

File ID Number	23-0426
Introduction Date	3/8/23
Enactment Number	23-0464
Enactment Date	3/8/2023
By	os



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

**OAKLAND UNIFIED SCHOOL DISTRICT
Office of the Board of Education**

March 8, 2023

To: Board of Education

From: Kyla Johnson-Trammell, Superintendent
Sondra Aguilera, Chief Academic Officer
Vanessa Sifuentes, High School Network Superintendent
Rebecca Lacocque, Director, Linked Learning

Subject: Amendment No. 1 - Grant Agreement - Walter & Elise Haas Fund- High School Linked Learning Office

ACTION REQUESTED:

Approval by the Board of Education of Amendment No. 1 to the Grant Agreement (WEHF-20220077) between the District and the Walter & Elise Haas Fund, with the District accepting to extend the period of alumni highway to work program, from February 9, 2022 through February 8, 2023, to February 9, 2022 through September 29, 2023, to support alumni highway to work program, which will bridge high school pathway with employment post graduation via the High School Linked Learning Office pursuant to the terms and conditions thereof, if any.

BACKGROUND:

Grant Agreement for OUSD schools for the 2021-2022 through 2023-2024 fiscal years was submitted for funding as indicated in the chart below. The Grant Face Sheet and grant application packets are attached.

File ID #	Backup Document Included	Type	Recipient	Grant's Purpose	Time Period	Funding Source	Grant Amount
23-0426	Yes	Grant	Oakland Unified School District, High School Linked Learning Office	To support graduating students who will enroll in a training program or community college and be certified for paid work by year 2023.	02/9/2022-09/29/2023	Walter & Elise Haas Fund	\$150,000.00

DISCUSSION:

The district created a Grant Face sheet process to:

- Review proposed grant projects at OUSD sites and assess their contribution to sustained student achievement
- Identify OUSD resources required for program success

OUSD received a Grant Face Sheet and a completed grant application for the program listed in the chart by the school.

FISCAL IMPACT:

The total amount of grants will be provided to OUSD schools from the funders.

- Grants valued at: \$150,000.00

RECOMMENDATION:

Approval by the Board of Education of a Grant Agreement for high schools via the High School Linked Learning Office for fiscal years 2021-2022 through 2023-2024, pursuant to the terms and conditions thereof, if any.

ATTACHMENTS:

Amendment to Grant Agreement WEHF-20220077
Original Grant Award and Sub-Agreement, Legislative File ID #22-0915

WALTER & ELISE HAAS FUND

November 9, 2022

Sondra Aguilera
Chief Academic Officer
Oakland Unified School District
1000 Broadway, Suite 680

Oakland, California 94607

RE: Amendment to Agreement: Grant WEHF-20220077

Dear Sondra:

The Walter and Elise Haas Fund acknowledges that when you accepted our grant WEHF-20220077 it included a specific scope of work. To support your organization through the uncertainties caused by the outbreak of COVID-19, the Haas Fund has approved your request to update your grant's report schedule. This letter amends the terms of your grant agreement executed on or about 02/09/2022:

- Amended Project End Date: 09/29/2023
- Amended Report Due Date: 10/13/2023

All other terms of your grant agreement remain in effect, including reporting requirements. Please sign below to acknowledge the amendment to the terms of this grant. A copy of this signed document will be uploaded to your [grantee portal](#).

Please know how much the trustees and staff of the Walter and Elise Haas Fund appreciate all you are doing to serve our community at this time.

Sincerely,

DocuSigned by:

Jamie Allison

C038705366A447D...

Jamie Allison
Executive Director

Mike Hutchinson, President, BOE

Kyla Johnson-Trammell, Superintendent & Secretary, BOE

cc: Rebecca Laccocque
Pui Ling Tam

Accepted on behalf of Oakland Unified School District:

Date: _____

Sondra Aguilera
Chief Academic Officer

Approve as to form:

Date: Feb. 8, 2023

Joshua Daniels

Chief Governance Officer

Trustees

Charlotte Haas Prime, *President*

Sarah Eisenhardt • Alejandro Fong • Daniel S. Goldman • Bradley Haas • Jennifer C. Haas

Jamie Allison, *Executive Director*

Certificate Of Completion

Envelope Id: F112BC6B356240329082AF54DECA6D32

Status: Sent

Subject: Walter & Elise Haas Fund - Grant Amendment #20220077 OUSD

Source Envelope:

Document Pages: 1

Signatures: 1

Envelope Originator:

Certificate Pages: 5

Initials: 1

Marcel Marania

AutoNav: Enabled

1 Lombard Street Suite 305

Enveloped Stamping: Enabled

San Francisco, CA 94111

Time Zone: (UTC-08:00) Pacific Time (US & Canada)

grantsmanager@haassr.org

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Record Tracking

Status: Original

Holder: Marcel Marania

Location: DocuSign

11/9/2022 9:10:02 AM

grantsmanager@haassr.org

Signer Events**Signature****Timestamp**

Pui Ling Tam



Sent: 11/9/2022 9:14:09 AM

puiling@haassr.org

Viewed: 11/9/2022 10:09:21 AM

Program Officer

Signed: 11/9/2022 10:09:31 AM

Walter & Elise Haas Fund

Signature Adoption: Pre-selected Style

Security Level: Email, Account Authentication
(None)

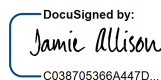
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Jamie Allison



Sent: 11/9/2022 10:09:33 AM

jamie@haassr.org

Viewed: 11/9/2022 11:40:57 AM

Executive Director

Signed: 11/9/2022 11:41:04 AM

Walter & Elise Haas Fund

Signature Adoption: Pre-selected Style

Security Level: Email, Account Authentication
(None)

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Signed using mobile

Electronic Record and Signature Disclosure:

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Sondra Aguilera

Sent: 11/9/2022 11:41:06 AM

sondra.aguilera@ousd.org

Chief Academic Officer

Security Level: Email, Account Authentication
(None)**Electronic Record and Signature Disclosure:**

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In Person Signer Events**Signature****Timestamp****Editor Delivery Events****Status****Timestamp****Agent Delivery Events****Status****Timestamp****Intermediary Delivery Events****Status****Timestamp****Certified Delivery Events****Status****Timestamp****Carbon Copy Events****Status****Timestamp**

Carbon Copy Events	Status	Timestamp
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Rebecca Lacocque rebecca.lacocque@ousd.org Linked Learning Director Security Level: Email, Account Authentication (None) Electronic Record and Signature Disclosure: Not Offered via DocuSign	COPIED	Sent: 11/9/2022 11:41:06 AM Viewed: 11/9/2022 12:06:04 PM
Marcel T. Marania grantsmanager@haassr.org Security Level: Email, Account Authentication (None) Electronic Record and Signature Disclosure: Not Offered via DocuSign		
Witness Events	Signature	Timestamp
Notary Events	Signature	Timestamp
Envelope Summary Events	Status	Timestamps
Envelope Sent	Hashed/Encrypted	11/9/2022 9:14:09 AM
Payment Events	Status	Timestamps
Electronic Record and Signature Disclosure		

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From time to time, Walter and Elise Haas Fund (we, us or Company) may be required by law to provide to you certain written notices or disclosures. Described below are the terms and conditions for providing to you such notices and disclosures electronically through the DocuSign system. Please read the information below carefully and thoroughly, and if you can access this information electronically to your satisfaction and agree to this Electronic Record and Signature Disclosure (ERSD), please confirm your agreement by selecting the check-box next to 'I agree to use electronic records and signatures' before clicking 'CONTINUE' within the DocuSign system.

Getting paper copies

At any time, you may request from us a paper copy of any record provided or made available electronically to you by us. You will have the ability to download and print documents we send to you through the DocuSign system during and immediately after the signing session and, if you elect to create a DocuSign account, you may access the documents for a limited period of time (usually 30 days) after such documents are first sent to you. After such time, if you wish for us to send you paper copies of any such documents from our office to you, you will be charged a \$0.00 per-page fee. You may request delivery of such paper copies from us by following the procedure described below.

Withdrawing your consent

If you decide to receive notices and disclosures from us electronically, you may at any time change your mind and tell us that thereafter you want to receive required notices and disclosures only in paper format. How you must inform us of your decision to receive future notices and disclosure in paper format and withdraw your consent to receive notices and disclosures electronically is described below.

Consequences of changing your mind

If you elect to receive required notices and disclosures only in paper format, it will slow the speed at which we can complete certain steps in transactions with you and delivering services to you because we will need first to send the required notices or disclosures to you in paper format, and then wait until we receive back from you your acknowledgment of your receipt of such paper notices or disclosures. Further, you will no longer be able to use the DocuSign system to receive required notices and consents electronically from us or to sign electronically documents from us.

All notices and disclosures will be sent to you electronically

Unless you tell us otherwise in accordance with the procedures described herein, we will provide electronically to you through the DocuSign system all required notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you during the course of our relationship with you. To reduce the chance of you inadvertently not receiving any notice or disclosure, we prefer to provide all of the required notices and disclosures to you by the same method and to the same address that you have given us. Thus, you can receive all the disclosures and notices electronically or in paper format through the paper mail delivery system. If you do not agree with this process, please let us know as described below. Please also see the paragraph immediately above that describes the consequences of your electing not to receive delivery of the notices and disclosures electronically from us.

How to contact Walter and Elise Haas Fund:

You may contact us to let us know of your changes as to how we may contact you electronically, to request paper copies of certain information from us, and to withdraw your prior consent to receive notices and disclosures electronically as follows:

To contact us by email send messages to: admin@haassr.org

To advise Walter and Elise Haas Fund of your new email address

To let us know of a change in your email address where we should send notices and disclosures electronically to you, you must send an email message to us at admin@haassr.org and in the body of such request you must state: your previous email address, your new email address. We do not require any other information from you to change your email address.

If you created a DocuSign account, you may update it with your new email address through your account preferences.

To request paper copies from Walter and Elise Haas Fund

To request delivery from us of paper copies of the notices and disclosures previously provided by us to you electronically, you must send us an email to admin@haassr.org and in the body of such request you must state your email address, full name, mailing address, and telephone number.

To withdraw your consent with Walter and Elise Haas Fund

To inform us that you no longer wish to receive future notices and disclosures in electronic format you may:

- i. decline to sign a document from within your signing session, and on the subsequent page, select the check-box indicating you wish to withdraw your consent, or you may;
- ii. send us an email to admin@haassr.org and in the body of such request you must state your email, full name, mailing address, and telephone number. We do not need any other information from you to withdraw consent.. The consequences of your withdrawing consent for online documents will be that transactions may take a longer time to process..

Required hardware and software

The minimum system requirements for using the DocuSign system may change over time. The current system requirements are found here: <https://support.docusign.com/guides/signer-guide-signing-system-requirements>.

Acknowledging your access and consent to receive and sign documents electronically

To confirm to us that you can access this information electronically, which will be similar to other electronic notices and disclosures that we will provide to you, please confirm that you have read this ERSD, and (i) that you are able to print on paper or electronically save this ERSD for your future reference and access; or (ii) that you are able to email this ERSD to an email address where you will be able to print on paper or save it for your future reference and access. Further, if you consent to receiving notices and disclosures exclusively in electronic format as described herein, then select the check-box next to 'I agree to use electronic records and signatures' before clicking 'CONTINUE' within the DocuSign system.

By selecting the check-box next to 'I agree to use electronic records and signatures', you confirm that:

- You can access and read this Electronic Record and Signature Disclosure; and
- You can print on paper this Electronic Record and Signature Disclosure, or save or send this Electronic Record and Disclosure to a location where you can print it, for future reference and access; and
- Until or unless you notify Walter and Elise Haas Fund as described above, you consent to receive exclusively through electronic means all notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you by Walter and Elise Haas Fund during the course of your relationship with Walter and Elise Haas Fund.

File ID Number	22-0915
Introduction Date	4/27/22
Enactment Number	22-0722
Enactment Date	4/27/2022
By	er



OAKLAND UNIFIED SCHOOL DISTRICT
Office of the Board of Education

April 27, 2022

To: Board of Education

From: Kyla Johnson-Trammell, Superintendent
Sondra Aguilera, Chief Academic Officer
Rebecca Lacocque, Director, High School Linked Learning Office

Subject: Grant Agreement - Walter & Elise Haas Fund - High School Linked Learning Office

ACTION REQUESTED:

Approval by the Board of Education of a Grant Agreement (WEHF-20220077) between the District and the Walter & Elise Haas Fund, with the District accepting \$150,000.00, to support alumni highway to work program, which will bridge high school pathway with employment post graduation via the High School Linked Learning Office for the period of February 9, 2022 through February 8, 2023, pursuant to the terms and conditions thereof, if any.

BACKGROUND:

Grant Agreement for OUSD schools for the 2021-2022 through 2022-2023 fiscal years was submitted for funding as indicated in the chart below. The Grant Face Sheet and grant application packets are attached.

File ID #	Backup Document Included	Type	Recipient	Grant's Purpose	Time Period	Funding Source	Grant Amount
22-0915	Yes	Grant	Oakland Unified School District, High School Linked Learning Office	To support graduating students who will enroll in a training program or community college and be certified for paid work by year 2023.	02/09/2022-02/08/2023	Walter & Elise Haas Fund	\$150,000.00

DISCUSSION:

The district created a Grant Face sheet process to:

- Review proposed grant projects at OUSD sites and assess their contribution to sustained student achievement
- Identify OUSD resources required for program success

OUSD received a Grant Face Sheet and a completed grant application for the program listed in the chart by the school.

FISCAL IMPACT:

The total amount of grants will be provided to OUSD schools from the funders.

- Grants valued at: \$150,000.00

RECOMMENDATION:

Approval by the Board of Education of a Grant Agreement for high schools via the High School Linked Learning Office for fiscal years 2021-2022 through 2022-2023, pursuant to the terms and conditions thereof, if any.

ATTACHMENTS:

Grant Face Sheet

Grant Agreement #WEHF-20220077

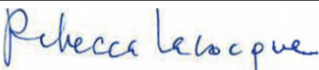
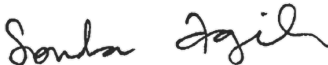
OUSD Grants Management Face Sheet

Title of Grant: Walter and Elise Haas Fund Alumni Highway to Work Program, Bridging high school pathways with employment post-graduation	Funding Cycle Dates: 02/09/2022-02/08/2023
Grant's Fiscal Agent: (contact's name, address, phone number, email address) Pui Ling Tam One Lombard Street, Suite 305 San Francisco, CA 94111 (415) 398-4474	Grant Amount for Full Funding Cycle: \$150,000.00
Funding Agency: Walter and Elise Haas Fund	Grant Focus: To support graduating students who will enroll in a training program or community college and be certified for paid work by 2023.
List all School(s) or Department(s) to be Served: All OUSD high schools and the Linked Learning Department	

Information Needed	School or Department Response
How will this grant contribute to sustained student achievement or academic standards?	This grant will support graduating students who will enroll in a training program or community college and be certified for paid work by 2023.
How will this grant be evaluated for impact upon student achievement? <small>(Customized data design and technical support are provided at 1% of the grant award or at a negotiated fee for a community-based fiscal agent who is not including OUSD's indirect rate of 3.98% in the budget. The 1% or negotiated data fee will be charged according to an Agreement for Grant Administration Related Services payment schedule. This fee should be included in the grant's budget for evaluation.)</small>	This grant will not be evaluated.
Does the grant require any resources from the school(s) or district? If so, describe.	No
Are services being supported by an OUSD funded grant or by a contractor paid through an OUSD contract or MOU? <small>(If yes, include the district's indirect rate of 3.98% for all OUSD site services in the grant's budget for administrative support, evaluation data, or indirect services.)</small>	No
Will the proposed program take students out of the classroom for any portion of the school day? <small>(OUSD reserves the right to limit service access to students during the school day to ensure academic attendance continuity.)</small>	No
Who is the contact managing and assuring grant compliance? <small>(Include contact's name, address, phone number, email address.)</small>	Rebecca Lacocque Director of Linked Learning 1000 Broadway, Suite 440, Oakland, CA 94607 (510) 879-4616 Rebecca.Lacocque@ousd.org

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Applicant Obtained Approval Signatures:

Entity	Name/s	Signature/s	Date
Principal/Administrator	Rebecca Lacocque		2/10/2022
Chief Academic Officer	Sondra Aguilera		3/31/2022

Grant Office Obtained Approval Signatures:

Entity	Name/s	Signature/s	Date
Fiscal Officer	Lisa Grant Dawson		
Superintendent	Kyla Johnson-Trammell		

WALTER & ELISE HAAS FUND

February 9, 2022

Sondra Aguilera
 Chief Academic Officer
 Oakland Unified School District
 1000 Broadway, Suite 680
 Oakland, California 94607

RE: Agreement for Grant WEHF-20220077

Dear Sondra:

I am pleased to inform you that the Walter and Elise Haas Fund has approved a one-year, \$150,000 project support grant to Oakland Unified School District to build the OUSD Alumni Highway to Work program, bridging high school pathways with employment post-graduation. The grant is payable as follows: \$150,000 outright in 2022. The grant period is 02/09/2022 to 02/08/2023.

We have removed formal reporting requirements on this grant. Instead, we kindly request your participation in a brief phone interview conducted by Pui Ling Tam; our staff will contact you after the grant period to arrange a convenient time.

This letter and its appendices constitute a legally binding agreement. It will be effective upon our receipt of this letter and the *Agreement to Grant Objectives* (Appendix A), both signed by an authorized representative of your organization. Please read Appendix B, *Grant Agreement*, very carefully, including reporting requirements. We will arrange for payment of \$150,000 upon receipt. Please keep a copy of this letter and appendices for your files.

Please direct all future reports and correspondence to Pui Ling Tam. Please know how much the trustees and staff of the Walter and Elise Haas Fund appreciate all you are doing to keep our community safe at this time.

Sincerely,


DocuSigned by:

Jamie Allison

C038705366A447D...

Jamie Allison

Executive Director

cc: Pui Ling Tam 
 Rebecca Lacocque
 Lisa Grant-Dawson

Accepted on behalf of Oakland Unified School District:



Sondra Aguilera
 Chief Academic Officer

Date: 3/31/2022

Approved as to form by OUSD Attorney Carrie M. Rasmussen on 3/19/22
 Appendix A: Agreement to Grant Objectives 
 Appendix B: Grant Agreement


 Gary Yee, President, Board of Education **Trustees**


 Kyla Johnson Trammell, Secretary, Board of Education

4/28/2022 Sarah Eisenhardt • Alejandro Fong • Daniel S. Goldman • Bradley Haas • Jennifer C. Haas

4/28/2022

Jamie Allison, Executive Director

RE: Agreement for Grant WEHF-20220077

APPENDIX A: AGREEMENT TO GRANT PURPOSE AND OBJECTIVES

**OAKLAND UNIFIED SCHOOL DISTRICT
02/09/2022 THROUGH 02/08/2023**

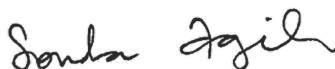
This grant is awarded with the understanding that the entire amount will be expended to address the following agreed-upon purpose and objectives. While minor changes in plan are expected, if your organization wishes to modify these fundamental intentions of the project, you must seek prior written approval of the Walter and Elise Haas Fund.

Purpose: One year of project support to build the OUSD Alumni Highway to Work program, bridging high school pathways with employment post-graduation

Grant Objectives:

- Pilot first cohort of youth in June 2022, where, upon graduation, 45 students will enroll in a local training program or at a community college and be certified for paid work by the start of 2023. Partnerships and pathways include: College of Alameda's Certified Nursing Assistant program and Highland Hospital; either Emergency Medical Technician *or* Histotech at Merritt College; Culinary and / or HVAC (Heating, Ventilation and Air Conditioning) at Laney College.
- Complete the design of Merritt and Laney program offerings, training of existing Transition Specialists to play this role Summer 2022 and future summers, and launching of at least three "highways" this summer.
- OUSD will continue to deepen partnership with the Oakland Workforce Development Board to enroll students in their young adult programs, both for the immediate benefit of their services and for long-term and sustainable ways of financially supporting OUSD Alumni through career training programs.
- Over three years, enroll a minimum of 180 alumni in "Highways to Work."

Accepted and agreed:



Sondra Aguilera
Chief Academic Officer
Oakland Unified School District

RE: Agreement for Grant WEHF-20220077

Grant Agreement

WHEN WE BOTH SIGN THE ATTACHED AWARD LETTER, WE AGREE THAT:

1. Your organization will use this grant money exclusively for the charitable, religious, scientific, literary, or educational purposes as described in the attached award letter.
2. Your organization will pay back any grant money *not* used for those purposes.
3. The Fund is not earmarking this grant for any attempt to influence legislation. The Fund is relying on your organization's representations regarding the amount budgeted for project activities that are not attempts to influence local, state, federal, or foreign legislation.
4. The Fund awards this grant to your organization because we support its mission, leadership, and program. During the grant period you agree to contact us if
 - a. Your organization substantially changes its mission, leadership, or grant project;
 - b. Your organization has a change in its federal tax exempt status;
 - c. Your organization transfers its assets, merges with another organization, approves a plan to shut down, or becomes insolvent.
5. The Fund can discontinue, modify, or withhold the total amount of this grant or any payment if we determine that grant funds are not being used as we are agreeing to in this document.
6. This page and the attached letter constitute the grant terms, which can be amended or modified only in writing signed by both of us.

Certificate Of Completion

Envelope Id: C61A8A4A31244CDE90014B50F9809D04

Status: Sent

Subject: Walter & Elise Haas Fund: Grant #20220077 OUSD

Source Envelope:

Document Pages: 3

Signatures: 1

Envelope Originator:

Certificate Pages: 5

Initials: 1

Marcel Marania

AutoNav: Enabled

1 Lombard Street Suite 305

Envelopeld Stamping: Enabled

San Francisco, CA 94111

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grantsmanager@haassr.org

IP Address: 107.152.25.186

Record Tracking

Status: Original

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2/9/2022 3:49:18 PM

grantsmanager@haassr.org

Signer Events**Signature****Timestamp**

Pui Ling Tam



Sent: 2/9/2022 3:52:17 PM

puiling@haassr.org

Viewed: 2/9/2022 4:10:17 PM

Program Officer

Signed: 2/9/2022 4:10:34 PM

Walter & Elise Haas Fund

Signature Adoption: Pre-selected Style

Security Level: Email, Account Authentication
(None)

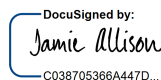
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Electronic Record and Signature Disclosure:

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Jamie Allison



Sent: 2/9/2022 4:10:35 PM

jamie@haassr.org

Viewed: 2/9/2022 4:21:34 PM

Executive Director

Signed: 2/9/2022 4:21:43 PM

Walter & Elise Haas Fund

Signature Adoption: Pre-selected Style

Security Level: Email, Account Authentication
(None)

Using IP Address: 73.241.192.60

Electronic Record and Signature Disclosure:

Accepted: 11/6/2020 3:54:19 PM

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Sondra Aguilera



Sent: 2/9/2022 4:21:44 PM

sondra.aguilera@ousd.org

Chief Academic Officer

Security Level: Email, Account Authentication
(None)**Electronic Record and Signature Disclosure:**

Accepted: 4/16/2021 8:16:32 AM

ID: c300e34a-e2bc-4d90-9855-e95b5e999d68

In Person Signer Events**Signature****Timestamp****Editor Delivery Events****Status****Timestamp****Agent Delivery Events****Status****Timestamp****Intermediary Delivery Events****Status****Timestamp****Certified Delivery Events****Status****Timestamp****Carbon Copy Events****Status****Timestamp**

Carbon Copy Events	Status	Timestamp
Deeptansh Chadha deep@haassr.org Associate, Grants and Learning Security Level: Email, Account Authentication (None) Electronic Record and Signature Disclosure: Accepted: 1/10/2022 9:18:27 AM ID: e9efe74a-88d9-4a9a-9144-26b4aa07e4dd	COPIED	Sent: 2/9/2022 4:10:36 PM
Lisa Grant-Dawson lisa.grantdawson@ousd.org Security Level: Email, Account Authentication (None) Electronic Record and Signature Disclosure: Not Offered via DocuSign	COPIED	Sent: 2/9/2022 4:21:44 PM
Rebecca Lacocque rebecca.lacocque@ousd.org Linked Learning Director Security Level: Email, Account Authentication (None) Electronic Record and Signature Disclosure: Not Offered via DocuSign	COPIED	Sent: 2/9/2022 4:21:45 PM Viewed: 2/9/2022 5:30:27 PM
Marcel Marania grantsmanager@haassr.org Security Level: Email, Account Authentication (None) Electronic Record and Signature Disclosure: Not Offered via DocuSign		
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Notary Events	Signature	Timestamp
Envelope Summary Events	Status	Timestamps
Envelope Sent	Hashed/Encrypted	2/9/2022 3:52:17 PM
Payment Events	Status	Timestamps
Electronic Record and Signature Disclosure		

ELECTRONIC RECORD AND SIGNATURE DISCLOSURE

From time to time, Walter and Elise Haas Fund (we, us or Company) may be required by law to provide to you certain written notices or disclosures. Described below are the terms and conditions for providing to you such notices and disclosures electronically through the DocuSign system. Please read the information below carefully and thoroughly, and if you can access this information electronically to your satisfaction and agree to this Electronic Record and Signature Disclosure (ERSD), please confirm your agreement by selecting the check-box next to 'I agree to use electronic records and signatures' before clicking 'CONTINUE' within the DocuSign system.

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Withdrawing your consent

If you decide to receive notices and disclosures from us electronically, you may at any time change your mind and tell us that thereafter you want to receive required notices and disclosures only in paper format. How you must inform us of your decision to receive future notices and disclosure in paper format and withdraw your consent to receive notices and disclosures electronically is described below.

Consequences of changing your mind

If you elect to receive required notices and disclosures only in paper format, it will slow the speed at which we can complete certain steps in transactions with you and delivering services to you because we will need first to send the required notices or disclosures to you in paper format, and then wait until we receive back from you your acknowledgment of your receipt of such paper notices or disclosures. Further, you will no longer be able to use the DocuSign system to receive required notices and consents electronically from us or to sign electronically documents from us.

All notices and disclosures will be sent to you electronically

Unless you tell us otherwise in accordance with the procedures described herein, we will provide electronically to you through the DocuSign system all required notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you during the course of our relationship with you. To reduce the chance of you inadvertently not receiving any notice or disclosure, we prefer to provide all of the required notices and disclosures to you by the same method and to the same address that you have given us. Thus, you can receive all the disclosures and notices electronically or in paper format through the paper mail delivery system. If you do not agree with this process, please let us know as described below. Please also see the paragraph immediately above that describes the consequences of your electing not to receive delivery of the notices and disclosures electronically from us.

How to contact Walter and Elise Haas Fund:

You may contact us to let us know of your changes as to how we may contact you electronically, to request paper copies of certain information from us, and to withdraw your prior consent to receive notices and disclosures electronically as follows:

To contact us by email send messages to: admin@haassr.org

To advise Walter and Elise Haas Fund of your new email address

To let us know of a change in your email address where we should send notices and disclosures electronically to you, you must send an email message to us at admin@haassr.org and in the body of such request you must state: your previous email address, your new email address. We do not require any other information from you to change your email address.

If you created a DocuSign account, you may update it with your new email address through your account preferences.

To request paper copies from Walter and Elise Haas Fund

To request delivery from us of paper copies of the notices and disclosures previously provided by us to you electronically, you must send us an email to admin@haassr.org and in the body of such request you must state your email address, full name, mailing address, and telephone number.

To withdraw your consent with Walter and Elise Haas Fund

To inform us that you no longer wish to receive future notices and disclosures in electronic format you may:

- i. decline to sign a document from within your signing session, and on the subsequent page, select the check-box indicating you wish to withdraw your consent, or you may;
- ii. send us an email to admin@haassr.org and in the body of such request you must state your email, full name, mailing address, and telephone number. We do not need any other information from you to withdraw consent.. The consequences of your withdrawing consent for online documents will be that transactions may take a longer time to process..

Required hardware and software

The minimum system requirements for using the DocuSign system may change over time. The current system requirements are found here: <https://support.docusign.com/guides/signer-guide-signing-system-requirements>.

Acknowledging your access and consent to receive and sign documents electronically

To confirm to us that you can access this information electronically, which will be similar to other electronic notices and disclosures that we will provide to you, please confirm that you have read this ERSD, and (i) that you are able to print on paper or electronically save this ERSD for your future reference and access; or (ii) that you are able to email this ERSD to an email address where you will be able to print on paper or save it for your future reference and access. Further, if you consent to receiving notices and disclosures exclusively in electronic format as described herein, then select the check-box next to 'I agree to use electronic records and signatures' before clicking 'CONTINUE' within the DocuSign system.

By selecting the check-box next to 'I agree to use electronic records and signatures', you confirm that:

- You can access and read this Electronic Record and Signature Disclosure; and
- You can print on paper this Electronic Record and Signature Disclosure, or save or send this Electronic Record and Disclosure to a location where you can print it, for future reference and access; and
- Until or unless you notify Walter and Elise Haas Fund as described above, you consent to receive exclusively through electronic means all notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you by Walter and Elise Haas Fund during the course of your relationship with Walter and Elise Haas Fund.