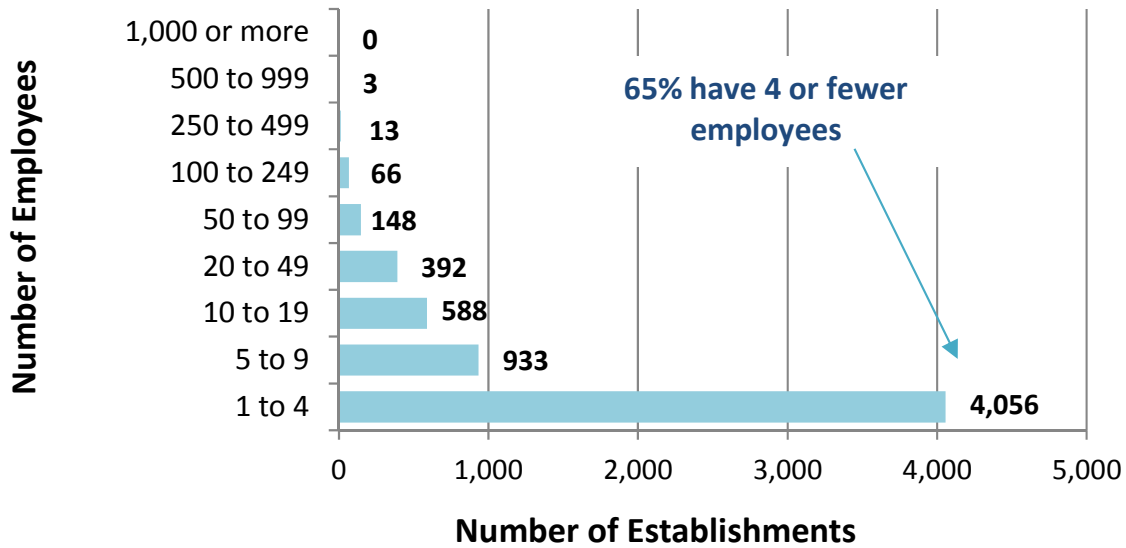
According to the U.S. Census Bureau’s 2012 County Business Patterns report for San Diego County, there was a total of 6,199 establishments with paid employees, located and providing construction services within San Diego County. Of this group, 90% (5,577) had 19 or fewer paid employees and 65% (4,056) had four or fewer paid employees. Specialty trade contractors represented 63% (3,891) of total firms.

These numbers represent a potentially large pool from which to attract and develop EBE contractors for SDUSD projects; however, many of these firms are small and may not be ready to work on public works projects.

FIGURE 3 presents the distribution by employment class size, of all construction industry establishments with paid employees, as reported by the U.S. Census Bureau’s 2012 County Business Patterns, for San Diego County.

FIGURE 3

Number of Construction Industry (NAICS 23) Establishments with Paid Employees, by Size, Located in San Diego County



NOTES: FIGURE 3

- Data set includes paid employees for pay period including March 12, 2012.
- The U.S. Census Bureau’s County Business Patterns data includes only those businesses with paid employees; it excludes businesses operating without an Employer Identification Number (EIN), and businesses with an EIN but without employees.
- The U.S. Census Bureau defines an “establishment” as a single physical location where business transactions take place and for which payroll and employment records are kept. Groups of one or more establishments under common ownership or control are firms. A single-unit firm owns or operates only one establishment.

2. DATA SOURCES: U.S. Census Bureau, 2012 Nonemployer Statistics (NS): San Diego County, and 2012 County Business Patterns (CBP)

FIGURES 4 and 5 present data from two independent data sources: (1) U.S. Census Bureau, Table: U.S: CB1200A13 - 2012 County Business Patterns: Geography Area Series: San Diego County Business Patterns by Employment Size Class (CBP); and (2) U.S. Census Bureau, Data Set: Economic Planning and Coordination Division, TABLE: 2012 Nonemployer Statistics (NS): San Diego County. For more information about County Business Patterns (CBP) data, please see NOTES: FIGURE 3.

Overall, the distribution by NAICS code subsector, for entities with and without paid employees, is very similar; the majority are specialty trade contractors (NAICS subsector 238), and nearly one-third, general contractors (NAICS subsector 236). A very small percentage of all construction establishments perform heavy and civil engineering construction (NAICS subsector 237), 5.2% of those that have paid employees and 1.6% of those with no paid employees.

**FIGURE 4
Comparison of Types of Construction Entities with and without Paid Employees**

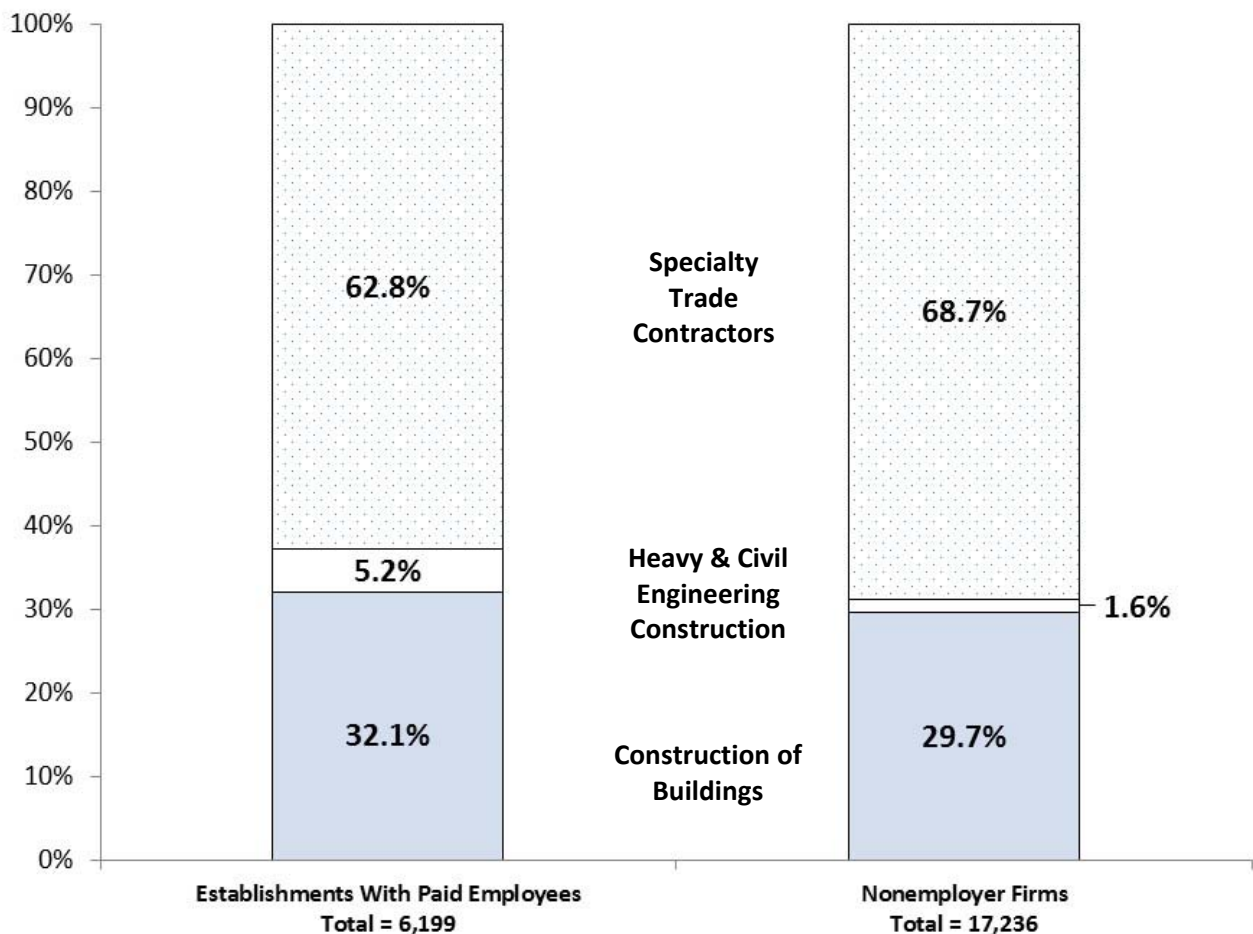


FIGURE 5

Construction Entities by NAICS Subsector, With and Without Paid Employees in 2012						
2012 NAICS Code 23 - Construction	Total Entities With and Without Paid Employees	% of Total	Number of Establishments with Paid Employees ⁽¹⁾	% of Total Entities	Number of Nonemployer Firms ⁽²⁾	% of Total Entities
Total	23,435	100%	6,199	26%	17,236	74%
236 - Construction of buildings	7,101	30.3%	1,988	8.48%	5,113	21.8%
237 - Heavy and civil engineering construction	598	2.6%	320	1.37%	278	1.2%
238 - Specialty trade contractors	15,736	67.1%	3,891	16.60%	11,845	50.5%
Data sources: (1) County Business Patterns, (2) Nonemployer Statistics						

NOTES: FIGURES 4 and 5

- Regarding the Nonemployer Statistics (NS) Data: The universe of nonemployer firms is created annually in conjunction with identifying the U.S. Census Bureau’s employer business universe. The source of this data is primarily from the annual or quarterly business income tax returns filed with the Internal Revenue Service and maintained in the U.S. Census Bureau’s Business Register.
- Most NS geography codes are derived from the business owner’s mailing address identified from administrative records. Because the owner's mailing address may not be the same as the physical location of the business, the resulting geography codes do not always represent where business is actually conducted, but this represents the best information available regarding the location of the business.
- Currently, the U.S. Census Bureau does not have a reliable method to identify the universe of firms that lease all of their employees. The Nonemployer Statistics report uses detailed processing and editing of the data to eliminate likely employers based on the size of receipts for a given industry.
- For the County Business Patterns data, the U.S. Census Bureau defines an “establishment” as a single physical location where business transactions take place and for which payroll and employment records are kept. Groups of one or more establishments under common ownership or control are firms. A single-unit firm owns or operates only one establishment.

3. DATA SOURCE U.S. Census Bureau Data Set: 2007 Survey of Business Owners (SBO), Table: SB0700CSA01. Statistics for All U.S. Firms by Industry, Gender, Ethnicity, and Race for the U.S., States, Metro Areas, Counties, and Places: 2007

The 2007 Survey of Business Owners (SBO), conducted in 2007, and published in 2012, is the first-ever and only publication by the U.S. Census Bureau to offer a detailed breakdown of business ownership at the county level, by race, ethnicity, and gender, and by industry NAICS codes. The delay in releasing this dataset was due to the enormous complexity of developing, for the first time, “Public Use Microdata Sets” for all levels of geography down to and including the county level.

The U.S. Census Bureau’s 2007 Survey of Business Owners includes businesses with and without paid employees. As shown in FIGURE 6 on the next page, of the total of 24,110 construction firms located in San Diego, the majority, 67% (16,266), had no employees. That a firm has no paid employees is not necessarily a disqualifier for performing on public projects. Many successful construction firms, large and small, operate with independent contractors and subcontractors.

In this data set, ethnicity is defined as either Hispanic or Non-Hispanic, and the category “Minority” encompasses minority races and/or Hispanic ethnicity. The U.S. Census Bureau’s 2007 SBO found that for all types of firms (with and without employees), 24% (5,798) were minority-owned (by race and/or Hispanic ethnicity), 1.5% (360) were African-American-owned, 7.4% (1,777) female-owned, and 18.3% (4,412), equally male-/female-owned.

FIGURE 6

Owners of Construction Firms in San Diego County, by Race, Ethnicity and Gender						
Demographic Category	All Firms		Firms with Paid Employees		Firms without Paid Employees	
	%	%	%	%	%	%
All Firms	24,110	100%	7,844	32.53%	16,266	67%
All firms classifiable by gender, ethnicity, & race	23,525	97.57%	7,306	93.14%	16,219	99.71%
Not classifiable	585	2.43%	539	6.87%	S	S
Ownership By Race						
White	21,623	89.68%	6,983	89.02%	14,640	90.00%
Black or African American	360	1.49%	27*	0.34%	333	2.05%
American Indian & Alaska Native	448	1.86%	8	0.10%	439	2.70%
Some other race	1,094*	4.54%*	288*	3.67%*	807*	4.96%*
Ownership By Minority Status						
Minority	5,798	24.05%	1,169	14.90%	4,630	28.46%
Equally minority/ nonminority	810	3.36%	310	3.95%	501	3.08%
Nonminority	16,916	70.16%	5,828	74.30%	11,088	68.17%
Ownership By Ethnicity						
Hispanic	4,543	18.84%	966	12.32%	3,577	21.99%
Equally Hispanic /non-Hispanic	558	2.31%	203	2.59%	355	0.26%
Non-Hispanic	18,424	76.42%	6136	78.23%	12,288	0.07%
Ownership By Gender						
Female-owned	1,777	7.37%	637	8.12%	1,140	7.01%
Male-owned	17,336	71.90%	5,039	64.24%	12,297	75.60%
Equally male-/female-owned	4,412	18.30%	1630	20.78%	2,782	17.10%

NOTES: FIGURE 6

- Race, ethnicity, and gender designations refer to the characteristics of owner/s possessing at least a 51% or more share of the total business ownership
- “Ownership” always refers to individual/s holding at least 51% of ownership shares.
- S = Data withheld because estimate did not meet publication standards.
- Numbers in this format: **boldface***, with an asterisk, represent data that were withheld by the U.S. Census Bureaus, but were derived via subtraction from the total, for purposes of this report.
- Detail may not add to total due to rounding or because a Hispanic firm may be of any race. Moreover, each owner had the option of selecting more than one race and therefore is included in each race selected. Firms with more than one domestic establishment are counted in each geographic area and industry in which they operate, but only once in the U.S. and state totals for all sectors.

4. DATA SOURCE: CALTRANS Office of Business and Economic Opportunity, Certification Unit

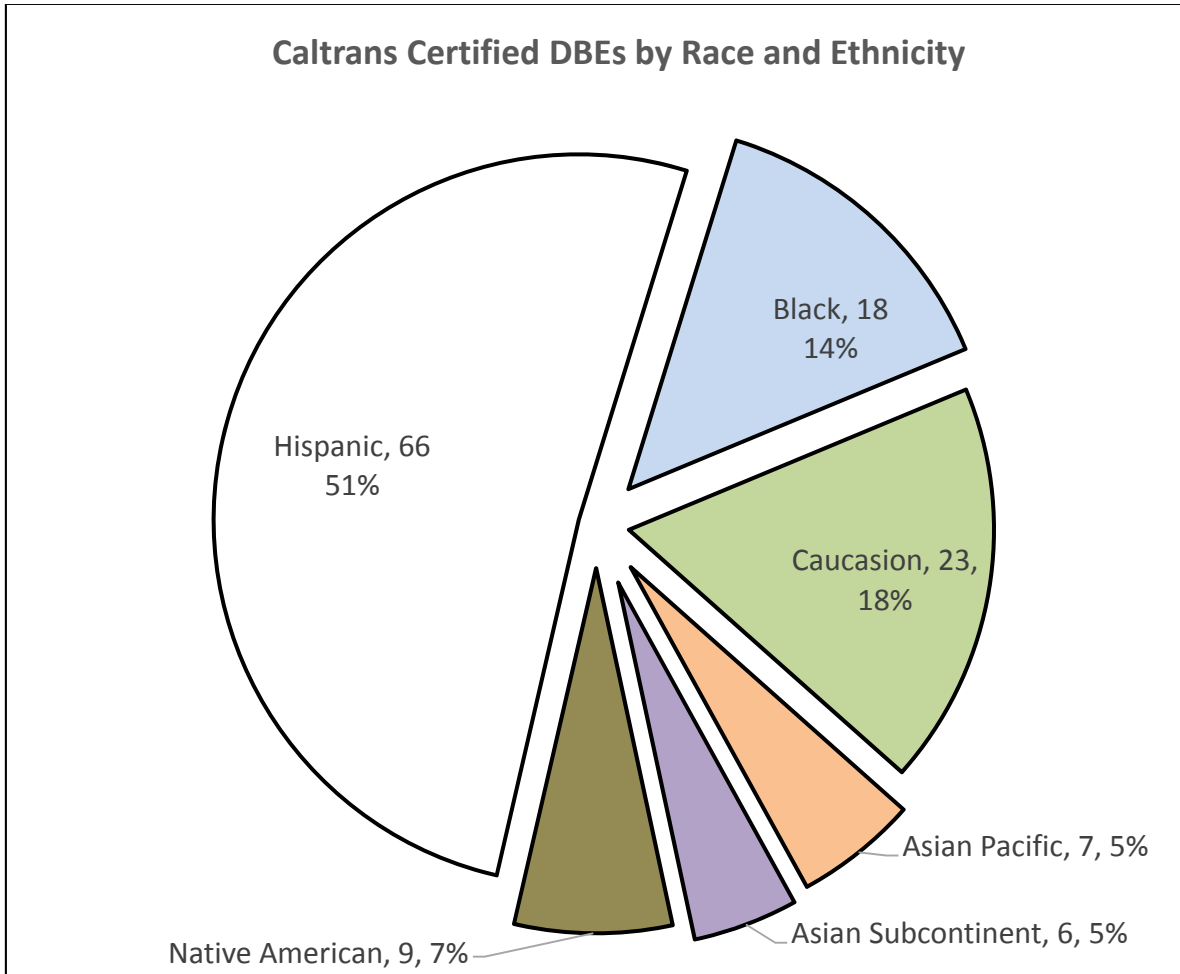
CALTRANS maintains a database of certified Disadvantaged Business Enterprises (DBEs). Eligibility for this certification requires that 51% of a firm is owned and controlled by one of more socially disadvantaged individuals, defined as minority (by race or Hispanic ethnicity) and/or female. These business owners must not have a personal net worth of more than \$1.32 million (excluding equity in home, business and most typical types of retirement accounts) and company revenues exceeding \$22.41 million (as a three year average). Although the number of firms is small, relative to the population of firms that could be certified, DBE certified firms may be regarded as highly interested and motivated to seek government contracts, given that the application for certification involves a considerable amount of preparation and documentation. CALTRANS conducts a rigorous review prior to certification, including a site visit and personal interview with every applicant.

As shown in FIGURES 7 and 8 below, a search of this database finds that there are only 129 DBEs listed as currently located and providing construction services within San Diego County. FIGURE 7 below, “Disadvantaged Business Enterprises Located in San Diego County and Providing Construction Services,” shows that of the total of 129 DBEs located in and providing construction services in San Diego, 14% (18) qualify as Black-owned, 26% (34), female-owned, and more than half (66) Hispanic-owned. The 34 female-owned firms include 23 that are Caucasian, 6 that are Hispanic, 3 Black, and 2 Native American.

FIGURE 7

Disadvantaged Business Enterprises Located in San Diego County and Providing Construction Services				
Demographic Category	Total	Race or Ethnicity	Gender	% of Total
Total DBEs by Gender	129			100.00%
Female owned			34	26.36%
Male owned			95	73.64%
Total DBEs by Race or Ethnicity	129			100.00%
Black		18		13.95%
Asian Pacific Islander		7		5.43%
Asian Subcontinent		6		4.65%
Native American		9		6.98%
Caucasian		23		17.83%
Hispanic		66		51.16%

FIGURE 8



NOTES: FIGURES 7 and 8

- CALTRANS requires that DBEs select a primary category of race or ethnicity (Hispanic), a DBE owner cannot choose both.
- Data was accessed on October 10, 2014 at: http://www.dot.ca.gov/hq/bep/find_certified.htm

IV. Construction Employees in San Diego County

5. DATA SOURCE: U.S. Census Bureau, American Community Equal Employment Opportunity Special Tabulation 2006-2010 (5-year ACS data) San Diego County

The U.S. Census Bureau's "Equal Employment Opportunity (EEO) Tabulation" (EEO Tabulation) is a custom data set designed to measure the effects of and compliance with EEO laws. The EEO Tabulation is sponsored by four federal agencies consisting of the EEO Commission, the Employment Litigation Section of the Civil Rights Division at the Department of Justice, the Office of Federal Contract Compliance Programs at the Department of Labor, and the Office of Personnel Management. This data is the only Census product that offers detailed break-downs at the County level, for employees by industry, and by ethnicity, race and sex.

The demographic composition of the construction industry workforce is of interest because a natural prerequisite for owning a construction firm is to have some work experience in construction services. Data for FIGURES 9 and 10 have been extracted from the EEO Tabulation, which provides information about 99,945 employees working in construction in San Diego County.

In the EEO Tabulation, each and every individual is categorized three ways: by gender, by ethnicity (Hispanic or Not Hispanic), and by race. The race categories used in the EEO Tabulation are: White, Black or African-American, American Indian and Alaska Native, Native Hawaiian or Other Pacific Islander, Asian, and "other" races. In addition, the EEO program allows individuals to choose a single race, or two or more races.

As shown in FIGURES 9 and 10 on the following page, 52% (51,530) were reported to be Not Hispanic and White alone (Caucasian); and 42% (41,655) were Hispanic and White alone, or Hispanic and one or more other races. Non-Hispanic Black or African-Americans accounted for 2% (1,960) of San Diego County's total construction workforce, and all other races (other than White alone), Not Hispanic, nearly 5% (4,800). Combining all Hispanics and all other races, excluding White alone, yields a total of 48,415 Minority employees or 48% of total employees.

FIGURE 9

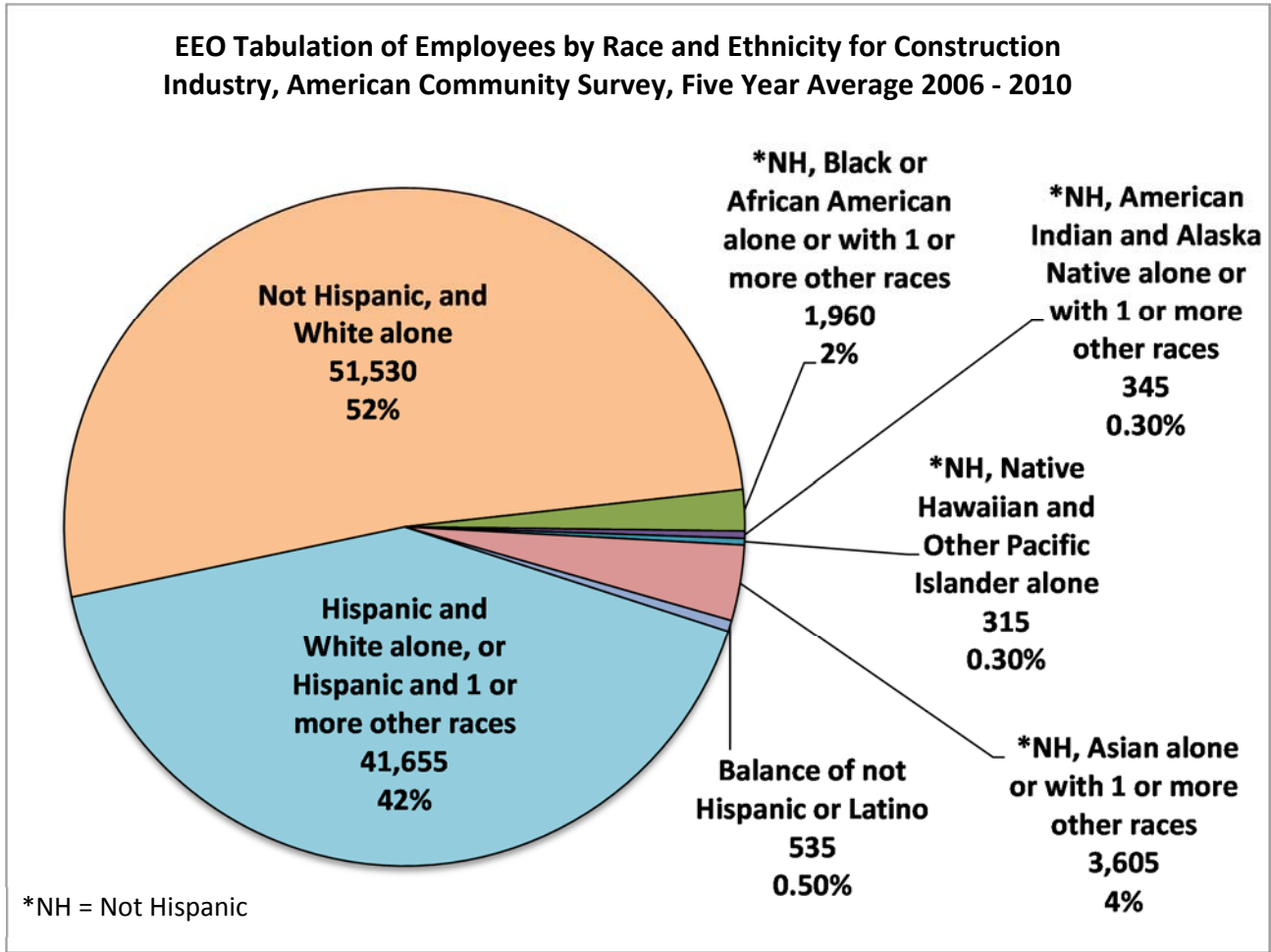


FIGURE 10

EEO Tabulation of Employees by Race and Ethnicity for Construction Industry, American Community Survey, Five Year Average 2006 - 2010

	TOTAL, all ehtnicities and races	HISPANIC and white alone, or HISPANIC and 1 or more other races	NOT HISPANIC					
			White alone	Black or African American alone or with 1 or more other races	American Indian and Alaska Native alone or with 1 or more other races	Native Hawaiian and Other Pacific Islander alone	Asian alone or with 1 or more other races	Balance of not Hispanic or Latino
Total	99,945	41,655	51,530	1,960	345	315	3,605	535
Percent	99.98%	41.68%	51.60%	2.00%	0.30%	0.30%	3.60%	0.50%

NOTES: FIGURES 9 and 10

- In the EEO Tabulation, each and every individual is categorized three ways: by gender, by ethnicity (Hispanic or Not Hispanic), and by race. The race categories used in the EEO tabulation are: White, Black or African-American, American Indian and Alaska Native, Native Hawaiian and Other Pacific Islander, Asian, and “other” races. In addition, for the race category, the EEO program allows individuals to choose a single race, or two or more races.

FIGURE 11, “EEO Tabulation of Employees by Race, Ethnicity, and Gender for Construction Industry, 5-year American Community Survey Data, 2006 – 2010,” expands upon FIGURE 10, by showing workforce participation by gender as well as ethnicity and race. Female employees were 11% (10,910) of the total construction workforce.

FIGURE 11

EEO Tabulation of Employees by Race, Ethnicity, and Gender for Construction Industry, American Community Survey, Five Year Average 2006 - 2010								
	TOTAL, all ethnicities and races	HISPANIC and white alone, or HISPANIC and 1 or more other races	NOT HISPANIC					Balance of not Hispanic or Latino
			White alone	Black or African American or with 1 or more other races	Indian and Alaska Native with 1 or more other races	Native Hawaiian and Other Pacific Islander alone	Asian alone or with 1 or more other races	
Total	99,945	41,655	51,530	1,960	345	315	3,605	535
Percent	99.98%	41.68%	51.60%	2.00%	0.30%	0.30%	3.60%	0.50%
Male	89,045	39,495	44,035	1,820	275	295	2,660	465
% of Total	89.20%	39.50%	44.10%	1.80%	0.30%	0.30%	2.70%	0.50%
Female	10,910	2,160	7,490	140	75	25	950	70
% of Total	11.00%	2.20%	7.50%	0.10%	0.10%	0.00%	1.00%	0.10%

NOTES: FIGURES 10 and 11

- Data is derived from U.S. Census Bureau, American Community Survey, EEO Special Tabulation 2006-2010 (5-year ACS data) San Diego County U.S. Census Bureau, American Community Survey, Table: 10w: A. Detailed Census Occupation by Industry (Construction 23), Sex, and Race/Ethnicity for Worksite Geography
- Subtotals do not add to 100% due to rounding and techniques such as data suppression and data swapping, that are used to avoid disclosing information about individual respondents. Data in this special tabulation are estimates provided by the U.S. Census Bureau, based on the Annual Community Survey, which includes 60 months of sample data from a questionnaire similar to and replacing what was formerly known as the Population Census “Long Form.”

- The U.S. Census recognizes two categories of ethnicity: Hispanic or Latino, and Not Hispanic or Latino. Respondents to U.S. Census Bureau surveys also are required to report a race or combination of races in addition to ethnicity.
- The EEO Special Tabulation does not use the term “Minority,” but the U.S. Census Bureau does use this term in other data sets, to encompass individuals of races other than Caucasian, and Hispanic or Latino of any race, including Caucasian.

V. Bibliography

1. DATA SOURCE: U.S. Census Bureau, Table: CB1200A13 - 2012 County Business Patterns: Geography Area Series: County Business Patterns by Employment Size Class

For a complete listing of NAICS codes by industry, see the U.S. Small Business Administration's Table of Small Business Size Standards Matched to North American Industry Classification System Codes: http://www.sba.gov/sites/default/files/files/size_table_07222013.pdf

For explanation of the U.S. Census Bureau's definition of establishments vs. firms, see: <http://www.healthypeople.gov/2020/data/datasource.aspx?id=36>

For information on confidentiality protection, Noise infusion, data perturbation, sampling error, nonsampling error, and definitions, see Survey Methodology: <http://www.census.gov/econ/cbp/methodology.htm>

Release of data for the 2012 County Business Patterns was completed May 26, 2014. The report for FIGURE 3 was accessed Oct 6, 2014 at: <http://www.census.gov/econ/cbp/index.html>

2. DATA SOURCE: U.S. Census Bureau, Data Set: Economic Planning and Coordination Division, TABLE: 2012 Nonemployer Statistics (NS): San Diego County

For information on confidentiality protection, sampling error, nonsampling error, and definitions, see Survey Methodology: <http://www.census.gov/econ/nonemployer/methodology.htm>

Nonemployer Statistics data were released May 30, 2013, and accessed October 7, 2014 at: <http://www.census.gov/econ/nonemployer/index.html>

3. DATA SOURCE: U.S. Census Bureau Data Set: 2007 Survey of Business Owners (SBO), Table: SB0700CSA01. Statistics for All U.S. Firms by Industry, Gender, Ethnicity, and Race for the U.S., States, Metro Areas, Counties, and Places: 2007

For information on confidentiality protection, sampling error, nonsampling error, and definitions, see Survey Methodology: <http://www.census.gov/econ/sbo/methodology.html>

Release of data for the U.S. Census Bureau's 2007 Survey of Business Owners (SBO) was completed in December of 2012. Data for this report was accessed May 30, 2013 at: <http://www.census.gov/econ/sbo/index.html>.

Release of data for the 2012 SBO is tentatively scheduled to occur in phases from June –December of 2015.

4. DATA SOURCE: CALTRANS Office of Business and Economic Opportunity, Certification Unit

DBE data is updated continuously. Data for this report was accessed October 10, 2014 at http://www.dot.ca.gov/hq/bep/find_certified.htm

5. DATA SOURCE: U.S. Census Bureau, American Community Equal Employment Opportunity Special Tabulation 2006-2010 (5-year ACS data) San Diego County

For information about Survey Methodology, please see: www.census.gov/people/eeotabulation/about/faq5_year.html#17, and <http://factfinder2.census.gov/faces/nav/jsf/pages/index.xhtml>

This data was fully released as of December 13, 2012. Currently, there are no plans to repeat this EEO Special Tabulation.

Data was accessed May 23, 2013 at: <http://factfinder2.census.gov/faces/nav/jsf/pages/index.xhtml>

APPENDIX C – ANNUAL CONTRACTOR SURVEY QUESTIONS

San Diego Unified School District collects year end data about the types of contractors working on our construction projects. This survey is being conducted as part of the business outreach program as both a gauge for improving our efforts and to provide a report to our ICOC.

If you have completed this survey in past years, thank you for your help—we gratefully request that you complete it again now.

This is an annual survey and you are being asked to complete this survey because your company was awarded a construction contract with San Diego Unified in 2013. “Awarded a contract” means that your company completed, is currently working on, or will begin working on a project that was awarded by San Diego Unified’s board of education between January and December 2013. Your company may be a prime contractor or a subcontractor.

Please take a moment to answer the following questions about your company. The information you provide will be held in the strictest of confidence. While the statistical data will be provided in public forums, it will not reveal individual- or company-specific information. This survey will take less than five (5) minutes to complete.

PLEASE NOTE—once a page in the survey is submitted, you will NOT be able to go back and change responses.

Business Size and Ownership

1. My company is (select one):
 - Large Business: Over 100 employees and average annual gross receipts of over \$14 million.
 - Small Business: Independently owned and operated, not dominant in your field of operation, less than 100 employees and average annual gross receipts of \$14 million or less.
 - I prefer not to respond to this survey
2. My company is (select all that apply):
 - Disabled Veteran-Owned: At least 51% owned by one or more disabled veterans, daily operations are managed and controlled by one or more disabled veterans. “Disabled Veteran” is defined as a veteran of U.S. military, naval, or air service with service-connected disability of at least 10% or more. [send to question No. 4]
 - Male-Owned: At least 51% owned by a male who controls day-to-day operations.
 - Woman-Owned: At least 51% owned by a woman who controls day-to-day operations.
 - Minority-Owned: At least 51% owned by one or more disadvantaged minority individuals, whose management and daily business operations are controlled by one or more such individual. [send to question No. 5]
 - “Disadvantaged Minority” groups include Black American, Hispanic American, Native American, American Aleut, American Eskimo, Asian-Pacific American, Subcontinent Asian-American, Asian Indian, Asian Pacific and Native Hawaiian.

Disabled Veteran Businesses

3. My company (check all that apply):

- is a DVBE, currently certified by the State of California
- is a SDVOB, currently verified by the U.S. Department of Veterans Affairs (VA)
- has a valid Center for Veterans Enterprise (CVE) letter
- is registered at VetBiz.gov and is on the VA's VIP (Vendor Information Page)
- is not certified/verified
- has a pending certification/verification
- has a lapsed certification/verification
- Not sure

Minority Owned Businesses

4. My company is owned and operated by a member of the following group (select the one group under which your DBE/MBE certification is held or with which your company's majority owner is most aligned):
- Black American
 - Hispanic American
 - Native American
 - American Aleut
 - American Eskimo
 - Asian-Pacific American
 - Subcontinent Asian-American
 - Asian Indian
 - Asian Pacific
 - Native Hawaiian
 - Other (please specify)

Certifications

The certifications listed below pertain to the State of California Department of General Services, California Unified Certification Program (via Caltrans) and other state, city, county or Local Agency Certification programs.

If your company has federal certifications (e.g., SDVOSB, 8a, etc.) please check the equivalent certification below and make a note in Other.

5. Please check all valid certifications below that your company currently holds or held at the time of contract award (select all that apply).
- SBE: Small Business Enterprise Certification
 - DVBE: Disabled Veteran Business Enterprise

- WBE: Women Business Enterprise
- DBE: Disadvantaged Business Enterprise
- MBE: Minority Business Enterprise
- Other (please specify):

Bidding Zone

6. I am comfortable bidding on projects valued at (select highest):

- Up to \$15,000
- Up to \$20,000
- Up to \$50,000
- Up to \$150,000
- Up to \$250,000
- Up to \$500,000
- Up to \$1,000,000
- Up to \$3,000,000
- Up to \$5,000,000
- Up to \$10,000,000
- \$10,000,000 and above
- None
- Other; please state.

Bonding Capacity

7. My bonding capacity is (select highest):

- None
- License bond only
- \$12,500
- \$50,000
- \$200,000
- \$500,000
- \$1,000,000
- \$3,000,000
- \$5,000,000
- \$10,000,000
- More than \$10,000,000
- More than \$25,000,000
- Bond provided by general contractor or partner

Contractor information

8. Are you a general contractor on this project(s)?

- Yes
- No
- I worked more than one project and my company was both a sub and a general this year

9. If your firm is a sub, please tell us your tier (list all if you were on more than one project this year)

- 1st
- 2nd
- 3rd
- DVBE supplier, manufacturer or equipment provider
- Other

10. If your firm is a sub, please name the general contractor you are working with (list all if you were on more than one project this year)

Company Location

11. My company is headquartered or has an office located (select all that apply):

- in San Diego County
- within the San Diego Unified School District
- in one of these zip codes: 92101, 92102, 92104, 92105, 92111, 92113, 92114, 92115, 92116, 92117, 92139
- None of these [skip]

12. My company is headquartered or has an office located (select all that apply):

- outside San Diego County
- outside California

Business Outreach

13. Are you currently in San Diego Unified’s business outreach program database?

- Yes [skip to end]
- No [skip to next page]

Business Outreach Database

If you would like to be included in the outreach database, copy and paste the following URL into your web browser: <http://tinyurl.com/sdusd-certform>. Please fill out the form and email, mail or fax it per the instructions on the form.

End

Thank you for participating in this important survey. Results will be available from the Business Outreach team in the near future upon request.

Staff contact and other information about the business outreach program can be found here: <http://www.sandi.net/page/934>.

APPENDIX D – BUSINESS OUTREACH AND ENGAGEMENT BUDGET DETAIL

Item	Cost	Quantity	Total
Business meetings: sponsorship/table costs		66	\$1,020
American Indian Chamber of Commerce	\$0	6	\$0
Central San Diego Black Chamber of Commerce	\$0	6	\$0
Disabled Veteran Business Alliance (DVBA), San Diego Chapter	\$0	4	\$0
Elite Service Disabled Veteran Owned Business Network (Elite Network)	\$0	12	\$0
National Association of Women in Construction (NAWIC)	\$45	8	\$360
Public Agency Consortium	\$0	6	\$0
San Diego County Hispanic Chamber of Commerce	\$50	2	\$100
San Diego North Economic Development Council (SDNEDC)	\$60	6	\$360
San Diego Supplier Development Council (SDSDC)	\$50	4	\$200
US Hispanic Contractors and Professionals, San Diego	\$0	6	\$0
Women's Construction Coalition (WCC)	\$0	6	\$0
Business Outreach Newsletter		4	\$8,800
Layout: 8.5 x 11 8-page printed newsletter	\$1,400	4	\$5,600
Printing	\$800	4	\$3,200
Outreach Events: Sponsorship/exhibit costs		26	\$9,400
Associated Subcontractors Alliance (ASA) GC Showcase	\$500	1	\$500
Blue Book Building and Construction Network's Annual GC Showcase	\$0	1	\$0
DVBA Annual Expo: Keep The Promise	\$1,000	1	\$1,000
DVBA Alliance Quarterly Regional Event	\$500	1	\$500
DVBA Veterans Day Outreach Event	\$200	1	\$200
Caltrans Annual Procurement & Resource Fair	\$750	1	\$750
CMAA Owners' Night	\$0	1	\$0
Council for Supplier Diversity (CSD) Diversity Summit	\$1,600	1	\$1,600
CSD Category Sourcing Exchanges	\$500	2	\$1,000
Doing Business with UCSD & Public Agency Partners	\$0	1	\$0
Elite SDVOB Network Business Matchmaking Event	\$500	1	\$500
Elite SDVOB Turning Contacts Into Contracts Procurement Conference	\$350	1	\$350
Gold Coast Annual Navy Procurement Event	\$0	1	\$0
National Association of Minority Contractors Conference	\$500	1	\$500
NAWIC Women In Construction (WIC) Week	\$0	1	\$0
North County SBDC Meet the Buyers Matchmaking for Businesses	\$250	2	\$500

Continued...

Item	Cost	Quantity	Total
Outreach Events: Sponsorship/exhibit costs, <i>continued...</i>			
PAC Night at Turner School of Construction	\$0	2	\$0
San Diego Community College District Annual Networking Outreach Event	\$0	1	\$0
SDSDC Operation Opportunity	\$500	1	\$500
SDNEDC Business Summit	\$500	1	\$500
WCC Contracting Opportunity Event	\$250	2	\$500
WCC Networking & Mixer Event	\$500	1	\$500
Construction Expo		1	\$12,400
Advertising	\$4,000	Lump	\$4,000
Postcard/Invitation Layout and Collateral	\$3,000	Lump	\$3,000
Production	\$800	Lump	\$800
Rentals	\$4,600	Lump	\$4,600
Media (POs)			\$43,700
Contractor News & Views	\$1,500	12	\$18,000
Elite SDVOB Network Web-presence	\$100	Annual	\$100
DiversityComm	As Needed		\$4,500
DVBA Web-presence	\$100	Annual	\$100
San Diego Monitor News and Business Journal	\$1,250	12	\$15,000
San Diego Daily Transcript	As Needed		\$4,500
Voice and Viewpoint	As Needed		\$1,500
Annual Demographic Assessment		1	\$7,425
SDCOC/Southwestern College	\$7,425	1	\$7,425
Award Submittals		5	\$1,750
Submittal Fees	\$350	5	\$1,750
Traveling Exhibit Update		1	\$2,000
Layout	\$1,200	1	\$1,200
Production	\$800	1	\$800
GRAND TOTAL			\$86,495



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