



Board Office Use: Legislative File Info.	
File ID Number	25-1313
Introduction Date	6/25/25
Enactment Number	
Enactment Date	

Board Cover Memorandum

To Board of Education

From Kyla Johnson-Trammell, Superintendent
Sondra Aguilera, Chief Academic Officer

Meeting Date June 25, 2025

Subject Expanded Learning Programs After School Program Master Contract 2025-2028 with Oakland Leaf Foundation

Ask of the Board XXApprove After School Master Contract
☐ Ratify Services Agreement

Services *Vendor will serve as lead agency for program coordination, academic intervention, homework support, student supervision and a variety of enrichment services, as described in the Master Contract, for the six OUSD school sites listed in Exhibit A.*

Term Start Date: 7/1/25 End Date: 7/31/28

Not-To-Exceed Amount \$9,087,186.60

Competitively Bid Yes

If the Service Agreement was not competitively bid and the not-to-exceed amount is more than \$96,700, list the exception(s) that applies (requires Legal review/approval and may require a resolution): [Exception]

In-Kind Contributions *District staff monitor budgets and grant compliance requirements. District provides space and Custodial Services for after school programs.*

Funding Source(s) *Resource 6010 – After School Education and Safety (ASES) Program in the amount of \$3,052,242.60; Resource 4124 – 21st Century Programs in the amount of \$184,944.00; Resource 2600 – Expanded Learning Opportunities Program (ELO-P) in the amount of \$5,850,000.00*

Background

The After School Education and Safety (ASES) Program is the result of the 2002 voter approved initiative, Proposition 49. This proposition amended California Education Code 8482 to expand and rename the former Before and After School Learning and Safe Neighborhood Partnerships Program. The ASES Program funds the establishment of local after school education and enrichment programs. These programs are created through partnerships between schools and local community resources to provide literacy, academic enrichment, and safe constructive alternatives for students in Kindergarten through ninth grade. The ASES program is defined within the language of SB 638 and Education Code (EC) sections 8482 and 8484.6.

The general purpose of the 21st Century Community Learning Centers (21st CCLC) program is to establish or expand community learning centers that provide students with academic enrichment opportunities along with activities designed to complement the students' regular academic program. California Education Code section 8421 further defines the purpose of the 21st Century High School After School Safety and Enrichment for Teens (ASSETS) program as (1) creating incentives for establishing locally driven after school enrichment programs that partner schools and communities to provide academic support and safe, constructive alternatives for high school pupils in the hours after the regular school day, and (2) assisting pupils in passing the high school exit examination for public school programs.

The Expanded Learning Opportunities Program (ELO-P) provides funding for afterschool and summer school enrichment programs for transitional kindergarten through sixth grade. "Expanded learning" means before school, after school, summer, or intersession learning programs that focus on developing the academic, social, emotional, and physical needs and interests of pupils through hands-on, engaging learning experiences. It is the intent of the Legislature that expanded learning programs are pupil-centered, results driven, include community partners, and complement, but do not replicate, learning activities in the regular school day and school year.

This agency has demonstrated experience and capacity in serving in the after school lead agency role. This organization successfully met all of the requirements of OUSD's Request for Qualifications process for issuance of contracts for after school programs and has been approved as a qualified lead agency partner by the OUSD Expanded Learning Office. The school Principal and their team have selected this agency from a list of approved lead agency partners.

Attachment(s)

- Expanded Learning Programs After School Program Master Contract 2025-2028 with Oakland Leaf Foundation
- Request for Proposal 25-148ExLO and Vendor Bid Materials

**Expanded Learning Programs
After School Program Master Contract 2025-2028
Between Oakland Unified School District and**

Oakland Leaf Foundation

1. **Intent.** This Master Contract establishes the Oakland Unified School District's ("OUSD") intent, contingent upon OUSD's receipt of California Department of Education and/or U.S. Department of Education after-school grant funds, to contract with Oakland Leaf Foundation ("AGENCY") to serve as the lead agency to provide after-school and/or summer educational programs and to serve a sufficient number of students and run services for a sufficient number of days to earn the core grant allocation of funding at the OUSD school sites identified in the Scope of Work(s) to be incorporated into this Master Contract by reference. A summary of Agency after school programs to be offered during the school year ("SUMMARY") is attached hereto as Exhibit A. Summer programs will be selected through a Scope of Work at a later date, based on OUSD needs, site availability, and subject to Board approval. Identification of summer programs is anticipated in February of each year and after-school providers will be assigned to OUSD schools to facilitate summer programming.
2. **Scope of Work.** The Scope of Work consists of the approved Annual Budget Tool and Annual Expanded Learning Opportunity Program Planning Tool, templates of which are attached hereto as Exhibit B. There shall be a Scope of Work for each separate school site served by AGENCY. The term of the Scope of Work shall not exceed one year. OUSD and AGENCY shall ensure that a Scope of Work is executed for each identified school site no later than 30 days prior to the date on which services under that Scope of Work are scheduled to begin. By approving this Master Contract, and the Scope of Work templates and Summary attached hereto as Exhibits A and B, the OUSD Board of Education ("BOARD") delegates to the Executive Director of Community Schools and Student Services ("CSSS Executive Director") the authority to approve and amend individual Scopes of Work for after school programs during the school year without further Board action required. Any Scopes of Work or amendments exceeding the approved amounts in the SUMMARY require Board approval.
3. These services will be funded by one or more of the following grants:
 - California Department of Education ("CDE") After School Education and Safety Program ("ASES")
 - US Department of Education 21st Century Community Learning Centers (21st CCLC)
 - US Department of Education 21st Century High School After School Safety and Enrichment for Teens ("ASSETS")
 - Expanded Learning Opportunities - Programs ("ELO-P")
 - Oakland Fund for Children and Youth - This Master Contract will also outline services provided on OUSD school grounds through the Oakland Fund for Children and Youth ("OFCY") After-School Initiative funds that shall be utilized as matching funds to CDE ASES and 21st CCLC funds.
 - Private grants
4. **Term of Master Contract.** The term of this Master Contract shall be July 1, 2025, through July 31, 2028.
5. **Termination and Suspension.**
 - 5.1. **Termination for convenience by OUSD.** The BOARD may at any time terminate this MOU or any Scope of Work entered into pursuant to Section 2 of this MOU for any or no reason upon not less than five (5) days written notice to AGENCY. OUSD shall compensate AGENCY for services satisfactorily provided through the date of termination. The OUSD After Schools Program shall also annually review the AGENCY's performance and bring recommendations to terminate the AGENCY to the Board.

5.2. **Termination for cause by OUSD.** In addition, OUSD may terminate this MOU or any Scope of Work entered for cause should AGENCY fail to perform any part of this MOU. Upon approval by OUSD legal counsel, the OUSD Superintendent or an OUSD Chief or Deputy may issue the termination notice without approval by the BOARD, in which case this Agreement would terminate upon ratification of the termination by the BOARD or three (3) days after the notice was provided, whichever is later, unless the condition or violation ceases or satisfactory arrangements for the correction are made. If OUSD's cost of procuring services from another contractor exceeds the cost of providing the services pursuant to this MOU, AGENCY shall pay the additional cost for the services through the end of the Term identified in Section 3.

5.3. In the event of termination or suspension, AGENCY must, upon request, follow all transition protocols and actively participate in the transition process, attend all transition meetings, promptly turn in all keys and key fobs, transfer custody of all records, and inventory of all after-school supplies.

5.4. **Average Daily Attendance Requirement.** In the event, an AGENCY fails to achieve 86 percent of their annual attendance target in any given calendar year (EC Section 8483.7[a][1][D]), AGENCY will be placed on probation from (January-May). If AGENCY is unable to meet compliance deliverables to improve ADA, AGENCY's contract will be assessed to determine capacity to continue serving as the expanded learning provider at the school site.

July-Dec: Capacity building, site work to increase ADA compliance

Jan-May: Assessment Period, sites will review ADA to comply with 86% ADA requirements. Sites that fall below expectations, tier 2 supports will be implemented.

Aug-Dec: Intensive Supports, sites falling below 86% ADA, intensive tier3 supports will be implemented.

Jan-May: Transition

5.5. **Suspension.** If OUSD, at its sole discretion, develops health and/or safety concerns related to the AGENCY's provision of services, then the CSSS Executive Director may, upon approval by OUSD legal counsel, issue a notice to AGENCY to suspend the Agreement or Scope of Work, in which case AGENCY shall stop providing services under the Agreement until further notice from OUSD. OUSD shall compensate AGENCY for services satisfactorily provided through the date of suspension. During the period of suspension, OUSD may procure services from another agency.

5.6. **No Premature Termination by AGENCY.** AGENCY hereby certifies that it is willing and able to provide required services for the full term of the MOU. AGENCY will not be permitted to unilaterally terminate the MOU or cease providing required services prior to completing the full term unless OUSD approves any change. In the event AGENCY ceases to provide required services prior to the end of the MOU term, OUSD may secure the required services from another contractor. If OUSD's cost of procuring services from another contractor exceeds the cost of providing the services pursuant to this MOU, or OUSD is unable to secure required services from another contractor, AGENCY shall pay any additional cost through the end of the term identified in Section 4. If OUSD suffers any loss of funding or other program consequences attributable to AGENCY's premature termination, AGENCY shall pay any additional cost in addition to any damages otherwise due under this MOU.

5.7. Alignment with OUSD's initiatives: (Creating Joyful Spaces) - Complaints, safety, lack of inclusion. (compromises district initiatives) _moving from approved to conditional. What does High Quality look like. Observations look like?

6. **Compensation.** Contingent on OUSD receipt of California Department of Education and/or U.S. Department of Education after-school grant funds and subject to grant funding levels, the ASES, 21st

CCLC, and ELO-P grant award amount for the school sites listed above, funding projection is based on three-year grant totals for each school site identified in Exhibit A. The three-year not-to-exceed amount for this Master Contract is \$ 9,087,186.60. AGENCY shall be entitled to compensation from these funds in accordance with the following terms and conditions:

6.1.Total Compensation. Subject to the provisions of 6.2 Positive Attendance and the provisions of 6.3 Administrative Fee and subject to AGENCY compliance with Master Contract requirements, AGENCY shall receive the amount of the grant award less OUSD's administrative fees and other site costs agreed to by the Site Administrator and AGENCY. Funding will be contingent on CDE grant allocations. Penalties may be assessed or payments withheld for non-compliance, including but not limited to Master Contract requirements, accurate attendance reporting, fiscal invoicing, full participation at OUSD required meetings, training, and in continuous quality improvement efforts. Falsification of attendance or any compliance documents will result in the termination of the contract.

6.2.Positive Attendance. Payment for services rendered related to the ASES, 21st CCLC, ASSETS, and ELO-P grants shall be based on actual student attendance rates (\$10.18 a day per student through ASES, 21st CCLC, ASSETS, and ELO-P.), not estimates, as those programs are "positive attendance based." OUSD reserves the right to modify the annual core allocation based on reported attendance. In the event that payments made to AGENCY exceed the reported attendance for the Core grant, the AGENCY will return payments to OUSD at the rate of \$10.18 a day for ASES, 21st CCLC, ASSETS, and ELO-P per student. Documentation of attendance must be submitted through the OUSD's Aeries student information system in order for invoices for payment of services for the ASES, 21st CCLC, ASSETS, and ELO-P grants to be processed. Attendance is due by the 10th day of the following month. In the event that any school site at which AGENCY has agreed to provide programming is closed for any emergency reason (including but not limited to reasons related to COVID-19), and AGENCY provides programming remotely pursuant to Section 7.4.5 of this MOU, AGENCY shall calculate attendance based on student participation in AGENCY's remote programming.

6.2.1. Reconciliation Process for Positive Attendance Based Grant Funds. OUSD will adjust the payment of the "positive attendance based" grants based on a quarterly review of monthly invoices and attendance for services rendered related to the ASES, 21ST CCLC (Core Grant), ASSETS, and ELO-P for any adjustments resulting from the reconciliation of the attendance reports for that quarter's months. The attendance reconciliation process will assess the program's performance with respect to the required compliance with the grant mandated attendance rates. Based on the review, financial adjustments of an additional payment or withholding will be made. Any remaining balance(s) will be forwarded to AGENCY or OUSD. Any adjustment required in excess of the withholding will necessitate additional adjustments to future invoices and payments.

6.2.2. Administrative Charges and Reconciliation. The reconciliation process for positive attendance-based grants must factor in the subtraction of administrative and other OUSD central charges, as outlined in section 6.3, from any grant amounts earned through attendance (OUSD indirect, custodial, evaluation, and After School Programs Office administrative and training/technical assistance fees).

6.3.OUSD Administrative Fees. OUSD shall charge and withhold up to 14% from the overall ASES, ELO-P, and 21st Century grant awards for central indirect, administrative, custodial, evaluation, and direct service training and technical assistance.

6.4.AGENCY Administrative Fees. AGENCY understands and agrees that it may not charge more than 5% of the total contract amount as administrative fees and that its administrative fees must be set at an appropriate dollar amount to keep the ASES, 21st CCLC, ASSETS, and 10% ELO-P grants within the grant-mandated allowable 15% for total indirect/administrative costs. The agency administrative fees charged to the ASES, ELO-P, and 21st CCLC grants must be used for direct administrative costs and cannot be used for agency indirect costs. Direct administrative

costs consist of expenditures for administrative activities that provide a direct benefit to the ASES, 21st CCLC, ASSETS, and ELO-P programs. Indirect costs consist of expenditures for administrative activities necessary for the general operation of the agency, but that cannot be tied to the ASES, 21st CCLC, ASSETS, and ELO-P programs.

6.5. Program Budget. The grant will remain as part of the site budget. Funds will be encumbered from the site budget on behalf of AGENCY for each school year during the term of this Agreement and will not exceed the budget reflected in Exhibit B for each Scope of Work.

6.6. Site Coordinator. (Per EC Section 8483.9(c)), the cost of a program Site Coordinator may be included as direct service provided that at least 85 percent of the Site Coordinator's time is spent at the program site.

6.7. Modifications to Budget. Any modifications to the approved grant budget must be approved by OUSD and AGENCY, before expenditures of funds for modified line items are authorized. Except as expressly set forth herein, OUSD shall not be liable to AGENCY for any costs or expenses paid or incurred by AGENCY in performing services for OUSD. The granting of any payment by OUSD, or the receipt thereof by AGENCY, shall in no way lessen the liability of AGENCY to correct unsatisfactory work, although the unsatisfactory character of that work may not have been apparent or detected at the time a payment was made. Work, that does not conform to the requirements of this Agreement, may be rejected by OUSD and in that case must be replaced by AGENCY without delay.

6.8. Program Fees. The intent of the ASES, 21st CCLC, ASSETS, and ELO-P programs is to establish local programs that offer academic assistance and enrichment for students in need of such services regardless of their ability to pay. Though it is not against the rules to charge fees for participation in programs, the CA Department of Education discourages it because it could exclude students in need from attending and taking advantage of the after-school program. Fees should not create a barrier to participation in the after-school program. After-school services must be equally accessible to all students targeted for services regardless of their ability to pay. Programs that propose to charge fees may not prohibit any family from participating based on their inability to pay and must offer a sliding scale of fees and scholarships for those who could not otherwise afford to participate. Any income collected from fees must be used to fund program activities specified in the grant application. AGENCY shall do full accounting of fees collected, and documentation shall be kept for 5 years for auditing purposes. If AGENCY decides to charge fees, this decision shall be made collaboratively with the Site Administrator, and AGENCY shall work collaboratively with the Site Administrator and parent leaders to develop an appropriate program fee structure for the school community. The fee structure must be identified within the Scope of Work approved by both parties prior to charging any program fees. AGENCY shall provide the OUSD After School Programs Office with additional documentation upon request, to ensure grant compliance. Programs that charge program fees will waive or reduce these fees for students eligible for free or reduced-priced meals. Programs cannot charge fees if the child is a homeless youth, as defined by the federal McKinney-Vento Homeless Assistance Act (42 U.S.C. Sec.1143a), newcomers (refugee, asylee, and unaccompanied minor), or if the child is in foster care. Any site receiving 21st Century Community Learning Center (CCLC) and ASSETS must report all fees collected (i.e., registration fees, family fees, application fees, etc.) to the OUSD After-School Program Office for CDE reporting. (EC 8482.6)

7. Services. AGENCY will serve as the lead agency at the OUSD school sites identified in the annual Scope of Work, will be responsible for operations and management of the ASES, 21st CCLC, ASSETS, ELO-P, OFCY, and private grants contracted to AGENCY by OUSD for fiscal years 2025-2026- through 2027-2028. This shall include the following required activities:

7.1. Student Outcomes. AGENCY shall achieve the student outcomes described in the grant application narrative and articulated in documents from the program evaluation team, both of which are incorporated herein. AGENCY agrees to develop school specific outcomes, as defined

in partnership with the principal. AGENCY recognizes that the principal is the chief decision maker for after-school and summer programs, and ensures that school site objectives are met. (EC 8483.3[c][5], 8483.3[c][6])

7.2.Alignment with Single Plan for Student Achievement (“Site Plan”). AGENCY will ensure the after-school program aligns with objectives of OUSD and OUSD school sites identified in the “School Site List and Annual Grant Amounts” attached hereto as Exhibit A which are designed to ensure the success of students as articulated in the Site Plan(s). AGENCY will work in partnership with the school principal(s) to ensure that the program components are aligned with and complement OUSD standards and school site curriculum. (EC 8483.3[c][5], 8483.3[c][6])

7.3.Alignment with LCAP. AGENCY will ensure the after-school program aligns with objectives LCAP Goal 2: Focal student groups demonstrate accelerated growth to close our equity gap and should be supportive of other LCAP goals, as identified in the Annual Expanded Learning Opportunity Program Planning Tool within the Scope of Work. (EC8483.3[c][6])

7.4. Continuous Quality Improvement (CQI). AGENCY must fully engage in continuous quality improvement (CQI) processes and complete the following steps of the CQI cycle each year, and timely submit corresponding CQI deliverables to the After School Programs Office:

- beginning of year self-assessment using Truth, Hope, Change, Curiosity tool
- planning with data (using self-assessment and other program data as available)
- development of a quality action plan with SMART goals for program improvement
- progress check for program quality e.g. quality coaching

The CQI cycle is intended to be a collaborative process involving program staff and can include other stakeholders (ie. youth leaders, school partners, parents, and other community partners).

Agency staff (Site Coordinators and other agency staff) are also required to participate in any OUSD sponsored CQI training provided by the OUSD After School Programs Office.

7.5.Oversight. AGENCY will provide oversight, fiscal management, payroll services, technical assistance, and facilitation of collaboration with other service providers. Agency must ensure compliance with ASES and 21st CCLC and ASSETS, and ELO-P funding guideline requirements and follow OUSD after-school policies and procedures. This includes compliance with OUSD staffing requirements and policies including No Child Left Behind and other legislative mandates. OUSD’s Expanded Learning Office will monitor all compliance requirements and provide regular supervision of sites at its discretion. AGENCY will provide all necessary documents within 48 hours of written request by OUSD.

7.6.Enrollment. At each OUSD school site identified in the “School Site List and Annual Grant Amounts” attached hereto as Exhibit A, and for which there is a Scope of Work, AGENCY will enroll sufficient number of students and run services for a sufficient number of days to earn the full core grant allocation of funding.

7.7.Program Requirements

7.7.1. Program Hours. The program shall be offered Monday through Friday, every regular school day annually (EC Section 8483[a][1]), commencing immediately upon the conclusion of the regular school day, operating a minimum of 15 hours/week, and until 6:00 pm daily.(EC 8483[a][1]), EC Section 8483[a][1][A][i]). Instructional activities must include a balance of both academic, enrichment/recreation, and physical components (EC Section 8483.3[c][5]). ELO-P funding can be used to support intercession programming and before-school care. AGENCY will ensure expanded learning programs commence at full capacity on the first day of school and conclude on the last day of school.

- 7.7.2. **Program Days.** The program shall be offered a minimum of 177 - 180 days during the 2025–2026 through the 2027-2028 school years (EC Section 8483[a][1]). AGENCY will close the ASES, 21st CCLC, ASSETS, and ELO-P program(s) no more than a maximum of 3 days in each of the 2025-2026 through the 2027-2028 school years for staff professional development, as permitted by Education Code. Programs that receive 21st CCLC Supplemental or ELO-P grant funds or private funding for summer shall additionally operate a sufficient number of days and hours in the summer, on weekends, and during intercession in the manner prescribed by the grant legislation and/or funder, in order to meet attendance goals required by the CA Department of Education and/or the funder. AGENCY can not utilize ASES/21stCCLC/ASSETS/ELO-P professional development days during the first week of school.
- 7.7.3. **Program Staffing.** AGENCY agrees to ensure each school site is fully staffed (lead agency staff and/or subcontractors) and able to provide comprehensive programming to 86% of the grants ADA requirement commencing on the first day of school and continuing through the last day. AGENCY will ensure staff are clearly identifiable. Site coordinator salary is considered direct service and the Site coordinator must be on campus at least 85% of the time (8483.9[c]). AGENCY will provide staff with training and development (EC Section 8483.3[c][4]) to ensure high quality programming. Selection of the Site Coordinator is subject to the approval of the school site principal (EC Section 8483.4)
- 7.7.4. **Program Components.** AGENCY agrees to provide programming that supports the guidelines as outlined in the ASES, 21st CCLC, ASSETS, and ELO-P grants for students identified at each of the schools listed in the “School Site List and Annual Grant Amounts” attached hereto Exhibit A. AGENCY acknowledges and agrees to provide programming consistent with grant guidelines understanding that:
- **Educational and Literacy.** An educational and literacy element that must provide tutoring and/or homework assistance designed to help students meet state standards in one or more of the following core academic subjects: reading/language arts, mathematics, history and social studies, or science. A broad range of activities may be implemented based on local student needs and interests. (EC 8482.3[c][1][A], 8482.3[f][6], 8483.3[c][1])
 - **Enrichment.** The enrichment element must offer an array of additional services, programs and activities that reinforce and complement the school's academic program. Enrichment may include but is not limited to arts, youth development, leadership, recreation, sports, music, career awareness, college interest, service learning, and other youth development activities based upon student needs and interests. (EC 8482.3[c][1][B], 8482.3[f][6], 8483.3[c][2]) All programs must offer both enrichment and recreation/physical fitness activities as core components of the after-school program, and summer program if summer program is provided. (EC 8483.3[c][7])
 - **Family Literacy Services.** AGENCY shall assess the need for family literacy services among adult family members of the students to be served by the program. All programs will, at a minimum, either refer families to existing services or coordinate with local service providers to deliver literacy and educational development services. (EC Section 8482.3[c][1][A])
 - **Equitable Access Programming.** AGENCY shall include a component for students at all schools site receiving Equitable Access funding to support full access to program components.
 - **Supplemental and Summer Services.** In all programs receiving 21st CCLC Supplemental and/or ELO-P grant funds or private funding for summer, AGENCY will provide educational and enrichment programming in the summer, on weekends, and/or during intercessions. A broad range of activities may be implemented based on local student needs and interests, and district guidelines for summer programming. If summer services will be added, a separate Scope of Work will reflect the summer scope, summer budget and any changes in location as to summer services to be provided.
 - **Elementary and Middle School Sports League Activities.**
All programs participating in the Middle School Sports League must include those activities in their Program Planning tool and Program Schedule. Middle School Sports League activities, including but not limited to on and off-site practices and games, are subject to the field trip

policy high-risk field trip activities requirements provided in this agreement. All sports participants and volunteers must have on file a completed Elementary and Middle School Sports Release of Liability and Assumption of Risk prior to participation. The Elementary and Middle School Sports Release of Liability and Assumption of Risk template will be provided to the AGENCY by OUSD prior to the beginning of each school year.

- **Tk-6 school sites that receive ELO Program** funding are required to offer the ELO Program to all TK/K-6 classroom-based pupils and provide program access to any TK/K-6 classroom-based pupils upon parent/guardian request. (46120(d)(1)(B) or 46120(d)(4)). TK is not optional and is included in the requirement because TK is operated as a program within Kindergarten.

7.7.4.1. **Super Snacks/Snack/Supper/Beverages:** AGENCY shall meet Federal and State meal and snack requirements (8482.3[d][1], 8482.3[d][2], 8483.3[c][8]) and all meals and snacks must be provided by OUSD Nutrition Services department. Nutrition Services shall:

7.7.4.1.1. Provide meals and beverages that meet State and Federal standards;

7.7.4.1.2. Provide the number of meals and beverages requested by AGENCY unless/until Nutrition Services determines that AGENCY's participation is lower than the super snack/snack/meal/beverage count provided by the AGENCY, in which case, the number will be adjusted;

7.7.4.1.3. Provide all supplies including utensils, napkins, forks, required;

7.7.4.1.4. Support compliance by AGENCY with required State and Federal administrative requirements;

7.7.4.1.5. Provide annual training to AGENCY.

7.7.4.2. Each AGENCY participating in the Nutrition Services super snack/snacks/supper/beverage program shall:

7.7.4.2.1. Attend annual training. In the event that the person responsible for super snack or snack distribution changes, AGENCY will make arrangements with Nutrition Services for training of new employees or representative of the AGENCY;

7.7.4.2.2. Complete After School Super Snack, Snack, and Supper Menu Production Worksheets (MPW) on a daily basis;

7.7.4.2.3. Ensure meal count is accurate;

7.7.4.2.4. Submit completed MPW to cafeteria staff by the next business day;

7.7.4.2.5. Return leftovers to the cafeteria;

7.7.4.2.6. Ensure that only students are served and receive food from the program;

7.7.4.2.7. Ensure that meals are not removed from campus

7.7.4.2.8. Immediately report to OUSD Site Coordinator and Nutrition Services any concerns related to food safety or food contamination

7.7.4.3. AGENCY will be billed at the rates immediately below, for meals by Nutrition Services under the following conditions.

7.7.4.3.1. MPW not completed and submitted by the next business day;

7.7.4.3.2. Super Snacks and Snacks are ordered and not picked up

7.7.4.4. In addition to any applicable liability associated with audit findings. AGENCY will be charged OUSD's current meal costs that OUSD is unable to claim due to AGENCY's failure to comply with program requirements: The current costs for the 2024-2025 school year are below; these amounts may change throughout the life of the agreement.

7.7.4.4.1. Super Snack: \$3.66

7.7.4.4.2. Supper: \$3.66

7.7.4.5. AGENCY will be liable for audit findings and/or assessments (See Section 12 below) that are attributable to AGENCY's failure to comply with the rules and regulations of the Nutrition Services program, including liability if reimbursement is denied Nutrition Services because of AGENCY's failure to comply with program requirements.

7.7.4.6. In accordance with guidance provided by the California Department of Education, in the event that the school site at which AGENCY has agreed to provide programming is closed for any emergency reason (including but not limited to reasons related to COVID-19), OUSD may fulfill its above-described obligations to provide after-school meals, snacks, and/or beverages through a "grab-and-go" meal distribution program, in which case AGENCY shall not be responsible for distributing after-school meals, snacks, and/or beverages.

7.7.5. **Staff Ratio.** The staff to youth ratio shall not exceed 1:20 for elementary, middle, and high school programs, with no more than 20 youth for each qualified, adult staff supervisor. TK-K programs must operate on a 1:10 staff to youth ratio. (EC Section 8483.4)

7.7.6. **Remote Provision of Services.** In the event that the school site at which AGENCY has agreed to provide programming is closed for any emergency reason (including but not limited to reasons related to COVID-19), AGENCY shall provide programming remotely, rather than in-person at the school site.

7.8. **Data Collection.** AGENCY will work with OUSD to collect and analyze data on student enrollment, student attendance, student academic performance, student satisfaction, and parent satisfaction. This includes, but is not limited to:

7.8.1. **Accountability Reports.** AGENCY will provide OUSD with the following set of program accountability reports:

- Financial reports
- Activity reports
- Attendance reports
- Outcomes reports: behavioral and academic
- Staff qualifications

7.8.2. **Attendance Reports.** AGENCY will provide OUSD with attendance reports using the OUSD/OFCY attendance systems and maintain required attendance records utilizing the OUSD/OFCY attendance systems, including completion of mandatory monthly reports. Original written documentation of all daily attendance records, including all daily sign in/out sheets, will be maintained by Agency for 5 years following the termination of this Agreement for auditing purposes. (EC 8482.3[f][10][A], 8484[a][1][A])

7.8.3. **Use of Enrollment Process.** AGENCY will use OUSD online and paper After School Program Parent Permission packet, including early release waiver, for all after-school participants. Forms will be provided to AGENCY by OUSD prior to the beginning of each school year. AGENCY will seek approval from the OUSD After School Programs Office for any modifications to the OUSD enrollment packet, in advance of distribution.

7.9. **Maintain a Clean, Safe, and Secure Environment.** AGENCY shall maintain clean, safe, and secure program environments for staff and students in conjunction with OUSD guidelines.

AGENCY, as they view necessary, will initiate and establish additional cleanliness, safety, supervision, training, and security policies and protocols sufficient to ensure staff, student, and family member safety. (EC 8483.3[c][3])

7.10. AGENCY shall register with and maintain current information within OUSD's Community Partners Database, unless OUSD communicates to AGENCY in writing otherwise, based on OUSD's determination that the services are not related to community schools outcomes. If/when agency programs and school sites change (mid-year or subsequent years), AGENCY shall promptly update the information in the database.

7.11. **Alignment of After School Safety Plan with School Site Comprehensive Safety Plan.** AGENCY will use the OUSD After School Program Emergency Plan template and work collaboratively with school site administrator(s) to complete and/or update and submit an annual after-school safety plan(s) by mid-October each year which aligns with and is part of each school site's comprehensive safety plan. AGENCY will seek approval from the OUSD After School Programs Office for any modifications to the OUSD template, in advance of distribution.

7.12. **AGENCY shall comply with all applicable California and Federal laws,** regulations, and ordinances. This includes, but is not limited to, compliance with the California Labor Code 6401.9 (Workplace Violence Prevention Plan Law), as well as any other laws related to labor, employment, safety, health, and environmental regulations. The AGENCY shall ensure that all activities and services conducted under this Agreement are in strict compliance with such laws and regulations. Any violation of these laws, regulations, or ordinances by the AGENCY or any of its employees, subcontractors, volunteers, or agents shall constitute a material breach of this Agreement.

7.12.1. **OAKLAND UNIFIED SCHOOL DISTRICT will not tolerate workplace violence** and is committed to maintaining a safe workplace for all employees, supervisors, managers, vendors, contractors, and visitors. The workplace is defined as any time or place when on School District business, at a School District sponsored event, or if the conduct has an impact on the workplace, regardless of where the conduct occurs. Prohibited actions include, but are not limited to, the following types of behaviors:

- Striking, punching, slapping, or assaulting another person
- Throwing or kicking objects
- Direct or implied threat to do harm to a person or to a property
- Threatening or intimidating communications or gestures
- Expression of a plan to hurt self/others
- Possession of a dangerous, deadly weapon (including imitation weapons) at the workplace, unless an employee has been authorized in advance
- Inappropriate behavior, statements, or actions that could reasonably be perceived as aggressive, threatening, or violent.

7.13. **Incident and Injury Reporting, Crisis Response and Training; Accident Insurance**

7.13.1. AGENCY will train staff and agents in required Incident and Injury Reporting and Crisis Response Protocols. All accidents or injuries to after-school program participants, visitors, or staff must be reported via email to OUSD's incident reporting email address identified in the Incident and Injury Reporting and Crisis Response Protocols by AGENCY staff within one business day of occurrence. OUSD will secure at its own expense limited OUSD student accident insurance coverage to assist in payment of eligible student medical expenses incurred by parent/guardians due to OUSD student accidents during the after-school program. This coverage will be secondary to any primary medical insurance for which student participants are eligible. After School Program staff will immediately refer parent/guardians seeking payment of medical expenses under student accident coverage to OUSD's designated accident insurance representative.

7.13.2. AGENCY will provide adaptive programming to support all OUSD students needs within **reasonable accommodations**. AGENCY will provide a welcoming environment to students who are physically, racially, ethnically, linguistically, and neurologically diverse to participate in expanded learning programs. Students with Individualized Education Programs (IEPs) or Section 504 Accommodation Plans (504s) are encouraged to enroll in expanded learning, including after-school programming. OUSD will assess and provide additional support to a school site to ensure reasonable accommodations are met.

7.14. **Meeting Participation.** AGENCY will participate in technical assistance, training, orientation, monthly meetings and other support and resource development activities provided by OUSD and collaborative partners in conducting program planning, implementation, and evaluation. These include required regular meetings with the school principal or other identified designee to ensure collaboration with the school vision. AGENCY staff will participate in meetings facilitated by the OUSD After School Programs Office to address program quality, program improvement and general troubleshooting

7.15. **AGENCY will ensure staff is trained by an OUSD nurse to provide emergency medication** for students with conditions such as asthma (albuterol inhaler), diabetes (glucagon, baqsimi (nasal spray)), severe allergies (Epi-pen), seizures (nayzilam, valtoco (nasal spray)), and any other condition where an emergency medication is prescribed which can be administered by trained staff in an emergency. This includes Non-emergency medication: ADHD medication, Benadryl, and Tylenol.

7.15.1.1. Epi-Pen Medication Overview:

- Epinephrine is the medication used in a severe allergic reaction. Epinephrine will open the airways and increase circulation.
- Pre-measured doses of the medication are placed into auto-injectors or EpiPens.
- It is safe to give epinephrine even if there is not a reaction.
- The sooner it is given; epinephrine is more likely to reduce the chance of death.
- Students given epinephrine must go to the hospital for observation.

7.15.2. **OUSD will be responsible via a School Nurse to monitor school district medication** administration practices for compliance with established policies and procedures. This will include providing training to assigned staff in the appropriate administration of medication aligned with the school district policy and procedure, and maintain student medication records confidentiality.

7.16. **Relationships.** AGENCY will maintain six essential collaborative relationships to ensure partnerships toward effective program implementation:

- Administration, faculty, and staff of each school site covered by this Master Contract (Exhibit A)
- OUSD After School Programs Office
- OUSD central administration departments
- Parents/Guardians
- Youth
- Community organizations and public agencies

7.17. **Licenses.** AGENCY shall obtain and keep in force all licenses, permits, and certificates necessary for the performance of this Agreement.

7.18. **Transportation of Students.** AGENCY will ensure student safety by ensuring a policy that requires staff to have the necessary insurance coverage under section 8.3.8 to drive students in their personal cars. In addition, AGENCY will need signed permission from the family.

- 7.19. Loss of Standing as Qualified Organization:** Failure to ensure MOU requirements are fulfilled may result in loss of good standing as a qualified organization and/or termination of the partnership.
- 7.20. Student Discipline & Due Process:** No student may be removed from participation in an after-school program operated by an Expanded Learning Lead Agency without due process. AGENCY must adhere to all applicable policies, procedures, and regulations governing student discipline to ensure fairness, equity, and transparency in decision-making.
- 7.20.1. Review and Determination by OUSD Expanded Learning Office (EXLO): In the event that a student exhibits behavioral conduct that may warrant removal from the program, the Expanded Learning AGENCY must document all incidents, interventions, and attempts to support the student prior to any determination. Before taking any action to remove a student, the AGENCY shall submit a formal incident report and request for review to the OUSD Expanded Learning Office (EXLO).
- 7.20.2. Approval Prior to Removal: The EXLO will conduct a comprehensive review of the reported behavioral conduct, including any mitigating circumstances, documented interventions, and student support strategies. The EXLO shall determine whether removal from the program is an appropriate and necessary action. No student shall be removed from participation unless and until the EXLO has vetted and approved such action in writing.
- 7.20.3. Interim Measures: While awaiting EXLO review and approval, the AGENCY may implement temporary interventions, including but not limited to, behavior contracts, additional supervision, modified participation, or referrals to support services. However, an AGENCY may not enact a unilateral removal or exclusion of a student without following the due process outlined herein.
- 7.20.4. Notification & Appeal: If removal is approved, the AGENCY must provide formal written notice to the student's parent/guardian, outlining the reasons for removal and any available appeal process. Appeals must be submitted in writing within 30 days to the EXLO office for reconsideration.
- 7.20.5. Non-Discrimination & Equity: All decisions regarding student behavior and potential removal must be made in alignment with OUSD policies on equity, inclusion, and non-discrimination. No student shall be excluded from participation in the program based on race, gender, disability status, or other protected classifications.
- 7.20.6. Compliance & Accountability: Failure to adhere to this process may result in corrective action against the Agency.
- 7.21. Equipment & Supply Inventory Management:** All equipment and supplies purchased for the Expanded Learning Program (ELP) using funding from the After School Education and Safety (ASES), Expanded Learning Opportunities Program (ELOP), After School Safety and Enrichment for Teens (ASSETs), or 21st Century Community Learning Centers (21st CCLC) grants remain the sole property of the Expanded Learning Program and do not belong to the Lead Agency. Lead Agencies are prohibited from repurposing, transferring, or claiming ownership of such equipment for any use outside the scope of the Expanded Learning Program.
- 7.21.1. Inventory & Documentation Requirements: Lead Agencies are required to maintain an accurate, up-to-date inventory of all equipment and non-consumable supplies purchased with grant funds. The inventory shall include, at a minimum:
- Item description
 - Date of purchase
 - Cost of purchase
 - Serial number (if applicable)
 - Location of the item
 - Condition/status of the item

This inventory must be submitted to the OUSD Expanded Learning Office (EXLO) annually and made available upon request for audits or compliance reviews.

7.21.2. Use, Storage, & Maintenance: Equipment and Supplies must be used exclusively for Expanded Learning Program activities and stored securely at the designated program site(s). Lead Agencies are responsible for ensuring proper maintenance and safeguarding of all program-purchased equipment.

7.21.3. Transfer & Disposition of Equipment: If a Lead Agency discontinues its partnership with the Expanded Learning Program or ceases operations at a site, all purchased equipment and remaining non-consumable supplies must be returned to the OUSD Expanded Learning Office or transferred to a designated successor agency as determined by OUSD. The Lead Agency may not sell, repurpose, or otherwise reallocate equipment outside of these guidelines.

7.21.4. Compliance & Enforcement: Failure to comply with inventory management and equipment ownership requirements may result in financial liability, grant non-compliance, or termination of the MOU. The OUSD Expanded Learning Office reserves the right to conduct site visits, audits, and compliance checks to ensure adherence to these provisions.

8. Field Trip Policy. **FIELD TRIPS, OFF-SITE EVENTS, AND OFF-SITE ACTIVITIES:**

8.1. AGENCY shall provide each Site Administrator and the OUSD Expanded Learning Office with a schedule of all after-school program field trips and/or off-site events and/or off-site activities, on a template to be provided by OUSD, by the first day of each semester, and a schedule of all summer field trips and/or off-site events and activities by the first day of the summer program, if AGENCY is providing summer services.

8.2. All field trips and off-site events/activities must be approved in advance by OUSD; AGENCY representatives, including staff and subcontractors, may not take students off-site for events, activities, and field trips without OUSD's approval. AGENCY shall submit OUSD's Field Trip request form to the after-school site coordinator, agency director, and site administrator to seek approval. AGENCY shall comply with OUSD policy and regulations regarding Field Trips.

If AGENCY becomes aware of an unauthorized field trip or off-site activity/event prior to the trip taking place, AGENCY shall cancel the trip/activity and notify the family, site leader, and OUSD Expanded Learning Office. Nothing in the preceding sentence shall be construed as requiring reporting to families, site leaders, or OUSD Expanded Learning Office when it is prohibited by law.

If AGENCY becomes aware of an unauthorized field trip or off-site activity/event after the trip/activity has taken place, AGENCY shall immediately terminate the AGENCY staff or subcontractor organizing the trip, and notify the family, site leader, and OUSD Expanded Learning Office. Nothing in the preceding sentence shall be construed as requiring reporting to families, site leaders, or OUSD Expanded Learning Office when it is prohibited by law.

8.3. AGENCY hereby certifies that after-school and any summer program staff and/or subcontractors will comply with OUSD board policy and regulations, and the procedures in Sections 8.3, 8.4, 8.5, and 8.6, for all field trips, off-site events and off-site activities.

8.3.1. **Licenses Permission Slips/Acknowledgement.** Field trip/excursion permission slip must be signed by parent(s)/guardian(s) of all student participants and an acknowledgment must be signed by all adult chaperones both of which shall include the following information:

8.3.1.1. a full description of the trip and scheduled activities

8.3.1.2. student/adult participant health information

- 8.3.2. **"Notice of Waiver of All Claims:** Education Code § 35330 provides that all persons making a field trip or excursion shall be deemed to have waived all claims against any school district, charter school, or the State of California for injury, accident, illness or death occurring during or by reason of the field trip or excursion, regardless of who holds the claims. If the field trip or excursion to which this permission slip applies is out-of-state, I hereby knowingly waive all of my and my daughter's/son's/ward's claims against any school district, charter school, and/or the State of California for injury, accident, illness or death occurring during or by reason of the out-of state field trip or excursion."
- 8.3.3. After-school and summer program staff or subcontractors leading trip must have a written list of students attending the trip.
- 8.3.4. No student shall be prevented from making a trip due to lack of sufficient funds.
- 8.3.5. After school and summer program staff or subcontractors leading the trip shall have a sufficient first aid kit in their possession or immediately available. If the trip is conducted in areas known to be infested with poisonous snakes, this first aid kit shall contain medically accepted snakebite remedies.
- 8.3.6. **Health Conditions/Medication:** Trip participant health information will be gathered and reviewed in advance of the trip and any needed revisions to the supervision plan made, including making sure that chaperones understand relevant information (e.g. food allergies). A plan will be developed to collect, secure, and dispense prescription medications from their original containers only and consistent with the physician's instructions.
- 8.3.7. **Supervision**
- 8.3.7.1. AGENCY Executive Director must review and approve the supervision plan.
- 8.3.7.2. Trip as structured is appropriate to age, grade level, and course of study.
- 8.3.7.3. Chaperones are all AGENCY employees or subcontractors, parent(s)/guardian(s), or other authorized chaperones and are 21 or older. After School and Summer Program Coordinators and lead trip staff are satisfied that all chaperones are willing and able to perform required duties, including understanding and implementing instructions, understanding health information for students in their group, and responding effectively in the event of an emergency. Trip attendees shall be limited to assigned school or after-school program staff, students, and authorized chaperones. Guests, including but not limited to friends and other family members, are strictly prohibited absent prior written approval of the after-school program coordinator or AGENCY executive director. Before the trip, after school and summer program staff leading the trip shall provide any adult chaperones who may accompany the students with clear information regarding their responsibilities. Chaperones shall be assigned a prescribed group of students and shall be responsible for the continuous monitoring of these students' activities. Chaperones shall not consume alcoholic beverages or be under the influence of controlled substances while accompanying and supervising students on a trip.
- 8.3.7.4. When a trip is made to a place of business or industry, staff shall arrange for an employee of the host company to serve as conductor.
- 8.3.7.5. Adult: Student Ratio is at least 1:10 or higher if swimming or wading or high-risk trip. If the trip involves water activities, this ratio shall be revised to ensure closer supervision of elementary grade or younger students, appropriate to their ages. The ratio of adults to students on field trips and excursions shall be reasonable under the circumstances.
- 8.3.7.6. Safety requirements have been met (e.g.: current First aid/CPR training of at least one chaperone, first aid kits, emergency contact and health info, instructions for chaperones, staff and chaperones have cell phones which are charged and available for communication).

8.3.8. **Transportation Requirements:** The AGENCY after-school and summer program staff or subcontractors shall ensure compliance with all state laws and may transport by the use of AGENCY's own equipment, contract to provide transportation, or arrange transportation by the use of other equipment to enrolled after school and summer participants provided that: (A) parent/guardians' written permission has been obtained in advance; (B) After School Program Coordinator and/or Summer Program Coordinator has confirmed that: transportation arrangements are safe and appropriate; (C) all drivers have valid California driver's license; (D) all drivers have received fingerprint clearance; (E) provided that such transport is covered under driver or registered owner's personal automobile insurance or AGENCY automobile liability insurance policy for at least \$100,000 per individual and \$300,000 per occurrence for liability for bodily injury; and \$50,000 per occurrence for liability for property damage; (F) all drivers and registered owners of private or rented vehicles used shall complete and sign declaration of driver forms assuring that: (i) the driver is at least 21 years of age and holds a current valid California driver's license;(ii) the driver has not been convicted of reckless driving or driving under the influence of drugs or alcohol within the past five years; and (iii) the driver provides proof of sufficient insurance; (G) if AGENCY transports by use of an Agency owned vehicle or arranges and/or contracts with a third party to provide this transportation, the AGENCY or organization or company with whom they contract must meet or exceed the standards required of OUSD's District approved bus vendors, including but not limited to: be licensed as a transportation provider, be certified to transport students (e.g., School Pupil Activity Bus certification) and have at least \$5,000,000 Automobile liability and \$1,000,000 per occurrence/\$2,000,000 aggregate General Liability insurance; which has an endorsement naming OUSD and AGENCY as additional insured; (H) arrangements have been made for additional vehicle for use in event of illness or emergency; and (I) students receive instruction in safe conduct on bus or other transport; and (J) drivers shall receive safety and emergency instructions and information which shall be kept in their vehicle, including health and emergency information for each student riding in his/her vehicle.

8.3.9. AGENCY must have reasonable confirmation that all organizations involved in the trip have demonstrated expertise and exhibit reasonably safe and reputable operating procedures and business practices appropriate to student trips.

8.3.10. Vendor is licensed to provide all proposed activities.

8.3.11. All after-school program student participants on field trips, off-site events, or activities must be covered by medical or accident insurance. (See Incident and Injury Reporting and Accident Insurance above.)

8.4. **Additional Requirements for High Risk, Overnight, or Out of State Trips:**

8.4.1. **Definition of High-Risk Activities**

8.4.2. Because of concerns about the risk to student safety, the after-school program coordinator shall not permit the following activities on campus or during AGENCY sponsored after-school or summer program trips, events, and activities unless the activity is properly supervised, students wear protective gear as appropriate, and each participant has medical or accident insurance coverage:

- Amusement Parks
- Interscholastic Athletic Activities
- Bicycle riding
- Circus Arts
- Hiking (Moderate to rigorous terrain or length) vs short nature "walks"
- Hang gliding
- Horseback riding
- Ice Skating
- In-line or Roller Skating
- Rock climbing, climbing walls

- Skateboarding or use of non-motorized scooters
- Snow sports of any kind
- Trampoline; Jumpers
- Motorcycling
- Rodeo
- Target Shooting
- Water Activities including but not limited to: swimming, snorkeling, scuba diving, sailing, boating, kayaking, river rafting, water slides, water skiing etc.
- Outdoor active, experiential programs (Ropes course, pulley, etc.)
- Other activities determined by the school principal to have a high risk to student safety

8.4.2.1. The cost of limited OUSD student accident insurance coverage for student accidents during such activities shall be borne by OUSD.

8.4.2.2. Students who operate or ride as a passenger on a bicycle, non-motorized scooter or skateboard upon a street, bikeway, or any other public bicycle path or trail shall wear a properly fitted and fastened bicycle helmet that meets the standards of law. Students also shall be required to wear such helmets while wearing in-line or roller skates.

8.4.3. Department of Justice and FBI fingerprinting and fingerprint clearance must be obtained for all non-District employee chaperones. Chaperones who continue beyond one school year will need to get fingerprint clearance once every three years from the time they begin chaperoning on after-school program trips. Chaperones shall act in accordance with district policies, regulations, and school rules. A person who is required to register as a sex offender pursuant to Penal Code 290 shall not serve as a chaperone on any field trip.

8.4.4. No chaperone shall be assigned to provide supervision or instruction of students unless he/she has submitted evidence of an examination within the past 60 days to determine that he/she is free of active tuberculosis. Chaperones whose skin test is negative shall thereafter be required to take a tuberculosis test every four years or sooner if deemed necessary by AGENCY.

8.4.5. Letter must be sent to parent(s)/guardian(s) and if it is an overnight trip, a meeting must be held for staff, chaperones, parent(s)/guardian(s), and students in advance of the trip to discuss trip and safety-related procedures, itinerary and questions.

8.4.6. Sleeping arrangements and night supervision are safe and appropriate.

8.4.7. **Vendor Proof of Insurance:** After School Program Coordinator and/or Summer Program Coordinator has obtained proof of insurance from all private vendors including:

- Facility
- Program

8.5.Additional Requirements for Field Trips/Excursions Which Include Swimming or Wading

8.5.1. No swimming or wading shall be allowed on trips unless planned and approved in advance.

8.5.2. When wading in the ocean, bay, river, or other body of water as part of a planned, supervised outdoor education activity, after-school program staff shall provide for a number of chaperones to exceed the normal one to ten ratios and shall instruct both chaperones and students of the real and potential risks inherent in such activities and the precautions necessary for their safety.

8.5.3. Swimming Activities

8.5.3.1. Parents/guardians must provide written permission for the student to swim and must indicate the student's swimming ability. Students whose parents do not give permission for their child to swim shall be identified in advance of the trip and a tracking system is designed to ensure they do not enter the pool or swim area.

- 8.5.3.2. Swimming facilities, including backyard pools, must be inspected by the AGENCY Executive Director and after-school program staff before the trip is scheduled.
- 8.5.3.3. Owners of private pools must provide a certificate of insurance, designating OUSD and AGENCY as an additional insured, for not less than \$2,000,000 in liability coverage.
- 8.5.3.4. Lifeguards must be designated for all swimming activities. If lifeguards are not provided by the pool owner or operator, the AGENCY Executive Director shall ensure their presence. The AGENCY Executive Director shall ensure that lifeguards are Red Cross certified or equivalent and must be at least 21 years old. A swim test must be administered before any student is permitted in the deep end of the pool or swim area. A tracking system shall be designed in advance of trip to identify those students who have and have not passed the swim test.
- 8.5.3.5. The ratio of adult chaperones to students shall be at least one to ten. In grades 4-6, this ratio shall be at least one to eight. In grades K-3, this ratio shall be at least one to four.
- 8.5.3.6. Specific supervisory responsibilities shall be determined in advance to accommodate the varying swimming abilities of students. These responsibilities shall be clarified in writing and reviewed verbally before the trip.
- 8.5.3.7. Emergency procedures shall be included with written instructions to adult chaperones and staff.
- 8.5.3.8. Staff and chaperones assigned to supervise students must wear swimsuits, know how to swim, and be at each side of the pool or swim area actively monitoring students at all times.
- 8.5.3.9. The After School Program Coordinator and/or Summer Program Coordinator may require students to wear flotation devices, depending upon their age and swimming ability.
- 8.5.3.10. A buddy-system or other means of surveillance shall be arranged in advance and strictly enforced during swimming activities.

8.6. Additional Requirements for trips to East Bay Regional Park District Bodies of Water (swimming pools, lagoons, shoreline parks and lakes) and Related Facilities

- 8.6.1. At least 2 weeks prior to trip date, all persons attending trip, including, but not limited to, each and every student, teacher, instructor, chaperone, supervisor, parent, administrator, volunteer, or aide (hereinafter "participant") will provide to the OUSD Office of the General Counsel an original, properly completed, signed and dated East Bay Regional Park District Waiver, on a form to be provided by the OUSD to AGENCY prior to the beginning of each school year, executed by either the participant if he or she is 18 years of age or older, or the participant's parent or legal guardian if the participant is under 18 years of age
- 8.6.2. Should AGENCY fail to provide an original, properly completed, signed, and dated East Bay Regional Park District Waiver for each trip participant as defined in Section 6.13.1 above, AGENCY agrees to hold harmless, defend and indemnify OUSD, its officers, employees, volunteers, and agents from all claims and actions resulting therefrom.

8.7. In the event that a field trip cannot proceed as planned for any reason (including but not limited to the closure of the field trip destination in response to COVID-19), AGENCY shall provide alternative programming to students (including remote programming, in the event that the school site at which AGENCY has agreed to provide programming is closed).

- 9. **Financial Records.** AGENCY agrees and understands that OUSD is responsible for fiduciary and programmatic oversight for the expenditure of the ASES, 21st CCLC, ASSETS, & ELO-P grant funds contracted to AGENCY by OUSD for the fiscal year 2025-2028 (EC 8482.3[f][5]). AGENCY will function as a sub-recipient of funding and as such, will follow all required fiscal guidelines and meet outlined

standards as referenced in applicable Federal and State sub-recipient guidelines for the federal 21st Century Community Learning Centers grant program, CFDA Number 84.287, awarded by the Office of Elementary and Secondary Education Academic Improvement and Teacher Quality Programs office. Sub-recipients that receive over \$500,000 of federal funds are required to undergo an annual audit and communicate findings to OUSD, as requested. AGENCY will ensure that all contracted funds of this MOU are expended as per grant guidelines.

9.1.**Accounting Records.** AGENCY will maintain its accounting records based upon the principles of fund accounting.

9.2.**Disputes.** AGENCY shall make all records related to ASES, 21ST CCLC, ASSETS, and ELO-P available to OUSD for review. OUSD and AGENCY shall meet and confer regarding any disputes as to the amount of actual expenses before taking any action to collect funds.

10. Invoicing

10.1. **Billing Structure.** AGENCY shall only invoice for actual expenditures incurred. Supporting documentation must be presented along with monthly invoices upon request. Billing details must be provided upon request to OUSD to ensure compliance with related sub recipient and grant guidelines.

10.2. **Unallowable Expenses.** AGENCY may not purchase computers or capital equipment using ASES, 21st Century Core Grant, 21st Century Direct Access, or 21st Century Family Literacy funds.

10.3. **Invoice Requirements.** AGENCY will submit invoices with evidence of the following staff qualifications for each AGENCY employee and AGENCY agent, including employees of subcontracting agencies and volunteers: TB Clearance, current CA Department of Justice and FBI fingerprint clearance, and Instructional Aide requirement. AGENCY will utilize the required OUSD invoicing and staff qualifications form, to be provided by OUSD to AGENCY prior to the beginning of each school year, for regular invoice submission.

10.4. **Submission of Invoices.** AGENCY must submit invoices to OUSD on a timely and regular basis for services rendered through the Expanded Learning Office's Salesforce Database. OUSD will not accept invoices submitted more than thirty days beyond the end of each fiscal quarter. No invoices will be accepted more than 30 days past the end of June 30 of the contractual fiscal year. AGENCY must also submit invoices according to specific invoicing deadlines as outlined by OUSD to ensure timely processing. **(Exhibit C)**

10.5. **Submission of Invoices for ASES, 21st Century, and ELO-P Grants.** For services rendered related to the ASES, 21st CCLC, ASSETS, ELO-P grants, OUSD shall pay AGENCY, on a monthly basis, for appropriately documented expenses related to the ASES, 21ST CCLC, ASSETS, and ELO-P grants, with a cumulative total for 2025-2028 not to exceed the amount identified in Section 6, and in accordance with the attached Exhibits to this Memorandum. Invoices for payment of services shall be submitted by the 10th of each month to the OUSD Expanded Learning Office via Salesforce Community invoicing tool. AGENCY will also submit the required OUSD invoicing and staff qualifications form via the Salesforce Community.

11. **Ownership of Documents.** AGENCY agrees that, pursuant to California law, it shall maintain program and fiscal documentation for the ASES, 21st CCLC, ASSETS, and ELO-P programs for a minimum of five years. All documents created by AGENCY pursuant to this MOU, including but not limited to reports, designs, schedules, registration packets, early release waivers, and other materials prepared, or in the process of being prepared, for the services to be performed by AGENCY, are and shall be at the time of creation and thereafter the property of OUSD, with all intellectual property rights therein vested in OUSD at the time of creation. OUSD shall be entitled to access to and copies of these materials during the progress of the work. Any such materials in the hands of AGENCY or in the hands of any subcontractor upon completion or termination of the work shall be immediately delivered to OUSD. If any materials are lost, damaged or destroyed before final delivery to OUSD, AGENCY shall replace them at its own expense

and AGENCY hereby assumes all risks of loss, damage or destruction of or to such materials. AGENCY may retain a copy of all materials produced under this MOU for its use in its general business activities.

12. Changes

- 12.1. **Agency Changes.** AGENCY may, at any time, request in writing changes to the Scope of Work. In the event that AGENCY encounters any unanticipated conditions or contingencies that may affect the scope of work or services and result in an adjustment in the amount of compensation specified herein, AGENCY shall so advise OUSD immediately upon notice of such condition or contingency. The written request shall explain the circumstances giving rise to the unforeseen condition or contingency and shall set forth the proposed adjustment in compensation. Such notice shall be given to OUSD prior to the time that AGENCY performs work or services related to the proposed adjustment in compensation. Any and all pertinent changes shall be expressed in an amended Scope of Work and signed by OUSD prior to AGENCY's implementation of such changes; changes that increase the proposed budget may require prior approval by the BOARD.
- 12.2. **Changing Legislation.** AGENCY understands that changes in Federal or state legislation or District policy may impact funding levels, grant requirements, and responsibilities of AGENCY during an academic school year. This MOU may be amended during the 2025 - through the - 2028 fiscal years to reflect additional changes resulting from such legislation.

13. Conduct of Consultant

- 13.1. **Staff Requirements.** AGENCY must comply with all Federal and State employment and labor laws. AGENCY will adhere to the following staff requirements for each AGENCY "agent", including employees, staff of subcontracting agencies, and volunteers. AGENCY will provide OUSD with evidence of staff qualifications, consistent with invoicing requirements outlined in Section 8.3 which include:
- 13.1.1. **Child Abuse and Neglect Reporting Act.** AGENCY will provide at its own expense Mandated Reporter training equivalent to that set forth in California Education Code section 44691(b) to all AGENCY agents at least annually within their first month working with OUSD students and comply with the Child Abuse and Neglect Reporting Act (CANRA) guidelines as Mandated Reporters to report suspicions of possible child abuse to the appropriate reporting agency as stated in California Penal Code § 11164 – 11174.
- 13.1.2. **Tuberculosis Screening.** AGENCY agents who work with students must submit to a tuberculosis risk assessment as required by EC 49406 within the prior 60 days. If tuberculosis risk factors are identified, AGENCY agents must submit to an intradermal or other approved tuberculosis examination to determine that he/she is free of infectious tuberculosis. If the results of the examination are positive, the AGENCY agent shall obtain an x-ray of the lungs. At his/her discretion, AGENCY agent may choose to submit to the examination instead of the risk assessment.
- 13.1.3. **Fingerprinting of Agents.** Current California Department of Justice (CDOJ) fingerprint clearance and FBI fingerprint clearance for each AGENCY agent working with students. AGENCY shall not permit its agents to come into contact with students until CDOJ and FBI clearance is ascertained, and AGENCY shall certify in writing to OUSD that none of its agents who may come into contact with pupils have been convicted of a violent or a serious felony. AGENCY shall further certify that it or its subcontracting agencies have received and reviewed fingerprint results for each of its agents, and Agency or its subcontracting agencies shall request and review subsequent arrest records for all agents who may come into contact with OUSD pupils in providing services to the District under this Agreement. (EC 8483.4)
- 13.1.4. **Minimum Qualifications.** AGENCY staff and agents who directly supervise students and are included in the 1:20 staff-to-student ratio (EC 8483.4) must meet the following minimum

qualifications for an instructional aide: a high school diploma or its equivalent and one of the following: (a) an AA degree; or completion of 48-semester units in college; or (b) successful completion of the Instructional Assistant exam, administered by the Alameda County Office of Education. In addition, AGENCY shall provide at its own expense, First Aid and CPR Training to sufficient AGENCY staff to ensure that no less than 2 AGENCY staff members with current First Aid and CPR Training are present on-site during the program each day. AGENCY must provide staff and agents adequate professional development, training, coaching, and preparation time to enable staff and agent performance to meet the goals of the ASES/21st Century after-school grant program and provide a safe and secure program.

- 13.2. **Removal of Staff.** In the event that OUSD, in its sole discretion, at any time during the term of this MOU, desires the removal of any AGENCY related persons, employee, representative or agent from OUSD school site and/or property, AGENCY shall immediately upon receiving notice from OUSD of such desire, cause the removal of such person or persons. In the event OUSD requests the removal of any AGENCY related persons, employees, representatives, or agents from the OUSD school site and/or property, the OUSD site administrator shall provide to the AGENCY written, supporting rationale for the decision. OUSD After School Program Office, after conferring with Legal and the Executive Officer supporting the site, shall decide, taking all the facts and circumstances into account, if AGENCY may reassign an employee or agent to another OUSD site. Prior to the removal or change of any AGENCY staff member who is a regular part of the after-school program, AGENCY shall inform the Site Administrator with as much notice as possible, and will work with the Site Administrator to ensure a smooth transition in staffing.
- 13.3. **Conflict of Interest.** AGENCY shall abide by and be subject to all applicable OUSD policies, regulations, statutes or other laws regarding conflict of interest. OUSD shall be permitted to hire an officer or employee of AGENCY for OUSD services in connection with or unrelated to this Agreement and AGENCY shall be permitted to hire any officer or employee of OUSD to perform any service by this Agreement, provided that the agreement attached hereto as Exhibit G is fully executed prior to the performance of any services by the officer or employee. AGENCY affirms to the best of his/her/its knowledge, there exists no actual or potential conflict of interest between AGENCY's family, business or financial interest and the services provided under this MOU, and in the event of a change in either private interest or services under this MOU, any question regarding possible conflict of interest which may arise as a result of such change will be brought to OUSD's attention in writing.
- 13.4. **Drug-Free / Smoke-Free Policy.** AGENCY understands that OUSD does not permit drugs, alcohol, and/or smoking at any time in any buildings and/or grounds on OUSD property. AGENCY agrees to adhere to this policy for its students, staff, visitors, employees, and or subcontractors.
- 13.5. **Non-Discrimination.** Consistent with the policy of OUSD and California and Federal laws, AGENCY shall not engage in unlawful discrimination of students on the basis of actual or perceived physical or mental disability, medical condition, sex, gender, gender identity, gender expression, nationality, race, or ethnicity, religion, sexual orientation, or any other characteristic that is contained in the definition of hate crimes set forth in Section 422.55 of the California Penal Code. Consistent with the policy of OUSD in connection with all work performed under Contracts, AGENCY shall not engage in unlawful discrimination in employment on the basis of actual or perceived race, color, national origin, ancestry, religion, age, marital status, pregnancy, physical or mental disability, medical condition, veteran status, gender, sex or sexual orientation. AGENCY agrees to comply with applicable Federal and California laws including, but not limited to, the Americans with Disabilities Act, Section 504 of the Rehabilitation Act, Title IX and the California Fair Employment and Housing Act beginning with Government Code Section 12900 and Labor Code Section 1735 and OUSD policy. In addition, AGENCY agrees to require like compliance by all its subcontractor(s).
- 13.6. **Bullying; Sexual Harassment.** The District's Board of Education recognizes the harmful effects of bullying and sexual harassment on student learning, school attendance, and

participation in after-school programs. In order to have safe environments that protect students from physical and emotional harm, AGENCY shall establish student safety as a high priority and shall not tolerate sexual harassment or bullying of any student. AGENCY shall adopt a policy expressly against harassment, sexual harassment, intimidation, and bullying and ensure related training on prevention and response is accordingly provided for all AGENCY employees and agents. AGENCY employees shall undergo training around appropriate interactions with students in child development settings.

- 13.7. **Restorative Justice (RJ) and Positive Behavioral Interventions and Supports (PBIS).** As a part of the District's commitment to eliminate disproportionality in discipline affecting African American male students, the District has initiated Restorative Justice and PBIS programs at many school sites. AGENCY is encouraged to learn more about these programs at school sites and work with District Staff to implement programs in the after-school programs that support a positive school climate.

14. **Indemnification.** AGENCY shall indemnify, hold harmless and defend OUSD and each of its officers, officials, employees, volunteers, and agents from any loss, liability, audit fines, assessments, penalties, forfeitures, costs, and damages (whether in contract, tort or strict liability, including but not limited to personal injury, death at any time and property damage) incurred by OUSD, AGENCY or any other person and from any claims, demands, and actions in law or equity (including attorney's fees and litigation expenses), arising or alleged to have arisen directly or indirectly out of performance of this MOU. AGENCY's obligations under the preceding sentence shall apply jointly and severally regardless of whether OUSD or any of its officers, officials, employees, volunteers, or agents are actively or passively negligent, but shall not apply to any loss or liability, fines, penalties, forfeitures, costs or damages caused solely by the active negligence or by the willful misconduct of OUSD. If AGENCY should subcontract all or any portion of the work or activities to be performed under this MOU, AGENCY shall require each subcontractor to indemnify, hold harmless and defend OUSD, its officers, officials, employees, volunteers, or agents in accordance with the terms of the preceding paragraph.

15. **Insurance.** Throughout the life of the MOU, AGENCY shall pay for and maintain in full force and effect with an insurance company(s) admitted by the California Insurance Commissioner to do business in the State of California and rated not less than "A/VII" in Best Insurance Rating Guide, the following policies of insurance and shall require each subcontractor to do the same:

- 15.1. **Commercial General Liability** insurance which shall include contractual, products and completed operations, corporal punishment and sexual misconduct and harassment coverage, and bodily injury and property damage liability insurance with combined single limits of not less than \$1,000,000 per occurrence / \$2,000,000 aggregate.
- 15.2. An ACORD Sheet for Professional Liability or Corporal Punishment insurance: It should have minimum policy limits of \$1MM per occurrence and \$2MM aggregate;
- 15.3. Either one of these two types of coverage are acceptable - It should be on an ACORD Sheet: A) Improper Sexual Conduct & Physical Abuse Liability or B) Sexual Abuse & Molestation. It should have minimum policy limits of \$1MM per occurrence and \$2MM aggregate minimum
- 15.4. **Worker's Compensation** insurance, as required by the California Labor Code, with not less than the statutory limits.
- 15.5. **Property and Fire** insurance shall provide to protect: Real Property, against risk of direct loss, commonly known as Special Form and Fire Legal Liability, to protect against liability for portions of premises leased or rented; Business Personal Property, to protect on a Broad Form, named peril bases, for all furniture, equipment, and supplies of AGENCY. If any OUSD property is leased, rented, or borrowed, it shall also be ensured the same as real property.

The above policies of insurance shall be written on forms acceptable to the Risk Manager of OUSD and endorsed to name the OUSD, its officers, employees, volunteers or agents, as additional insured. Said

Additional Insured endorsement shall be provided to OUSD upon AGENCY's execution of this MOU and before work commences under this Master Contract. If at any time said policies of insurance lapse or become canceled, OUSD may immediately terminate this agreement. The acceptance by OUSD of the above-required insurance does not serve to limit the liability or responsibility of the insurer or AGENCY to OUSD. (Exhibit D). OUSD has the rights to update the insurance requirements and AGENCY must comply with the updated requirements. Failure to comply will result in the termination of contract.

16. **Legal Notices.** All legal notices provided for under this MOU shall be sent via email to the email address set forth below, or personally delivered during normal business hours, or sent by U.S. Mail (certified, return receipt requested) with postage prepaid to the other PARTY at the address set forth below.

OUSD

Name: General Counsel
Site/Dept: OUSD Legal Department
Address: 1011 Union Street, Site 946
City, ST Zip: Oakland, CA 94607
Phone: 510-879-5060
Email: OUSDLegal@ousd.org

AGENCY

Name: Melissa Mendez Ochoa
Title: Executive Director
Address: 510 Third Street, Suite 200
City, ST Zip: Oakland, CA 94609
Phone: 510-564-4334
Email: melissa.menez_ochoa@oaklandleaf.org

Notice shall be effective when received if personally served or emailed or, if mailed, three days after mailing. Either PARTY must give written notice of a change of mailing address or email.

17. **Incorporation of Recitals and Exhibits.** The Recitals and each exhibit attached hereto are hereby incorporated herein by reference.
18. **Counterparts.** This MOU and all amendments and supplements to it may be executed in counterparts, and all counterparts together shall be construed as one document.
19. **Program Books and Supplies.** Supplies can be purchased by OUSD and by the Lead Agency. A Lead Agency cannot exceed \$4,500 in supply purchases. Supplies to be used in both the school day and after-school program must be jointly funded, with a maximum of 50% applied to ASES/21st/ELOP/ASSETS. All supplies purchased with grant funding remain the property of OUSD and must remain at the site (see section 7.21).
20. **Certification Regarding Debarment, Suspension, Ineligibility, and Voluntary Exclusion:** The District certifies to the best of its knowledge and belief, that it and its principals: Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency according to Federal Acquisition Regulation Subpart 9.4, and by signing this contract, verifies that this vendor does not appear on the Excluded Parties List. <https://www.sam.gov/>

On behalf of our respective institutions or organizations, we hereby execute this Memorandum of Understanding.

OAKLAND UNIFIED SCHOOL DISTRICT	AGENCY
<div><input type="checkbox"/> President, Board of Education</div> <div><input type="checkbox"/> State Administrator</div> <div><input type="checkbox"/> Superintendent</div>	<div><div>Signed by:</div><div><div>Melissa Mendez Ochoa</div><div>5/9/2025</div></div><div>Agency Signature</div><div>Date</div></div> <div><div>Melissa Mendez Ochoa, Executive Director</div><div>Print Name, Title</div></div> <div>Attachments:<ul style="list-style-type: none">● Exhibit A. School Site List and Annual Grant Amounts● Exhibit B. Scope of Work Template and Budget Tool Template● Exhibit C. Procedure for Invoicing & Attendance● Exhibit D. Certificates of Insurance● Exhibit E. Statement of Qualifications● Exhibit F. Agency Letter● Exhibit G. Agreement to Allow Distinct and Separate Employment by OUSD and AGENCY</div> <div><div>Legislative File ID: <u>25-1313</u></div></div>
<div><div>Secretary, Board of Education</div><div>Date</div></div> <div><div><div>DocuSigned by:</div><div><div>Andrea Bustamante</div><div>5/9/2025</div></div><div>Executive Director</div><div>Community Schools and Student Services Dept.</div></div><div>Date</div></div> <div><div><div>Signed by:</div><div><div>Sandra Aguilera</div><div>5/19/2025</div></div><div>Chief Academic Officer</div><div>Continuous School Improvement</div></div><div>Date</div></div> <div><div>MOU template approved by OUSD Office of the General Counsel May 2025</div></div>	

Exhibit A
 Schools Sites Supported Under this Agreement and Annual Grant Amounts
 After School Programs (Not Summer School)

After-School Sites:

School Site Name:	Projected After-School Enrollment Numbers:	Projected Total Annual Grant:
Bret Harte Middle School	107	\$565,130.84
Cleveland Elementary School	83	\$552,612.13
EnCompass Academy	83	\$452,612.13
International Community School	83	\$452,612.13
La Escuelita Elementary	110	\$553,482.84
Think College Now Elementary	83	\$452,612.13
	Total:	\$3,029,062.20

Exhibit B

Blank Template of PPT and Budget Tool

INSERT HERE



25-26 OUSD Expanded Learning Programs - Program Planning Tool (PPT)

2025-2026 ELEMENTARY/MIDDLE & HIGH

Program Planning Tool Table of Contents			
Section		Purpose	Suggested Lead (Principal, Site Coordinator, Agency Director)
	School Site Information	Outlines vital programmatic info, including services, funding sources, and critical stakeholders.	Agency Director
	Program - Dates/Min Days	Identify program closure days for PD and clarify the minimum days for the school year.	Agency Director
	Program - Operations (attendance/staffing)	Outlines the attendance and enrollment goals for the program.	Agency Director
	Program Operations (Offering and Schedule, Sub-Contractors)	Description of program schedule and program offerings, including any subcontractors or community-based programs the after-school program will host.	Site Coordinator & Site Principal
	Program Model and Enrollment Process	Identifies program model and offerings, including intersession. It also includes an enrollment process and timeline.	Site Coordinator & Site Principal
	Inclusion	Describes State/Federal/OUSD's requirements for supporting all students.	Site Coordinator & Site Principal
	Program Components	Includes CDE-required program components and how the program will meet these (<i>educational and literacy component, educational enrichment, physical activity, social-emotional learning, family engagement, and universal design</i>).	Agency Director & Site Principal
	*Educational/Literacy		Agency Director & Site Principal
	*Social Emotional		Agency Director & Site Principal
	*Enrichment		Agency Director & Site Principal
	*Physical Activity		Agency Director & Site Principal
	*Family Engagement		Agency Director & Site Principal
	Continuous Quality Improvement		
	Facilities	Outlines which parts of the campus the Expanded Learning program will utilize, including UED programming.	Agency Director & Site Coordinator
	Campus Safety & Access	Includes safety agreements between the Lead Agency and the School Site, including a link to the safety plan	Agency Director & Site Principal
* Community School Managers and Quality Supports Coaches should be a part of the planning process.			

SECTION 1: SCHOOL SITE AND AFTER-SCHOOL PROGRAM INFORMATION

School Site Information							
School Site Name:		School Type:	Tk Only Site				
			0 Elementary (TK-5)				
			0 Elementary/Middle (TK-8)				
			0 Middle (6-8)				
Expanded Learning Lead Agency:			0 High School (9-12)				
			0 Alternative High School				
			0 Continuation High School				
			0 Comprehensive High School				
		Please indicate which funding source(s) is allocated to your site:					
After-School Funding Source:			0	ASES			
			0	21st CCLC			
			0	ASSETS			
			0	Expanded Learning Opportunity Program (ELO-P)			
			0	Oakland Fund for Children and Youth (OFCY)			
			0	Program Fees			
		* Complete program budget is located in the site's Quip program folder					
Program Model		Before School	0	After-School	0	Intersession	0
CDS Code: (This is a 14-digit code, search here)							
Principal Name:		Principal Signature and date:					
Lead Agency Signatory Name:		Lead Agency Signature and date:					
Executive Director, Community Schools & Student Services:	Andrea Bustamante	Executive Director, CSSS Signature and date:					

SECTION 2: PROGRAM OPERATIONS

PROGRAM DATES, MINIMUM DAYS & SCHEDULE
To be compliant with California Department of Education (CDE) grant requirements, the after-school program must commence immediately upon the conclusion of the regular day, operate a minimum of 15 hours/week, and be open until at least 6:00 pm on every school day for elementary and middle schools (EC 8483). Programs are required to operate all 180 days of the school year. Programs must begin to operate on the first day of school and run until the last day of school.
Program Operations for the 2025-2026 school year. First Day: August 11, 2025 Last Day: May 28, 2026.
2025 UPDATED ED CODE:

<p>Per CDE Education Code Section 8483.7(c) allows programs to close for a <u>maximum of 3 days during a calendar year (not a school year)</u> for staff development. Families and school site personnel must be notified of these program closure dates in advance, and the lead agency must maintain and upload documentation of professional development activities offered on these dates, including training agendas and staff sign-in sheets. This should be uploaded no later than 5 business days after the closure day.</p> <p>Identify the three days (if any) your program plans to close this year for PD. The program must be open all other days of the school year. (Updates for any date changes are due September 2025).</p>				
1st:		2nd:		3rd:
ATTENDANCE, STAFFING, OUTREACH, AND RECRUITMENT				
<p>All programs serving students TK through 6th grade must be accessible to all students who need it. All programs are required to meet their ASES and/or 21CCLC ADA or risk grant reductions in the following school year. Accordingly, it is important for site teams to work collaboratively with the lead agency to identify outreach strategies to eliminate waitlists.</p> <p>*Sites utilizing ELO-Program funds must OFFER comprehensive after-school and intersessional Expanded Learning Opportunities to ALL <u>unduplicated pupils</u> in Transitional Kindergarten/Kindergarten through sixth grade (TK/K–6) classroom-based instructional programs starting in 2025–26. California Education Code (EC) Section 46120(a)(1).</p> <p>*ELO-Program must prioritize enrollment for all <u>unduplicated pupils</u>.</p> <p>*Pupils that are foster, unhoused, ELL and/or qualify for free and reduced-price meals cannot be charged fees.</p>				
Enrollment Estimation: 25 - 26 (<i>for the site's combined funding</i>) (ASES, 21CCLC, and ELOP)			Average Daily Attendance: CDE ADA Target (ASES, 21CCLC, ASSETs)	
Staffing Estimations: Review enrollment projections for the 2025-26 school year to identify staffing requirements. All staff should be reflected in the Quip Budget - Allowable Expenses Crosswalk				
Grade Levels Served and Enrollment Estimations (Site-Based School Day Enrollment Data)				
Grade Level	TK/K 10:1 Student/Staff Ratio	1st - 5th Grade 20:1 Student/Staff Ratio	6th-8th Grade 20:1 Student/Staff Ratio	9th-12th Grade 20:1 Student/Staff Ratio
Enrollment Estimation				
Staffing Targets Based on the projected enrollment numbers				
Teachers on ET (not UED/QSC) or OUSD STAFF OT				
PROGRAM OFFERING, SAMPLE SCHEDULE, AND COMMUNITY-BASED PARTNERS (SUB-CONTRACTORS)				
0	The " Program Schedule " has been completed and uploaded into the deliverables folder.			

0	Insert Link Here: {Ensure it is uploaded in your deliverable folder}		
	The program schedule should include: <ul style="list-style-type: none"> a. Before care b. Class/Activity title, i.e., African Dance, Yoga - be specific c. Day and time program is being offered 		
	Use the attached template to describe program components, then link them to this document. Use the drop-box option (a) CDE--academic, enrichment, physical activity to indicate the component your offering fits under.		
	<i>*In the fall, sites are required to resubmit updated program schedules. This schedule should be clearly aligned with the supports identified in section 4.</i>		
Please list any community-based organizations/sub-contractors the site will partner with in the 2025-26 school year . All Subcontractors should also be in the site's Quip Budget - Allowable Expenses Crosswalk			
Organization Name: <i>Example: Jane's Cooking</i>		Estimated Contract Amount	Who will manage the services: <i>School Site - Lead Agency</i>
			Who is paying the subcontractor? (Lead Agency/School/ExLO)

SECTION 3: ENROLLMENT

ENROLLMENT PROCESS TO SERVE ALL STUDENTS	
ENROLLMENT PROCESS & TIMELINE	
Please use this template as an example.	
Upload Instructions: Please upload to your Program Plan Deliverables Folder. Please name your file in this format: SchoolName_EnrollmentTimeline.	
Please check the box below after completing the above instructions	
	The enrollment timeline has been uploaded to Google Drive Deliverables Program Plan folder.
Insert Link to Enrollment Timeline: _____	

SECTION 4: INCLUSION

INCLUSION - SUPPORTING ALL OUSD STUDENTS
*Please check all the boxes to demonstrate awareness and implementation of mandatory expectations.
Who can receive the Golden Ticket?
Per federal statute, California Education Code, and Oakland Unified School District policy, any students identified by the OUSD Transitional Student and Family Unit can receive a <i>Golden Ticket</i> . Golden ticket students

get priority access into the after-school program. If a student/family indicates they have a Golden Ticket, the correct response is to enroll and admit them immediately. If you have any concerns regarding their status, reach out to your Expanded Learning Program Manager. Transitional students are by definition:
- Any OUSD student who is a homeless youth, as defined by the federal <i>*McKinney-Vento Homeless Assistance Act (42 U.S.C. Sec. 1143a)</i> , who is in foster care, or is designated as an unaccompanied minor.
- Any OUSD student who identifies as a newcomer, refugee or as an asylee. <i>*Subtitle VII-B of the McKinney-Vento Homeless Assistance Act (42 U.S.C. § 11431 et seq.)</i>
- Establishes the definition of homeless used by schools
- Ensures that children and youth experiencing homelessness have immediate and equal access to public education
- Provides for educational access, stability, and support to promote school success
- Needed to address the unique barriers faced by many homeless students
- OUSD's ExLO will also distribute Golden Tickets to students under special circumstances (Example: Emergency Transfers)
0 The expanded learning lead agency is aware of and will implement the OUSD Golden Ticket Policy.
Reasonable Accommodations Handout. Expanded Learning Inclusion Policy
Oakland School Board passed Resolution No. 2021-0159 in June 2021: Ensuring Access to Social-Emotional and Academic Supports for Students with Disabilities.

SECTION 5: PROGRAM COMPONENTS

PROGRAM COMPONENTS (The descriptions below should reflect the site's specific needs)

[CDE](#) requires that programs must provide a safe environment and include an **educational component** that provides tutoring and/or homework assistance; and an **educational enrichment** component, which may include, but is not limited to STEAM, recreation, prevention, and other Social Emotional Learning (SEL) activities (EC Section 8482.6); and provide opportunities for **physical activity**. (EC Section 8483.3[c][7]) The description below should reflect site-specific needs.

1) EDUCATIONAL COMPONENT

OUSD requires that part of your Educational Component focuses on Literacy and includes academic support in the core subject (language arts, math, history/social science, etc). Make sure to include how district literacy practices will be integrated.

- (i) Describe how the expanded learning program will provide the educational & literacy component.
- (ii) How are students building academic skills?
- (iii) How does the program align/supplement the school day priorities and curriculum?

Respond Below:

2) How is social-emotional academic development being integrated? (Include specific strategies for creating a safe & supportive environment through encouragement and actively engaged learning.) (i.e., collaborative skills, self-management, responsible decision-making, etc.)

Respond Below:

3) Enrichment Component that offers students engaging activities in various areas (fine arts, career technical

education, presentation, etc.)
How does the expanded learning program choose which educational enrichment activities are offered? <i>(Include specific strategies designed to foster skill-building youth voice and leadership, and diversity, access and equity.)</i>

Respond Below:

4) Physical Activity is an activity other than recess that is structured and supervised with a warm-up, structured physical activities, and a cool down. (This should happen for all students in the program.)
CDE expects Elementary programs to offer 30-60 minutes of developmentally appropriate, daily physical activity (to help meet CDE recommendation of 30-60 daily minutes of moderate to vigorous physical activity for youth). This is not ‘free play’ or recess. (We understand Middle and High will vary based on sports programs and scheduling. Programs should provide a physical component to non athletes.)
Please explain how the expanded learning program will address physical activity in your program, including type, frequency, and target population. All students should have the opportunity for physical activity).
<ul style="list-style-type: none"> · Plan and evaluate (review fitness test results, track minutes, etc.) · Include a variety of activities throughout the year
Describe how the expanded learning program will provide structured physical activity for all participants. <i>(Include specific strategies to promote healthy choices and behaviors.)</i>

Respond Below:

5) Family Engagement that may include literacy activities and other educational services that engage adult family members of students.
Describe how the expanded learning program provides opportunities to promote literacy and/or other educational services to adult family members of students?

Respond Below:

SECTION 6: CONTINUOUS QUALITY IMPROVEMENT

SECTION 6: CONTINUOUS QUALITY IMPROVEMENT (Alignment with CDE)	
This cycle of improvement revolves around twelve critical standards—the Quality Standards for Expanded Learning in California —which were developed in partnership between the California Department of Education’s (CDE) After School Division and the California Afterschool Network (CAN) Quality Committee.	
POINTS OF SERVICE Quality Standards & PROGRAMMATIC Quality Standards	
Resources:	
Definitions: CDE Quality Standards	
Unpacked: CDE Quality Standards & CQI Spectrum	
Unpacked: CDE Quality Standards & CQI Spectrum	
0	<u>California Department of Education Quality Standards have been entered into the Google Form.</u>
Identify a Point of Service Standard you want to work on next year based on your data from Public Profit and set a goal for your program.	

Evaluation Data Point:
Point of Service Quality Standard:
Goal:

SECTION 7: FACILITIES

SECTION 8: Facilities			
(a)	Plan with the school site administrator which rooms and outside spaces the expanded learning program will use Monday - Friday from the start of the program to 6 pm. Make sure to include bathrooms and snack areas.		
(b)	Lead Agency Director, will go into the Facilitron website to complete facilities usage requests no later than May 16, 2025. Visit the Facilitron website at: www.facilitron.com/dashboard/login		
	*NOTE: If using the school kitchen during the program, there needs to be an additional approved Facilitron request . A Nutritional Services (NS) staff member must supervise the proper use of the kitchen equipment and clean up afterward. Program using the kitchen will need to pay for the NS staff member's time during the kitchen use, similar to custodian services. The staff's hourly rate will determine the rate of pay.		
0	Lead Agency has reserved all facilities in Facilitron.	Date Entered into Facilitron	
Indoors (specify # of rooms) <i>i.e. 10 classrooms / 160 students</i>		Common spaces (specify space names) <i>i.e. Cafeteria, library, gym, large play yard, etc</i>	
# of classrooms	# of Students	Hours to be used	Which common spaces will your program use?

SECTION 8: CAMPUS SAFETY AND ACCESS

Section 8: Campus Safety and Access	
Please collaborate with the school's administration team to come up with agreements around campus safety and facility entrances. Add a link to the OUSD protocol. OUSD School Administrator Guidance to Police-Free Response Protocol	
Which entrances and exits will be open during the transition to afterschool?	
Once the transition has occurred, how can teachers or parents access the campus to leave or pick up students?	
In case of a lockdown or a secure school, does the site coordinator have access to keys they need to safely carry this out? What other adults on campus after school who should calibrate with afterschool for safety?	
Stay Away Orders The site principal will ensure communication between school day and	

after school regarding stay away orders. What is the process for the principal to inform the expanded learning site coordinator when a stay away order is implemented?	
Add a link to your 2025-2026 safety plan.	
Indicate all actions that will occur to ensure after-school program safety and alignment with school day procedures for emergency preparedness and emergency response:	
0	The Site Administrator and ExLO Site Coordinator will meet at beginning of the school year to update the Expanded Learning Safety Plan collaboratively.
0	The school site will share the Comprehensive School Site Safety Plan with the site coordinator.
0	School day and expanded learning programs will coordinate emergency drill schedules & procedures (ie. earthquake, fire, and lockdown drills).
0	Expanded learning staff will participate in site-level faculty safety trainings.
0	School will provide expanded learning staff with access to disaster supplies and other resources in case there is an emergency after school.
0	Site Administrator and ExLO Site Coordinator will meet regularly to review expanded learning incidences and update safety plans as needed.
0	The completed Expanded Learning 2026-2027 Safety Plan will be submitted to the Expanded Learning Programs Office by 10/1/25.
2. List the training and resources the school will provide to after school staff on safety procedures, including lockdown procedures and communication protocols for crisis response. <i>How will you ensure staff is trained for emergencies? What are the onsite communication protocols and expectations?</i>	
0	The principal and site coordinator have reviewed the OUSD Expanded Learning Emergency/Crisis 1st Level Response Notification Protocol and understand expectations regarding communication and incident reporting when an issue involving after-school safety
0	Expanded learning coordinator will have access to facility keys to ensure safety for after-school programs. Should a lockdown or a secure school is needed. The expanded learning Program will have access to facility keys for all areas where expanded learning programming occurs?
Culture Keeper	
0	The school site will utilize expanded learning and/or school day funds to pay Extra-time/Over-time (ET/OT) for an ExLO Culture Keeper.
0	The school site does not need a Culture Keeper,

2025-2026 AFTER SCHOOL BUDGET PLANNING SPREADSHEET

Site Name:			ASES			21CCLC Core			21CCLC Equitable Access			ELO-P		OFCY Match Funds	Program Fees (if applicable)	Other School Site Funds	Other Lead Agency Funds
Site #:		%	Resource 6010, Program		%	Resource 4124, Program		%	Resource 4124, Program		%	Resource 2600, Program					
Average # of students to be served daily (ADA):		0.00	OUSD Lead Agency			OUSD Lead Agency			OUSD Lead Agency			OUSD Lead Agency Lead Agency Lead Agency				OUSD	Lead Agency
TOTAL GRANT AWARD			0.00			0.00			0.00			0.00					
OUSD Indirect (5.00%)			0.00			0.00			0.00			0.00					
OUSD ASPO admin, evaluation, and Custodial Staffing and Supplies at 3.5%			0.00			0.00			0.00			0.00					
TOTAL SITE ALLOCATION			0.00			0.00			0.00			0.00					
1120	Quality Support Coach/Academic		3050			0			0			0				0	
1120	Certificated Teacher Extended		0			0			0			0				0	
1120	Certificated Teacher Extended																
1120	Certificated Teacher Extended																
Total certificated			3050 0			0 0			0 0			0 0 0 0				0 0 0	
2205	Site Coordinator (list here, if district		0			0			0							0 0	
2225	Culture Keeper (optional)		0			0			0							0	
Total classified			0 0			0 0			0 0			0 0 0 0				0 0 0	
3000's	Employee Benefits for Certificated		747.25			0			0			0					
3000's	Employee Benefits for Classified Staff		0			0			0			0					
3000's	Employee Benefits for Salaried		0			0			0			0					
Total benefits			747.25 0			0 0			0 0			0 0 0 0				0 0 0	
4310	Supplies		0													0 0	
4310	Curriculum		0													0 0	
5829	Field Trips		0 0													0 0	
4420	Equipment (including computers -		0													0 0	
Bus tickets for students																	
Total books and supplies			0 0			0 0			0 0			0 0 0 0				0 0	

Facilities count toward 25% of this match requirement:	0.00	
Remaining match amount required:	0.00	
Match should be met by combined OFCY funds,	0.00	
Total Match amount left to meet:	0.00	

Required Signatures for Budget Approval:

Principal:
Lead

Date:
Date:

Exhibit C (1)



PROCEDURE FOR INVOICING & ATTENDANCE
Oakland Unified School District
Comprehensive After School Programs

The following procedures are required in submitting invoices that utilize ELO-P, 21st Century and/or ASES funding:

All ELO-P, 21st Century and/or ASES attendances and invoices must be submitted via the OUSD/Expanded Learning Salesforce Community.

- ◆ All attendance must be entered into Aeries Student Information System, and all copies of sign-in/sign-out sheets must be uploaded into the site's deliverable Google folder by the 10th of every month. Attendance sign-in must comply with OUSD and CDE's protocols.
- ◆ A detailed breakdown of charges must be provided, including the number of hours worked and the hourly rate. All subcontractors' payments and purchases under \$500/per item must be reflected in the corresponding invoice. Receipts for purchases made with expanded learning funds must be attached to the invoice to support any expenses reflected on the invoice. Bus itinerary and reservation documentation must be attached for all field trip expenditures **Failure to fully complete an invoice according to these specifications may result in a delay of payment.**
- ◆ All invoices should cover only one calendar month, i.e. the 1st through the 30th or 31st, and should be entered by the 10th of every month.
- ◆ Contractor, Agency, Site Coordinator, and Principal signatures will be collected through the Salesforce Community Database and DocuSign. All of these signatures must be signed by the intended individual.
- ◆ **Invoices should be accompanied by one Invoicing and Staff Qualifications form per school site.**

If there are any questions regarding the invoicing process, please contact the expanded learning program manager.

PROCEDURES for PAID INSERVICE/EXTENDED CONTRACTS and TIME SHEETS OUSD CERTIFICATED TEACHERS

The following procedures are required in submitting fiscal forms for Paid In-service/Extended Time for OUSD employees utilizing the 21st Century and/or ASES funding:

Paying OUSD Certificated Employees (Teachers)

- ◆ Extended Contract teachers should submit a “Request for Extended Contract” form to After School Programs Office IN ADVANCE to approve all projected work to be completed, using appropriate Budget Org Key (Object Code usually -1120 or -1122)
- ◆ Have Employee sign Extended Contract & ALL Time Sheets
- ◆ Have Principal approve and sign Extended Contract & ALL Time Sheets
- ◆ Please be sure to submit ORIGINALS of all documents
- ◆ Please use only ONE SIDED Time Sheets
- ◆ Deliver to OUSD After School Programs Office — All ELO-P, 21st Century and/or ASES Extended Contracts and Time Sheets must be submitted via email to the OUSD After School Programs Office in order to be processed and paid.
- ◆ **Union Contract rate for teachers on extended contracts is \$47.50/hr.**
- ◆ Once the Extended Contract has been submitted and approved, only timesheets are required to be submitted for subsequent payments.
- ◆ Timesheets should be submitted to the After School Programs Office no later than the last working day of any month for payment at the end of the following month.

If there are any questions regarding these documents or procedures, please contact the Expanded Learning Office at expandedlearning@ousd.org.



**PROCEDURES for EXTENDED TIME and/or OVERTIME FORMS (ET/OT)
for OUSD CLASSIFIED EMPLOYEES**

The following procedures are required in submitting fiscal forms for Extended Time and/or Overtime (ET/OT) for OUSD classified employees utilizing ELO-P, 21st Century and/or ASES funding:

Paying OUSD Classified Employees (SSOs, Custodians, Instructional Aides, etc.)

- ◆ Complete Informed K-12 OUSD ET/OT Form
- ◆ All Custodial ET/OT forms must be submitted to Custodial Services at 900 High Street.
- ◆ All Culture Keeper ET/OT forms must be submitted electronically to Culture Keeper Coordinator
- ◆ Any other ET/OT forms for 21st Century and ASES classified staff must be routed to school Principal, who should then route to After School Program Office. ET/OT forms must be delivered to the After School Programs Office no later than each classified payday for payment on the following payday.
- ◆ Rate varies depending on the employee's hourly rate

If there are any questions regarding these documents and procedures, please contact our office at (510) 879-2888.

Exhibit D

Certificates of Insurance and Additional Insured Endorsement

INSERT HERE



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

10/10/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must have **ADDITIONAL INSURED** provisions or be endorsed. If **SUBROGATION IS WAIVED**, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Fidelity Insurance Service a member of United Valley 801 Allston Way Berkeley CA 94710	CONTACT NAME: Aliyyah Harvey PHONE (A/C, No, Ext): (510) 548-8200 FAX (A/C, No): (510) 548-6145 E-MAIL ADDRESS: aharvey@fidelityinsuranceservice.com
INSURED Oakland Leaf Foundation 520 3rd Street #109 Oakland CA 94607	INSURER(S) AFFORDING COVERAGE INSURER A: NIAC INSURER B: Hartford Casualty Ins Co INSURER C: Amwins Brokerage Insurance Services INSURER D: INSURER E: INSURER F:
	NAIC # 99998 29424

COVERAGES**CERTIFICATE NUMBER:** CL24101023563**REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> Prof. Liability <input checked="" type="checkbox"/> Improper Sexual Conduct (ISC) GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	Y		202416332NPO	10/05/2024	10/05/2025	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 500,000 MED EXP (Any one person) \$ 20,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 3,000,000 PRODUCTS - COMP/OP AGG \$ 3,000,000 Prof & ISC Occ & Agg \$ 1mill/\$2mill
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			202416332NPO	10/05/2024	10/05/2025	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> EXCESS LIAB DED RETENTION \$			202416332UMBPO	10/05/2024	10/05/2025	EACH OCCURRENCE \$ 1,000,000 AGGREGATE \$ 1,000,000
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y / N <input type="checkbox"/>	N / A	57WECAE2JLV	10/30/2024	10/30/2025	<input checked="" type="checkbox"/> PER STATUTE E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
C	Commercial Cyber and Privacy Liability			C4LRF-252661-CYBER2024	10/16/2024	10/16/2025	Occurrence & Aggregate Retention \$ 1,000,000 \$ 2,500

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Oakland Unified School District is additional insured with respect to the operations of the named insured per written contract.

CERTIFICATE HOLDER**CANCELLATION**Oakland Unified School District Attn: Risk Management
1011 Union St Suite 987

Oakland

CA 94607

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

© 1988-2015 ACORD CORPORATION. All rights reserved.

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

ADDITIONAL INSURED – DESIGNATED PERSON OR ORGANIZATION

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART

SCHEDULE

Name Of Additional Insured Person(s) Or Organization(s):

Oakland Unified School District

Oakland Unified School district, its officers, employees, volunteers, or agents.

Information required to complete this Schedule, if not shown above, will be shown in the Declarations.

- A. Section II – Who Is An Insured** is amended to include as an additional insured the person(s) or organization(s) shown in the Schedule, but only with respect to liability for "bodily injury", "property damage" or "personal and advertising injury" caused, in whole or in part, by your acts or omissions or the acts or omissions of those acting on your behalf:
1. In the performance of your ongoing operations; or
 2. In connection with your premises owned by or rented to you.

However:

1. The insurance afforded to such additional insured only applies to the extent permitted by law; and
2. If coverage provided to the additional insured is required by a contract or agreement, the insurance afforded to such additional insured will not be broader than that which you are required by the contract or agreement to provide for such additional insured.

- B. With respect to the insurance afforded to these additional insureds, the following is added to Section III – Limits Of Insurance:**

If coverage provided to the additional insured is required by a contract or agreement, the most we will pay on behalf of the additional insured is the amount of insurance:

1. Required by the contract or agreement; or
2. Available under the applicable Limits of Insurance shown in the Declarations; whichever is less.

This endorsement shall not increase the applicable Limits of Insurance shown in the Declarations.



THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

**WAIVER OF OUR RIGHT TO RECOVER FROM
OTHERS ENDORSEMENT - CALIFORNIA**

Policy Number: 57 WEC AE2JLV

Endorsement Number:

Effective Date: 10/30/24

Effective hour is the same as stated on the Information Page of the policy.

Named Insured and Address: Oakland Leaf Foundation
510 3RD ST
OAKLAND CA 94607

We have the right to recover our payments from anyone liable for an injury covered by this policy. We will not enforce our right against the person or organization named in the Schedule. (This agreement applies only to the extent that you perform work under a written contract that requires you to obtain this agreement from us.)

You must maintain payroll records accurately segregating the remuneration of your employees while engaged in the work described in the Schedule.

The additional premium for this endorsement shall be 2 % of the California workers' compensation premium otherwise due on such remuneration.

SCHEDULE

Person or Organization

Job Description

Any person or organization for whom you are required by written contract or agreement to obtain this waiver of rights from us

Countersigned by _____
Authorized Representative

**IMPROPER SEXUAL CONDUCT AND PHYSICAL ABUSE LIABILITY
COVERAGE PART DECLARATIONS**

PRODUCER:

Fidelity Insurance Service, Inc. - UV
P.O. Box 2096
Berkeley, CA 94702

POLICY NUMBER: 2024-16332

RENEWAL OF NUMBER: 2023-16332

NAME OF INSURED AND MAILING ADDRESS:

Oakland Leaf Foundation

510 3rd St.
Oakland, CA 94607

POLICY PERIOD: FROM 10/5/2024 TO 10/5/2025
AT 12:01 A.M. STANDARD TIME AT YOUR MAILING ADDRESS SHOWN ABOVE

BUSINESS DESCRIPTION: After school & summer program for youth

IN RETURN FOR THE PAYMENT OF THE PREMIUM, AND SUBJECT TO ALL THE TERMS OF THIS
POLICY, WE AGREE WITH YOU TO PROVIDE THE COVERAGE AS STATED IN THIS POLICY.

LIMITS OF COVERAGE:		PREMIUM
GENERAL AGGREGATE	\$2,000,000	\$2,750
EACH CLAIM LIMIT	\$1,000,000	

NOTE: The limit of liability available to pay judgements or settlements shall be reduced by amounts incurred for Defense Costs.

TOTAL PREMIUM:

\$2,750

FORMS AND ENDORSEMENTS APPLICABLE TO THIS COVERAGE PART AND MADE PART OF THIS POLICY AT THE TIME OF ISSUANCE:

IL P 001 01 04, NIAC-E069 ISC 02 19, NIAC-E131 ISC 05 20, NIAC-E180 ISC 01 21, NIAC-E342 ISC 08 22, NIAC-E57 02 12, NIAC-ISCET 05 20

COUNTERSIGNED:

BY



(AUTHORIZED REPRESENTATIVE)

Notice: This risk pooling contract is issued by a pooling arrangement authorized by California Corporations Code Section 5005.1. The pooling arrangement is not subject to all of the insurance laws of the State of California and is not subject to regulation by the Insurance Commissioner. Insurance guaranty funds are not available to pay claims in the event the risk pool becomes insolvent.

NIAC-ISC

Exhibit E

Statement of Qualifications

INSERT HERE



OAKLAND LEAF

Oakland Leaf Statement of Qualifications

Oakland Leaf was founded in 2001 by a collective of East Oakland educators' desire to cultivate community transformation through creative education for youth and families. Their mission was to counter the inequalities and violence surrounding the youth by providing innovative programs and services that would equip them with the necessary skills to evolve into future leaders. That summer Oakland Leaf developed and hosted its first annual enrichment summer camp that emphasized arts, culture and social justice. The following fall, Oakland Leaf was invited to serve as the after-school lead agency for an East Oakland school.

Now we serve 1,000 East Oakland students annually in our 7 after-school programs at high need elementary and middle schools, two paid high school internships, and three summer camps, all free of charge. Our vision is to embolden youth to be creative leaders who actualize a more loving, just, and vibrant Oakland.

Our free, year-round programming for K-12 grade East Oakland students are designed to support socioemotional skills, build a critical thinking toolkit through hands-on projects and develop the next generation of Oakland leaders.

Oakland Leaf's programs create space for youth voice, building in opportunities for young people to express their feelings productively, and grow as a leader to support important transitions. Our high school paid internship programs provide high school youth with the space to develop their leadership and career skills, learn about food justice and social inequities facing their communities to cultivate a sense of belonging. And, Oakland Peace Camp creates an immersive experience that connects fun, engaging activities with a social justice to propel our youth forward. For this reason, our programs are designed to support the development of children and youth by feeding the minds, bodies, and spirits of low-income youth and families in Oakland.

Our programming is based on youth development practices and principles. We develop and assess our staff and programming for cultural relevance and engagement; a strategy reinforced by taking a project based approach to our classes. All of our programs are culturally relevant, project-based, and culminate in a student showcase or performance. This gives students the opportunity to showcase their learning through expositions and community showcases.

Oakland Leaf, guided by our credo, "Love is an action!," works in partnership with Oakland Fund for Children and Youth (OFCY) and Oakland Unified School District (OUSD) to achieve a shared vision of a full-service community school district. Students and schools with limited economic



OAKLAND LEAF

Oakland Leaf Statement of Qualifications

resources are targeted to ensure that students have access to the resources and the tools needed to achieve academic success and develop into thoughtful and creative citizens. Our whole-child approach to the work makes it possible for schools to provide wrap-around services for students and families. We work with each school to support its specific Community Schools Strategic Site Plan. We have been leading the way in helping Oakland public schools transcend traditional classroom learning and we partner together by using our programs to transform schools into thriving year-round community hubs.

Since its incorporation as a 5015(c)(3) in 2002, Oakland Leaf has matured into an organization with reliable and effective administrative and financial practices. Our Board of Directors guides our fiscal strategies, while fiscal operations are managed by our Executive Director with the support of a well-qualified Finance & Operations Manager, certified in non-profit financial management. Additionally, Oakland Leaf is audited yearly to ensure that the organization is using Generally Accepted Accounting Principles (GAAP).

Oakland Leaf has managed federal, state, and local funds through its partnerships with City and State agencies such as OFCY, OUSD, ASES, and 21st Century Community Learning Centers. All of our programs adhere to comprehensive City and State standards for fiscal and administrative requirements such as staff-to-youth ratios and units of service requirements as well as measures for accountability including quarterly evaluations, submission of reports, and invoicing.

Oakland Leaf has a current organizational budget of over \$3.2 million with diverse funding sources. In addition to successfully managing public revenue, we have increased our income from private philanthropy. This year private philanthropy makes up 41% of our total income.

Oakland Leaf balances its priority to put as much revenue into programs as possible with the realities of the need to invest in a strong and sustainable infrastructure. We have established processes and procedures to ensure organizational consistency, accountability, transparency, data collection, and program evaluation. We have also developed programs that ensure long-term sustainability.

Exhibit F

Agency Letter

INSERT HERE



MEMO

Date: March 10, 2025

RE: Staff Qualifications

To Whom It May Concern:

All Oakland Leaf employees, volunteers, and agents working in our OUSD after-school program will have fingerprint clearance through the Department of Justice and FBI, and will also have TB clearance before they begin work on OUSD School sites. We will ensure that ATI numbers from fingerprinting are accompanied with our invoices.

If you have any questions feel free to contact me at (510) 564-4334.

Thank you,

Melissa Mendez Ochoa
Executive Director

EXHIBIT G

Agreement to Allow Distinct & Separate Employment by OUSD and AGENCY

As set forth in Paragraph 13.3 of the Memorandum of Understanding between AGENCY and Oakland Unified School District (“OUSD”), this Agreement (“Agreement”) allows for the employment of the EMPLOYEE, _____, for distinct and separate employment roles with OUSD and with AGENCY. These two employment positions do not overlap in duties, hours, or control by the respective employers, OUSD or AGENCY. As used in this Agreement, “Parties” means Employee, OUSD, and AGENCY.

1. Employment Position. OUSD shall provide Employee with a written document describing the position that Employee shall perform for OUSD. AGENCY shall provide Employee with a written document describing the position that Employee shall perform for AGENCY. None of the duties performed for either employer shall interfere or conflict with their responsibilities for the other employer.
2. Hours of Work. OUSD shall inform Employee of the hours of work for the OUSD employment position. AGENCY shall inform Employee of the hours of work for the AGENCY position. None of the work hours shall be overlapping. Employee shall not work any hours beyond the regular working hours for either OUSD or AGENCY unless express written approval is given by the Employer for whom the extra hours are being worked.
3. Control & Supervision – OUSD Employment. During the employment position and working hours performed for OUSD, EMPLOYEE will devote their full services to OUSD and shall not engage in any work that conflicts with or compromises EMPLOYEE’s best efforts to OUSD. EMPLOYEE shall be supervised by designated OUSD personnel and OUSD will provide the information, tools, and equipment necessary for such employment. OUSD shall control all aspects of the employment relationship for the work performed for OUSD. EMPLOYEE shall not use the information, tools, or equipment of OUSD in performing the work for AGENCY, without OUSD’s express permission. All work product of the EMPLOYEE shall belong to the employer for whom the services were being provided at the time the work was created. AGENCY shall not have any control or supervision over EMPLOYEE during the EMPLOYEE’s OUSD work hours.
4. Control & Supervision – AGENCY Employment. During the employment position and working hours performed for AGENCY, EMPLOYEE will devote their full services to AGENCY and shall not engage in any work that conflicts with or compromises EMPLOYEE’s best efforts to AGENCY. EMPLOYEE shall be supervised by designated AGENCY personnel and AGENCY will provide the information, tools, and equipment necessary for such employment. AGENCY shall control all aspects of the employment relationship for the work performed for AGENCY. EMPLOYEE shall not use the information, tools, or equipment of AGENCY in performing the work for OUSD, without AGENCY’s express permission. All work product of the EMPLOYEE shall belong to the employer for whom the services were being provided at the time the work was created. OUSD shall not have any control or supervision over EMPLOYEE during the EMPLOYEE’s AGENCY work hours.
5. Workers Compensation Liability Insurance. As required by California and federal law, each employer shall maintain workers compensation liability insurance for Employee’s behalf for the employment position for which EMPLOYEE is employed by each of them.
6. Wages. OUSD is separately and independently liable for all wages and benefits earned by EMPLOYEE for performance of the OUSD employment position. OUSD shall have no liability for any portion of wages and benefits earned by EMPLOYEE for performance of the AGENCY employment position, and AGENCY agrees to indemnify, defend, and hold harmless OUSD from any such claim. Similarly, AGENCY is separately and independently liable for all wages and benefits earned by EMPLOYEE for performance of the AGENCY employment position. AGENCY shall have no liability for any portion of wages and benefits

earned by EMPLOYEE for performance of the OUSD employment position, and OUSD agrees to indemnify, defend, and hold harmless OUSD from any such claim.

7. No Joint Employer Relationship. The Parties acknowledge and agree that it is not their intent to create any joint employer relationship and, instead, each employment relationship is separate and distinct as set forth in this Agreement. Notwithstanding, EMPLOYEE understands and agrees personnel information may be exchanged between OUSD and AGENCY.
8. Termination. Subject to any applicable employment laws, any Party may terminate this Agreement or any employment relationship created under this Agreement with two weeks written notice to the other Parties.
9. Litigation. This Agreement shall be performed in Oakland, California and is governed by the Laws of the State of California. The Alameda County Superior Court shall have jurisdiction over any state court litigation initiated to enforce or interpret this Agreement.
10. Integration/Entire Agreement of Parties: This Agreement and the Master Contract between AGENCY and OUSD from which this Agreement stems, constitute the entire agreement between the Parties and supersedes all prior discussions, negotiations, and agreements, whether oral or written. This Agreement may be amended or modified only by a written instrument executed by all Parties.
11. Counterparts. This Agreement and all amendments and supplements to it may be executed in counterparts, and all counterparts together shall be construed as one document.
12. Signature Authority. Each party has the full power and authority to enter into and perform this Agreement, and the person signing this Agreement on behalf of each Party has been given the proper authority and empowered to enter into this Agreement.
13. Employment Contingent on Governing Board Approval: OUSD shall not be bound by the terms of this Agreement or employment of EMPLOYEE until it has been formally approved by OUSD's Governing Board, and no payment shall be owed or made to EMPLOYEE absent formal approval. This Agreement shall be deemed to be approved when it has been signed all Parties and employment of EMPLOYEE has been approved by the Governing Board.

OAKLAND UNIFIED SCHOOL DISTRICT

-
- ☐ President, Board of Education
 - ☐ Superintendent or Designee

Secretary, Board of Education

AGENCY

EMPLOYEE



OAKLAND UNIFIED SCHOOL DISTRICT

Community Schools, Thriving Students

Request for Proposal #24-148ExLO

**EXPANDED LEARNING LEAD AGENCY
FOR EXPANDED LEARNING OFFICES**

**OAKLAND UNIFIED SCHOOL DISTRICT
Attention: Procurement Department
900 High Street, 2nd Floor
OAKLAND, CA 94601**

**email: procurement@ousd.org
phone: (510) 879-2990**

**Proposals Due:
July 12, 2024**

THE TERMS AND CONDITIONS OF THIS SOLICITATION ARE GOVERNED BY
THE APPLICABLE STATE AND FEDERAL LAWS.

A. Table of Contents

A. Table of Contents	2
B. Schedule of Events	3
C. Introduction and Overview	4
Term of the List of Qualified Agencies	5
Overview of OUSD Expanded Learning Programs	5
D. Funding	7
Other considerations for the allocations of funds	8
E. OUSD Expanded Learning / Program Operation	9
F. Base-line Expanded Learning Program Requirements	9
G. Staffing	11
H. Enrollment, Attendance and Evaluation Documentation	12
I. Contract and Payments	13
J. Guidelines for Charging Fees	13
K. RFP Process	14
L. Minimum Proposals	15
M. Application Submission Contents	16
N. Application Submission Instructions	17
FORMAT	17
O. Evaluation and Selection	19
Application Rubric	19
P. Terms & Conditions for Receipt of Applications	20
Errors and Omissions by Applicant	20
Change Notices	21
Failure to Object to Errors and Omissions in Application	21
Financial Responsibility	21
Proposer's Obligations Under the Conflict of Interest Laws and Board Policies	21
Reservations of Rights by the District	21
No Waiver	22
Q. Standard Contract Provisions	22
APPENDIX I: RFP Application	23
2024 OUSD Request for Proposals Application (Template)	23
APPENDIX II: Application Questions	25
APPENDIX III. Instructions for RFP Application Submission:	29
Required Supporting Documentation Instructions:	29
APPENDIX IV: OUSD Expanded Learning Lead Agency MOU Boilerplate Checklist	31
OUSD AFTER-SCHOOL LEAD AGENCY 2022-25 MOU SAMPLE CONTRACT	34
APPENDIX V: Appeals Process for Applicants	35

B. Schedule of Events

Event	Date	Info
RFP 2024 Announcement	June 6, 2024	
RFP Digital Application Released	June 7, 2024	Link on Procurement Website
RFP Pre-Conference Q & A (Virtual)	June 25, 2024 at 2:00 p.m. pst	Zoom link on Procurement Website
Deadline for Questions	June 28, 2024	
RFP Submission Due Date	July 12, 2024	
Lead Agency Status Notifications	September 6, 2024	
School Site/Lead Agency Confirmation of Partnership	November 29, 2024	
OUSD MOU Approval Season	May - June 2025	
Lead Agency Service Contract	July 1, 2025 - June 30, 2028	

OUSD will use every effort to adhere to the schedule. However, OUSD reserves the right to amend the schedule, as it deems necessary.

The District reserves the right to amend or cancel this proposal at any time.

Proposers are responsible for viewing any new changes related to this proposal online at <https://www.ousd.org/bidopportunities>.

If a proposer desires any clarification or questions of any kind regarding this solicitation, the proposer must make a written request and should be addressed via email to:

Francisco Flores, Procurement Analyst
francisco.flores@ousd.org

NOTE: Contacting Board members and/or any District staff other than the procurement analyst who is outlined above, may disqualify the proposer from the selection process.

What is an RFP? An RFP (Request for Proposals) is a proposal based selection process, in accordance with Public Contracts Code section 20111.5. It is a request by OUSD Expanded Learning Office for non-profit organizations to submit their proposals to be considered an OUSD-approved primary contractor/expanded learning program provider for district school-site based comprehensive expanded learning program services, after which OUSD will determine which providers are qualified based on that determination.

What is a Pre-Conference Q & A? A pre-conference Q & A is an opportunity to ask members of the selection team any questions you may have, and/or clear up any confusion regarding project details/scope of work that is in the RFP. This is an *Optional Online Meeting*.

C. Introduction and Overview

The mission statement of OUSD's Office of Expanded Learning states: *In community, we cultivate transformative experiences for youth on their journey as they become thriving, productive leaders.*

The Oakland Unified School District (OUSD) Department of Expanded Learning invites interested nonprofit organizations to respond with their proposals to serve as an Expanded Learning Program Provider in designing, planning, administering, and operating effective, high-quality comprehensive expanded learning programs. Eligible providers will be committed to support OUSD's strategic plan to ensure strong readers by the third grade, support empowered graduates, create joyful schools, and grow a diverse and stable staff. In addition, eligible providers must also support citywide goals.

Lead Agency partners will invest in providing expanded learning supplemental programs that complement the regular school day program and support the OUSD priorities for student achievement, health, and well-being. Oakland Unified School District's (OUSD) mission is to build a Full-Service Community District focused on high academic achievement while serving the whole child, eliminating inequity, and providing each child with excellent teachers daily. Expanded Learning supports this mission while holding our values of equity, joy, and liberation for youth and adults. Select Lead Agencies will commit to working in partnership with school sites and the OUSD Expanded Learning Office (ExLO) to provide comprehensive programming that supports the entire school community.

Through the RFP process, OUSD seeks organizations who demonstrate the capacity to be adaptive, make necessary shifts, and be able to work within the established OUSD model of school and community partnerships through various funding sources' parameters.

Organizations must be fiscally sound with the capacity to leverage other resources to provide students with high quality expanded learning programming: after-school and summer youth development experiences that complement and support school district and city priorities for student success and well-being.

Community organizations that serve as a Lead Agency are an integral part of our OUSD Full Service Community Schools and make an impactful contribution toward strengthening student outcomes.

Term of the List of Qualified Agencies

This Request for Proposals (RFP) for Expanded Learning & Summer Program Lead Agency will result in a list of OUSD vetted lead agencies with which OUSD will enter three-year master contracts. From the list of contracted agencies, school site administrators may select an OUSD approved expanded learning program provider. An organization being placed on the approved lead agency list and entering a master contract with OUSD does not guarantee an assignment at an OUSD school site.

The selection of the expanded learnings & summer program Lead Agency is at the discretion of the school site administrator (Principal). School site administrators will select a Lead Agency from the list of approved after-school providers by assessing the quality/capacity of the current expanded learning program, identifying program goals, and considering any other factors relevant to the school site. Yearly program plans are created through a collaborative partnership between the Lead Agency and school site administrators to ensure both parties are meeting overall program expectations.

Once selected to serve at a given school, a lead agency will be contracted to serve that school site for three years, subject to continuing annual approval of the school site administrator and District.

Overview of OUSD Expanded Learning Programs

OUSD Expanded Learning Programs strive to create and sustain "safe haven" environments where Oakland children and youth can access expanded learning opportunities and integrated education, health, cultural, and enrichment programs outside of school hours or the regular school year. OUSD Expanded Learning Programs operate in all elementary, middle, and high schools across the city of Oakland.

When programming is conducted in-person, over 15,000 students across 80+ schools participate in OUSD expanded learning programs that operate Monday - Friday until 6:00 pm. Students who participate in expanded learning programs every day receive an additional 540 hours of learning by the end of the school year, equivalent to 90 additional days of school. In these valuable after-school hours, students engage in youth development activities that foster their physical health, social-emotional learning/well-being, and support their academic

achievement in school. In order to meet these goals, the quality and success of the District’s expanded learning programs is critical.

These expanded learning and summer programs are aligned with efforts in Oakland to improve young people’s educational outcomes, including Oakland’s investment in the Kids First! Legislative initiative goal to “Help Children and Youth Succeed in School and Graduate High School” and the Oakland Unified School District’s Full Service Community Schools initiative that seeks to provide health, education, and social services to youth, their families and the community.

OUSD expanded learning and summer programs offer critical support to schools, students, and their families. In addition to providing children and youth with sanctuary, quality expanded learning programs to support students academically and socially, OUSD expanded learning programs serve a large proportion of youth who typically benefit from additional learning support, including students from low-income households (81%) and English Learners (31%). Additionally, approximately 23% of OUSD after-school participants are African American and 46% are Latino.

OUSD seeks community partners whose organization mission and vision closely align and support the District’s strategic plan and vision for Full Service Community Schools.

High quality expanded learning programs must satisfy the various grant funding requirements— detailed further below and in the MOU—and provide additional opportunities for youth to practice the academic and social skills they need to succeed. OUSD expanded learning programs provide youth with a mix of academic support, recreational/physical, and enrichment activities. Within these broad categories, expanded learning providers work collaboratively with school partners to develop a balance of activities that meet the unique interests and needs of the student population and support the goals and priorities of the school community for student achievement and well-being. Below are examples of the mix of after-school activities offered in OUSD Expanded Learning Programs.

SAMPLE AFTER-SCHOOL ACTIVITIES BY CATEGORY

CATEGORY	ACTIVITIES
Academic Support	Academic Enrichment Learning, Tutoring, Expanded Library Services, Supplementary Education Services, Homework Support, Credit Recovery, Reading & Literacy, Math, Science
Recreation/ Physical Activity / Organized Sports	Cooperative Games, Dance, Martial Arts, Yoga, Intramural Sports, Sports Leagues, Mindfulness

Enrichment	Arts and Cultural Activities, Health and Nutrition Education, Substance Abuse & Drug Prevention, Violence Prevention, Counseling & Character Education
College and Career	Career & Job Training, Entrepreneurial Education, Technology/Telecommunications Training, Community Service & Service Learning, Internships and Apprenticeships
Leadership Development	Peer Mentoring, Peer Tutoring, Youth-Led Community Service
Science Technology Engineering & Math	Gardening, Coding, Robotics, Making, Forensics, Cooking
Outdoor Education	Community Mapping, Hiking, Backcountry Camping, Kayaking, Bicycling

D. Funding

OUSD Expanded Learning Programs are currently primarily funded through grants from the California Department of Education (CDE). CDE provides funds to school districts that collaborate with community partners to provide safe and educationally enriching alternatives for children and youth during non-school hours. The base grants that CDE awards to OUSD for after-school programs represent four (4) funding sources:

- After-School Education & Safety (ASES) for elementary, middle, and K-8 schools are state funds. ASES grants are three-year renewable funding sources.
- 21st Century Community Learning Center (21st CCLC) grants for elementary, middle, and K-8 schools are federal funds. 21st CCLC grants are awarded based on a highly competitive application process, and last for five years.
- 21st Century After-School Safety and Enrichment for Teens (ASSETS) grants for high schools are federal funds. 21st Century ASSETS grants are awarded based on a highly competitive application process, and last for five years.
- Expanded Learning Opportunities - Program (ELO-P) funding is a universal grant that supports all TK - 6th Grade OUSD's unduplicated students' access to free expanded learning opportunities.

OUSD directly applies for these grant funds from the California Department of

Education, and grant funds are received and managed by the school district. OUSD contracts a portion of grant funds to Lead Agencies to operate expanded learning programs in close partnership with schools.

Additionally, Lead Agency partners leverage other funding and resources to support high quality programs, including private grant dollars, AmeriCorps grants, volunteers, and other in-kind resources. Leveraging additional resources on behalf of the expanded learning programs is an essential function of the Lead Agency partner because of the reality that state and federal expanded learning grant dollars alone are often inadequate to run a high-quality program. ELO-P, ASES, and 21st Century grant dollars are currently awarded at a rate of:

- ASES: \$10.18/student/day for TK-8th Grade students
- 21st Century: \$10.18/student/day for TK-8th Grade students
- 21st Century ASSETS: \$10.10/student/day for high school students
- ELO-P: \$15/student/day for TK-6th Grade students

Other considerations for the allocations of funds

- OUSD elementary and middle school ASES grants can only be used to provide expanded learning programming daily (180 days) immediately after the school day and facilitate programming for at least 15 hours a week until at least 6:00 pm.
- OUSD High School ASSETS base grants can be used to operate programs before school, after school, weekends and during summer/intersession in accordance with grant guidelines.
- Some sites may also receive 21st Century related grants including Supplemental funding (to support summer programming).
- ASES and 21st CCLC grant funds are intended to complement, but not supplant, other funding provided by OUSD, school sites, or community partners.
- ASES and 21st CCLC Grant funds are inadequate to cover the true cost of running a high quality expanded learning program. OUSD and its Lead Agency community partners are committed to leveraging additional funding and resources to match grants provided by the California Department of Education.
- ASES/21st Century grants are attendance-based grants.
- ELO-P funding must be used to provide expanded learning opportunities during out-of-school time; before school, after-school, summer/intersession at no cost to unduplicated students.

Sites that fail to meet calculated attendance will trigger California Department of Education intervention and funding levels may be reduced. Sites must earn 85% of attendance to be in good standing for full funding. Failure to achieve attendance targets may result in a Lead Agency being removed from the OUSD approved list of Lead Agencies.

E. OUSD Expanded Learning / Program Operation

In Oakland, approved lead agencies must be equipped and have organizational infrastructure to provide synchronous and asynchronous programming at the discretion of OUSD, as reflected in the MOUs.

In the spirit of OUSD's Full Service Community Schools vision, our approved expanded learning organizations partners work closely with schools and their principals to develop specific programmatic goals to provide holistic support and equitable learning opportunities for all students. As school-day teachers focus on providing high quality instruction in the classroom, expanded learning programs provide high quality enrichment, physical, academic, and SEL opportunities to students during the after school and non-school days when youth are most vulnerable to crime, violence, and risky behavior.

Expanded Learning Lead Agencies are expected to offer programming to all students in TK - 12th grade reflected of the school site's specific grant requirement.

F. Base-line Expanded Learning Program Requirements

The goal of the expanded learning program is to support student success in school through academic support, social emotional development and educational enrichment. The school site administrator, working in partnership with the Expanded Learning Lead Agency, is an integral part of developing the expanded learning program components that are appropriate to support his/her school site goals articulated in the School Site Plan. All Lead Agencies are selected by Principals to collaborate on the development and implementation of the expanded learning program in compliance with State and Federal guidelines, and District requirements.

OUSD's Expanded Learning Office goals align with grant requirements which aim to provide a comprehensive expanded learning program during the school year and/or summer program which consists of a balance of academic and enrichment activities, including daily physical activity components. The funds cannot be used to supplant school day activities.

An expanded learning program must include the following:

- To satisfy **ASES Funding**:
 - Educational and literacy component to provide tutoring and/or homework assistance,
 - Educational enrichment component and,
 - Daily physical activity/recreation component and,

- Serve a minimum 83 elementary and 111 middle school students daily and, free to all unduplicated students
- To satisfy **21st CCLC E/M**:
 - Educational and literacy components to provide tutoring and/or homework assistance,
 - Educational enrichment component,
 - Physical activity/recreation component, and
 - Serve a minimum ADA contingent on grant allocation and,
 - Free to all unduplicated students
- To satisfy **ASSETs**:
 - Educational and literacy component to provide tutoring and/or homework assistance,
 - Educational enrichment component,
 - Physical activity/recreation component, and
 - Serve a minimum of 139 students daily
- To satisfy **ELO-P**:
 - Offer 9 Hours of Programming (School day hours count toward the 9 hours)
 - Support TK-6th grade students
 - 175 school days & 30 days intersessions (For the purpose of this site plan, the scope of work will be for a total of 60 school days)
 - TK/K staff ratio 10:1
 - Must offer the program to all unduplicated TK-6 grade students
 - Parallel ASES Compliance Reporting
 - ELO-P funding can not be used to provide school day support (CDE Guidance)

Additional Program Requirements:

- **All programs** must provide a nutritious snack and track attendance daily.
- Expanded learning lead agencies and school sites are **expected to implement reasonable accommodations** under Section 504 of the Americans with Disability Act to support OUSD's students with disabilities. The standard for reasonableness must be determined on a case-by-case basis.
- Per federal statute, California Education Code, and Oakland Unified School District policy, any students identified by the OUSD Transitional Student and Family Unit get priority access into the after-school program. If a student/family indicates they are homeless, newcomer, refugee, and/or asylee will have automatic enrollment.
- All programs must adhere and align with all OUSD safety policies and procedures, this includes OUSD's George Floyd Resolution which promotes a safe and supportive environment.

Please note that the below list of compliance requirements is not exhaustive. Lead Agencies are expected to know and comply with these and other district and state and federal requirements not listed here, including but not limited to state and federal laws and requirements outlined in applicable OUSD Board policies and the Memorandum of Understanding (“MOU”) with OUSD which all Lead Agencies selected to serve a school site must sign and have approved by OUSD’s Governing Board. A sample MOU is attached as Appendix III. Please note this MOU is subject to change depending on District needs. Applicants are encouraged to review it for more program requirement specifics.

Operational Requirements

- Elementary and Middle School After-School Programs must operate 5 days/week, for at least 15 hours/week, commencing immediately at the end of the regular school day and run until at least 6 p.m.
- High School After-School Programs must operate a minimum of 15 hours/week
- Summer School Programs need only comply with legislative or funder requirements
- OUSD’s Expanded Learning Programs Office (ExLO) has established early-release policies that must be implemented at each expanded learning and/or summer program. Further details of required hours and attendance expectations are located in the MOU.

G. Staffing

Staff working in OUSD Expanded Learning Programs must meet the minimum requirements to be in compliance with the California Dept of Education Codes. Staff members who directly supervise students must meet the district’s Proposal for an instructional aide, paraprofessional, or provide documentation that confirms completing 48 college units or the equivalent of an AA college degree.

Programs must operate with a minimum staff to student ratio of 1:20 for 1-12 grade and 1:10 for TK-K. Unless otherwise advised due to the health and safety of the students. It is required that each expanded learning program have a Site Coordinator who is full-time, salaried with benefits, and present at the school site during their work hours. The California Education Code provides that “selection of the program site [coordinator] shall be subject to the approval of the school site principal.” The Lead Agency must notify school principals in writing of any expanded learning staff changes within 24 hours.

Oakland expanded learning programs share a basic staffing pattern across all sites, though specific staff duties may vary somewhat from site to site. The most common staffing plan includes a full-time Site Coordinator, a Quality Support Coach (OUSD Credentialed Teacher), and youth development workers. Many programs also work with additional *service providers for specific services, and some may rely on regular volunteer assistance as well*. At some sites, certificated teachers provide targeted academic assistance, and academic enrichment activities for expanded learning participants through OUSD extended contracts.

Expanded Learning Lead Agencies should be fully staffed and prepared to provide programming for a total of 180 days. Lead agencies should have contingency plans to ensure that each program is fully staffed and able to meet the school site's enrollment needs.

H. Enrollment, Attendance and Evaluation Documentation

Approved Lead Agencies will need to consider CDE Guidelines, OUSD Expanded Learning Office expectations, and site-level input (e.g. site administrator) when it comes to student enrollment consideration, attendance protocol, and programmatic evaluation.

- a. Enrollment: Approved Lead Agencies must be familiar with CDE guidelines of ASES, 21st CCLC, ELO-P, and ASSETs Programs when working with a unique population defined as foster youth, McKinney-Vento, and students qualify with free-reduced lunch status. Lead Agencies must prioritize enrollment for any child that is homeless, defined by the federal McKinney-Vento Homeless Assistance Act (42 U.S.C. Sec.1143a), newcomers (refugee, asylee, and unaccompanied minor), or if the child is in foster care. Lead agency will work with the school site administrator to develop a written enrollment policy. The enrollment policy needs to include, but not be limited to, enrollment priorities, application process, and acceptance notification, waitlist procedures, behavior guidelines, parental expectations, student expectations, procedure for removing students from expanded learning programs, and so on. Approved Lead Agencies are required to provide the written enrollment policy to all families who apply for the program.
- b. Fees: Unduplicated students must have access to the program at no cost. Lead Agencies should implement a process for identifying unduplicated students and ensuring that fees are not charged to those families.
- c. Attendance: Approved Lead Agency is required to be aware of all required attendance submission protocol and procedures to ensure good standing status with the Expanded Learning Office and CDE. All attendance documentation shall be closely monitored, and managed for accuracy by the Site Coordinator

and/or occasional audit request by the district and CDE. This includes accurate completion and daily maintenance of student sign in/out sheets, weekly inputting of attendance data into the OUSD online system, and monthly submission of scanned electronic attendance records to OUSD ExLO. Lead Agencies are also responsible for conducting internal audits of attendance records to ensure that program sites maintain accurate, verifiable data on student attendance. All program records must be maintained for five years for auditing purposes.

I. Contract and Payments

Agencies that are approved through the process described in this RFP must enter a 3-year master contract with the District. They may not begin operating at a school site unless the District and agency have executed a contract on the District's template. The District's Board of Education will likely approve these master contracts during the May-August 2025 Board meetings.

Although the master contract will last for 3 years, note that agencies and sites will be matched in 1-year relationships, as they are currently.

In Spring of each year, all Lead Agencies must initiate and engage in annual program planning with school leadership at each program site. Lead Agencies will submit a program plan and budget for the upcoming school year to the OUSD EXLO and Board of Education for approval, at the beginning of each school year.

Invoices are processed on a cost reimbursement basis for actual expenditures incurred. Due to the timing of OUSD contracting and fiscal procedures, Lead Agency partners must operate with a 4 month reserve covering the full cost of the agency's OUSD expanded learning program implementation. Typically, there are delays to the initial payment of agency invoices at the beginning of each school year.

J. Guidelines for Charging Fees

The intent of ASES, 21st CCLC, ASSETS, and ELO-P grants, which aligns with OUSD values, is to establish local programs that offers academic support and enrichment to students in need of such services regardless of a family's inability to pay.

CDE and OUSD discourage charging fees as that could exclude students in need from attending and taking advantage of the expanded learning program. ASES, 21st CCLC, ELO-P grants do not prohibit charging fees for expanded learning programs; however, programs that choose to charge fees, will need to collaborate with a Site Administrator to create and submit

the program's fee structure for approval in accordance with the terms in the MOU. In addition, all students that fall under the category of **unduplicated cannot be charged fees**. Sites that receive 21st CCLC and ASSETS grants will be required to report any fees collected (i.e.- registration fees, family fees, application fees, etc.). Programs that opt to charge program fees may not prohibit any family from participating due to financial circumstances. All program materials related to outreach and enrollment must state clearly that no unduplicated child will be denied services. CA EdCode stipulates that a sliding scale must also be offered in a fee schedule.

K. RFP Process

OUSD Expanded Learning Office is conducting a dual pathway process for new and current organizations. The RFP evaluation rubric will feature some questions that may be differentiated based upon the organizations current approval status and will have the same scoring process. Organizations should go through the appropriate process and provide the necessary documentation.

Organizations interested in serving in the OUSD Expanded Learning Lead Agency role for the 2025 - 28 school year must successfully complete the Lead Agency RFP process and earn the designation of a recommended lead agency. Therefore, an organization that does not successfully complete the Lead Agency RFP process or does not earn a *recommended* status will not be approved to serve as an OUSD lead agency for the 2025-2028 cycle. Organizations that are not selected during this RFP cycle will have the opportunity to reapply for the next RFP process which begins in 2028.

Organizations submitting an RFP proposal by the deadline will be assessed based on their RFP application responses, and any additional supporting materials requested by the RFP Review Team to determine the organization's potential to serve in the Lead Agency role. If additional information is required, organizations will be invited for an interview with the RFP Review Team.

Organizations completing this RFP process will be assessed and scored into one of the following categories:

- 1) **Recommended:** Community organization has adequately demonstrated its capacity to serve in a Lead Agency role and to fulfill all comprehensive Lead Agency responsibilities outlined by OUSD and CDE as well as those listed in Section III of this RFP. The organization demonstrates the capacity to collaborate, integrate, and adapt to the community. This *recommended* status will be valid for up to 3 years, depending on the organization's ability to meet and maintain and/or exceed federal, state, and district compliance requirements, to be assessed annually.

- 2) **Not Recommended:** Community organization has not adequately demonstrated its capacity to serve in the Lead Agency role and to fulfill most of the Lead Agency responsibilities outlined by OUSD and listed in Section III of this RFP. Organizations receiving this *not-recommended* status will not be included in the list of qualified organizations that will be shared with stakeholders. An organization receiving this *not recommended* status may submit another Lead Agency RFP at a future date when the OUSD opens up a new RFP cycle.

OUSD will notify an agency of its determination before or by September 6, 2024 via email. If OUSD determines that an agency is Not Recommended, the agency shall have the opportunity to contest that determination. Additional details regarding this process are contained in Appendix V.

L. Minimum Proposals

Applicants may respond to **one or more of the** following Lead Agency categories:

Lead Agency: Elementary School (including K-8)

Lead Agency: Middle School

Lead Agency: High School

OUSD is seeking applications from established community organizations that currently possess 501(c)(3) status and adequate fiscal reserves to cover at least four (4) months of general operating expenses as a Lead Agency partner. Grant funds sub-contracted to Lead Agency partners do not cover the full cost of running a full comprehensive expanded learning program in Oakland; thus, organizations choosing to serve in the Lead Agency role must be financially stable and demonstrate the capacity to leverage other resources in support of youth programming.

A demonstrable experience in operating a comprehensive expanded learning program is strongly preferred, but all organizations must provide acceptable documents demonstrating two (2) years of experience in the following areas:

- Providing program services to the students in the service category (ies). Specific evidence of a positive track record of the capacity to effectively coordinate the entirety of a school's afterschool and/or expanded learning year-long program as well as successful collaboration with the school site administrator, faculty, and staff.
- Agency administrative capacity to comply with compliance and fiscal policies of the OUSD and CDE, including: agency administration manual; fiscal and personnel policies; attendance records; cost allocation plans, etc.

- Hiring, retention, and provision of professional development opportunities for qualified staff to provide services to OUSD students in a culturally and linguistically competent and age appropriate manner with a focus on youth development strategies.
- Capacity to effectively engage a large number of diverse students on an ongoing basis who demonstrate the desire and enthusiasm to participate in the program at a very high and consistent rate. Additionally, the agency can illustrate specific examples and strategies it has developed that actively engage parents and family members throughout the school year.
- Maintaining collaborative relationships with school site leadership in the development and implementation of a quality expanded learning program that supports the district's and the school's goals.

Organizations that apply for the Lead Agency role must be able to comply with all requirements outlined in the standard OUSD Expanded Learning Lead Agency MOU (see Appendix IV for sample of current year MOU) should it be chosen as Lead Agency. For example, while a copy of the organization's current insurance coverage is required with this application, should the organization be chosen, it will need to attain the level of insurance outlined in the MOU.

M. Application Submission Contents

Failure to provide any of the following information or forms may result in an application being disqualified.

A Complete Lead Agency Application will consist of all the following required items:

- 1) **Proposal Cover Sheet** (see Appendix I for sample)
- 2) **Letter of Agreement** (no more than one (1) page): A one-page letter signed by the person authorized to obligate the proposing agency to perform the commitments contained in the application. The letter should state that the proposing agency is willing and able to perform the commitments contained in the application.
- 3) **Written Responses to Application Questions** (no more than 8 double-spaced pages in response to the six (6) titled sections that appear in Appendix II Application Questions), signed under penalty of perjury,
- 4) **Supporting Documents**, listed in (Appendix III).
- 5) **Boilerplate Checklist:** " Expanded Learning Program and Services

Agreement” - Submission of the Signed Boilerplate Checklist (Appendix IV) will constitute a representation by your firm that it has read all of the clauses contained in the OUSD Lead Agency Memorandum of Understanding. The sample contract for the services detailed in this RFP (Appendix IV, version for Fiscal Year 22-25), and that your firm is willing to comply with OUSD contracting requirements.

- 6) **Sample Program Schedule and Summary:** Provide a sample program schedule along with a short description of each activity. No more than (2) pages.

N. Application Submission Instructions

Proposals shall be **emailed** to the Procurement Department at **procurement@ousd.org** no later than July 12, 2024.

Proposal shall be submitted with subject line: **“RFP Proposal # 24-148”**

****When submitting your proposal, be sure to get a ticket number or confirmation email.***

Proposals submitted via email should be submitted as PDF file format. PDF file size should be sufficient enough to send via email, the District does not assume responsibility if the PDF file is too large to email. If electronic submission is a factor, the District encourages hand delivery of the proposal directly to the Procurement Department, 900 High Street 2nd Floor Oakland, CA 94601 between the hours of 9:00am - 3:00pm pst. All proposals delivered after scheduled closing time for receipt of proposals will not be considered. Incomplete proposals may be deemed non-responsive and therefore not considered.

The District reserves the right to reject any or all proposals. The award of this solicitation is conditional on the winning bidder(s) accepting the terms of the MOU contract available to view below. Proposals and any other information submitted by respondents in response to this solicitation shall become the property of the District. Notwithstanding any indication by Contractor of confidential contents, and with the exception of bona fide confidential information, contents of proposals are public documents subject to disclosure under the California Public Records Act after award. The District will not provide compensation to Contractors for any expenses incurred by the Contractors for proposal preparation or for any demonstration that may be made. Contractors submit proposals at their own risk and expense.

FORMAT

All submissions must be on the RFP Application Form, typed using an easy to read 12-point font such as Arial or Times New Roman and one inch margins. All submissions

must be double-spaced. All submissions must answer all six (6) titled sections below in no more than 8 pages total. Organizations may elaborate on specific documents provided in the Required Supporting Documentation (Appendix III)

O. Evaluation and Selection

For all applications, the completion of the application will be assessed first; applications that do not submit complete documentation will not have the application reviewed.

OUTLINE THE PROCESS FOR NEW AND CURRENT ORGANIZATIONS

Applications demonstrating the capacity to meet minimum requirements will have their Proposals evaluated and scored by an RFP Review Team made up of individuals with expertise in the relevant subject matter for which the application is submitted. The RFP review team will read and score responses to the application questions in Appendix II.

Application Rubric

Performance Area	Expectations for OUSD Recommended Organizations <i>(not an exhaustive list)</i>
Collaborative Partnerships (20 Points) This performance area focuses on the extent to which organizations develop strong relationships with ExLO, school site, community-based partners, families, and other program stakeholders.	<ul style="list-style-type: none"> • Organizations establish and maintain clear, open and regular lines of communication with stakeholders • Organizations establish and maintain clear, aligned values with stakeholders around supporting and honoring youth • Organizations seek and respond to feedback, engage in active listening, shared decision-making, and planning processes with stakeholders • Organizations and partners celebrate one another and the unique role each occupies in supporting youth
Empowerment (10 Points) This performance area focuses on the extent to which organizations promote youth agency, self-actualization, leadership, and liberation.	<ul style="list-style-type: none"> • Organizations provide opportunities for youth to own and share their stories and speak their own “truth” • Organizations celebrate youth interests, passions, culture, and help them to explore their own growth • Organizations provide opportunities for youth to lead and develop projects • Organizations encourage youth to consider multiple perspectives
Safe and Supportive Environment (20 Points) This performance area focuses on organization’s ability and capacity to attend to all facets of safety for participants while cultivating a sense of belonging.	<ul style="list-style-type: none"> • Organizations prioritize and implement systems of support to ensure physical, emotional, cultural, structural, and inclusionary safety for youth and staff • Organizations integrate SEL and restorative practices into program culture • Organizations establish strong relationships, clear boundaries, and trust between staff, youth, and families • Organizations clearly articulate and actualize values and group agreements

<p>Lifelong Learning (15 Points)</p> <p>This performance area focuses on the extent to which organization practices help to support youths' academic engagement, cultivation, and transformation.</p>	<ul style="list-style-type: none"> • Youth engage in activities focused on nurturing fundamental habits for lifelong learning • Youth participate in diverse enrichment programming that reflect student interests and that promote joy, skill-building, and hands-on experience • Youth participate in activities that promote mindfulness, practice socio-emotional learning, and developing a growth mindset
<p>Adaptive Programming (15 Points)</p> <p>This performance area focuses on organization's adaptive capacity/willingness and that practices reflect values of diversity and inclusion of youth and other stakeholders.</p>	<ul style="list-style-type: none"> • Organizations offer differentiated services to meet individual student and family needs • Organizations provide services that are inclusive, responsive, and culturally relevant • Where applicable, organizations services are trauma-informed • Organizations demonstrate capacity to adapt to physical, environmental, cultural, and social shifts
<p>Strong Systems and Structures (20 Points)</p> <p>This performance area focuses on the efficacy of an organization's program structure, compliance management capacity, infrastructure viability, and a thriving culture to support responsible financial management of programs and services that benefit students.</p>	<ul style="list-style-type: none"> • Organization services are supported by a strong, stable, and adaptive organizational infrastructure, financial capacity to deliver and sustain services, and the ability to execute compliance expectations and deliverables • Organizations are purpose- and values-driven and programming is aligned with collaborative vision between the school site and the provider • Organizations engage in continuous quality improvement processes to ensure transparency of expectations and a culture of accountability, responsibility, compliance, and metrics • Organizations provide staff with consistent and applicable professional development support and learning opportunities

Applicants must agree to abide by all OUSD policy requirements as outlined in the Appendix IV Boilerplate MOU checklist. The list of "Approved Expanded Learning Lead Agencies" will be utilized by school site administrators for a period of up to three (3) years pending funding availability to select a Lead Agency to administer the expanded learning program on his/her school site.

P. Terms & Conditions for Receipt of Applications

Errors and Omissions by Applicant

Applicants are responsible for reviewing all portions of this RFP, and promptly notifying the District, in writing, if they discover any ambiguity, discrepancy, omission, or other error in the RFP. Any such notification should be directed to the District promptly after discovery, but in no event

later than five working days prior to the date for receipt of applications. Modifications and clarifications will be made by addenda as provided below.

Change Notices

The District may modify the RFP prior to the application due date by issuing Change Notices, which will be on the OUSD. The applicant shall be responsible for ensuring that its application reflects any and all Change Notices issued by the District prior to the application due date regardless of when the application is submitted.

Failure to Object to Errors and Omissions in Application

Failure by the District to object to an error, omission, or deviation in the application will in no way modify the RFP or excuse the vendor from full compliance with the specifications of the RFP or any contract awarded pursuant to the RFP.

Financial Responsibility

The District accepts no financial responsibility for any costs incurred by applicants in responding to this RFP. Submissions of the RFP will become property of the District and may be used by the District in any way deemed appropriate.

Proposer's Obligations Under the Conflict of Interest Laws and Board Policies

A proposer must be aware that if the proposer will enter into a contract with the District, proposer/contractor shall be responsible to comply with conflict of interest laws and Board policies, which are briefly summarized in Section 11.4 ("Conflict of Interest") of the attached Appendix IV ("OUSD Expanded Learning Lead Agency MOU" sample contract). It is the responsibility of a contractor to comply with the law and OUSD Board policies. Submission of an application signifies that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity.

Reservations of Rights by the District

The issuance of this RFP does not constitute an agreement by the District that any contract will actually be entered into by the District. The District expressly reserves the right at any time to:

- Reject any or all applications;
- Reissue a Request for Proposals ;
- Prior to submission deadline for applications, modify all or any portion of the selection procedures, including deadlines for accepting responses, the specifications or requirements for any materials, equipment or services to be provided under this RFP, or the requirements for contents or format of the

applications;

- Procure any materials, equipment or services specified in this RFP by any other means;
- Determine that no project will be pursued.

No Waiver

No waiver by the District of any provision of this RFP shall be implied from any failure by the District to recognize or take action on account of any failure by a proposer to observe any provision of this RFP.

Q. Standard Contract Provisions

Any agency selected from the *Expanded Learning Program Lead Agency Qualified List* by a school site administrator, and which chooses to enter into contract with the District, will enter into a contract substantially in the form of the Expanded Learning Lead Agency MOU, attached hereto as Appendix IV. Failure to timely execute the contract, or to furnish any and all insurance certificates and policy endorsements, surety bonds or other materials required in the contract, shall be deemed an abandonment of a contract offer. The District, in its sole discretion, may select another qualified agency and may proceed against the original selectee for damages.

APPENDIX I: RFP Application

2024 OUSD Request for Proposals Application (Template)

(Email procurement@ousd.org for template)

ASES, 21st CCLC, ELO-P, and ASSETS Expanded Learning Programs

Cover Sheet Template:

Organization Name			
Primary Contact Person:		Secondary Contact Person:	
Email:		Email:	
Telephone #:		Telephone #:	

Service Category: Check the grade levels your organization is interested in serving.	
	Elementary (Grades TK-5)
	Elementary/Middle (Grades TK-8)
	Middle (Grades 6-8)
	High (Grades 9-12)

Does your organization have 501c3 status? Please provide documentation of this status in your supporting documentation section.		Yes
		No
Are you currently an OUSD Approved Lead Agency Partner?		Yes
		No
Have you served as an OUSD Lead Agency partner before in past years? If so, please identify the years and durations served.		Yes
		No
		# Years
Do you currently serve in the Lead Agency role for any other school districts besides OUSD?		Yes
		No
If yes, please list all school districts you have served.		
How many school sites does your organization have the capacity to serve as a lead agency?		# Sites
In the box below, please briefly explain your rationale for this number of sites?		

On behalf of _____ (Agency), I, _____ (name)
 _____ (Position), declare under penalty of perjury under the laws
 of the State of California that the foregoing is true and correct.

Signature: _____ Date: _____

APPENDIX II: Application Questions

After reading the RFP narrative, please respond to all of the prompts within all six (6) titled sections below in no more than 8 double-spaced pages in 12pt Font. Organizations may elaborate on specific documents provided in the Required Supporting Documentation (Appendix III).

The prompts are distinct and differentiated based upon if the applicant is a new or a current organization. See below for the definition of each designation and only respond to the prompts that apply to organizations of that designation or status.

New Organizations/Applicants:

Organizations applying to be a comprehensive expanded learning provider within OUSD and were not an OUSD-approved lead agency during the 2022-25 RFP cycle.

Collaborative Partnerships (up to 2 pages) (20 Points)	<ol style="list-style-type: none">1. Describe a collaborative partnership that the organization experienced while engaged in a school and/or district setting. Site specific examples.2. How does the organization seek and respond to feedback from stakeholders? Please specify what the organization did to make this happen.3. How does the organization and its partners maintain clear and aligned values for supporting and honoring youth?4. Please provide specific examples of how the organization collaborates with a variety of stakeholders to make decisions and ensure a positive culture and climate in your programs.
Empowerment (up to 1 page) (10 Points)	<ol style="list-style-type: none">5. Describe how the organization honors and celebrates different perspectives and unique roles to support youth.6. What professional development does your organization provide staff to support student belonging, engagement, and leadership opportunities?
Safe and Supportive Environment (up to 1 page) (20 Points)	<ol style="list-style-type: none">7. Provide examples of strategies your organization implements to ensure youth experience a sense of belonging, are valued, acknowledged, and celebrated in the program.8. What training is implemented and/or available to support staff in ensuring their programs provide safe and supportive environments? Please share examples of any curriculum and/or resources available to staff.

<p>Lifelong Learning (up to 1 page)</p> <p>(15 Points)</p>	<p>9. What practices and resources within your organization support academic engagement, confidence, and habits for lifelong learners?</p> <p>10. Lifelong Learning can be formal, nonformal, informal, and self-directed; describe how your organization supports staff-to-students learning in the program offering.</p> <p>11. Describe how youth participate in diverse enrichment programming that reflects their interests and promotes joy, skill-building, and hands-on experience. Site Examples.</p>
<p>Adaptive Programming (up to 1 page)</p> <p>(15 Points)</p>	<p>12. What strategies are in place to support staff and students when the organization has to make unexpected shifts due to physical, environmental, and social contexts? Share how you would communicate that.</p> <p>13. How does the organization offer differentiated services to meet school, student, and family needs?</p> <p>14. Share an example of how the program will provide inclusive programming to all OUSD students, including students with special needs.</p>
<p>Strong Systems and Structures (up to 2 pages)</p> <p>(20 Points)</p>	<p>15. Using the organization's budget and profit and loss statement in the required supporting documentation, create a budget narrative showing how the organization would allocate funds to run a high-quality comprehensive expanded learning program. These budgets must be based on the grant requirements detailed in the Funding description above (Section E.); including a required staffing ratio of 1:20 (or better)</p> <ul style="list-style-type: none"> ○ Elementary/Middle School Funding: ($\\$10.18 \times (65\% - \text{total UDS}) \times 175 \text{ days}$) <ul style="list-style-type: none"> ■ Ex: $(100 \text{ Unduplicated students} \times \\$10.18 \times 175 \text{ day}) \times 65\% = \\$115,797$ ○ Your budget must detail: ○ Projected Program Fees ○ Staffing costs for service delivery, staff training, and prep time ○ Full-time salaried site coordinator ○ Any agency management-level staff who grant funds will pay for the support of direct service programming ○ Supplies, materials, curriculum, books, field trips, etc. ○ Agency administrative costs are not to exceed 5% from ASES and 10% from ELO-P of the contracted amount Note: <ul style="list-style-type: none"> ■ The budget does not need to include snack costs ○ Strong practices for staff and program improvement with support from the lead agency. <p>16. The state of California has introduced Expanded Learning Opportunities</p>

	<p>Program (ELO-P) funding, allowing expanded learning programs to grow and adapt to meet the community's needs. ELO-P funds are subject to shift based on state budgeting. How will the organization ensure that current programming levels are sustainable if/when funds are no longer accessible?</p> <p>17. What is the organization's experience with implementing ASES/21st CCLC/ASSETS/ELO programs? Share a success and a challenge that the organization faced managing its requirements.. In retrospect, what shifts would the organization make to achieve a more successful outcome?</p>
--	--

Current/Returning Organizations:

Active and contracted comprehensive expanded learning providers that are OUSD-approved for the 2022-2025 cycle. If the applying organization is on this [list](#), it is classified as a returning or current organization and can only respond to the prompts below.

<p>Collaborative Partnerships (up to 2 pages)</p> <p>(20 Points)</p>	<ol style="list-style-type: none"> 1. During SY 2022-2024, how did the organization and its partners maintain clear and shared values around supporting and honoring the needs of youth? 2. How has the organization sought and responded to feedback from stakeholders, engaged in active listening, and made shared decisions? 3. Share a specific example of a successful collaborative partnership with stakeholders. Share an example of a challenging collaborative partnership and how the organization navigated the situation that did not reach the desired outcome. In retrospect, what shifts would you make to achieve a more successful outcome?
<p>Empowerment (up to 1 page)</p> <p>(10 Points)</p>	<ol style="list-style-type: none"> 4. How has the organization supported youth agency and provided youth leadership opportunities? 5. What professional development did the organization provide staff that supported student engagement and leadership opportunities? 6. What shifts did your organization make to create spaces for youth voice and choice?
<p>Safe and Supportive Environment (up to 1 page)</p> <p>(20 Points)</p>	<ol style="list-style-type: none"> 7. Provide examples of strategies your organization implemented to ensure youth experienced a sense of belonging and felt valued, acknowledged, and celebrated in the program. 8. What training was available to support staff in ensuring their programs provide safe and supportive environments? Please share curriculum, training, and resources available to staff. 9. How has the organization aligned with OUSD policy to provide a safe and

	supportive environment?
<p>Lifelong Learning (up to 1 page)</p> <p>(15 Points)</p>	<p>10. What practices and resources within the organization support academic engagement, confidence, and habits for lifelong learners?</p> <p>11. Describe how youth participated in diverse enrichment programming that reflected their interests and promoted joy, skill-building, and hands-on experience. Site Examples.</p>
<p>Adaptive Programming (up to 1 page)</p> <p>(15 Points)</p>	<p>12. What strategies are in place to support students when the organization has to make unexpected shifts due to physical, environmental, and social contexts?</p> <p>13. How does the organization offer differentiated services to meet school, student, and family needs?</p> <p>14. Share an example of how the program provided inclusive programming to OUSD students, including students with special needs.</p>
<p>Strong Systems and Structures (up to 2 pages)</p> <p>(20 Points)</p>	<p>15. Using your organization's budget and profit and loss statement in the required supporting documentation, create a budget narrative showing how your agency allocates funds to run a high-quality comprehensive expanded learning program. These budgets must be based on the grant requirements detailed in the Funding description above (Section E.), including a required staffing ratio of 1:20 (or better).</p> <ul style="list-style-type: none"> ○ Elementary/Middle School Funding: $(\\$10.18 \times (65\% - \text{total UDS}) \times 175 \text{ days})$ <ul style="list-style-type: none"> ■ Ex: $(100 \text{ Unduplicated students} \times \\$10.18 \times 175 \text{ day}) \times 65\% = \\$115,797$ ○ Your budget must detail: ○ Projected Program Fees ○ Staffing costs for service delivery, staff training, and prep time ○ Full-time Full time salaried site coordinator ○ Any agency management-level staff who grant funds will pay will be paid by grant funds for the support of direct service programming ○ Supplies, materials, curriculum, books, field trips, etc. ○ Agency administrative costs are not to exceed 5% from ASES and 10% from ELO-P of the contracted amount Note: <ul style="list-style-type: none"> ■ The budget does not need to include snack costs ○ Strong practices for staff and program improvement with support from the lead agency. <p>16. The state of California has introduced Expanded Learning Opportunities Program (ELO-P) funding, allowing expanded learning programs to grow and adapt to meet the community's needs. ELO-P funds are subject to shift based on state budgeting. How will your organization ensure that current programming levels are sustainable if/when funds are no longer accessible?</p>

	<p>17. During 2022-2024, what was your organization's success around meeting CDE compliance expectations? Expectations include meeting staff ratio, staffing qualifications, average daily attendance, and serving unduplicated, special needs, and TK/K students. . Share a success and a challenge that the organization faced in meeting compliance expectations. In retrospect, what shifts would your organization make to achieve more successful outcomes?</p>
--	---

APPENDIX III. Instructions for RFP Application Submission:

Any documents submitted after the deadline will not be accepted or reviewed.

Required Supporting Documentation Instructions:

To support RFP responses and verify organizational Proposals, the following documentation is required. The *Application Questions* in Appendix II will directly reference these documents and ask for an elaboration of the information these documents provide. All documents received will be viewed internally and not shared publicly. These documents do not count towards the 8-page limit for the RFP application described in Appendix II. Additionally, please label all supporting documents clearly according to this list:

Any files missing could result in disqualification from the RFP process.

All files will need to be clearly labeled based on the list below:

- One (1) sample Expanded learning program schedule with activity summary
- A sample budget pertaining to the program schedule and activity summary
- Current Profit and Loss statement from 2022 or 2023
- Copy of 2023 990 Tax Form
- Copy of Monitoring Reports and/or other external evaluations of the program (maximum of 1)
- Organizational chart of agency that illustrates how the OUSD Expanded Learning Program is to be supported administratively and programmatically
- Copy of organization's 501(c)(3) letter
- Bank statements to show proof of operating cash reserves
- Job description for site coordinator and program instructor positions
- Copy of IRS letter certifying tax exempt status
- Proof of "active" status with the office of the California Secretary of State Board roster

and minutes – Include the current board roster indicating officers and affiliations as well as Board approved minutes from the 2022-2023 school year.

- Signed letter of agreement (as elaborated upon in Section N)
- Most recent audited financial statements within 2 years and summary of the audit findings
- Letters of reference (maximum of 2)
- Documents demonstrating fulfillment of minimum Proposals (see Section M)
- Copy of current certificate of current insurance: Commercial/General Liability \$1M per occurrence and Workman's Comp.

The following documents listed below are **not** required upon submission of proposal but will be required upon receiving 'Recommended' status.

1. Statement of Qualifications

A Statement of Qualifications is a paragraph or two on the organization's letterhead that explains why they are qualified to provide this service.

2. Commercial General Liability Insurance Coverage via an ACORD sheet.

A. Address in the "Certificate Holder" section: Oakland Unified School District, Attn: Risk Management; 1011 Union Street, Oakland CA 94607

B. Policy Limits: 1,000,000 per occurrence / \$2,000,000 aggregate

2. (a) Policy Endorsement naming OUSD as an additional insured (from the Agent): this is a Separate document from above.

3. An ACORD Sheet for Professional Liability or Corporal Punishment insurance: It should have minimum policy limits of \$1MM per occurrence and \$2MM aggregate

3. (a) Policy Endorsement naming OUSD as an additional insured on this policy.

4. Either one of these two types of coverages are acceptable - It should be on an ACORD Sheet

A) Improper Sexual Conduct & Physical Abuse Liability or

B) Sexual Abuse & Molestation. It should have minimum policy limits of \$1MM per occurrence and \$2MM aggregate minimum;

4. (a) Policy Endorsement naming OUSD as an additional insured on this policy.

5. Agency Letter: This letter states the following : (and should be on your letterhead)

(a) All of the employees that work at OUSD have passed fingerprint review by CA DOJ and FBI, TB testing requirements, and mandate reporting.

(b) ATI Numbers (from fingerprinting) will need to appear on all invoices submitted to OUSD

(c) Proof of fingerprint passage and TB Test passage of staff working at OUSD will be available to OUSD upon demand.

APPENDIX IV: OUSD Expanded Learning Lead Agency MOU Boilerplate Checklist

1. Intent
2. Term of MOU
3. Termination
4. Compensation
 - 4.1. Total Compensation
 - 4.2. Positive Attendance
 - 4.2.1. Reconciliation Process for Positive Attendance-Based Grant Funds
 - 4.2.2. Administrative Charges and Reconciliation
 - 4.3. OUSD Administrative Fees
 - 4.4. Agency Administrative Fees
 - 4.5. Program Budget
 - 4.6. Modifications to Budget
 - 4.7. Program Fees
5. Scope of Work
 - 5.1. Student Outcomes
 - 5.1.1. Alignment with Community School Strategic Site Plan
 - 5.2. Oversight
 - 5.3. Enrollment
 - 5.4. Program Requirements
 - 5.4.1. Program Hours
 - 5.4.2. Program Days
 - 5.4.3. Program Components
 - 5.4.4. Staff Ratio
 - 5.5 Data Collection
 - 5.5.1. Accountability Reports
 - 5.5.2. Attendance Reports
 - 5.5.3. Use of Enrollment Packet

- 5.6. Maintain Clean, Safe and Secure Environment
- 5.7. Meeting Participation
- 5.8. Relationships
- 5.9. Licenses
- 6. Field Trip Policy. Field Trips, Off Site Events and Off Site Activities
 - 6.1. – 6.13.2., including, but not limited to:
 - 6.1. Licenses Permission Slips/Acknowledgement
 - 6.1.3. Notice of Waiver of All Claims
 - 6.5. Health Conditions/Medication
 - 6.6. Supervision
 - 6.7. Transportation Requirements
 - 6.11. Additional Requirements for High Risk, Overnight, Out of State Trips
 - 6.12. Additional Requirements for Field Trips/Excursions Which Include Swimming or Wading
 - 6.13. Additional Requirements for Trips to East Bay Regional Park District Bodies of Water (swimming pools, lagoons, shoreline parks and lakes) and Related Facilities
- 7. Financial Records
 - 7.1. Accounting Records
 - 7.2. Disputes
- 8. Invoicing
 - 8.1. Billing Structure
 - 8.2. Unallowable Expenses
 - 8.3. Invoice Requirements
 - 8.4. Submission of Invoices
 - 8.5. Submission of Invoices for ASEP and 21st Century Grants
- 9. Ownership of Documents
- 10. Changes
 - 10.1. Agency Changes
 - 10.2. Changing Legislation
- 11. Conduct of Consultant
 - 11.1. Child Abuse and Neglect Reporting Act
 - 11.2. Staff Requirements

- 11.2.1. Tuberculosis Screening
 - 11.2.2. Fingerprinting of Agents
 - 11.2.3. Minimum Proposals
- 11.3. Removal of Staff
- 11.4. Conflict of Interest
- 11.5. Drug-Free/Smoke Free Policy
- 11.6. Non-Discrimination
- 12. Indemnification
- 13. Insurance
 - 13.1. Commercial General Liability
 - 13.2. Worker's Compensation
 - 13.3. Property and Fire
- 14. Litigation
- 15. Incorporation of Recitals and Exhibits
- 16. Counterparts
- 17. Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion
- 18. All exhibits, with required forms and timelines

OUSD AFTER-SCHOOL LEAD AGENCY 2022-25 MOU SAMPLE CONTRACT

The contract template that is currently being used by lead agencies can be accessed by clicking the [following link](#). The MOU contract will be a master contract between OUSD and the lead agency that does not specify the school site(s) where the agency is assigned, and that master contract will last for three (3) years (but note that agencies and sites will continue be matched in 1-year relationships, as they are currently).

All applicants are required to review the MOU contract template currently in use, and sign the OUSD Expanded Learning Lead Agency MOU Boilerplate Checklist of the RFP (Appendix IV).

If having a hard time opening the contract template, please email procurement@ousd.org for a copy.

Submission of this Signed Boilerplate Checklist will constitute a representation by your firm that it has read all the clauses listed in the OUSD Expanded Learning Lead Agency MOU contract sample (Appendix IV), is willing and able to comply with OUSD contracting requirements, and understands that the standard OUSD Expanded Learning Lead Agency MOU is subject to change annually.

Signature

Date

Name and Title of Signatory

Name of Organization

APPENDIX V: Appeals Process for Applicants

Any applicant may appeal to the Oakland Unified School District Procurement Department if the determination that it is not prequalified. An appeal must be based on one or both of two following:

- **Unfair process** (e.g., the appellant's proposal was treated differently than others, conflict of interest by OUSD Department of Expanded Learning staff, etc.)
- **Material error** (e.g., the appellant's proposal was reviewed under the wrong funding strategy, failure to consider all application materials, incorrect application of evaluation rubric or some other mistake of fact occurred), or

The appellant must submit the appeal by September 13, 2024 (i.e., 5 business days after the Lead Agency Notification Date). If the appellant fails to file an appeal prior to the applicable appeals deadline, the appellant waives any and all rights to challenge the decision of the District.

An appeal must clearly state the facts that establish one of the above-referenced bases for appeal and how, as a result, the appellant's proposal was affected negatively. The appeal will be considered and adjudged by the Senior Manager, Rosaura Altamirano, whose decision will be final. Appellant should submit the appeal and any supporting documents should be sent electronically by email to:

Rosaura M. Altamirano

Senior Manager, Supply Chain & Logistics, rosaura.altamirano@ousd.org

Appellants will receive written notice of the outcome of their appeal by September 26, 2024. In the event that an applicant's appeal is successful, the agency will be treated as all other prequalified agencies.

APPENDIX I: RFP Application

2024 OUSD Request for Proposals Application (Template)

ASES, 21st CCLC, ELO-P, and ASSETS Expanded Learning Programs

Cover Sheet Template:

Organization Name	Oakland Leaf Foundation		
Primary Contact Person:	Melissa Mendez Ochoa	Secondary Contact Person:	Isabel Gonzalez
Email:	melissa.mendez_ochoa@oaklandleaf.org	Email:	isabel.gonzalez@oaklandleaf.org
Telephone #:	707-225-1466	Telephone #:	510-872-3056

Service Category: Check the grade levels your organization is interested in serving.	
X	Elementary (Grades TK-5)
X	Elementary/Middle (Grades TK-8)
X	Middle (Grades 6-8)
	High (Grades 9-12)

Does your organization have 501c3 status? Please provide documentation of this status in your supporting documentation section.	X	Yes
		No
Are you currently an OUSD Approved Lead Agency Partner?	X	Yes
		No
Have you served as an OUSD Lead Agency partner before in past years? If so, please identify the years and durations served.	X	Yes
		No
	20	# Years
Do you currently serve in the Lead Agency role for any other school districts besides OUSD?		Yes
	X	No
If yes, please list all school districts you have served.		
How many school sites does your organization have the capacity to serve as a lead agency?	6	# Sites
In the box below, please briefly explain your rationale for this number of sites?		
At this time, Oakland Leaf is able to serve only six Oakland Unified School District (OUSD) sites due to our current administrative capacity. This limitation ensures that we can provide the highest quality support and programming to the students and staff at these sites. By focusing our resources and efforts on a manageable number of locations, we can maintain the standards of excellence and compliance.		

On behalf of Oakland Leaf Foundation (Agency), I, Melissa Mendez Ochoa (name)
Executive Director (Position), declare under penalty of perjury under the laws
of the State of California that the foregoing is true and correct.

Signature:



Date: 06/08/2024



Letter of Agreement

Dear Oakland Unified School District's (OUSD) Department of Expanded Learning,

This Letter of Agreement establishes the intention of Oakland Leaf Foundation to work together with Oakland Unified School District's (OUSD) Department of Expanded Learning to facilitate a comprehensive after school program at OUSD school sites.

Oakland Leaf Foundation's mission is to cultivate community transformation through creative education. Our approach to youth development and student empowerment emphasizes enrichment activities that focus on: project-based learning, community awareness, cultural literacy, leadership development, social justice and reflection. Our goal is to develop youth with relevant, sustainable skills for them to become creative individuals with healthy habits.

Oakland Leaf has partnered with OUSD to provide expanded learning programs to students since 2003. In that role, Oakland Leaf has and will continue to:

- Serve as lead agency for the program including fiscal responsibility for managing after school grant funds per grant requirements and developing after school program and budget plans in close collaboration with school leadership
- Provide an After School Site Manager and adequate, qualified staffing to ensure program quality and compliance and meet the grant required 20:1 student to staff ratio.
- Ensure all hiring criteria and procedures such as fingerprint clearances, criminal background checks, and TB testing are completed with approval for all after school program staff and volunteers.
- Provide daily comprehensive after school programming consisting of academic, enrichment, and physical activity/recreational components to an adequate number of student participants to fulfill attendance requirements.
- Operate program until 6pm daily on every day regular day school is in session, to fulfill ASES attendance requirements.
- Work with the independent evaluator to collect and analyze data on student enrollment, attendance, academic performance, and student and parent satisfaction.

Oakland Leaf is aware of their responsibilities fiscally and programmatically for all compliance requirements if approved as lead agency. We are committed to upholding all of the responsibilities outlined in our application. We have been honored to partner with OUSD and we hope that we can continue to grow our partnership for future years.

Sincerely,

Melissa Mendez Ochoa
Executive Director
Oakland Leaf Foundation

Collaborative Partnerships

1. We achieve value alignment and prioritizing youth in decision making through several key methods. Our managers engage in daily and weekly informal meetings with school administration to address immediate concerns and maintain a steady flow of communication. Monthly meetings between managers and principals provide a structured opportunity to review progress and plan, with our Director of the Afterschool Programs joining quarterly. Our Executive Director meets with the Principal and Director of the Afterschool Programs annually to ensure alignment of values and goals.

Another method is active participation in school meetings to ensure shared values that support and honor the needs of youth. Our managers and Program Culture Leaders attend leadership meetings such as Coordination of Student Services Team (COST) and Student/Family Specific SST meetings to allow for targeted support and interventions. During the first month of the program, all direct line staff participate in classroom observations to identify best practices and implement in afterschool to ensure consistent and effective approach to youth support.

These strategies collectively ensure that we are consistently focused on supporting and honoring the needs of youth and fostering an environment of collaboration.

2. One of the core values of Oakland Leaf is providing opportunities for input from various stakeholders to ensure our agency remains accountable and committed to continuous improvement. We administer annual surveys to staff, youth, and parents/guardians to gather feedback on program impact, satisfaction, and areas for enhancement. Using analytical tools, we extract insights from the data and implement programmatic changes

based on this feedback. These changes are designed by our program manager team.

During the design process, we meet to get further input, creating a collaborative opportunity to adapt the changes according to the school's needs. All feedback results and plans for change are then shared with the stakeholders.

3. The long-standing partnership with America Scores, spanning over five years, has consistently provided valuable opportunities for skill-building among our students. Our partnership has been characterized by strong communication and shared values. Both organizations prioritize the well-being and development of youth, ensuring that programs are tailored to meet their needs and interests. The consistent collaboration and mutual support have allowed us to continuously improve and adapt the program, keeping it relevant and impactful.

Conversely, a partnership that presented challenges was with KidzToPro. The issues arose from mismatched expectations and communication gaps. In navigating this challenging partnership, we attempted to increase communication frequency and clarify expectations. Meetings were held to address specific concerns and realign the program's goals with student needs. However, the changes were not sufficient to fully turn the situation around. In retrospect, an early alignment of goals and expectations would have been crucial for achieving a successful outcome. A more thorough initial alignment with KidzToPro would have ensured both parties were on the same page from the start. Learning from this experience, we now emphasize the importance of actively meeting with potential partners, even those recommended by trusted sources, to ensure close alignment of needs and capacity to achieve intended outcomes.

Empowerment

4. Oakland Leaf's commitment to youth agency and youth leadership opportunities is ingrained in our values and manifests through initiatives aimed at empowering youth, amplifying their voices, and cultivating their leadership. Our framework ensures that students of all ages have opportunities to assume leadership roles ranging from serving as emcees for events to leading icebreakers and reflection. Additionally, we ensure projects are initiated by instructors, yet students are actively encouraged to take the lead in designing, planning, and implementation. By allowing this collaborative space and roles, we not only empower students but also foster a sense of program ownership.
5. Oakland Leaf's staff undergo training in the Building Intentional Communities and Oakland Leaf Restorative Justice curriculum to equip them with tools to establish inclusive and enriching environments as well as essential techniques for conflict resolution and community building. In addition, training sessions on classroom management and project-based learning strategies provide instructors with effective tools and techniques to support student engagement and cultivate youth leadership skills. We ensure that staff are well-prepared to create transformative learning experiences that nurture student engagement and foster leadership capabilities among the youth we serve.
6. We have implemented several shifts to prioritize youth voice and choice within our programs. One change involves our approach to external partnerships, where new partnership decisions are informed by youth to ensure our program offerings align closely with their interests and needs, fostering a sense of choice and ownership among students.. These efforts not only enable us to continuously refine our programmatic offerings but also empower youth by valuing their input and involving them in decision-making.

Safe and Supportive Spaces (up to 1 page - 20 points)

7. Oakland Leaf ensures youth feel a strong sense of belonging through various strategies. During the first three weeks of school, the first week after winter break, and weekly, we prioritize community-building activities to foster connection. Monthly assemblies celebrate student achievements and honor those exemplifying our core values. Daily program closings include “Much Loves,” where students and staff share appreciations, fostering community spirit. Students earn Leaf Dollars for positive behavior, which accumulate towards student-created rewards. These initiatives create safe, supportive spaces where students feel valued, acknowledged, and encouraged to thrive.
8. Our staff undergoes training at the start of school year or upon onboarding, focusing on Weikert’s Youth Program Quality Assessment Tiers related to Safe and Supportive Environments. This includes emotional safety, a healthy environment, emergency preparedness, behavior management, crisis management, and First Aid/CPR. In addition, we provide tools on session flow, engagement strategies, skill-building, and creating youth-centered spaces.. Staff are regularly observed using an internal tool to ensure adherence to safety and support standards. This approach ensures staff are prepared to create environments where youth thrive.
9. Oakland Leaf collaborates with our principals to provide a safe and supportive environment through a shared vision for a full-service community school district. We regularly evaluate and align our practices with OUSD policies. Our staff receives training on relevant guidelines and practices like SEL three signature practices. This approach ensures our programs meet and exceed OUSD standards, creating environments where students feel safe, supported, and empowered to learn and grow.

Lifelong Learning

- 10.** Oakland Leaf's focuses on lifelong learning to boost academic engagement and lifelong learning. Our Scholars in Action class offer literacy interventions (Reading with Relevance and SIPPS) and homework support. Creative formats, like analyzing song lyrics, foster dynamic learning. Community service projects for 5th and 8th graders promote civic responsibility and leadership. Students address local issues and set project goals together, enhancing their sense of agency. Oakland Leaf's Restorative Justice curriculum includes culturally responsive, trauma-informed lessons that promote self-reflection and empathy. Activities like "A, B, Cs of Me" and "My Community" foster environmental awareness and social justice. Weekly crew classes teach self-management, self-awareness, relationships, and decision-making. Student cyphers encourage respectful dialogue on relevant topics. Overall, Oakland Leaf prepares youth to thrive academically, socially, and personally.
- 11.** Oakland Leaf's provides diverse enrichment experiences fostering joy, skill-building, and hands-on learning. Students engage in art & culture classes emphasizing multicultural education. Activities like theater workshops and visual arts classes help students explore their identities and appreciate other cultures. STEM Classes such as 3D art, robotics, coding, and tinkering ignite curiosity and develop critical thinking. Students engage in sports, cooking classes, and gardening for Health & Wellness to promote fitness, emotional well-being, and overall health. Overall, Oakland Leaf's programs enhance academic engagement, life skills, cultural understanding, and social responsibility, preparing students to succeed and lead in their communities.

Adaptive Programming

- 12.** Oakland Leaf responds to unexpected shifts by aligning with core values, reviewing data to understand impacts, and adapting programs accordingly. Clear communication with students, parents, staff, and partners is prioritized, providing timely updates on reasons for changes and their impacts. We adjust curriculum and activities to fit new circumstances, ensuring relevance and engagement. These strategies maintain a positive and supportive environment, supporting students through unexpected changes.
- 13.** Oakland Leaf offers differentiated services to meet diverse school, student, and family needs by prioritizing strategic partnerships and integrating input. Collaborating with various organizations broadens access to creative learning opportunities and enables us to offer a diverse array of programs that cater to different interests. We actively solicit and incorporate input from parents and students to help us understand community needs, shaping the refinement of our services to remain relevant and aligned with stakeholder expectations. We are committed to tailoring services that address multifaceted needs.
- 14.** At Oakland Leaf, inclusivity is central. We supported a significant population of Extended School Year (ESY) students at one site, integrating them into both academic year and summer afterschool programs alongside their peers. To support ESY students effectively, we use personalized instructional strategies like tailored lesson plans and specialized tools for engagement and comprehension. Breaks and supportive environments help manage their energy levels and focus. Building strong relationships between ESY students and adult allies enhances academic engagement and emotional well-being. High participation rates among ESY students returning for summer programs highlight the success of our inclusive approach.

Strong Systems and Structures

- 15.** Oakland Leaf strategically allocates funds to ensure effective program implementation and sustainability. Our various funding streams support staffing, program design, and operational needs aligned with grant requirements and organizational goals. ASES funding supports critical managerial and academic mentor positions, covering salaries for a 10 months of Program Manager and 2 to 3 part-time academic mentors who provide essential student support. The Oakland Fund for Children and Youth (OFCY) expands our staffing by adding two months to the Program Manager contract and funds a full-time Program Culture Leader and part-time enrichment instructors, enhancing program offerings and operational management. ELOP funding supports a part-time academic coordinator and a part-time Kinder Instructor, strengthening academic support and capacity. Oakland Leaf leverages individual donors, foundations, and corporate partnerships to supplement costs for instructors and program partners, expanding programmatic scope and quality. Financially, we maintain stability with a healthy profit and loss statement and a \$193,000 reserve fund, alongside a \$200,000 line of credit for flexibility in addressing short-term financial needs. Our budget strategy ensures funding efficiency, aligns with program goals, and supports high-quality educational experiences for students, families, and the community.
- 16.** Oakland Leaf is dedicated to maintaining program quality and accessibility, especially amid potential fluctuations in ELO-P funding from California. We have a robust strategy to ensure continuity and support for our community. We actively seek grants, corporate sponsorships, and individual donations to diversify funding beyond ELO-P, reducing reliance on any single source. We prioritize operational efficiency, continuously

improving program delivery and administrative practices to maximize impact and reduce costs. Our sustainability plan includes scenario planning and contingency measures to manage funding uncertainties effectively, ensuring organizational resilience. We maintain reserve funds as a financial safety net, carefully managed to navigate funding gaps or challenges without compromising programs. These initiatives prepare Oakland Leaf to sustain current programming levels, ensuring high-quality educational and enrichment opportunities despite potential changes in ELO-P funding.

17. Oakland Leaf prioritizes compliance with CDE requirements, ensuring effective and inclusive programs through structured protocols. Administrative processes are meticulously designed by our Director of Finance & Administration and Director of Programs, with input from Program Managers, ensuring compliance before implementation. All-staff summer training includes comprehensive compliance training at every level. An example of a compliance success was that in 2023, all elementary sites met attendance targets, with one site achieving 2024 goals by May. Each site accommodated 2 to 3 TK/Kinder classes to meet community needs, and one site doubled enrollment compared to 2021-2022. A challenge that we faced in meeting compliance expectations in 2022-2023 was starting off with significant staffing shortages, making it challenging to meet the required staff-to-student ratios. This issue highlighted the need for a more robust staffing strategy and contingency planning. We were able to develop contingency plans for staff shortages and focused on enhancing recruitment efforts. Oakland Leaf strives to consistently exceed compliance expectations through continuous improvement, ensuring high-quality, impactful programs for all students.

AFTERSCHOOL Program Schedule					
Lead Agency: Oakland Leaf Foundation					
Elementary School Schedule					
Time Block	Monday	Tuesday	Wednesday	Thursday	Friday
1:15 - 1:35			Gathering/ UED		
1:35 - 2:45			Game Centers/ Assembly		
2:45 - 3:00	Gathering	Gathering	every other week	Gathering	Gathering
3:00 - 3:30	Break Bread: Snack	Break Bread: Snack	Break Bread: Snack	Break Bread: Snack	Break Bread: Snack
3:30-4:30	K, 1, 3, 5 Enrichment: SEL/Cypher	2nd and 4th- Enrichment Be The Change	K, 1, 3, 5 Enrichment: Crew Class/ Crew Competitions every other week	2nd and 4th- Enrichment SEL/Cypher	K-5th Fun Friday! Clubs
	2nd and 4th- Scholars in Action-Tech	K, 1, 3, 5 Scholars in Action- Tech	2nd and 4th- Scholars in Action- Literacy	K, 1, 3, 5 Scholars in Action- Literacy	
4:30 - 5:00	Movement/Movimiento	Movement/Movimiento	Movement/Movimiento	Movement/Movimiento	Movement/Movimiento
5:00 - 6:00	K, 1, 3, 5 Scholars in Action-Tech	2nd and 4th Scholars in Action- Tech	K, 1, 3, 5 Scholars in Action-Literacy	2nd and 4th- Scholars in Action-Literacy	K-5th Fun Friday!-Academic Activity/Closing Cypher Every other week
	2nd and 4th Enrichment- SEL/Cypher	K, 1, 3, 5- Enrichment Be The Change	2nd and 4th Enrichment: Crew Class/ Crew Competitions every other week	K, 1, 3, 5 Enrichment: SEL/Cypher	
6:00-6:15	Sign Out and Program Dismissal	Sign Out and Program Dismissal	Sign Out and Program Dismissal	Sign Out and Program Dismissal	Sign Out and Program Dismissal

Program Schedule Description			
Program Title	Description	Staff	Component
Enrichment: SEL/Cypher	Social Emotional Learning component will incorporate lessons that address the 5 SEL Competencies	Direct Staff K-5th grade	Educational Enrichment
Enrichment Be The Change	Enrichment Lesson focusing on Food is my Fuel (Nutrition) , STEAM, and Theatre arts	Direct Staff K-5th grade	Educational Enrichment
Enrichment: Crew	Program session will include the 3 SEL signature practices and a relevant, interactive, and skill-building activity for youth to engage in. i.e.- Arts and Culture, STEAM, Service Learning, etc.	Direct Staff K-5th grade	Educational Enrichment
Fun Friday! Clubs	Program session will include the 3 SEL signature practices and a relevant, interactive, and skill-building activity for youth to engage in. i.e.- Arts and Culture, STEAM, Service Learning, etc. Students will choose the activity to attend for a period of 5 weeks.	Direct Staff K-5th grade	Educational Enrichment
Game Centers	Physical activity based sessions to get youth moving and exercising indoors and outdoors	Direct Staff K-5th grade	Physical Activity
Movement	Supervised Outdoor play	Direct Staff K-5th grade	Physical Activity
Assembly	Whole Program gathering for youth to receive awards, class competitions, workshops, and celebrations.	Direct Staff K-5th grade	Educational Enrichment
Scholars in Action-Tech	Students will engage in I-Ready or STmath and any other online homework assignments	Direct Staff K-5th grade	Educational and Literacy Core
Scholars in Action-Literacy	Students will engage in Reading w/ Relevance or Centers based activities	Direct Staff K-5th grade	Educational and Literacy Core
Fun Friday!-Academic Activity	Students will engage in organized academic lessons such as current events, poetry, music production, scrabble, documentary, important historical figures etc.	Direct Staff K-5th grade	Educational and Literacy Core

OUSD ASP Sample Budget

Expenses	Approved Budget	ASES	ELOP	OFCY	Fundraising
Personnel Expenses					
Program Manager	\$ 59,825.04	\$ 54,386.40	\$ -	\$ 5,438.64	\$ -
Program Culture Leader	\$ 37,187.50	\$ -	\$ 17,708.33	\$ 19,479.17	\$ -
Attendance Clerk	\$ -	\$ -	\$ -	\$ -	\$ -
Academic Coordinator	\$ 23,881.00	\$ -	\$ 23,413.00	\$ 468.00	\$ -
Kinder Instructor	\$ 26,667.40	\$ -	\$ 26,277.30	\$ 390.10	\$ 0.00
Kinder Instructor	\$ -	\$ -	\$ -	\$ -	\$ -
1st Grade Instructor	\$ 26,538.91	\$ -	\$ -	\$ 26,538.91	\$ -
Academic Mentor	\$ 23,498.00	\$ 20,858.63	\$ -	\$ 394.74	\$ 2,244.63
Academic Mentor	\$ 24,338.40	\$ 23,929.54	\$ -	\$ 408.86	\$ -
Enrichment Instructor	\$ 23,037.25	\$ -	\$ 22,650.25	\$ 387.00	\$ -
Enrichment Instructor	\$ 24,050.89	\$ -	\$ 23,646.86	\$ 404.03	\$ -
Subtotal, Personnel	\$ 269,024.39	\$ 99,174.57	\$ 113,695.74	\$ 53,909.45	\$ 2,244.63
Payroll Taxes/Workers Comp	\$ 35,392.92	\$ 14,030.33	\$ 14,189.23	\$ 6,893.23	\$ 280.13
Paid Holidays	\$ -	\$ -	\$ -	\$ -	\$ -
Health Benefits	\$ 16,826.09	\$ 5,809.14	\$ 5,809.14	\$ 5,207.81	\$ -
Total, Personnel Expenses	\$ 321,243.40	\$ 119,014.04	\$ 133,694.11	\$ 66,010.49	\$ 2,524.76
Contract Services					
Ouside Contract Services	\$ 960.00	\$ -	\$ -	\$ 960.00	\$ -
America SCORES	\$ 10,000.00	\$ -	\$ 10,000.00	\$ -	\$ -
Destiny Arts	\$ 6,000.00	\$ -	\$ 6,000.00	\$ -	\$ -
Girls Incorporated	\$ -	\$ -	\$ -	\$ -	\$ -
Cycles of Change	\$ -	\$ -	\$ -	\$ -	\$ -
Subtotal, Contract Services	\$ 16,960.00	\$ -	\$ 16,000.00	\$ 960.00	\$ -
Direct Expenses					
Cell Phone Reimbursement	\$ 480.00	\$ -	\$ -	\$ -	\$ 480.00
Program Events	\$ 1,750.00	\$ -	\$ -	\$ -	\$ 1,750.00
Staff Appreciation	\$ 1,240.00	\$ -	\$ -	\$ -	\$ 1,240.00
Garden Supplies	\$ -	\$ -	\$ -	\$ -	\$ -
Office Supplies	\$ 1,350.00	\$ -	\$ -	\$ -	\$ 1,350.00
Classroom Supplies	\$ 2,300.00	\$ -	\$ -	\$ -	\$ 2,300.00
Fieldwork	\$ -	\$ -	\$ -	\$ -	\$ -
Professional Development/Retreats	\$ -	\$ -	\$ -	\$ -	\$ -
Student/Family Nutrition	\$ 665.00	\$ -	\$ -	\$ -	\$ 665.00
T-Shirts	\$ 1,000.00	\$ -	\$ -	\$ -	\$ 1,000.00
Transportation & Lodging	\$ 40.00	\$ -	\$ -	\$ -	\$ 40.00
Department of Justice	\$ 98.00	\$ -	\$ -	\$ -	\$ 98.00
Subtotal, Direct Expenses	\$ 5,453.00	\$ -	\$ -	\$ -	\$ 5,453.00
Total, Non-Personnel Expenses	\$ 22,413.00	\$ -	\$ 16,000.00	\$ 960.00	\$ 5,453.00
Total Program Expenses	\$ 343,656.40	\$ 119,014.04	\$ 149,694.11	\$ 66,970.49	\$ 7,977.75
LCS Garden Club	\$ 10,233.45	\$ -	\$ -	\$ -	\$ 10,233.45
Total ASP Common	\$ 23,740.35	\$ -	\$ -	\$ 6,095.28	\$ 17,645.07
Total Indirect	\$ 75,301.00	\$ 6,630.16	\$ 17,463.04	\$ 11,934.23	\$ 39,273.57
GRAND TOTAL	\$ 452,931.20	\$ 125,644.20	\$ 167,157.15	\$ 85,000.00	\$ 75,129.84
Total Awarded Amount		\$ 125,644.20	\$ 167,157.15	\$ 85,000.00	



OAKLAND LEAF FOUNDATION

FY24 P&L

July 2023 - June 2024

	TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET
Revenue				
40000 Contributed Support				
41000 Contract for Services	3,245,272.31	3,515,880.00	-270,607.69	92.30 %
42000 Corporations	34,782.00	48,240.00	-13,458.00	72.10 %
43000 Foundations	233,700.00	343,500.00	-109,800.00	68.03 %
44000 Events	168,963.44	265,000.00	-96,036.56	63.76 %
46000 Individual Contributions	136,269.00	132,120.00	4,149.00	103.14 %
49990 Other Income	2,534.63		2,534.63	
Total 40000 Contributed Support	3,821,521.38	4,304,740.00	-483,218.62	88.77 %
49991 In-Kind Donation	3,000.00		3,000.00	
Total Revenue	\$3,824,521.38	\$4,304,740.00	\$ -480,218.62	88.84 %
GROSS PROFIT	\$3,824,521.38	\$4,304,740.00	\$ -480,218.62	88.84 %
Expenditures				
50010 DIRECT EXPENSES	94,467.28	203,608.00	-109,140.72	46.40 %
60000 PERSONNEL EXPENSES				
60001 ADMINISTRATIVE STAFF	606,840.26	677,495.00	-70,654.74	89.57 %
60002 PROGRAM STAFF	2,251,446.18	2,341,006.00	-89,559.82	96.17 %
69810 INDIRECT PERSONNEL EXPENSES		0.00	0.00	
69840 PAYROLL TAXES + BENEFITS	419,333.37	719,331.00	-299,997.63	58.29 %
Total 60000 PERSONNEL EXPENSES	3,277,619.81	3,737,832.00	-460,212.19	87.69 %
62100 CONTRACT SERVICES - DIRECT	190,386.80	147,065.00	43,321.80	129.46 %
70000 FACILITIES EXPENSES- SHARED	76,851.25	70,565.00	6,286.25	108.91 %
80000 OPERATING EXPENSES-SHARED	161,048.50	136,864.00	24,184.50	117.67 %
Payroll Expenses	0.00		0.00	
Total Expenditures	\$3,800,373.64	\$4,295,934.00	\$ -495,560.36	88.46 %
NET OPERATING REVENUE	\$24,147.74	\$8,806.00	\$15,341.74	274.22 %
Other Revenue	\$11,500.38	\$0.00	\$11,500.38	0.00%
Other Expenditures	\$ -0.86	\$0.00	\$ -0.86	0.00%
NET OTHER REVENUE	\$11,501.24	\$0.00	\$11,501.24	0.00%
NET REVENUE	\$35,648.98	\$8,806.00	\$26,842.98	404.83 %

Return of Organization Exempt From Income Tax
Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)**2022**Department of the Treasury
Internal Revenue ServiceDo not enter social security numbers on this form as it may be made public.
Go to www.irs.gov/Form990 for instructions and the latest information.**Open to Public Inspection**

A For the 2022 calendar year, or tax year beginning 7/01, 2022, and ending 6/30, 2023	
B Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	C Name and address of principal officer: MELISSA MENDEZ OCHOA OAKLAND LEAF FOUNDATION 520 3RD STREET, STE 109 OAKLAND, CA 94607
	D Employer identification number 81-0565800
	E Telephone number (510) 564-4334
	G Gross receipts \$ 2,740,202.
F Name and address of principal officer: MELISSA MENDEZ OCHOA SAME AS C ABOVE	
H(a) Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
H(b) Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. See instructions.	
I Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) () (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527	
J Website: WWW.OAKLANDLEAF.ORG	
K Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other	
L Year of formation: 2002	
M State of legal domicile: CA	

Part I Summary

Activities & Governance	1 Briefly describe the organization's mission or most significant activities: OAKLAND LEAF CULTIVATES COMMUNITY TRANSFORMATION THROUGH CREATIVE EDUCATION FOR YOUTH AND FAMILIES. OAKLAND LEAF RUNS 6 COMPREHENSIVE AFTERSCHOOL PROGRAMS, A SUMMER CAMP, AND TWO HIGH SCHOOL INTERNSHIPS.
	2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.
	3 Number of voting members of the governing body (Part VI, line 1a) 3 13
	4 Number of independent voting members of the governing body (Part VI, line 1b) 4 12
	5 Total number of individuals employed in calendar year 2022 (Part V, line 2a) 5 91
	6 Total number of volunteers (estimate if necessary) 6 0
	7a Total unrelated business revenue from Part VIII, column (C), line 12 7a 0.
b Net unrelated business taxable income from Form 990-T, Part I, line 11 7b 0.	
Revenue	8 Contributions and grants (Part VIII, line 1h) Prior Year 2,475,985. Current Year 2,614,913.
	9 Program service revenue (Part VIII, line 2g)
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d) 3,294. 279.
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) 82,710. 102,204.
	12 Total revenue — add lines 8 through 11 (must equal Part VIII, column (A), line 12) 2,561,989. 2,717,396.
	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)
Expenses	14 Benefits paid to or for members (Part IX, column (A), line 4)
	15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) 1,944,229. 2,246,181.
	16a Professional fundraising fees (Part IX, column (A), line 11e)
	b Total fundraising expenses (Part IX, column (D), line 25) 264,107.
	17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) 366,918. 583,640.
	18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) 2,311,147. 2,829,821.
Net Assets or Fund Balances	19 Revenue less expenses. Subtract line 18 from line 12 250,842. -112,425.
	20 Total assets (Part X, line 16) Beginning of Current Year 850,983. End of Year 871,158.
	21 Total liabilities (Part X, line 26) 43,728. 176,328.
	22 Net assets or fund balances. Subtract line 21 from line 20 807,255. 694,830.

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here	Signature of officer MELISSA MENDEZ OCHOA		Date EXECUTIVE DIRECTOR	
	Type or print name and title			
Paid Preparer Use Only	Print/Type preparer's name SUZANNE R. HEALY	Preparer's signature SUZANNE R. HEALY	Date	Check <input type="checkbox"/> if self-employed PTIN P00533689
	Firm's name HEALY AND ASSOCIATES	Firm's EIN 81-1489821		
	Firm's address 1200 CONCORD AVE STE 250	Phone no. 925-603-0800		
	CONCORD, CA 94520			

May the IRS discuss this return with the preparer shown above? See instructions ☒ Yes ☐ No

Part III Statement of Program Service AccomplishmentsCheck if Schedule O contains a response or note to any line in this Part III ☒ **X****1** Briefly describe the organization's mission:

SEE SCHEDULE O

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ☐ Yes ☒ No

If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☐ Yes ☒ No

If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.**4a** (Code:) (Expenses \$ 2,398,343. including grants of \$) (Revenue \$)BRET HARTE AFTER-SCHOOL PROGRAM:THE BRET HARTE AFTER-SCHOOL PROGRAM PROVIDES 140 YOUTH IN THE 6TH TO 8TH GRADE RANGE THE ENVIRONMENT TO BE CREATIVE, STEWARDS, CRITICAL THINKERS AND ACTIVE PARTICIPANTS IN THEIR SCHOOL IN ORDER TO BRING CHANGE TO THEIR IMMEDIATE COMMUNITY. YOUTH ARE SUPPORTED IN CREATING ALLIANCES THAT ARE NURTURED THROUGH INDIVIDUAL DEVELOPMENT, CROSS CULTURAL EXCHANGE, LEADERSHIP AND EXPOSURE TO THE WORLD BEYOND THEIR IMMEDIATE COMMUNITY.**4b** (Code:) (Expenses \$ including grants of \$) (Revenue \$)ICS AND TCN AFTER-SCHOOL PROGRAM:THE ICS AND TCN AFTER-SCHOOL PROGRAM (ICS TCN ASP) EMPOWERS STUDENTS TO BE KEEPERS OF THE COMMUNITY. THIS PROGRAM SERVES 160 STUDENTS ON AVERAGE PER DAY THAT ARE IN 1ST THROUGH 5TH GRADE AT THE CESAR CHAVEZ SHARED CAMPUS. WITHIN A SAFE, CARING, SUPPORTIVE, AND FUN LEARNING ENVIRONMENT ICS TCN ASP STUDENTS LET OUT THE INNER ARTIST, SCHOLAR, ATHLETE, SCIENTIST, LEADER, AND CRITICAL THINKER WITHIN FOR THE WORLD TO SEE. THEY ARE FREE TO EXPLORE THEIR IDENTITY, BE EXCITED ABOUT WHO THEY CAN BE, LOVE WHO THEY ARE, AND TREAT OTHERS AS REFLECTIONS OF THEMSELVES.**4c** (Code:) (Expenses \$ including grants of \$) (Revenue \$)ASCEND AFTER-SCHOOL PROGRAM (ASP):ASCEND ASP AIMS TO PROVIDE WRAP-AROUND/HOLISTIC SUPPORT TO STUDENTS OF THE ASCEND SCHOOL OFFERING ACADEMIC AND ENRICHMENT CLASSES THAT ENGAGE AND CHALLENGE STUDENTS IN AN ENVIRONMENT THAT VALUES AND FOSTERS YOUTH LEADERSHIP, EMPOWERMENT, A SENSE OF COMMUNITY, AND CRITICAL THINKING. ASCEND SERVES ON AVERAGE 110 STUDENTS PER DAY THAT RANGE FROM KINDERGARTEN TO 8TH GRADE.**4d** Other program services (Describe on Schedule O.) SEE SCHEDULE O

(Expenses \$ including grants of \$) (Revenue \$)

4e Total program service expenses 2,398,343.

Part IV Checklist of Required Schedules

	Yes	No	
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A	1	X	
2 Is the organization required to complete Schedule B, Schedule of Contributors? See instructions	2	X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I	3		X
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II	4		X
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C, Part III	5		X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I	6		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II	7		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III	8		X
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV	9		X
10 Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi endowments? If "Yes," complete Schedule D, Part V	10		X
11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X, as applicable.			
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI	11a	X	
b Did the organization report an amount for investments – other securities in Part X, line 12, that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII	11b		X
c Did the organization report an amount for investments – program related in Part X, line 13, that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII	11c		X
d Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX	11d		X
e Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X	11e	X	
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X	11f		X
12a Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII	12a	X	
b Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional	12b		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	13		X
14a Did the organization maintain an office, employees, or agents outside of the United States?	14a		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If "Yes," complete Schedule F, Parts I and IV	14b		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? If "Yes," complete Schedule F, Parts II and IV	15		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV	16		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I. See instructions	17		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II	18	X	
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III	19		X
20a Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H	20a		X
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	20b		
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II	21		X

Part IV Checklist of Required Schedules (continued)

	Yes	No
22 Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III.</i>	22	X
23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J.</i>	23	X
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If a "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a.</i>	24a	X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b	
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c	
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d	
25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I.</i>	25a	X
b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I.</i>	25b	X
26 Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part II.</i>	26	X
27 Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III.</i>	27	X
28 Was the organization a party to a business transaction with one of the following parties (see the Schedule L, Part IV, instructions for applicable filing thresholds, conditions, and exceptions):		
a A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? <i>If "Yes," complete Schedule L, Part IV.</i>	28a	X
b A family member of any individual described in line 28a? <i>If "Yes," complete Schedule L, Part IV.</i>	28b	X
c A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? <i>If "Yes," complete Schedule L, Part IV.</i>	28c	X
29 Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M.</i>	29	X
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M.</i>	30	X
31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I.</i>	31	X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II.</i>	32	X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I.</i>	33	X
34 Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1.</i>	34	X
35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?	35a	X
b If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2.</i>	35b	
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2.</i>	36	X
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI.</i>	37	X
38 Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19? Note: All Form 990 filers are required to complete Schedule O.	38	X

Part V Statements Regarding Other IRS Filings and Tax ComplianceCheck if Schedule O contains a response or note to any line in this Part V. ☐

	Yes	No
1a Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable.	1a	10
b Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable.	1b	0
c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	1c	X

Part V Statements Regarding Other IRS Filings and Tax Compliance (continued)

	Yes	No
2a Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return. 2a 91		
b If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	2b X	
3a Did the organization have unrelated business gross income of \$1,000 or more during the year?	3a	X
b If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O.	3b	
4a At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	4a	X
b If "Yes," enter the name of the foreign country See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		
5a Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	5a	X
b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b	X
c If "Yes," to line 5a or 5b, did the organization file Form 8886-T?	5c	
6a Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?	6a	X
b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	6b	
7 Organizations that may receive deductible contributions under section 170(c).		
a Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	7a X	
b If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b X	
c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	7c	X
d If "Yes," indicate the number of Forms 8282 filed during the year. 7d		
e Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e	X
f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7f	X
g If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	7g	
h If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	7h	
8 Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?	8	
9 Sponsoring organizations maintaining donor advised funds.		
a Did the sponsoring organization make any taxable distributions under section 4966?	9a	
b Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?	9b	
10 Section 501(c)(7) organizations. Enter:		
a Initiation fees and capital contributions included on Part VIII, line 12. 10a		
b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities. 10b		
11 Section 501(c)(12) organizations. Enter:		
a Gross income from members or shareholders. 11a		
b Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.) 11b		
12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	12a	
b If "Yes," enter the amount of tax-exempt interest received or accrued during the year. 12b		
13 Section 501(c)(29) qualified nonprofit health insurance issuers.		
a Is the organization licensed to issue qualified health plans in more than one state?	13a	
Note: See the instructions for additional information the organization must report on Schedule O.		
b Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans. 13b		
c Enter the amount of reserves on hand. 13c		
14a Did the organization receive any payments for indoor tanning services during the tax year?	14a	X
b If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O.	14b	
15 Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?	15	X
If "Yes," see the instructions and file Form 4720, Schedule N.		
16 Is the organization an educational institution subject to the section 4968 excise tax on net investment income?	16	X
If "Yes," complete Form 4720, Schedule O.		
17 Section 501(c)(21) organizations. Did the trust, or any disqualified or other person engage in any activities that would result in the imposition of an excise tax under section 4951, 4952, or 4953?	17	
If "Yes," complete Form 6069.		

Part VI Governance, Management, and Disclosure. For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI. ☒ **X**

Section A. Governing Body and Management

	Yes	No
1a Enter the number of voting members of the governing body at the end of the tax year. 1a 13 If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O.		
b Enter the number of voting members included on line 1a, above, who are independent. 1b 12		
2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	2	X
3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person?	3	X
4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4	X
5 Did the organization become aware during the year of a significant diversion of the organization's assets?	5	X
6 Did the organization have members or stockholders?	6	X
7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	7a	X
b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	7b	X
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
a The governing body?	8a	X
b Each committee with authority to act on behalf of the governing body?	8b	X
9 Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O.	9	X

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

	Yes	No
10a Did the organization have local chapters, branches, or affiliates?	10a	X
b If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?	10b	
11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	11a	X
b Describe on Schedule O the process, if any, used by the organization to review this Form 990. SEE SCHEDULE O		
12a Did the organization have a written conflict of interest policy? If "No," go to line 13	12a	X
b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	X
c Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done SEE SCHEDULE O	12c	X
13 Did the organization have a written whistleblower policy?	13	X
14 Did the organization have a written document retention and destruction policy?	14	X
15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
a The organization's CEO, Executive Director, or top management official. SEE SCHEDULE O	15a	X
b Other officers or key employees of the organization.	15b	X
If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.		
16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a	X
b If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?	16b	

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed CA

18 Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.

☐ Own website ☐ Another's website ☒ Upon request ☒ Other (explain on Schedule O) SEE SCH. O

19 Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year. SEE SCHEDULE O

20 State the name, address, and telephone number of the person who possesses the organization's books and records.

THE ORGANIZATION 520 3RD STREET, STE 109 OAKLAND CA 94607 (510) 564-4334

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent ContractorsCheck if Schedule O contains a response or note to any line in this Part VII. ☐**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees****1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

See the instructions for the order in which to list the persons above.

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) MELISSA MENDEZ OCHOA EXECUTIVE DIR.	40 0			X				123,650.	0.	0.
(2) MARINA ORTEGA BOARD-CHAIR	2 0	X		X				0.	0.	0.
(3) ELIZABETH KIM BOARD MEMBER	2 0	X						0.	0.	0.
(4) SHAELYN DAWSON BOARD MEMBER	2 0	X						0.	0.	0.
(5) LEO KREMER TREASURER	2 0	X		X				0.	0.	0.
(6) DEBRA LEVINSKY BOARD MEMBER	2 0	X						0.	0.	0.
(7) MONICA GUZMAN BOARD MEMBER	2 0	X						0.	0.	0.
(8) KIM BRONSON BOARD MEMBER	2 0	X						0.	0.	0.
(9) SCOTT SILLERS BOARD MEMBER	2 0	X						0.	0.	0.
(10) STEPHEN WALROD BOARD MEMBER	2 0	X						0.	0.	0.
(11) STEVEN TINDALL BOARD MEMBER	2 0	X						0.	0.	0.
(12) JOSE LUIS RODRIGUEZ BOARD MEMBER	2 0	X						0.	0.	0.
(13) AUDREY YANG BOARD MEMBER	2 0	X						0.	0.	0.
(14)										

Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(15) -----	-----									
(16) -----	-----									
(17) -----	-----									
(18) -----	-----									
(19) -----	-----									
(20) -----	-----									
(21) -----	-----									
(22) -----	-----									
(23) -----	-----									
(24) -----	-----									
(25) -----	-----									
1b Subtotal								123,650.	0.	0.
c Total from continuation sheets to Part VII, Section A								0.	0.	0.
d Total (add lines 1b and 1c)								123,650.	0.	0.

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization 1

3 Did the organization list any **former** officer, director, trustee, key employee, or highest compensated employee on line 1a? *If "Yes," complete Schedule J for such individual.*

	Yes	No
3		X
4		X
5		X

4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? *If "Yes," complete Schedule J for such individual.*

5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? *If "Yes," complete Schedule J for such person.*

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization 0

Part VIII Statement of RevenueCheck if Schedule O contains a response or note to any line in this Part VIII ☐

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514
Contributions, Gifts, Grants, and Other Similar Amounts	1a	Federated campaigns	1a			
	b	Membership dues	1b			
	c	Fundraising events	1c			
	d	Related organizations	1d			
	e	Government grants (contributions)	1e	2,060,375.		
	f	All other contributions, gifts, grants, and similar amounts not included above ...	1f	554,538.		
	g	Noncash contributions included in lines 1a-1f	1g	82,975.		
	h Total. Add lines 1a-1f			2,614,913.		
Program Service Revenue	2a <u>FEES FOR SERVICES</u>		Business Code			
			611710			
	b	-----				
	c	-----				
	d	-----				
	e	-----				
	f	All other program service revenue ...				
	g Total. Add lines 2a-2f					
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)			279.		279.
	4 Income from investment of tax-exempt bond proceeds					
	5 Royalties					
	6a	Gross rents	(i) Real	(ii) Personal		
			6a			
			6b			
	b	Less: rental expenses	6b			
	c	Rental income or (loss)	6c			
	d Net rental income or (loss)					
	7a	Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other		
			7a			
			7b			
	b	Less: cost or other basis and sales expenses	7b			
	c	Gain or (loss)	7c			
	d Net gain or (loss)					
	8a	Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18				
			8a	124,359.		
8b			22,806.			
b Less: direct expenses						
c Net income or (loss) from fundraising events			101,553.			
9a	Gross income from gaming activities. See Part IV, line 19					
		9a				
		9b				
b Less: direct expenses						
c Net income or (loss) from gaming activities						
10a	Gross sales of inventory, less returns and allowances					
		10a				
		10b				
b Less: cost of goods sold						
c Net income or (loss) from sales of inventory						
Miscellaneous Revenue			Business Code			
	11a	<u>OTHER INCOME</u>	900099	651.	651.	
	b	-----				
	c	-----				
	d	All other revenue				
	e Total. Add lines 11a-11d			651.		
12 Total revenue. See instructions			2,717,396.	651.	0.	279.

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX. ☐

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21.				
2 Grants and other assistance to domestic individuals. See Part IV, line 22.				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16.				
4 Benefits paid to or for members.				
5 Compensation of current officers, directors, trustees, and key employees.	123,650.	105,308.	6,166.	12,176.
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B).	0.	0.	0.	0.
7 Other salaries and wages.	1,839,660.	1,566,774.	91,732.	181,154.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions).				
9 Other employee benefits.	109,503.	70,651.	19,670.	19,182.
10 Payroll taxes.	173,368.	151,021.	7,534.	14,813.
11 Fees for services (nonemployees):				
a Management.				
b Legal.				
c Accounting.				
d Lobbying.				
e Professional fundraising services. See Part IV, line 17.				
f Investment management fees.				
g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Schedule O.)	240,372.	210,293.	28,733.	1,346.
12 Advertising and promotion.	7,303.	4,365.	53.	2,885.
13 Office expenses.	28,967.	17,721.	5,040.	6,206.
14 Information technology.	5,316.	4,840.	198.	278.
15 Royalties.				
16 Occupancy.	52,008.	45,767.	2,600.	3,641.
17 Travel.	193.	155.	38.	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials.				
19 Conferences, conventions, and meetings.				
20 Interest.	7,149.	6,292.	357.	500.
21 Payments to affiliates.				
22 Depreciation, depletion, and amortization.	6,965.	6,129.	348.	488.
23 Insurance.	13,087.	11,517.	654.	916.
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)				
a PROGRAM SUPPLIES	110,491.	110,055.	331.	105.
b IN-KIND GOODS	82,975.	60,205.	3,265.	19,505.
c INTERN STIPENDS	15,784.	15,784.		
d PAYROLL PROCESSING FEES	5,019.	4,417.	251.	351.
e All other expenses.	8,011.	7,049.	401.	561.
25 Total functional expenses. Add lines 1 through 24e.	2,829,821.	2,398,343.	167,371.	264,107.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720).				

Part X Balance SheetCheck if Schedule O contains a response or note to any line in this Part X. ☐

		(A) Beginning of year		(B) End of year
Assets	1 Cash — non-interest-bearing	111,650.	1	24,071.
	2 Savings and temporary cash investments	233,475.	2	233,565.
	3 Pledges and grants receivable, net		3	
	4 Accounts receivable, net	477,158.	4	591,852.
	5 Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		5	
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		6	
	7 Notes and loans receivable, net		7	
	8 Inventories for sale or use		8	
	9 Prepaid expenses and deferred charges	14,253.	9	14,188.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 20,894.		
	b Less: accumulated depreciation	10b 17,412.		
		10,447.	10c	3,482.
	11 Investments — publicly traded securities		11	
	12 Investments — other securities. See Part IV, line 11		12	
	13 Investments — program-related. See Part IV, line 11		13	
	14 Intangible assets		14	
15 Other assets. See Part IV, line 11	4,000.	15	4,000.	
16 Total assets. Add lines 1 through 15 (must equal line 33)	850,983.	16	871,158.	
Liabilities	17 Accounts payable and accrued expenses	24,709.	17	43,640.
	18 Grants payable		18	
	19 Deferred revenue		19	
	20 Tax-exempt bond liabilities		20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22 Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		22	
	23 Secured mortgages and notes payable to unrelated third parties		23	
	24 Unsecured notes and loans payable to unrelated third parties		24	
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D	19,019.	25	132,688.
	26 Total liabilities. Add lines 17 through 25	43,728.	26	176,328.
Net Assets or Fund Balances	Organizations that follow FASB ASC 958, check here and complete lines 27, 28, 32, and 33. <input checked="" type="checkbox"/>			
	27 Net assets without donor restrictions	532,255.	27	594,830.
	28 Net assets with donor restrictions	275,000.	28	100,000.
	Organizations that do not follow FASB ASC 958, check here and complete lines 29 through 33. <input type="checkbox"/>			
	29 Capital stock or trust principal, or current funds		29	
	30 Paid-in or capital surplus, or land, building, or equipment fund		30	
	31 Retained earnings, endowment, accumulated income, or other funds		31	
	32 Total net assets or fund balances.	807,255.	32	694,830.
	33 Total liabilities and net assets/fund balances.	850,983.	33	871,158.

Part XI Reconciliation of Net AssetsCheck if Schedule O contains a response or note to any line in this Part XI. ☐

1	Total revenue (must equal Part VIII, column (A), line 12)	1	2,717,396.
2	Total expenses (must equal Part IX, column (A), line 25)	2	2,829,821.
3	Revenue less expenses. Subtract line 2 from line 1	3	-112,425.
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	807,255.
5	Net unrealized gains (losses) on investments	5	
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain on Schedule O)	9	0.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	694,830.

Part XII Financial Statements and ReportingCheck if Schedule O contains a response or note to any line in this Part XII. ☐

	Yes	No
1 Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.		
2a Were the organization's financial statements compiled or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		X
b Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: <input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	X	
c If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.	X	
3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F?		X
b If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits		

BAA

TEEA0112L 09/01/22

Form 990 (2022)

SCHEDULE A
(Form 990)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

Attach to Form 990 or Form 990-EZ.

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2022

**Open to Public
Inspection**

Name of the organization

OAKLAND LEAF FOUNDATION

Employer identification number

81-0565800

Part I Reason for Public Charity Status. (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
- 2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990).)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: _____
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7 ☒ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 9 ☐ An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: _____
- 10 ☐ An organization that normally receives (1) more than 33-1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33-1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
- 11 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 12 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
- a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
- b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
- c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
- d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
- e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
- f Enter the number of supported organizations: _____
- g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
(A)						
(B)						
(C)						
(D)						
(E)						
Total						

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	871,893.	824,974.	732,419.	2,475,985.	2,614,913.	7,520,184.
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf.						0.
3 The value of services or facilities furnished by a governmental unit to the organization without charge.						0.
4 Total. Add lines 1 through 3.	871,893.	824,974.	732,419.	2,475,985.	2,614,913.	7,520,184.
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f).						865,357.
6 Public support. Subtract line 5 from line 4.						6,654,827.

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
7 Amounts from line 4.	871,893.	824,974.	732,419.	2,475,985.	2,614,913.	7,520,184.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources.	637.	277.	206.	3,294.	279.	4,693.
9 Net income from unrelated business activities, whether or not the business is regularly carried on.						0.
10 Other income. Do not include gain or loss from the sale of capital assets. (Explain in Part VI.) SEE PART VI		4,679.	7,371.	1,128.	651.	13,829.
11 Total support. Add lines 7 through 10.						7,538,706.
12 Gross receipts from related activities, etc. (see instructions).					12	4,053,814.
13 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here .						<input type="checkbox"/>

Section C. Computation of Public Support Percentage

14 Public support percentage for 2022 (line 6, column (f), divided by line 11, column (f)).	14	88.28 %
15 Public support percentage from 2021 Schedule A, Part II, line 14.	15	83.49 %
16a 33-1/3% support test—2022. If the organization did not check the box on line 13, and line 14 is 33-1/3% or more, check this box and stop here . The organization qualifies as a publicly supported organization.	<input checked="" type="checkbox"/>	
b 33-1/3% support test—2021. If the organization did not check a box on line 13 or 16a, and line 15 is 33-1/3% or more, check this box and stop here . The organization qualifies as a publicly supported organization.	<input type="checkbox"/>	
17a 10%-facts-and-circumstances test—2022. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here . Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization.	<input type="checkbox"/>	
b 10%-facts-and-circumstances test—2021. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here . Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization.	<input type="checkbox"/>	
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions.	<input type="checkbox"/>	

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose.						
3 Gross receipts from activities that are not an unrelated trade or business under section 513.						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf.						
5 The value of services or facilities furnished by a governmental unit to the organization without charge.						
6 Total. Add lines 1 through 5.						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons.						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year.						
c Add lines 7a and 7b.						
8 Public support. (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
9 Amounts from line 6.						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources.						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975.						
c Add lines 10a and 10b.						
11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on.						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)						

14 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here**. ☐**Section C. Computation of Public Support Percentage**

15 Public support percentage for 2022 (line 8, column (f), divided by line 13, column (f)).	15	%
16 Public support percentage from 2021 Schedule A, Part III, line 15.	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2022 (line 10c, column (f), divided by line 13, column (f)).	17	%
18 Investment income percentage from 2021 Schedule A, Part III, line 17.	18	%

19a 33-1/3% support tests—2022. If the organization did not check the box on line 14, and line 15 is more than 33-1/3%, and line 17 is not more than 33-1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization. ☐**b 33-1/3% support tests—2021.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33-1/3%, and line 18 is not more than 33-1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization. ☐**20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions. ☐

Part IV Supporting Organizations

(Complete only if you checked a box on line 12 of Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

	Yes	No
1 Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.		
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).		
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer lines 3b and 3c below.		
b Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in Part VI when and how the organization made the determination.		
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in Part VI what controls the organization put in place to ensure such use.		
4a Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes" and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.		
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.		
c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.		
5a Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI , including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).		
b Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
c Substitutions only. Was the substitution the result of an event beyond the organization's control?		
6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in Part VI .		
7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990).		
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? If "Yes," complete Part I of Schedule L (Form 990).		
9a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If "Yes," provide detail in Part VI .		
b Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes," provide detail in Part VI .		
c Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in Part VI .		
10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer line 10b below.		
b Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)		

Part IV Supporting Organizations (continued)

	Yes	No
11 Has the organization accepted a gift or contribution from any of the following persons?		
a A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body of a supported organization?	11a	
b A family member of a person described on line 11a above?	11b	
c A 35% controlled entity of a person described on line 11a or 11b above? If "Yes" to line 11a, 11b, or 11c, provide detail in Part VI .	11c	

Section B. Type I Supporting Organizations

	Yes	No
1 Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.	1	
2 Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.	2	

Section C. Type II Supporting Organizations

	Yes	No
1 Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).	1	

Section D. All Type III Supporting Organizations

	Yes	No
1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?	1	
2 Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).	2	
3 By reason of the relationship described on line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.	3	

Section E. Type III Functionally Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).			
a <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.			
b <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.			
c <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see instructions).			
2 Activities Test. Answer lines 2a and 2b below.		Yes	No
a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.	2a		
b Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.	2b		
3 Parent of Supported Organizations. Answer lines 3a and 3b below.			
a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? If "Yes" or "No," provide details in Part VI .	3a		
b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.	3b		

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

- 1 ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (explain in Part VI). **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A – Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3.	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)	8	

Section B – Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	Total (add lines 1a, 1b, and 1c)	1d	
e	Discount claimed for blockage or other factors (explain in detail in Part VI):		
2	Acquisition indebtedness applicable to non-exempt-use assets	2	
3	Subtract line 2 from line 1d.	3	
4	Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by 0.035.	6	
7	Recoveries of prior-year distributions	7	
8	Minimum Asset Amount (add line 7 to line 6)	8	

Section C – Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, column A)	1	
2	Enter 0.85 of line 1.	2	
3	Minimum asset amount for prior year (from Section B, line 8, column A)	3	
4	Enter greater of line 2 or line 3.	4	
5	Income tax imposed in prior year	5	
6	Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	6	
7	<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).		

BAA

Schedule A (Form 990) 2022

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)**Section D – Distributions**

		Current Year
1	Amounts paid to supported organizations to accomplish exempt purposes	1
2	Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	2
3	Administrative expenses paid to accomplish exempt purposes of supported organizations	3
4	Amounts paid to acquire exempt-use assets	4
5	Qualified set-aside amounts (prior IRS approval required – <i>provide details in Part VI</i>)	5
6	Other distributions (describe in Part VI). See instructions.	6
7	Total annual distributions. Add lines 1 through 6.	7
8	Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions.	8
9	Distributable amount for 2022 from Section C, line 6	9
10	Line 8 amount divided by line 9 amount	10

Section E – Distribution Allocations (see instructions)

	(i) Excess Distributions	(ii) Underdistributions Pre-2022	(iii) Distributable Amount for 2022
1	Distributable amount for 2022 from Section C, line 6		
2	Underdistributions, if any, for years prior to 2022 (reasonable cause required – <i>explain in Part VI</i>). See instructions.		
3	Excess distributions carryover, if any, to 2022		
a	From 2017		
b	From 2018		
c	From 2019		
d	From 2020		
e	From 2021		
f	Total of lines 3a through 3e		
g	Applied to underdistributions of prior years		
h	Applied to 2022 distributable amount		
i	Carryover from 2017 not applied (see instructions)		
j	Remainder. Subtract lines 3g, 3h, and 3i from line 3f.		
4	Distributions for 2022 from Section D, line 7: \$		
a	Applied to underdistributions of prior years		
b	Applied to 2022 distributable amount		
c	Remainder. Subtract lines 4a and 4b from line 4.		
5	Remaining underdistributions for years prior to 2022, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, <i>explain in Part VI</i> . See instructions.		
6	Remaining underdistributions for 2022. Subtract lines 3h and 4b from line 1. For result greater than zero, <i>explain in Part VI</i> . See instructions.		
7	Excess distributions carryover to 2023. Add lines 3j and 4c.		
8	Breakdown of line 7:		
a	Excess from 2018		
b	Excess from 2019		
c	Excess from 2020		
d	Excess from 2021		
e	Excess from 2022		

BAA

Schedule A (Form 990) 2022

Part VI

Supplemental Information. Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions.)

PART II, LINE 10 - OTHER INCOME

NATURE AND SOURCE	2022	2021	2020	2019	2018
OTHER INCOME	\$ 651.	\$ 1,128.	\$ 7,371.	\$ 4,679.	
TOTAL	<u>\$ 651.</u>	<u>\$ 1,128.</u>	<u>\$ 7,371.</u>	<u>\$ 4,679.</u>	<u>\$ 0.</u>

**Schedule B
(Form 990)**

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

Attach to Form 990 or Form 990-PF.
Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2022

Name of the organization

OAKLAND LEAF FOUNDATION

Employer identification number

81-0565800

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☒ 501(c)(3) (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☐ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- ☐ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☒ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33-1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000; or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.

- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.

- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. \$ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990).

Name of organization	Employer identification number
OAKLAND LEAF FOUNDATION	81-0565800

Part I Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	CRANKSTART FOUNDATION 1660 BUSH STREET SUITE 300 SAN FRANCISCO, CA 94109	\$ 101,500.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	THE SAN FRANCISCO FOUNDATION: LOVE 1 EMBARCADERO CENTER SUITE #14 SAN FRANCISCO, CA 94111	\$ 105,500.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization

OAKLAND LEAF FOUNDATION

Employer identification number

81-0565800

Part III **Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor.** Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.)..... \$ N/A
Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	N/A		
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

**SCHEDULE D
(Form 990)**Department of the Treasury
Internal Revenue Service

Name of the organization

Supplemental Financial StatementsComplete if the organization answered "Yes" on Form 990,
Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.

Attach to Form 990.

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2022**Open to Public
Inspection**

Employer identification number

OAKLAND LEAF FOUNDATION

81-0565800

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.

Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year		
2 Aggregate value of contributions to (during year)		
3 Aggregate value of grants from (during year)		
4 Aggregate value at end of year		

- 5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? ☐ Yes ☐ No
- 6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? ☐ Yes ☐ No

Part II Conservation Easements.

Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

- 1 Purpose(s) of conservation easements held by the organization (check all that apply).
- | | |
|---|---|
| <input type="checkbox"/> Preservation of land for public use (for example, recreation or education) | <input type="checkbox"/> Preservation of a historically important land area |
| <input type="checkbox"/> Protection of natural habitat | <input type="checkbox"/> Preservation of a certified historic structure |
| <input type="checkbox"/> Preservation of open space | |
- 2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.
- | | Held at the End of the Tax Year |
|---|---------------------------------|
| a Total number of conservation easements | 2 a |
| b Total acreage restricted by conservation easements | 2 b |
| c Number of conservation easements on a certified historic structure included in (a) | 2 c |
| d Number of conservation easements included in (c) acquired after July 25, 2006 and not on a historic structure listed in the National Register | 2 d |
- 3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year _____
- 4 Number of states where property subject to conservation easement is located _____
- 5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? ☐ Yes ☐ No
- 6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year _____
- 7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year _____
- 8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? ☐ Yes ☐ No
- 9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

- 1 a If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide in Part XIII the text of the footnote to its financial statements that describes these items.
- b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:
- (i) Revenue included on Form 990, Part VIII, line 1. \$ _____
- (ii) Assets included in Form 990, Part X. \$ _____
- 2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under FASB ASC 958 relating to these items:
- a Revenue included on Form 990, Part VIII, line 1. \$ _____
- b Assets included in Form 990, Part X. \$ _____

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

3 Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply):

a ☐ Public exhibition

d ☐ Loan or exchange program

b ☐ Scholarly research

e ☐ Other _____

c ☐ Preservation for future generations

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

Part IV Escrow and Custodial Arrangements. Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1 a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII and complete the following table:

	Amount
c Beginning balance.....	1 c
d Additions during the year.....	1 d
e Distributions during the year.....	1 e
f Ending balance.....	1 f

2 a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII ☐

Part V Endowment Funds. Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1 a Beginning of year balance.....					
b Contributions.....					
c Net investment earnings, gains, and losses.....					
d Grants or scholarships.....					
e Other expenditures for facilities and programs.....					
f Administrative expenses.....					
g End of year balance.....					

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

a Board designated or quasi-endowment _____ %

b Permanent endowment _____ %

c Term endowment _____ %

The percentages on lines 2a, 2b, and 2c should equal 100%.

3 a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

(i) Unrelated organizations..... **3a(i)**

Yes	No
-----	----

(ii) Related organizations..... **3a(ii)**

Yes	No
-----	----

b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? **3b**

Yes	No
-----	----

4 Describe in Part XIII the intended uses of the organization's endowment funds.

Part VI Land, Buildings, and Equipment.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1 a Land.....				
b Buildings.....				
c Leasehold improvements.....				
d Equipment.....		20,894.	17,412.	3,482.
e Other.....				
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.).....				3,482.

BAA

Schedule D (Form 990) 2022

Part VII Investments – Other Securities.

N/A

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives.....		
(2) Closely held equity interests.....		
(3) Other		
(A)		
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
(I)		
Total. (Column (b) must equal Form 990, Part X, column (B) line 12.)		

Part VIII Investments – Program Related.

N/A

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
(10)		
Total. (Column (b) must equal Form 990, Part X, column (B) line 13.)		

Part IX Other Assets.

N/A

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	
Total. (Column (b) must equal Form 990, Part X, column (B) line 15.)	

Part X Other Liabilities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) LINE OF CREDIT	100,000.
(3) VACATION PAYABLE	32,688.
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	
(11)	
Total. (Column (b) must equal Form 990, Part X, column (B) line 25.)	132,688.

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII. ☐

Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements	1	2,717,396.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains (losses) on investments	2 a	
b	Donated services and use of facilities	2 b	
c	Recoveries of prior year grants	2 c	
d	Other (Describe in Part XIII.)	2 d	
e	Add lines 2 a through 2 d	2 e	
3	Subtract line 2 e from line 1	3	2,717,396.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b.	4 a	
b	Other (Describe in Part XIII.)	4 b	
c	Add lines 4 a and 4 b	4 c	
5	Total revenue. Add lines 3 and 4 c . (This must equal Form 990, Part I, line 12.)	5	2,717,396.

Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements	1	2,829,821.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2 a	
b	Prior year adjustments	2 b	
c	Other losses	2 c	
d	Other (Describe in Part XIII.)	2 d	
e	Add lines 2 a through 2 d	2 e	
3	Subtract line 2 e from line 1	3	2,829,821.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b.	4 a	
b	Other (Describe in Part XIII.)	4 b	
c	Add lines 4 a and 4 b	4 c	
5	Total expenses. Add lines 3 and 4 c . (This must equal Form 990, Part I, line 18.)	5	2,829,821.

Part XIII Supplemental Information.

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

**SCHEDULE G
(Form 990)**

Department of the Treasury
Internal Revenue Service

Supplemental Information Regarding Fundraising or Gaming Activities

Complete if the organization answered "Yes" on Form 990, Part IV, line 17, 18, or 19, or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.

Attach to Form 990 or Form 990-EZ.

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2022

**Open to Public
Inspection**

Name of the organization

OAKLAND LEAF FOUNDATION

Employer identification number

81-0565800

Part I

Fundraising Activities. Complete if the organization answered "Yes" on Form 990, Part IV, line 17. Form 990-EZ filers are not required to complete this part.

1 Indicate whether the organization raised funds through any of the following activities. Check all that apply.

- | | |
|---|--|
| a <input checked="" type="checkbox"/> Mail solicitations | e <input checked="" type="checkbox"/> Solicitation of non-government grants |
| b <input checked="" type="checkbox"/> Internet and email solicitations | f <input checked="" type="checkbox"/> Solicitation of government grants |
| c <input type="checkbox"/> Phone solicitations | g <input checked="" type="checkbox"/> Special fundraising events |
| d <input checked="" type="checkbox"/> In-person solicitations | |

2a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees, or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services? ☐ Yes ☒ No

b If "Yes," list the 10 highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization.

(i) Name and address of individual or entity (fundraiser)	(ii) Activity	(iii) Did fundraiser have custody or control of contributions?		(iv) Gross receipts from activity	(v) Amount paid to (or retained by) fundraiser listed in column (i)	(vi) Amount paid to (or retained by) organization
		Yes	No			
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
Total						0.

3 List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing.

Part II Fundraising Events. Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000.

		(a) Event #1	(b) Event #2	(c) Other events	(d) Total events
		GALA & MISC. (event type)	(event type)	NONE (total number)	(add column (a) through column (c))
Revenue	1 Gross receipts	124,359.			124,359.
	2 Less: Contributions				
	3 Gross income (line 1 minus line 2)	124,359.			124,359.
Direct Expenses	4 Cash prizes				
	5 Noncash prizes				
	6 Rent/facility costs				
	7 Food and beverages				
	8 Entertainment				
	9 Other direct expenses	22,806.			22,806.
	10 Direct expense summary. Add lines 4 through 9 in column (d)				22,806.
	11 Net income summary. Subtract line 10 from line 3, column (d)				101,553.

Part III Gaming. Complete if the organization answered "Yes" on Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

		(a) Bingo	(b) Pull tabs/instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add column (a) through column (c))
Revenue	1 Gross revenue				
Direct Expenses	2 Cash prizes				
	3 Noncash prizes				
	4 Rent/facility costs				
	5 Other direct expenses				
	6 Volunteer labor	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	
	7 Direct expense summary. Add lines 2 through 5 in column (d)				
	8 Net gaming income summary. Subtract line 7 from line 1, column (d)				

9 Enter the state(s) in which the organization conducts gaming activities: _____

a Is the organization licensed to conduct gaming activities in each of these states? ☐ Yes ☐ No

b If "No," explain: _____

10 a Were any of the organization's gaming licenses revoked, suspended, or terminated during the tax year? ☐ Yes ☐ No

b If "Yes," explain: _____

- 11** Does the organization conduct gaming activities with nonmembers? ☐ Yes ☐ No
- 12** Is the organization a grantor, beneficiary or trustee of a trust, or a member of a partnership or other entity formed to administer charitable gaming? ☐ Yes ☐ No

13 Indicate the percentage of gaming activity conducted in:

a The organization's facility	13 a	%
b An outside facility	13 b	%

14 Enter the name and address of the person who prepares the organization's gaming/special events books and records:

Name

Address

15 a Does the organization have a contract with a third party from whom the organization receives gaming revenue? ☐ Yes ☐ No

b If "Yes," enter the amount of gaming revenue received by the organization \$ _____ and the amount of gaming revenue retained by the third party \$ _____

c If "Yes," enter name and address of the third party:

Name

Address

16 Gaming manager information:

Name

Gaming manager compensation \$ _____

Description of services provided

☐

Director/officer

☐

Employee

☐

Independent contractor

17 Mandatory distributions:

a Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license? ☐ Yes ☐ No

b Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year. . . \$ _____

Part IV

Supplemental Information. Provide the explanations required by Part I, line 2b, columns (iii) and (v); and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions.

SCHEDULE M
(Form 990)

Department of the Treasury
Internal Revenue Service

Noncash Contributions

Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.

Attach to Form 990.

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2022

**Open to Public
Inspection**

Name of the organization

OAKLAND LEAF FOUNDATION

Employer identification number

81-0565800

Part I **Types of Property**

	(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1 Art — Works of art				
2 Art — Historical treasures				
3 Art — Fractional interests				
4 Books and publications				
5 Clothing and household goods				
6 Cars and other vehicles				
7 Boats and planes				
8 Intellectual property				
9 Securities — Publicly traded				
10 Securities — Closely held stock				
11 Securities — Partnership, LLC, or trust interests				
12 Securities — Miscellaneous				
13 Qualified conservation contribution — Historic structures				
14 Qualified conservation contribution — Other				
15 Real estate — Residential				
16 Real estate — Commercial				
17 Real estate — Other				
18 Collectibles				
19 Food inventory				
20 Drugs and medical supplies				
21 Taxidermy				
22 Historical artifacts				
23 Scientific specimens				
24 Archeological artifacts				
25 Other (PROG SUPPLIES)			60,205.	FMV
26 Other (SUPPLIES/AUCTIO)			22,770.	
27 Other ()				
28 Other ()				

29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part V, Donee Acknowledgement

29

30a During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it must hold for at least 3 years from the date of the initial contribution, and which isn't required to be used for exempt purposes for the entire holding period?

b If "Yes," describe the arrangement in Part II.

31 Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions?

32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?

b If "Yes," describe in Part II.

33 If the organization didn't report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II.

	Yes	No
30a		X
31		X
32a		X
33		

BAA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule M (Form 990) 2022

Part II **Supplemental Information.** Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

SCHEDULE O
(Form 990)

Department of the Treasury
Internal Revenue Service

Name of the organization

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on
Form 990 or 990-EZ or to provide any additional information.
Attach to Form 990 or Form 990-EZ.

Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2022

**Open to Public
Inspection**

OAKLAND LEAF FOUNDATION

Employer identification number

81-0565800

FORM 990, PART III, LINE 1 - ORGANIZATION MISSION

OAKLAND LEAF SPURS CREATIVE AND EDUCATIONAL GROWTH FOR OAKLAND YOUTH BY PROVIDING PROGRAMS THAT CULTIVATE CRITICAL THINKING SKILLS, EMPHASIZE SOCIOEMOTIONAL LEARNING OPPORTUNITIES, AND SUPPORT AUTHENTIC LEADERSHIP DEVELOPMENT. OAKLAND LEAF FACILITATED DYNAMIC AFTER-SCHOOL PROGRAMS FOR K-8 STUDENTS AT SIX HIGH NEED SCHOOLS: ASCEND, BRET HARTE, ENCOMPASS ACADEMY, INTERNATIONAL COMMUNITY SCHOOL, LEARNING WITHOUT LIMITS, AND THINK COLLEGE NOW. OAKLAND LEAF YOUTH CREATED INTENTIONAL COMMUNITIES, EXPERIENCED NEW CREATIVE EXPERIENCES, AND DEVELOPED CONFIDENCE IN THEIR UNIQUE VOICE.

FORM 990, PART III, LINE 4D - OTHER PROGRAM SERVICES DESCRIPTION

ENCOMPASS AFTER-SCHOOL PROGRAM (ASP) :

ENCOMPASS AFTER-SCHOOL PROGRAM PROVIDES EXTENDED ACADEMIC AND ENRICHMENT SERVICES TO 100 STUDENTS IN 1ST -5TH GRADE. STUDENTS IN PROGRAM DEVELOP AND STRENGTHEN THEIR ACADEMIC, PHYSICAL, SOCIAL, LIFE, AND LEADERSHIP SKILLS. WE AIM TO OFFER A CULTURALLY SENSITIVE, RESPONSIBLE, AND RESPONSIVE PROGRAM AIMED TO DEVELOP STUDENTS INTO CONFIDENT AND COMPASSIONATE LEADERS. FOR THIS YEAR, THIS PROGRAM WAS CONSIDERED A "THRIVING" PROGRAM AND SCORED A 4.77 OUT OF A 5.0 SCALE ACCORDING TO THE YOUTH PROGRAM QUALITY ASSESSMENT.

LEARNING WITHOUT LIMITS AFTER-SCHOOL PROGRAM:

LEARNING WITHOUT LIMITS AFTER-SCHOOL PROGRAM IS DEDICATED TO ENHANCING THE LEARNING EXPERIENCE OF 85 STUDENTS IN 1ST THROUGH 5TH GRADE AT LEARNING WITHOUT LIMITS BY OFFERING ACADEMIC AND ENRICHMENT CLASSES THAT ENGAGE, CHALLENGE, AND EMPOWERS STUDENTS TO EXPLORE AND TAKE ON YOUTH LEADERSHIP, THINK CRITICALLY, AND BUILD A SENSE OF COMMUNITY.

Name of the organization

OAKLAND LEAF FOUNDATION

Employer identification number

81-0565800

FORM 990, PART III, LINE 4D - OTHER PROGRAM SERVICES DESCRIPTION

OAKLAND PEACE CAMP:

OAKLAND PEACE CAMP (OPC) FINISHED ITS 13TH YEAR IN SUMMER 2015. OPC IS A FREE FOUR-WEEK SUMMER CAMP FOR 120 YOUTH 10 TO 18 YEARS OLD, THAT UTILIZES A PROJECT-BASED ARTS, SOCIAL JUSTICE, AND SCIENCE BASED CURRICULUM. OAKLAND PEACE CAMP EMPHASIZES YOUTH EMPOWERMENT, ARTS-BASED LEARNING, COMMUNITY ACTIVISM, CULTURAL LITERACY, AND REFLECTION. PEACE CAMP HELPS BUILD A COHESIVE COMMUNITY BY ENCOURAGING OAKLAND LEAF STUDENTS, INTERNS, AND FAMILIES TO INTERACT AND LEARN FROM EACH OTHER

LOVE CULTIVATING SCHOOLYARDS:

WITH LOVE CULTIVATING SCHOOLYARDS (LCS) YOUTH BECOME ACTIVE KEEPERS OF THE LAND THROUGH HANDS-ON GARDEN ACTIVITIES AND LEADERSHIP OPPORTUNITIES. LCS ALLOWS 15 HIGH SCHOOL PAID YOUTH INTERNS TO LEARN ABOUT ENVIRONMENTAL JUSTICE AND TEACH A GARDEN CLASS TO 15-20 ELEMENTARY AGED STUDENTS.

FORM 990, PART VI, LINE 11B - FORM 990 REVIEW PROCESS

THE TAX RETURN IS PREPARED BY AN OUTSIDE ACCOUNTING FIRM. AFTER COMPLETION OF SAID RETURNS, THE ORGANIZATION IS SENT A DRAFT OF THE TAX RETURNS TO BE REVIEWED AND EXAMINED. THE ORGANIZATION MAKES COPIES OF THE RETURNS AND DISTRIBUTES TO THOSE INDIVIDUALS CHARGED WITH GOVERNANCE. THOSE INDIVIDUALS AT THAT TIME CAN REVIEW AND IF APPLICABLE DISCUSS ANY LINE ITEMS IN THE RETURN WITH THE ACCOUNTANT WHO HAS PREPARED THE RETURN. IF ALL ITEMS ARE FOUND TO BE ACCEPTABLE, AN AUTHORIZATION IS SIGNED AND PROVIDED TO AUTHORIZE THE OUTSIDE ACCOUNTING FIRM TO PROCESS, SIGN AND PROVIDE COPIES OF THE RETURNS TO BE FILED (PAPER OR ELECTRONICALLY) WITH THE DESIGNATED GOVERNMENTAL AGENCIES. THE TAX RETURNS ARE THEN SIGNED BY THE ORGANIZATION, STAMPED AND MAILED WITH CERTIFIED RETURN RECEIPT OR THE SIGNED FORM 8879 IS PROVIDED TO THE OUTSIDE ACCOUNTING FIRM ALLOWING ELECTRONIC FILING.

Name of the organization

OAKLAND LEAF FOUNDATION

Employer identification number

81-0565800

FORM 990, PART VI, LINE 12C - EXPLANATION OF MONITORING AND ENFORCEMENT OF CONFLICTS

ORGANIZATION REQUIRES ANNUAL UPDATES TO CONFLICT OF INTEREST STATEMENTS.

FORM 990, PART VI, LINE 15A - COMPENSATION REVIEW & APPROVAL PROCESS - CEO & TOP MANAGEMENT

THE BOARD OF DIRECTORS REVIEWS THE EXECUTIVE DIRECTOR'S ANNUAL SALARY FOR PERFORMANCE AND NONPROFIT SUPPORT AGENCY INDUSTRY WAGE RELATED DECISIONS.

FORM 990, PART VI, LINE 18 - EXPLANATION OF OTHER MEANS FORMS AVAILABLE FOR PUBLIC INSPECTION

FEDERAL TAX RETURNS ARE AVAILABLE AT GUIDESTAR.ORG & CHARITYNAVIGATOR.ORG.

FORM 990, PART VI, LINE 19 - OTHER ORGANIZATION DOCUMENTS PUBLICLY AVAILABLE

GOVERNING DOCUMENTS ARE AVAILABLE FOR PUBLIC INSPECTION AT THE PRINCIPAL PLACE OF BUSINESS.

THE CONFLICT OF INTEREST POLICY AND THE ORGANIZATION'S FINANCIAL STATEMENTS ARE AVAILABLE UPON REQUEST.



OUSD Expanded Learning Program 2022-2023 Data Profile

International Community Elementary School Oakland Leaf

School Year Program Enrollment

35%

of the school's student
population in My Program

97

Students enrolled in My
Program

278

School Student Population

Source: OUSD Expanded Learning Program 2022-2023 School Year Enrollment and Attendance Data and OUSD Official Enrollment Data 2022-2023 school year.

Student Demographic Information for My Program

71%

English Language Learners

12%

SPED youth

12%

Home language is Spanish

Grade

Kindergarten	12%
1st grade	20%
2nd grade	16%
3rd grade	24%
4th grade	13%
5th grade	14%

Race/Ethnicity

Latino	91%
Multi-ethnic	4%
White	3%
Native American	1%

Gender

Female	51%
Male	49%

Source: OUSD Official Enrollment Data 2022-2023 school year. Due to rounding, numbers might not equal to 100%.

Youth Feedback

The following tables provide the percentage of students in your program who agreed with the survey item statements.

- “-”: there were no responses for that survey item statement.
- “NA”: the number of responses for that survey item statement were 3 or less.

Youth Survey Responses: 39

Safe and Supportive Environment

Survey Item	My Program	All ELPs
I feel safe in this program.	100%	94%
There is an adult who cares about me in this program.	95%	93%
This program helps me to make friends.	92%	82%
In this program, I feel included.	82%	89%
The adults in this program listen to my ideas.	77%	85%
There is an adult in this program who notices when I am upset.	85%	84%

Lifelong Learning

Survey Item	My Program	All ELPs
This program makes learning fun.	92%	81%
In this program, I try new activities.	87%	89%
I like to go to school because I get to go to this program.	89%	74%
This program helps me feel more motivated to learn in school. (MS/HS)	--	76%
I learn how to do things in this program that help with my schoolwork. (MS/HS)	--	80%

Empowerment

Survey Item	My Program	All ELPs
Since coming to this program, I feel like I can try new things, even if I think they might be hard.	87%	82%
The adults in this program encourage me to try harder.	84%	87%
In this program, I have chances to lead others. (MS/HS)	--	79%
Since coming to this program, I feel more connected to my school. (MS/HS)	--	82%

Source: OUSD ELP 2022-2023 School Year Participant Survey, n = 39. Total Youth Responses for All Expanded Learning Programs, N = 2,844.

Family Feedback

The following tables provide the percentage of parents or guardians who agreed or strongly agreed with the survey item statements.

- “-”: there were no responses for that survey item statement.
- “NA”: that the number of responses for that survey item statement were 3 or less.

Family Survey Responses: 41

Family Engagement

Survey Item	My Program	All ELPs
I know what my child is doing and learning in this program.	88%	81%
The staff members in this program listen to me when I have a question or comment.	98%	76%
I receive communication from this program.	90%	76%
It was easy to register my student for this program.	98%	74%
This program helps me learn about other resources in the district and community.	85%	70%

Program Quality

Survey Item	My Program	All ELPs
My student feels supported by staff in this program.	98%	74%
My student tells me good things about this program.	93%	75%
This program is a safe place for my student.	98%	73%
In this program, my student has opportunities to try new things.	93%	71%

Satisfaction and Family Needs

Survey Item	My Program	All ELPs
I would recommend this program to other families in my community.	95%	66%
This program teaches skills that help my child in school.	88%	71%
Since coming to this program, my student's feelings about school has improved.	90%	67%
This program provides activities that meet my student's interests and talents, such as sports and arts.	93%	73%
[If your student has special needs.] This program has accommodations so that my child can participate in activities.	25%	47%

Source: OUSD ELP 2022-2023 School Year Family Survey, n = 41. Total Family Responses for All Expanded Learning Programs, N = 808.



OAKLAND LEAF

FY25 Oakland Leaf Organizational Chart with headcount

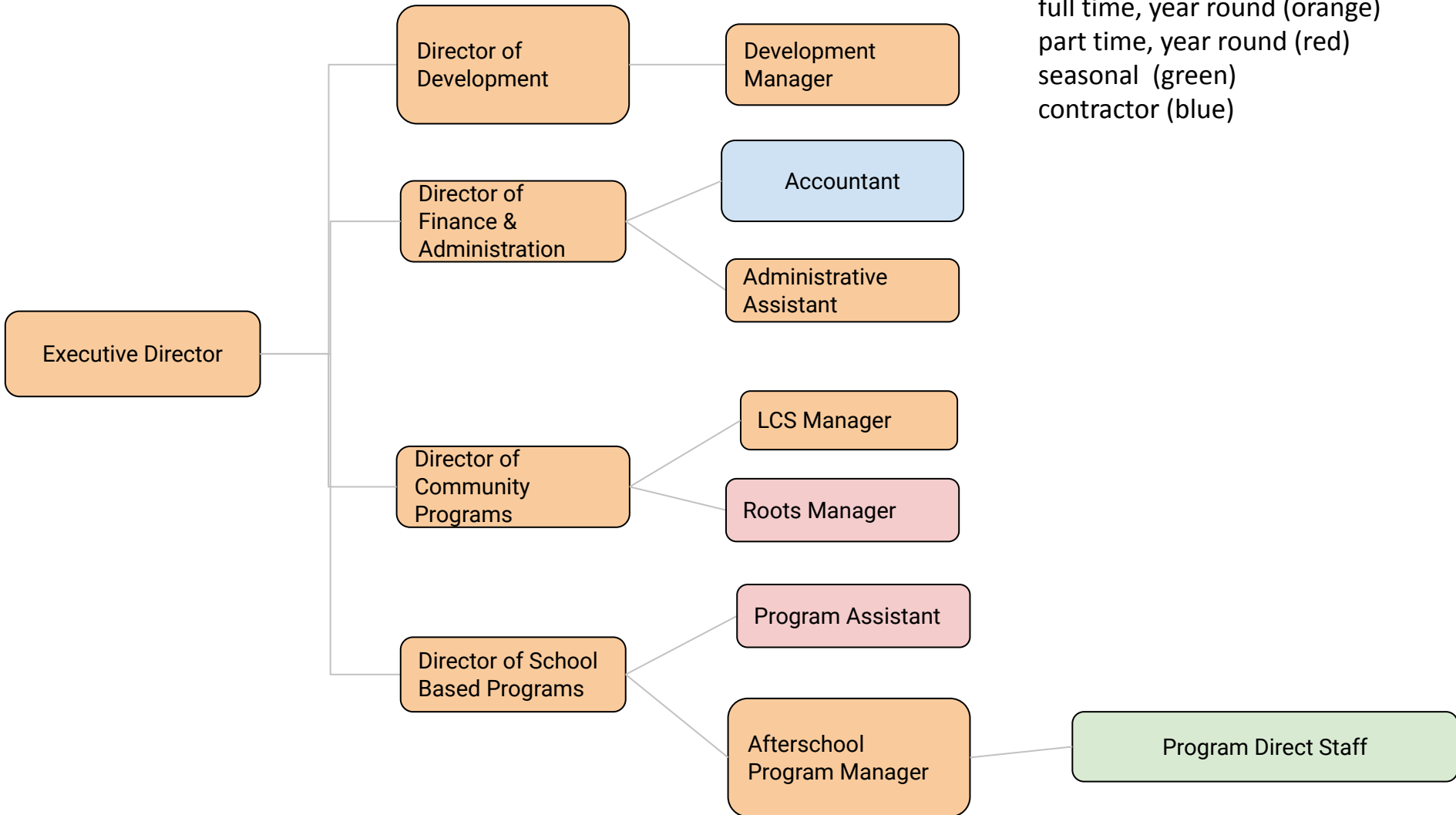
Color code

full time, year round (orange)

part time, year round (red)

seasonal (green)

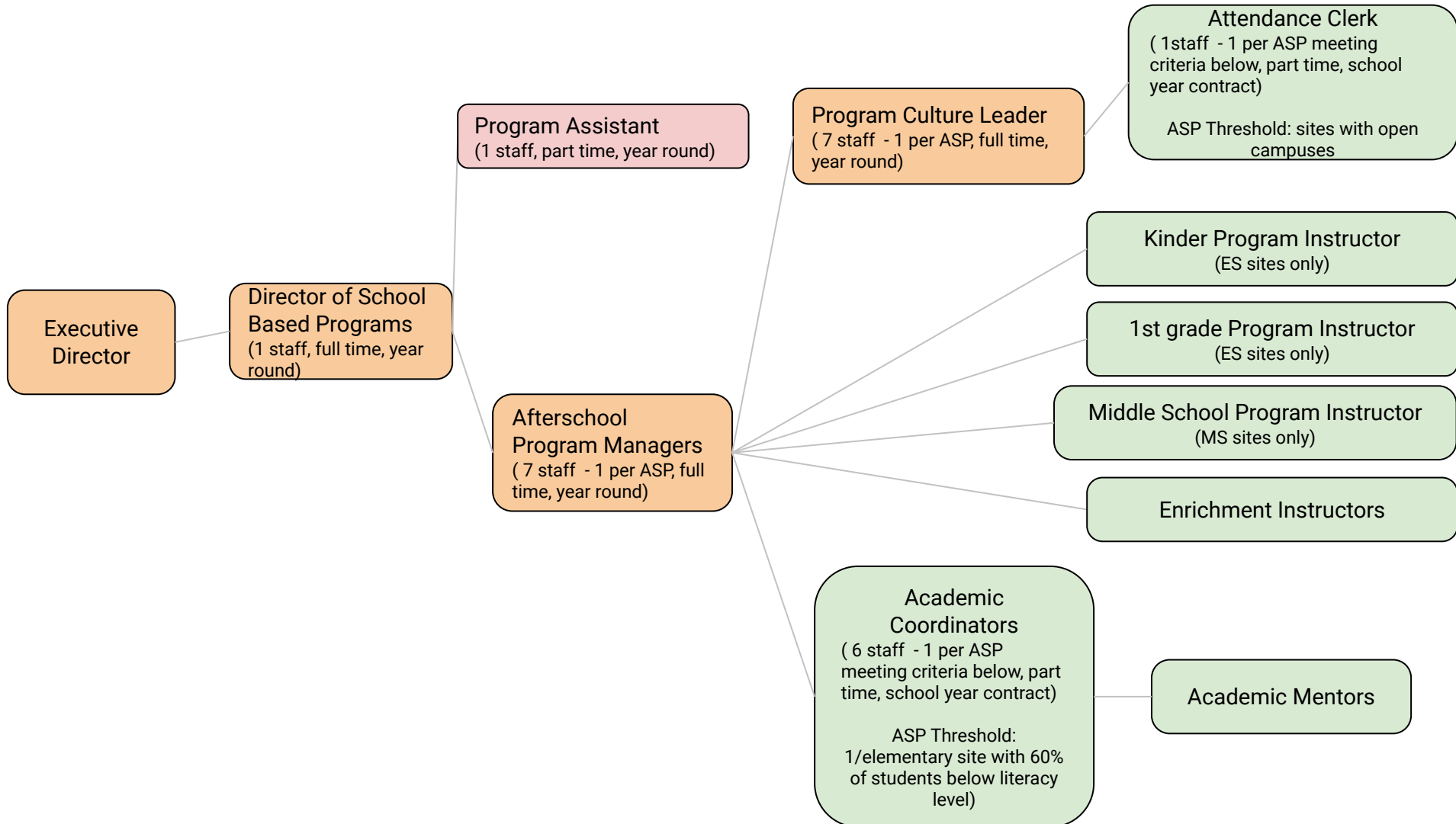
contractor (blue)





OAKLAND LEAF

FY25 Afterschool Dept Organizational Chart with headcount



ATLANTA GA 39901-0001

In reply refer to: 0752421263
June 19, 2019 LTR 4168C 0
81-0565800 000000 00
00080986
BODC: TE

OAKLAND LEAF FOUNDATION
520 3RD ST STE 109
OAKLAND CA 94607



055444

Employer ID number: 81-0565800
Form 990 required: Yes

Dear Taxpayer:

We're responding to your request dated June 10, 2019, about your tax-exempt status.

We issued you a determination letter in May 2003, recognizing you as tax-exempt under Internal Revenue Code (IRC) Section 501(c)(3).

We also show you're not a private foundation as defined under IRC Section 509(a) because you're described in IRC Sections 509(a)(1) and 170(b)(1)(A)(vi).

Donors can deduct contributions they make to you as provided in IRC Section 170. You're also qualified to receive tax deductible bequests, legacies, devises, transfers, or gifts under IRC Sections 2055, 2106, and 2522.

In the heading of this letter, we indicated whether you must file an annual information return. If you're required to file a return, you must file one of the following by the 15th day of the 5th month after the end of your annual accounting period:

- Form 990, Return of Organization Exempt From Income Tax
- Form 990EZ, Short Form Return of Organization Exempt From Income Tax
- Form 990-N, Electronic Notice (e-Postcard) for Tax-Exempt Organizations Not Required to File Form 990 or Form 990-EZ
- Form 990-PF, Return of Private Foundation or Section 4947(a)(1) Trust Treated as Private Foundation

According to IRC Section 6033(j), if you don't file a required annual information return or notice for 3 consecutive years, we'll revoke your tax-exempt status on the due date of the 3rd required return or notice.

You can get IRS forms or publications you need from our website at www.irs.gov/forms-pubs or by calling 800-TAX-FORM (800-829-3676).

If you have questions, call 877-829-5500 between 8 a.m. and 5 p.m.,

0752421263
June 19, 2019 LTR 4168C 0
81-0565800 000000 00
00080987

OAKLAND LEAF FOUNDATION
520 3RD ST STE 109
OAKLAND CA 94607

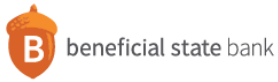
local time, Monday through Friday (Alaska and Hawaii follow Pacific time).

Thank you for your cooperation.

Sincerely yours,

A handwritten signature in cursive script, appearing to read "Teri M. Johnson".

Teri M. Johnson
Operations Manager, AM Ops. 3



OAKLAND LEAF FOUNDATION
510 3RD ST STE 200
OAKLAND CA 94607-3528

Returned Mail
***** Account Number 820008020 D

Page 1
Statement Date 6/28/24

TYPE OF ACCOUNT--Interest Business Checking

Statement Summary

Beginning Balance	5/31/24			193,944.09	0
Deposits/Credits		1	Credits	827.45	
Checks/Debits		1	Debits	827.45	
Interest Paid				30.82	
Ending Balance	6/28/24			193,974.91	

Credits/Deposits

Date	Amount	Description
6/25	827.45	~380245~ Replenish June 2024 Line Of Cre, Transfer From *****945 D To *****020 D
6/28	30.82	Interest Deposited

Other Debits

Date	Amount	Description
6/24	827.45	Automatic Transfer Eft Transfer Debit

Daily Balance Information

Date	Balance	Date	Balance	Date	Balance
Beginning Balance	193,944.09				
6/24	193,116.64	6/25	193,944.09	6/28	193,974.91



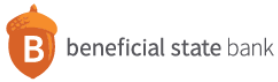
In Case of Errors or Questions About Your Electronic Transfers Telephone us at 1-888-326-2265, write us at Beneficial State Bank, Customer Call Center, 2002 NE M.L. King Blvd, Portland, Oregon 97212, or email us at support@beneficialstate.com as soon as you can, if you think your statement or receipt is wrong or if you need more information about a transfer listed on the statement or receipt. We must hear from you no later than 60 days after we sent the FIRST statement on which the problem or error appeared.

- (1) Tell us your name and account number (if any).
 - (2) Describe the error or the transfer you are unsure about, and explain as clearly as you can why you believe it is an error or why you need more information.
 - (3) Tell us the dollar amount of the suspected error.
- If you tell us orally, we may require that you send us your complaint or question in writing within 10 business days.

We will determine whether an error occurred within 10 business days after we hear from you and will correct any error promptly. If we need more time, however, we may take up to 45 days to investigate your complaint or question. If we decide to do this, we will credit your account within 10 business days for the amount you think is in error, so that you will have the use of the money during the time it takes us to complete our investigation. If we ask you to put your complaint or question in writing and we do not receive it within 10 business days, we may not credit your account.

For errors involving new accounts, point-of-sale, or foreign- initiated transactions, we may take up to 90 days to investigate your complaint or question. For new accounts, we may take up to 20 business days to credit your account for the amount you think is in error.

We will tell you the results within three business days after completing our investigation. If we decide that there was no error, we will send you a written explanation. You may ask for copies of the documents that we used in our investigation.



OAKLAND LEAF FOUNDATION
510 3RD ST STE 200
OAKLAND CA 94607-3528

Returned Mail
***** Account Number 820008020 D

Page 1
Statement Date 5/31/24

TYPE OF ACCOUNT--Interest Business Checking

Statement Summary

Beginning Balance	4/30/24			193,911.17	0
Deposits/Credits		1	Credits	437.50	
Checks/Debits		1	Debits	437.50	
Interest Paid				32.92	
Ending Balance	5/31/24			193,944.09	

Credits/Deposits

Date	Amount	Description
5/31	437.50	~373788~ Replenish Line Of Credit Intere, Transfer From *****945 D To *****020 D
5/31	32.92	Interest Deposited

Other Debits

Date	Amount	Description
5/24	437.50	Automatic Transfer Eft Transfer Debit

Daily Balance Information

Date	Balance	Date	Balance	Date	Balance
Beginning Balance	193,911.17				
5/24	193,473.67	5/31	193,944.09		



In Case of Errors or Questions About Your Electronic Transfers Telephone us at 1-888-326-2265, write us at Beneficial State Bank, Customer Call Center, 2002 NE M.L. King Blvd, Portland, Oregon 97212, or email us at support@beneficialstate.com as soon as you can, if you think your statement or receipt is wrong or if you need more information about a transfer listed on the statement or receipt. We must hear from you no later than 60 days after we sent the FIRST statement on which the problem or error appeared.

- (1) Tell us your name and account number (if any).
 - (2) Describe the error or the transfer you are unsure about, and explain as clearly as you can why you believe it is an error or why you need more information.
 - (3) Tell us the dollar amount of the suspected error.
- If you tell us orally, we may require that you send us your complaint or question in writing within 10 business days.

We will determine whether an error occurred within 10 business days after we hear from you and will correct any error promptly. If we need more time, however, we may take up to 45 days to investigate your complaint or question. If we decide to do this, we will credit your account within 10 business days for the amount you think is in error, so that you will have the use of the money during the time it takes us to complete our investigation. If we ask you to put your complaint or question in writing and we do not receive it within 10 business days, we may not credit your account.

For errors involving new accounts, point-of-sale, or foreign- initiated transactions, we may take up to 90 days to investigate your complaint or question. For new accounts, we may take up to 20 business days to credit your account for the amount you think is in error.

We will tell you the results within three business days after completing our investigation. If we decide that there was no error, we will send you a written explanation. You may ask for copies of the documents that we used in our investigation.



Program Manager Job Description **[SCHOOL NAME] Afterschool Program**

About Oakland Leaf

Oakland Leaf was founded in 2001 by a collective of East Oakland educators intent on empowering youth voice. Since that time we have developed into a highly regarded youth development institution providing free programming to upwards of 1,000 youth annually. Our goal is to empower youth with the confidence to explore life with curiosity and excitement, advocate for themselves and their community, and catalyze change as leaders. Our comprehensive after-school programs emphasize: social emotional learning, health and wellness, empowerment and leadership, arts and culture, and having fun -- because kids deserve to be kids!

Who we are

We are a collection of educators, artists, creatives, athletes, activists, life enthusiasts, and above all, passionate supporters of youth in our shared communities. If you possess the passion to make Oakland a more loving, just, and vibrant place, then Oakland Leaf might be the place for you to root in, rise up and branch out.

[SCHOOL NAME] Afterschool Program

Oakland Leaf's Afterschool Program (ASP) at [SCHOOL NAME] is a free program providing culturally relevant enrichment classes, social-emotional learning opportunities, and academic support to students 5 days per week. [SCHOOL NAME] ASP is designed to cultivate a sense of belonging, agency, and social responsibility among students, and support their development into compassionate, creative, engaged community leaders.

This program takes place at [SCHOOL WEBSITE LINK] where Oakland Leaf serves as the Lead Agency.

Summary of Position

The Program Manager provides overall management of Oakland Leaf's [SCHOOL NAME] Afterschool Program including supervision of staff, maintaining the program budget, ensuring implementation of policies and procedures, and coordinating operations of the specific program. This position reports to the Director of School Based Programs.

Specific Duties & responsibilities

- Manage implementation of after-school programs operations, including student recruitment, selection, registration, attendance, and exit; program design and curriculum development; parent engagement; school transitions; facility, supply, and food service logistics; and special events and activities coordination.
- Manage implementation of afterschool program design and curriculum that reflects Oakland Leaf's vision, mission, values and needs of the community
- Manage implementation of the program improvement process, including data collection, performance and outcome analysis, professional learning, and program improvement
- Establish work plans for, and train, support, and supervise full-time/part-time program employees, volunteers, and/or interns.



Program Manager Job Description **[SCHOOL NAME] Afterschool Program**

- Serve as principal liaison with the school principal, assistant principals, office manager, teachers, custodians, food service workers, and school security officers.
- Participate in all Oakland Leaf meetings, events, and activities designated by the Director of Afterschool Program
- Establish and maintain positive relationships with community stakeholders such as partners, families, students and other community members.
- Other duties determined by the Program Director to support the After-School Program and events

Minimum Qualifications

- Organizational, time management, and prioritization skills
- Ability to work independently, reliably, take initiative and problem solve
- Exceptional judgment, including a high level of discretion when handling confidential materials
- Excellent interpersonal and communication (written and oral) skills
- A strong work ethic, with a desire to go above and beyond standard expectations
- Strong attention to detail throughout all aspects of their work
- Continuous learner
- Ability to motivate, excite, encourage critical thinking and build community with youth and staff
- Ability to effectively and simultaneously manage multiple projects
- Work well in a team setting
- Basic behavior management and conflict resolution skills
- Commitment to Oakland leaf and School site mission and core values
- Provide TB clearance and background clearance from FBI and DOJ
- Fluency in Spanish is preferred but not required

Education & Experience

- Bachelor's Degree in Educational Field, not required but preferred
- At least 2+ years of experience as an Afterschool Program Assistant or working as a manager/coordinator in youth development setting
- Experience working collaboratively in school communities

Working conditions/physical demands

- Normal school and office conditions
- Offsite meetings
- Required to work some nights for events
- Must be able to lift up to 25lb

Work Schedule and Period

- Year round, full time (10 AM to 6:30 PM excluding 30 min lunch break), exempt employee

Compensation

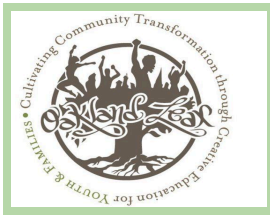
- \$60,000 to \$65,000, depending on experience



Program Manager Job Description **[SCHOOL NAME] Afterschool Program**

- 100% paid medical, dental and acupuncture employee benefits
- Paid Holidays and generous paid time off policy

Oakland Leaf is an equal opportunity employer and will not discriminate against any individual, employee, or application for employment on the basis of race, color, marital status, religion, age, sex, sexual orientation, national origin, handicap, or any other legally protected status recognized by federal, state, or local law



Kinder/1st Grade Program Instructor Job Description (Part-Time)

About Oakland Leaf

Oakland Leaf was founded in 2001 by a collective of East Oakland educators intent on empowering youth voice. For the past 20+ years, Oakland Leaf has evolved into a highly regarded leader in the fields of youth development and out-of-school time learning.

Oakland Leaf facilitates culturally relevant out-of-school time programming for approximately 1,000 K-12 East Oakland students through seven after school programs at public elementary and middle schools across East Oakland, one paid internship programs for high school students, and two 5-week summer camps - one for elementary children and one for middle school youth. Our programming emphasizes social and emotional learning, creative expression, critical thinking, leadership development, social justice, college and career readiness, and includes a diverse range of enrichment opportunities including S.T.E.M. activities, sports, poetry, visual arts, dance, literacy, community impact projects, and more.

Who we are

We are a collection of educators, artists, creatives, athletes, activists, life enthusiasts, and above all, passionate supporters of youth in our shared communities. If you possess the passion to make Oakland a more loving, just, and vibrant place, then Oakland Leaf might be the place for you to root in, rise up and branch out.

Summary of Position

The Program Instructor prepares and provides in-person academic and enrichment instruction to Kinder or 1st grade students at one of six Oakland Leaf Elementary After-School programs. This position reports to the site specific Program Manager.

Specific Responsibilities

- Develop weekly lesson plans that engage the youth, are age appropriate, and meet the high-quality standards of Oakland Leaf's mission
- Create and facilitate engaging, project-based curriculum that is of high interest for Oakland Kinder or 1st grade students daily for 1-hour enrichment sessions.
- Provide 1 hour daily academic session that assists Kinder or 1st grade students with homework and academic success.
- Implementation of Oakland Leaf standards for managing the classroom i.e. visible daily agenda, community agreements, etc.
- Set up and manage consistent structures, routines, and protocols for youth to follow.
- Passion for innovation and excellence in social and restorative justice and youth development
- Respond (not react) with a warm-demander stance when redirecting youth behavior



- Complete all administrative tasks on a daily and/or weekly basis including but not limited to student attendance, monthly reports, surveys, etc.
- Participate in mandatory staff meetings and trainings when scheduled

Minimum Qualifications

- Provide TB clearance and background clearance from FBI and DOJ
- Provide 48 semester college units or pass the Instructional Aide exam
- Ability to manage and support a group of 10 Kinder students or 20 1st grade students
- Ability to plan and prepare lessons and deliver instruction
- Commitment to Oakland leaf mission and core values

Working conditions/physical demands

- Normal school and office conditions
- Offsite meetings
- Required to work some nights for events
- Must be able to lift up to 25lb

Work Schedule and Period

- Note: This is a part time, seasonal position
- Monday through Friday, 1 PM to to 6:30 PM for 180 work days from Monday, August 12, 2024 through Thursday, May 29, 2025 excluding school holidays and breaks
- Orientation from Wednesday, July 31, 2024 through Friday, August 9, 2024 11 AM to 4 Pm daily.

Compensation

- \$20 to \$25 per hour, depending on experience
- Paid school holidays and breaks

Oakland Leaf is an equal opportunity employer and will not discriminate against any individual, employee, or application for employment on the basis of race, color, marital status, religion, age, sex, sexual orientation, national origin, handicap, or any other legally protected status recognized by federal, state, or local law



Academic Mentor Job Description (Part-Time)

About Oakland Leaf

Oakland Leaf was founded in 2001 by a collective of East Oakland educators intent on empowering youth voice. For the past 20+ years, Oakland Leaf has evolved into a highly regarded leader in the fields of youth development and out-of-school time learning.

Oakland Leaf facilitates culturally relevant out-of-school time programming for approximately 1,000 K-12 East Oakland students through seven after school programs at public elementary and middle schools across East Oakland, one paid internship programs for high school students, and two 5-week summer camps - one for elementary children and one for middle school youth. Our programming emphasizes social and emotional learning, creative expression, critical thinking, leadership development, social justice, college and career readiness, and includes a diverse range of enrichment opportunities including S.T.E.M. activities, sports, poetry, visual arts, dance, literacy, community impact projects, and more.

Who we are

We are a collection of educators, artists, creatives, athletes, activists, life enthusiasts, and above all, passionate supporters of youth in our shared communities. If you possess the passion to make Oakland a more loving, just, and vibrant place, then Oakland Leaf might be the place for you to root in, rise up and branch out.

Summary of Position

The Academic Mentor prepares and provides in-person academic instruction to elementary or middle school students in one of seven Oakland Leaf After-School programs. Academic Instruction includes homework support and literacy intervention. This position reports to the site specific Program Manager.

Specific Responsibilities

- Implement weekly lesson plans that engage the youth, are age appropriate, and meet the high-quality standards of Oakland Leaf's mission
- Provide two 1 hour daily academic sessions that assists elementary or middle school students with homework and academic success. Each session will be with two different groups of students.
- Implementation of Oakland Leaf standards for managing the classroom i.e. visible daily agenda, community agreements, etc.
- Set up and manage consistent structures, routines, and protocols for youth to follow.
- Passion for innovation and excellence in social and restorative justice and youth development
- Respond (not react) with a warm-demander stance when redirecting youth behavior



- Complete all administrative tasks on a daily and/or weekly basis including but not limited to student attendance, monthly reports, surveys, etc.
- Participate in mandatory staff meetings and trainings when scheduled

Minimum Qualifications

- Provide TB clearance and background clearance from FBI and DOJ
- Provide 48 semester college units or pass the Instructional Aide exam
- Ability to manage and support a group of 20 elementary or middle school students
- Ability to plan and prepare lessons and deliver instruction
- Commitment to Oakland leaf mission and core values

Working conditions/physical demands

- Normal school and office conditions
- Offsite meetings
- Required to work some nights for events
- Must be able to lift up to 25lb

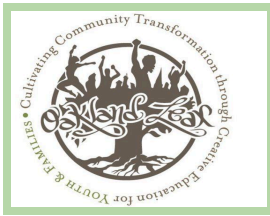
Work Schedule and Period

- Note: This is a part time, seasonal position
- Monday through Friday, 1 PM to to 6:30 PM for 180 work days from Monday, August 12, 2024 through Thursday, May 29, 2025 excluding school holidays and breaks
- Orientation from Wednesday, July 31, 2024 through Friday, August 9, 2024 11 AM to 4 Pm daily.

Compensation

- \$20 to \$25 per hour, depending on experience
- Paid school holidays and breaks

Oakland Leaf is an equal opportunity employer and will not discriminate against any individual, employee, or application for employment on the basis of race, color, marital status, religion, age, sex, sexual orientation, national origin, handicap, or any other legally protected status recognized by federal, state, or local law



Enrichment Instructor Job Description (Part-Time)

About Oakland Leaf

Oakland Leaf was founded in 2001 by a collective of East Oakland educators intent on empowering youth voice. For the past 20+ years, Oakland Leaf has evolved into a highly regarded leader in the fields of youth development and out-of-school time learning.

Oakland Leaf facilitates culturally relevant out-of-school time programming for approximately 1,000 K-12 East Oakland students through seven after school programs at public elementary and middle schools across East Oakland, one paid internship programs for high school students, and two 5-week summer camps - one for elementary children and one for middle school youth. Our programming emphasizes social and emotional learning, creative expression, critical thinking, leadership development, social justice, college and career readiness, and includes a diverse range of enrichment opportunities including S.T.E.M. activities, sports, poetry, visual arts, dance, literacy, community impact projects, and more.

Who we are

We are a collection of educators, artists, creatives, athletes, activists, life enthusiasts, and above all, passionate supporters of youth in our shared communities. If you possess the passion to make Oakland a more loving, just, and vibrant place, then Oakland Leaf might be the place for you to root in, rise up and branch out.

Summary of Position

The Enrichment Instructor prepares and provides in-person enrichment instruction to elementary or middle school students in one of seven Oakland Leaf After-School programs. Enrichment will focus on one of three areas: 1)Art & Culture 2)STEM 3)Health & Wellbeing. This position reports to the site specific Program Manager.

Specific Responsibilities

- Develop weekly lesson plans that engage the youth, are age appropriate, and meet the high-quality standards of Oakland Leaf's mission
- Create and facilitate engaging, project-based curriculum that is of high interest for Oakland elementary or middle school aged youth daily for two 1-hour enrichment sessions. Each session will be with two different groups of students.
- Implementation of Oakland Leaf standards for managing the classroom i.e. visible daily agenda, community agreements, etc.
- Set up and manage consistent structures, routines, and protocols for youth to follow.
- Passion for innovation and excellence in social and restorative justice and youth development
- Respond (not react) with a warm-demander stance when redirecting youth behavior



- Complete all administrative tasks on a daily and/or weekly basis including but not limited to student attendance, monthly reports, surveys, etc.
- Participate in mandatory staff meetings and trainings when scheduled

Minimum Qualifications

- Provide TB clearance and background clearance from FBI and DOJ
- Provide 48 semester college units or pass the Instructional Aide exam
- Ability to manage and support a group of 20 elementary or middle school students
- Ability to plan and prepare lessons and deliver instruction
- Commitment to Oakland leaf mission and core values

Working conditions/physical demands

- Normal school and office conditions
- Offsite meetings
- Required to work some nights for events
- Must be able to lift up to 25lb

Work Schedule and Period

- Note: This is a part time, seasonal position
- Monday through Friday, 1 PM to to 6:30 PM for 180 work days from Monday, August 12, 2024 through Thursday, May 29, 2025 excluding school holidays and breaks
- Orientation from Wednesday, July 31, 2024 through Friday, August 9, 2024 11 AM to 4 Pm daily. .

Compensation

- \$20 to \$25 per hour, depending on experience
- Paid school holidays and breaks

Oakland Leaf is an equal opportunity employer and will not discriminate against any individual, employee, or application for employment on the basis of race, color, marital status, religion, age, sex, sexual orientation, national origin, handicap, or any other legally protected status recognized by federal, state, or local law

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: **JUN 04 2003**

OAKLAND LEAF FOUNDATION
C/O MICHAEL SIEGEL
3632 64TH AVE
OAKLAND, CA 94605

Employer Identification Number:
81-0565800
DLN:
17053122024003
Contact Person:
RICHARD K DOLFI ID# 31363
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
December 31
Foundation Status Classification:
509(a)(1)
Advance Ruling Period Begins:
August 13, 2002
Advance Ruling Period Ends:
December 31, 2006
Addendum Applies:
No

Dear Applicant:

Based on information you supplied, and assuming your operations will be as stated in your application for recognition of exemption, we have determined you are exempt from federal income tax under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3).

Because you are a newly created organization, we are not now making a final determination of your foundation status under section 509(a) of the Code. However, we have determined that you can reasonably expect to be a publicly supported organization described in sections 509(a)(1) and 170(b)(1)(A)(vi).

Accordingly, during an advance ruling period you will be treated as a publicly supported organization, and not as a private foundation. This advance ruling period begins and ends on the dates shown above.

Within 90 days after the end of your advance ruling period, you must send us the information needed to determine whether you have met the requirements of the applicable support test during the advance ruling period. If you establish that you have been a publicly supported organization, we will classify you as a section 509(a)(1) or 509(a)(2) organization as long as you continue to meet the requirements of the applicable support test. If you do not meet the public support requirements during the advance ruling period, we will classify you as a private foundation for future periods. Also, if we classify you as a private foundation, we will treat you as a private foundation from your beginning date for purposes of section 507(d) and 4940.

Grantors and contributors may rely on our determination that you are not a private foundation until 90 days after the end of your advance ruling period. If you send us the required information within the 90 days, grantors and contributors may continue to rely on the advance determination until we make

Letter 1045 (DO/CG)

OAKLAND LEAF FOUNDATION

a final determination of your foundation status.

If we publish a notice in the Internal Revenue Bulletin stating that we will no longer treat you as a publicly supported organization, grantors and contributors may not rely on this determination after the date we publish the notice. In addition, if you lose your status as a publicly supported organization, and a grantor or contributor was responsible for, or was aware of, the act or failure to act, that resulted in your loss of such status, that person may not rely on this determination from the date of the act or failure to act. Also, if a grantor or contributor learned that we had given notice that you would be removed from classification as a publicly supported organization, then that person may not rely on this determination as of the date he or she acquired such knowledge.

If you change your sources of support, your purposes, character, or method of operation, please let us know so we can consider the effect of the change on your exempt status and foundation status. If you amend your organizational document or bylaws, please send us a copy of the amended document or bylaws. Also, let us know all changes in your name or address.

As of January 1, 1984, you are liable for social security taxes under the Federal Insurance Contributions Act on amounts of \$100 or more you pay to each of your employees during a calendar year. You are not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

Organizations that are not private foundations are not subject to the private foundation excise taxes under Chapter 42 of the Internal Revenue Code. However, you are not automatically exempt from other federal excise taxes. If you have any questions about excise, employment, or other federal taxes, please let us know.

Donors may deduct contributions to you as provided in section 170 of the Internal Revenue Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

Donors may deduct contributions to you only to the extent that their contributions are gifts, with no consideration received. Ticket purchases and similar payments in conjunction with fundraising events may not necessarily qualify as deductible contributions, depending on the circumstances. Revenue Ruling 67-246, published in Cumulative Bulletin 1967-2, on page 104, gives guidelines regarding when taxpayers may deduct payments for admission to, or other participation in, fundraising activities for charity.

You are not required to file Form 990, Return of Organization Exempt From Income Tax, if your gross receipts each year are normally \$25,000 or less. If you receive a Form 990 package in the mail, simply attach the label provided, check the box in the heading to indicate that your annual gross receipts are normally \$25,000 or less, and sign the return. Because you will be treated as a public charity for return filing purposes during your entire advance ruling period, you should file Form 990 for each year in your advance ruling period.

OAKLAND LEAF FOUNDATION

that you exceed the \$25,000 filing threshold even if your sources of support do not satisfy the public support test specified in the heading of this letter.

If a return is required, it must be filed by the 15th day of the fifth month after the end of your annual accounting period. A penalty of \$20 a day is charged when a return is filed late, unless there is reasonable cause for the delay. However, the maximum penalty charged cannot exceed \$10,000 or 5 percent of your gross receipts for the year, whichever is less. For organizations with gross receipts exceeding \$1,000,000 in any year, the penalty is \$100 per day per return, unless there is reasonable cause for the delay. The maximum penalty for an organization with gross receipts exceeding \$1,000,000 shall not exceed \$50,000. This penalty may also be charged if a return is not complete. So, please be sure your return is complete before you file it.

You are not required to file federal income tax returns unless you are subject to the tax on unrelated business income under section 511 of the Code. If you are subject to this tax, you must file an income tax return on Form 990-T, Exempt Organization Business Income Tax Return. In this letter we are not determining whether any of your present or proposed activities are unrelated trade or business as defined in section 513 of the Code.

You are required to make your annual information return, Form 990 or Form 990-EZ, available for public inspection for three years after the later of the due date of the return or the date the return is filed. You are also required to make available for public inspection your exemption application, any supporting documents, and your exemption letter. Copies of these documents are also required to be provided to any individual upon written or in person request without charge other than reasonable fees for copying and postage. You may fulfill this requirement by placing these documents on the Internet. Penalties may be imposed for failure to comply with these requirements. Additional information is available in Publication 557, Tax-Exempt Status for Your Organization, or you may call our toll free number shown above.

You need an employer identification number even if you have no employees. If an employer identification number was not entered on your application, we will assign a number to you and advise you of it. Please use that number on all returns you file and in all correspondence with the Internal Revenue Service.

If you distribute funds to individuals, you should keep case histories showing the recipients' names, addresses, purposes of awards, manner of selection, and relationship (if any) to members, officers, trustees or donors of funds to you, so that you can substantiate upon request by the Internal Revenue Service any and all distributions you made to individuals. (Revenue Ruling 56-304, C.B. 1956-2, page 306.)

If we said in the heading of this letter that an addendum applies, the addendum enclosed is an integral part of this letter.

Letter 1045 (DO/CG)



STATE OF CALIFORNIA
FRANCHISE TAX BOARD
PO BOX 942857
SACRAMENTO CA 94257-0540

Entity Status Letter

Date: 6/25/2024

ESL ID: 3190590793

Why You Received This Letter

According to our records, the following entity information is true and accurate as of the date of this letter.

Entity ID: 2430152

Entity Name: OAKLAND LEAF FOUNDATION

- ☒ 1. The entity is in good standing with the Franchise Tax Board.
- ☐ 2. The entity is **not** in good standing with the Franchise Tax Board.
- ☒ 3. The entity is currently exempt from tax under Revenue and Taxation Code (R&TC) Section 23701 d.
- ☐ 4. We do not have current information about the entity.
- ☐ 5. The entity was administratively dissolved/cancelled on _____ through the Franchise Tax Board Administrative Dissolution process.

Important Information

- This information does not necessarily reflect the entity's current legal or administrative status with any other agency of the state of California or other governmental agency or body.
- If the entity's powers, rights, and privileges were suspended or forfeited at any time in the past, or if the entity did business in California at a time when it was not qualified or not registered to do business in California, this information does not reflect the status or voidability of contracts made by the entity in California during the period the entity was suspended or forfeited (R&TC Sections 23304.1, 23304.5, 23305a, 23305.1).
- The entity certificate of revivor may have a time limitation or may limit the functions the revived entity can perform, or both (R&TC Section 23305b).

Connect With Us

Web: **ftb.ca.gov**
Phone: 800-852-5711 from 7 a.m. to 5 p.m. weekdays, except state holidays
916-845-6500 from outside the United States

California

Relay Service: 711 or 800-735-2929 (For persons with hearing or speech impairments)

OAKLAND LEAF FOUNDATION (2430152)



Request Certificate

<i>Initial Filing Date</i>	08/13/2002
<i>Status</i>	Active
<i>Standing - SOS</i>	Good
<i>Standing - FTB</i>	Good
<i>Standing - Agent</i>	Good
<i>Standing - VCFCF</i>	Good
<i>Formed In</i>	CALIFORNIA
<i>Entity Type</i>	Nonprofit Corporation - CA - Public Benefit
<i>Principal Address</i>	510 THIRD ST. SUITE 200 OAKLAND, CA 94607
<i>Mailing Address</i>	510 THIRD STREET UNIT 200 OAKLAND, CA 94607
<i>Statement of Info Due Date</i>	08/31/2026
<i>Agent</i>	Individual Melissa Mendez Ochoa 510 THIRD STREET SUITE 200 OAKLAND, CA 94607



Oakland Leaf Board of Directors 2023-2024

Officers:

Monica Guzman, Chair
Principal on Special Assignment, San Leandro
Unified School District
(Joined 2020, 2nd Term)

Audrey Yang, Secretary
User Experience Research Consultant
(Joined 2021, 1st Term)

Leo Kremer, Treasurer
Co Founder, Founders Restaurant Table Group
(Joined 2021, 1st Term)

Kim Bronson, At-Large
Sourcing Manager, Genentech
(Joined 2021, 1st Term)

Shaelyn Dawson, At-Large
Attorney, Morrison & Foerster
(Joined 2022, 1st Term)

Elizabeth Kim, At-Large
Investment Banker and M&A Advisor
(Joined 2023, 1st term)

Debra Levinsky, Emeritus Board Member
Retired Medical Doctor, Private Practice
(Founding Member)

Jose Luis Rodriguez, At-Large & Alumni
Project Manager, Growing Together
(Joined 2021, 1st Term)

Steven Tindall, At-Large
Partner at Gibbs Law Group LLP
(Joined 2021, 1st Term)

Stephen Walrod, Emeritus Board Member
Clinical Psychologist, Private Practice
(Founding Member)

Lindsey Williams, At-Large
Administrative Director, UCSF Medical Center
(Joined 2023, 1st term)



Oakland Leaf Foundation Board Meeting

04/18/2024 6:00pm

Present: Kim Bronson, Shaelyn Dawson (via zoom), Monica Guzman, Leo Kremer, Jose Luis Rodriguez, Steven Tindall

Absent: Liz Kim, Lindsay Williams, Audrey Yang

MEETING AGENDA

TIME	AGENDA ITEM	FACILITATOR
6:00 - 6:20	<u>Welcome and Dinner</u> •	Monica, Chair
6:20 -6:25	<u>Check In</u>	Monica, Chair
6:25- 6:30	<u>Approval of minutes</u> • prior meeting minutes ○ Steven Tindall made a motion to approve. Leo Kremer seconds. All in favor.	Monica, Chair
6:30 - 6:50	<u>Q3 Report Out</u> • FY24 Board Report for Quarter 3 (Slides 1 to 21) Development Update: Submitted two Oakland Promise Request for Proposals (RFPs). ED has been focused on donor cultivation - reaching out to donors to schedule coffee chats or lunch. We received a gift from Workday for hosting a volunteer event in February. Our annual event had to be rescheduled to June due to low ticket sales and sponsorships. Lots of luck on the auction front. With the new date, only one person is not able to make new date. Donors who have purchased tickets that could not make the original date. Overall, we are still projected to fall under our fundraising goal this year by \$107k assuming with a new date we reach our \$110k goal for the event - we have received \$44k as of today, meaning we have to raise \$66k - last year during the event we raised \$67k. Question around what volunteer events look like - Events vary depending on the request from corporate lead, has been everything from hands on in our gardens to creating signs for our gardens. Hr, Finance & Ops Updates: Mid year staff survey has informed changes for the second half of the year. Over 85% of staff reported they feel happy to work at Oakland Leaf, feel a sense of accomplishment from their work, and know how their role helps meet the org's vision and mission. The biggest area	Melissa, ED

of growth continues to be professional Development. Onboarding improvements have shown impact with an increase in staff stating they feel more supported when starting compared to last winter results - however still not where we want to be. We are in the midst of moving, lots of spring cleaning.

Question regarding whether the professional development feedback is around wanting more of it or the content of it - the staff are asking that the topics are more relevant.

ASP

Sites are fully staffed which has helped our programs tremendously. Program Culture Leaders and Program Managers have been able to implement small group or one-on-one interventions for students that require it. In January the ASP team launched a new lesson plan template, there has been a lot of positive feedback from our direct staff. Submission of our weekly overview lesson plan template has been increasing. Bret Harte students are enthusiastically participating in school sports and winning most of their games. Bret Harte's boys basketball, Girls basketball, and soccer all participated in Oakland Athletic League (OAL) playoffs. Space continues to be a challenge for our ASP sites. Bret Harte Attendance continues to be a struggle not just for us but for daytime - already projected to not make their 2024 ADA number, this could result in a grant reduction. Collaborating with the daytime on intervention to reach out to students on the chronic absentee list or in danger of being on the list.

Question around how OAL works - The district runs the league, any OUSD middle school can sign up.


Question around wanting to know more about space issue - With ELOP we now serve more students, at our charter campuses ELOP is funding parallel programs at the same time and at OUSD teachers are getting paid to stay for 15-30 minutes to do literacy intervention with students. This means we are getting less access to spaces but serving more students.

Comment on how attendance is a nationwide issue there was a recent NY times article about chronic absenteeism.

Internships

LCS and Roots interns have participated in a series of professional development workshops such as time management, finance literacy, and effective communication. In the upcoming months they will learn about resume building and interviewing 101. Garden Club Resumed - A sense of community has been cultivated at each garden club, and the increase in student voices that we hear during enrichments.

Summer Camps

	<p>Planning is in full swing - hosting two camps one at ICS TCN and one at BH. Our goal is to enroll 360 students between both camps. Students will attend 3-4 hours of academic support with daytime teachers and then transition to our camp from 1230 PM to 630 PM. The camp is being fully staffed by our strongest ASP teachers.</p> <p>Questions round how long camp takes place - it is a 5 week camp.</p>	
6:50 - 7:30	<p><u>Executive Report</u></p> <ul style="list-style-type: none">  FY24 Board Report for Quarter 3 (Slides 22 to 42) <p>Office Lease We are moving in two weeks into our new space. The new space will not be a shared space with other non profits but will be fully our space. This will result in a reduction to rent next fiscal year.</p> <p>Board suggested we do a small celebration in the new space.</p> <p>Org Goals: Our org goals have been set for next fiscal year, the goals are based on the last year of our current strategic plan. Our first strategy of Enhance Programming will have three goals: 1)Implement Oakland Leaf quality curriculum across sites on a consistent basis, 2) Strengthen our RJ and SEL practices, 3) Further strengthen our internship program in terms of workforce development Our second strategy of Invest in People will have three goals 1) Increase staff development and trainings 2) Enhance and elevate onboarding 3) Strengthen/Formalize opportunities for advancement. Our third goal of Measure impact will have one goal focused on strengthening the building blocks of being a true data driven and learning organization. Our fourth goal of Strengthen Brand will have one goal focused on developing a strong fundraising plan for the organization</p> <p>FY25 Org Changes</p> <p>Directors went through a SWOT analysis but also mapped our financial-programmatic impact for all programs to decide what changes we need to make for next year. In addition, there are projected revenue changes to our income next year. Due to OUSD new ELOP funding policy based on 2024 Average Daily attendance numbers, we are losing some ELOP funding - total of \$249k. This will mostly balance out with us enrolling less students and thus hiring less instructors, the reduction of instructors is \$215k and no longer partner with Girls Inc at ICS TCN resulting in \$45k savings.</p> <p>We will be cutting the Attendance Clerk position from all sites unless they meet criteria of open campus - only one site, Cleveland meets that requirement. This change is a savings of \$115k.</p>	Melissa, ED

We will be adding Academic Coordinators to help with our academic component and college/career awareness initiative. Any site that has 60% of students who are below literacy level will get a coordinator. This is all our sites but Cleveland. This will be an increase of \$83k. However this position expansion is still contingent on if we receive Oakland Promise funding.

The proposed budget in June for next fiscal year will show all returning staff receiving a 3.2% cost of living adjustment. This is an increase of \$85k. Staff have been informed there will be no performance increases due to budget constraints.

Our internship department is getting a big change. Our Love Cultivating Schoolyards will no longer have two components: the internship piece and after school garden club. We are removing the internship component of LCS and it will solely focus on the Garden Club component. The ELOP funding from cutting the attendance clerk position will be used to cover the cost of Garden Club. Our current LCS interns will be moved to our Roots internship, meaning our Roots program will expand and be assigned to support LCS Garden Manager. Due to this we hope to add a 0.5 FTE Roots Manager to hold this program. This shift in the internship department will be a \$4k savings overall but give LCS a more sustainable funding.

Looking ahead, OUSD will release their RFP process. OUSD has a list of approved afterschool lead agencies, principals can only contract with agencies on that list. Every 3 years this list gets updated based on the RFP. This process will take place during the summer. In the Fall, principals will go through exploration phase where they can re-evaluate their lead agency. This would be our chance to add a school site. As of right now, all our OUSD principals have expressed wanting to stay with Oakland Leaf. Once school site partnerships are confirmed, City of Oakland releases RFP for Oakland Fund for Children of Youth (OFCY) which is the funding that supplements our ASES and ELOP funding. This is a 3 year grant award.

With change in LCS model, we hope to create a funding model. Just like Girls Inc serves as a lead agency but also a subcontractor for other lead agencies - we want to replicate that model for our LCS garden club. How do we run garden clubs for other lead agencies like Girls Inc, EBAYC, EBAC, etc?

ASP Partnerships

With OUSD RFP coming up, we need to discuss if we want to expand or stay with current agencies. We will need to make a decision during summer - other questions to explore. Do we want to stay focused on East Oakland or open up to Oakland? Do we want to change to just be an elementary ASP lead agency? Do we want to add a MS to our list so it is not just Bret harte?

	ED shared that 3 sites reach out this year with hopes of OL interviewing to be the lead agency.	
7:30 - 7:40	Board Assessment Report Out <ul style="list-style-type: none"> Deck <p>Ryan shared the board assessment results from the Board Assessment that each board member completed in December.</p> <p>Ryan presented areas of opportunities for each category based on responses. Ryan worked with Melissa and Monica to determine two projects that he could do for us based on these opportunities. Given the constraint of a month two items were identified: Orientation onboard deck and compliance calendar</p> <p>Orientation Onboarding Deck - built off what Melissa presented to board in the Fall. This is an onboarding deck that captures the policies, gives an intro to nonprofit boards, board structure, and next steps.</p> <p>Compliance Calendar - outlines the routine and regulatory obligations of nonprofits in CA. This is a reference document that the board can use to know what filings are coming up or how often they should review the filings.</p>	Ryan, Board Fellow
7:40 - 7:50	Board Business <ul style="list-style-type: none"> Board went into closed Session 	Melissa, ED
7:50	Closed session	Monica, Chair

UPCOMING BOARD MEETINGS			
DATE	Purpose	Dinner sign up	Attendance Notes
June 13, 2024	Budget Approval for FY25		



Oakland Leaf Foundation Board Meeting

06/25/2024 6:00pm

Zoom Link:

<https://us02web.zoom.us/j/88697264532?pwd=l86upSW5D1cxWkrtORJzmSe4bhxbn7.1>

Present: Kim Bronson, Shaelyn Dawson, Elizabeth Kim, Leo Kremer, Jose Luis Rodriguez, Steven Tindall, Lindsay Williams

Absent: Monica Guzman, Audrey Yang

MEETING AGENDA	
TIME	AGENDA ITEM
6:00 - 6:05	Welcome <ul style="list-style-type: none">•
6:05 -6:10	Check In
6:10- 6:15	Approval of minutes <ul style="list-style-type: none">• prior meeting minutes<ul style="list-style-type: none">○ Steven Tindall made a motion to approve. Leo Kremer seconds. All in favor.
6:15 - 6:45	Q4 as of 5/31/24 Report Out <ul style="list-style-type: none">• Development<ul style="list-style-type: none">○ Completed a wealth screening to assess donors' giving patterns, mission fit, and assets. Looked at 800 donors who have ever given \$500 or more and narrowed down to 63 targets with specified touch points.○ Submitted multiple grants with a few new prospective grants. We did get an increase in funding from one of our returning funders - increased from \$4k to \$20k/year. Oakland Promise came in at an awarded amount of \$10k.○ Our event planning was on track and took place earlier this month, we met our net income goal of \$78k.• Finance & Administration<ul style="list-style-type: none">○ Based on data informed learnings from this year, we have improved our screening and application process for the upcoming school year.○ End of year staff survey demonstrated that staff feel more appreciated, we have been intentional around this piece. However, professional development continues to be an area for improvement.○ As of today, we are forecasted to end the fiscal year with about \$1k in surplus. Cash flow continues to be a concern, we have been just fine with Line of Credit but getting reimbursed from contracts for service has been slow.• ASP

	<ul style="list-style-type: none"> ○ The EOY events were dynamic and showcased the job, laughter, and creativity that took place throughout the year. We had two funders come out to one of our showcase who informed me how happy they were to experience the joy and see the projects on display. ○ Our Managers held their staff reflection to talk about the highlights for this year and challenges, they have started to develop plans on what needs to change for next year. Part of the reflection had to do with reviewing our youth and family surveys. They celebrated that 93% of families are pleased with our program and feel their child is safe during the program. We had a parent say the following “We are grateful for such an amazing after school program. The girls really love it and I can see how it is shaping and developing them both. We are grateful for your hard work and to your awesome team.” ○ Our programs are all projected to meet their required ADA target with the exception of BH. We have been in collaboration with OUSD to develop plans of actions to ensure that we can meet at least 75% of our goal to bring us to tier 2. ● Internship <ul style="list-style-type: none"> ○ LCS and Roots held an end of year joint celebration at Dimond Park. The team reflected on the intern surveys which showed the great improvement compared to fall - it demonstrated the impact the implemented changes had on the program. ○ We got to table at the Oakland Promise Event that was a resource fair for middle and high school students. Our staff were interviewed for their social media! ○ The challenge we are still trying to address is how during Spring we see a decrease in engagement due to competing events and academics. ● Summer Camps <ul style="list-style-type: none"> ○ Summer camp is almost done, next week! We have been serving 300 students in camp this summer between BH and ICS TCN. Our elementary students have been able to practice their creative skills through arts & crafts, participate in summer gardening, and engage in many movement activities with lots of time outdoors and through team sports. They were able to go to Angel Island this week and will be going to the zoo next week. Our middle school students have practice their creative skills through activities like watercolor painting, they learned how to make solar ovens, and are in the midst of their service learning project. For Service Learning, they were able to present their projects to a panel last week for feedback and recommendations. They will finish their projects next week. They were able to go on a hiking field trip on Lands End Loop Trail in San Francisco last week and next week will be having Adventure Day at Del Valle where they will be able to go boating and swimming as well as have Crew Competitions. ● Executive <ul style="list-style-type: none"> ○ OUSD has release their RFP due on July 12th - this an important piece as it determines if we are approved to be an afterschool provider for school years of 2025/26 to 2027/28 ○ Our funding from Clty of Oakland is entering year 3 of 3. We just submitted the updated scope of work and budget for the final year of contract. They have also updated us that they are working on their strategic initiatives for the upcoming RFP to be released in January 2025.
--	---

	<ul style="list-style-type: none"> ○ Discussed the need to update our admin staffing structure. Board recommended that we look at entire staffing to see what updates need to be made, not just at individual departments.
6:45 - 7:15	FY25 Budget Proposal <ul style="list-style-type: none"> ● Discussed the context of the budget being our 3 areas of strategy plan - enhance program, staff development, impact and awareness. ● Reviewed the services that Oakland Leaf will provide for next year - projected enrollment for afterschool program is 950 students and 30 interns. ● Income Sources: Fundraising matches what was raised this year, Contracts for Service for OUSD ASES, OFCY and EFC ASES/ELOP remain the same. OUSD ELOP is decreasing. 60% of our fundraising goal is already committed and 34% is already pending. ● In terms of expenses there will be a cut of \$300k due to ELOP funding decreases - we have cut the Attendance Clerk position and reduced the number of instructors to match enrollment targets. ● We are still working on building our reserve. ● Board felt this is a strong and conservative budget. ● Kim Bronson made a motion to approve with stipulation Leadership Cost for ED be added, Liz Kim seconds. All in favor.
7:15 - 7:20	Board Business <ul style="list-style-type: none"> ● Updating Handbook to incorporate CA's Paid Sick Leave <ul style="list-style-type: none"> ○ Board discussed how this does not increase financial liability as sick leave does not need to be paid out. ○ Leo Kremer made a motion to approve. Steven Tindall seconds. All in favor.
7:20	Closed session

UPCOMING BOARD MEETINGS			
DATE	Purpose	Dinner sign up	Attendance Notes
August 15, 2024	Launch of new School Year FY24 EOY Update		
October 16, 2024	Q1 Report Out		

OAKLAND LEAF FOUNDATION
(A NONPROFIT PUBLIC BENEFIT CORPORATION)
REPORT ON AUDIT OF FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2023

CONTENTS

	<u>PAGE</u>
INDEPENDENT AUDITOR'S REPORT	1-2
FINANCIAL STATEMENTS:	
Statement of Financial Position	3
Statement of Activities	4
Statement of Functional Expenses	5
Statement of Cash Flows	6
NOTES TO FINANCIAL STATEMENTS	7-13

INDEPENDENT AUDITOR'S REPORT

December 18, 2023

Board of Directors
Oakland Leaf Foundation
Oakland, California

Opinion

I have audited the accompanying financial statements of Oakland Leaf Foundation (a nonprofit public benefit corporation), which comprise the statement of financial position as of June 30, 2023, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements.

In my opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Oakland Leaf Foundation as of June 30, 2023, and the changes in net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

I conducted my audit in accordance with auditing standards generally accepted in the United States of America. My responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of my report. I am required to be independent of Oakland Leaf Foundation and to meet my other ethical responsibilities in accordance with the relevant ethical requirements relating to my audit. I believe that the audit evidence I have obtained is sufficient and appropriate to provide a basis for my audit opinion.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about Oakland Leaf Foundation's ability to continue as a going concern within one year after the date that the financial statements are available to be issued.

Auditor's Responsibilities for the Audit of the Financial Statements

My objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes my opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements, including omissions, are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with generally accepted auditing standards, I:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of Oakland Leaf Foundation's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in my judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about Oakland Leaf Foundation's ability to continue as a going concern for a reasonable period of time.

I am required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control related matters that I identified during the audit.



Healy and Associates
Concord, California

OAKLAND LEAF FOUNDATION
STATEMENT OF FINANCIAL POSITION
JUNE 30, 2023

ASSETS

CURRENT ASSETS:

Cash and cash equivalents	\$ 257,636
Grants receivable	591,852
Prepaid expenses	<u>14,188</u>

TOTAL CURRENT ASSETS 863,676

Property and equipment, net 3,482

Deposit 4,000

TOTAL ASSETS \$ 871,158

LIABILITIES AND NET ASSETS

LIABILITIES:

CURRENT LIABILITIES:

Accounts payable and accrued expenses	\$ 43,640
Vacation payable	32,688
Line of credit	<u>100,000</u>

TOTAL CURRENT LIABILITIES 176,328

COMMITMENTS

NET ASSETS:

Without donor restrictions:

General	584,830
Board designated	10,000
With donor restrictions	<u>100,000</u>

TOTAL NET ASSETS 694,830

TOTAL LIABILITIES AND NET ASSETS \$ 871,158

OAKLAND LEAF FOUNDATION
STATEMENT OF ACTIVITIES
YEAR ENDED JUNE 30, 2023

	Without Donor Restrictions	With Donor Restrictions	Total
<u>SUPPORT AND REVENUE</u>			
Government grants	\$ 2,060,375	\$ -	\$ 2,060,375
Contributions	332,637	-	332,637
Gala event			
Gross receipts	\$ 124,359		
Less: expenses	<u>(22,806)</u>		
	101,553	-	101,553
Foundation grants	87,000	-	87,000
In-kind revenue	82,975	-	82,975
Corporate grants	51,926	-	51,926
Interest income	279	-	279
Other income	<u>651</u>	<u>-</u>	<u>651</u>
	2,717,396	-	2,717,396
Net assets released from restrictions	<u>175,000</u>	<u>(175,000)</u>	<u>-</u>
TOTAL SUPPORT AND REVENUE	<u>2,892,396</u>	<u>(175,000)</u>	<u>2,717,396</u>
<u>EXPENSES</u>			
Program services	2,398,343	-	2,398,343
General and administrative	167,371	-	167,371
Fundraising and events	<u>264,107</u>	<u>-</u>	<u>264,107</u>
TOTAL EXPENSES	<u>2,829,821</u>	<u>-</u>	<u>2,829,821</u>
CHANGE IN NET ASSETS	62,575	(175,000)	(112,425)
NET ASSETS, beginning of year	<u>532,255</u>	<u>275,000</u>	<u>807,255</u>
NET ASSETS, end of year	<u>\$ 594,830</u>	<u>\$ 100,000</u>	<u>\$ 694,830</u>

OAKLAND LEAF FOUNDATION
STATEMENT OF FUNCTIONAL EXPENSES
YEAR ENDED JUNE 30, 2023

	Program Services	General and Administrative	Fundraising and Events	Total
EXPENSES				
Salaries	\$ 1,672,082	\$ 97,898	\$ 193,330	\$ 1,963,310
Payroll taxes	151,021	7,534	14,813	173,368
Employee benefits	62,818	19,499	17,323	99,640
Workers' compensation	7,833	171	1,859	9,863
TOTAL PERSONNEL EXPENSES	1,893,754	125,102	227,325	2,246,181
Contract services	189,554	1,171	-	190,725
Program supplies	110,055	331	105	110,491
In-kind expenses	60,205	3,265	19,505	82,975
Rent	45,767	2,600	3,641	52,008
Consultants	10,176	27,562	1,208	38,946
Office expense	17,721	5,040	6,206	28,967
Event expense	-	-	22,806	22,806
Intern stipends	15,784	-	-	15,784
Insurance	11,517	654	916	13,087
Professional development	10,563	-	138	10,701
Marketing and outreach	4,365	53	2,885	7,303
Interest expense	6,292	357	500	7,149
Depreciation	6,129	348	488	6,965
Telephone and internet	4,840	198	278	5,316
Payroll processing fees	4,417	251	351	5,019
Equipment rental	3,695	210	294	4,199
Taxes and licenses	3,354	191	267	3,812
Travel	155	38	-	193
	504,589	42,269	59,588	606,446
	2,398,343	167,371	286,913	2,852,627
Less: expenses included with revenues on the statement of activities				
Fundraising event expenses	-	-	(22,806)	(22,806)
Total expenses included in the expense section on the statement of activities	\$ 2,398,343	\$ 167,371	\$ 264,107	\$ 2,829,821

OAKLAND LEAF FOUNDATION
STATEMENT OF CASH FLOWS
YEAR ENDED JUNE 30, 2023

CASH FLOWS FROM OPERATING ACTIVITIES:

Change in net assets	\$ (112,425)
----------------------	--------------

Adjustments to reconcile change in net assets to
cash used by operating activities:

Depreciation	6,965
--------------	-------

**CHANGES IN CURRENT ASSETS AND
CURRENT LIABILITIES:**

Grants receivable	(114,694)
-------------------	-----------

Prepaid expenses	65
------------------	----

Accounts payable and accrued expenses	18,931
---------------------------------------	--------

Vacation payable	<u>13,669</u>
------------------	---------------

NET CASH USED BY OPERATING ACTIVITIES	<u>(187,489)</u>
---------------------------------------	------------------

CASH FLOWS FROM FINANCING ACTIVITIES:

Borrowing on line of credit	<u>100,000</u>
-----------------------------	----------------

NET CASH PROVIDED BY FINANCING ACTIVITIES	<u>100,000</u>
---	----------------

NET CHANGE IN CASH AND CASH EQUIVALENTS	(87,489)
---	----------

CASH AND CASH EQUIVALENTS, beginning of year	<u>345,125</u>
--	----------------

CASH AND CASH EQUIVALENTS, end of year	<u><u>\$ 257,636</u></u>
--	--------------------------

SUPPLEMENTAL INFORMATION:

Interest paid	<u><u>\$ 7,149</u></u>
---------------	------------------------

OAKLAND LEAF FOUNDATION
NOTES TO FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2023

NOTE A – NATURE OF ACTIVITIES

Oakland Leaf Foundation (Organization) is a California nonprofit public benefit corporation incorporated in December 2002 to cultivate community transformation through creative education for youth and families. Their vision is to embolden youth and families to be creative leaders who actualize a more loving, just, and vibrant Oakland. They support youth to be critical and creative thinkers, make healthy and safe decisions for themselves and the environment, navigate their lives, and approach life with curiosity and a desire to learn. The Organization is supported primarily through grants and contributions.

NOTE B – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Accounting Method and Basis of Presentation

The accounting records of the Organization are maintained on the accrual basis of accounting. The financial statements of the Organization have been prepared in accordance with ASU 2016-14, Not-for-Profit Entities (Topic 958) – *Presentation of Financial Statements of Not-for-Profit Entities*, which require the Organization to report information regarding its financial position and activities according to the following net asset classifications:

Net assets without donor restrictions: Net assets that are not subject to donor-imposed restrictions and may be expended for any purpose in performing the primary objectives of the Organization. These net assets may be used at the discretion of the Organization's management and the Board of Directors.

Net assets with donor restrictions: Net assets subject to stipulations imposed by donors and grantors. Some donor restrictions are temporary in nature; those restrictions will be met by actions of the Organization or by the passage of time. Other donor restrictions are perpetual in nature, whereby the donor has stipulated the funds be maintained in perpetuity.

Donor restricted contributions are reported as increases in net assets with donor restrictions. When a restriction expires, net assets are reclassified from net assets with donor restrictions to net assets without donor restrictions in the statements of activities.

Estimates

The preparation of financial statements in conformity with U.S. generally accepted accounting principles requires the Organization to make estimates and assumptions that affect the reported amounts of assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates, and those differences could be material.

OAKLAND LEAF FOUNDATION
NOTES TO FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2023

NOTE B - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

Cash and Cash Equivalents

Cash and cash equivalents include all monies in banks and highly liquid investments with maturity dates of less than three months, which are neither held for nor restricted by donors for long term purposes.

Fair Value Measurements

The Organization's financial instruments include cash and cash equivalents measured using Level 1 inputs. Fair value is defined as the price that would be received to sell an asset in the principal or most advantageous market for the asset in an orderly transaction between market participants on the measurement date. Fair value should be based on the assumptions market participants would use when pricing an asset. U.S. GAAP establishes a fair value hierarchy that prioritizes investments based on those assumptions. The fair value hierarchy gives the highest priority to quoted prices in active markets (observable inputs) and the lowest priority to an entity's assumptions (unobservable inputs). The Organization groups assets at fair value in three levels, based on the markets in which the assets are traded, and the reliability of the assumptions used to determine fair value. These levels are:

- **Level 1**— Quoted prices for identical assets in active markets.
- **Level 2**—Observable inputs other than Level 1, which include quoted prices for similar assets in active markets, quoted prices from those willing to trade in markets that are not active, or other inputs that are observable or can be corroborated by market data for the term of the instrument.
- **Level 3**— Unobservable inputs that cannot be corroborated by observable market data.

Grants Receivable

Grants receivable are primarily due from governmental agencies and non-profit organizations. The Organization evaluates the collectability of its receivables on an ongoing basis and records a provision for potential uncollectible receivables when appropriate. Management did not consider an allowance for doubtful accounts necessary as of June 30, 2023.

Property and Equipment

The Organization records depreciation on its property and equipment expenditures in excess of \$5,000 on a straight-line basis using the following estimated useful lives:

Computer equipment and software:	3 Years
Furniture and fixtures:	5 Years

Maintenance and repairs are expensed as incurred.

OAKLAND LEAF FOUNDATION
NOTES TO FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2023

NOTE B - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

Revenue Recognition - Contributions

The Organization recognizes contributions when cash, securities or other assets, an unconditional promise to give, or notification of a beneficial interest is received. Conditional promises to give, that is, those with a measurable performance or other barrier, and a right of return, are not recognized until the conditions on which they depend have been substantially met.

Revenue Recognition – Contract Earnings

A portion of the Organization's revenue is derived from cost-reimbursable grants, which are conditioned upon the incurrence of allowable qualifying expenses. Amounts received are recognized as revenue when the Organization has incurred expenditures in compliance with specific grant provisions. Amounts received prior to incurring qualifying expenditures are reported as refundable advances in the statement of financial position. The Organization has \$4,464,419 in cost-reimbursement grants that have not been recognized at June 30, 2023 because qualifying expenditures have not yet been incurred. No amounts have been received in advance under the cost-reimbursable federal and state grants.

Functional Allocation of Expenses

The costs of program activities and supporting services have been summarized on a functional basis in the statements of functional expenses. The statement presents the natural classification of detail of expenses by function. Accordingly, certain costs have been allocated among the programs and supporting services benefited. Indirect costs such as general and administrative expenses include costs that are not directly identifiable with any specific program, but which provide the overall support and direction of the Organization. Such expenses which are common to multiple functions have been allocated among the various functions benefited based on time and effort spent in the area or on the space used.

In-kind Contributions

In-kind contributions are recorded at the respective fair values. In-kind contributions received are \$82,975 for the year ended June 30, 2023. In addition, the Organization receives use of facilities space(s) for carrying out their program. The value of the donated use of facilities cannot be quantified and is therefore not included in the accompanying financial statements.

OAKLAND LEAF FOUNDATION
NOTES TO FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2023

NOTE B - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

Relevant Accounting Pronouncements

In February 2016, the FASB issued ASU 2016-02, Leases (Topic 842). The new standard establishes a comprehensive new lease accounting model. It clarifies the definition of a lease and causes lessees to recognize leases on the statement of financial position as a lease liability with a corresponding right of use asset for leases with a lease term of more than one year. It is effective for financial statements issued for fiscal years beginning after December 15, 2021, and interim periods within those fiscal years. The standard requires a modified retrospective transition for capital or operating leases existing at or entered into after the beginning of the earliest comparative period presented in the financial statements, but it does not require transition accounting for leases that expire prior to the date of initial application. The Organization adopted the standard on July 1, 2022. The Organization elected the 'package of practical expedients', which permitted the Organization not to reassess under the new standard its prior conclusions about lease identification, lease classification, and initial direct costs; and all of the new standard's available transition practical expedients. In addition, the Organization adopted the practical expedients of using the risk-free interest rate and the short-term lease definition. The adoption of the standard resulted in no change to Organization's financial statements.

NOTE C - INCOME TAX

The Organization has received tax exempt status under Section 501(c)(3) of the Internal Revenue Code, Section 23701(d) of the State of California Revenue and Taxation Code. The Organization's tax returns are subject to examination by federal and state taxing authorities generally for three years after they are filed. The Organization has no unrelated business income, and management has analyzed the tax positions taken, or expected to be taken, that would require recognition of a liability or disclosure in the financial statements.

NOTE D - PROPERTY AND EQUIPMENT

Property and equipment by major classes at June 30, 2023 are as follows:

Furniture and equipment	\$ 20,894
Accumulated depreciation	<u>(17,412)</u>
	<u>\$ 3,482</u>

Depreciation expense for the year ended June 30, 2023 was \$6,965.

OAKLAND LEAF FOUNDATION
NOTES TO FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2023

NOTE E – LINE OF CREDIT

The Organization has a secured line of credit in the amount of \$100,000, bearing interest at 2% over the index rate with a floor of 6.75%, with advances available through July 2023, and matures July 2028. At June 30, 2023, there was a balance of \$100,000 outstanding.

NOTE F – COMMITMENTS

The Organization leases office space under an annual non-cancellable lease which ran through December 2021 and has been amended for two one-year renewals at a rate of approximately \$4,250 per month. For the year ended June 30, 2023, rent expense is \$52,008.

Office equipment is leased to conduct the Organization's operations under long-term operating lease agreements which run through October 2024 at a rate of approximately \$235 per month.

The minimum lease payments under these agreements are summarized as follows:

<u>Year ended June 30</u>	
2024	\$ 28,258
2025	\$ 932

NOTE G – CONCENTRATIONS

Cash on Deposit

Financial instruments that potentially subject the Organization to concentrations of credit risk consist of cash and cash equivalents in a financial institution. Funds on deposit exceeding federally insured limits totaled \$89,173 at June 30, 2023.

Revenue and Support

During the year ended June 30, 2023, the Organization received 62% of its support and revenue from the Oakland Unified School District and the City of Oakland. A significant reduction in the level of this support could affect the Organization's ability to continue its operations.

Grants Receivable

Three funders represent approximately 83% (36%, 29% and 18%) of total grants receivable. Management has evaluated the sources of funding and determines them to be fully collectible.

OAKLAND LEAF FOUNDATION
NOTES TO FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2023

NOTE H – EMPLOYEE BENEFITS

The Organization accrues vacation for full-time staff members. At June 30, 2023, the accrued vacation payable is \$32,688, and is included in the accompanying financial statements.

During the year ended June 30, 2023, the Organization adopted a plan under the CalSavers Retirement Savings Program (Program). The Program requires all California employers with 5 or more employees to provide access to a retirement plan by June 30, 2022. The Organization does not contribute to the Program.

NOTE I – LIQUIDITY AND AVAILABILITY

Financial assets available for general expenditure, that is, without donor or other restrictions limiting their use, within one year of the balance sheet date, comprise the following:

Cash and cash equivalents	\$ 257,636
Grants receivable	591,852
Total financial assets	<u>849,488</u>
Less:	
Net assets with board designations	(10,000)
Net assets expected to be released within one year	<u>(100,000)</u>
Financial assets available to meet cash needs for general expenditures within one year	<u><u>\$ 739,488</u></u>

The Organization's board designated funds are \$10,000 at June 30, 2023. Although they do not intend to spend from this board designated fund, these amounts could be made available if necessary. As part of the Organization's liquidity management, the Organization has a policy to structure its financial assets to be available as its general expenditures, liabilities, and other obligations come due.

NOTE J – NET ASSETS WITH BOARD DESIGNATIONS

For the year ended June 30, 2023, net assets with board designations had the following activity:

<u>Nature of Designation</u>	<u>Beginning Balance</u>	<u>Income and Contribution</u>	<u>Released from Restriction</u>	<u>Ending Balance</u>
Reserve	\$ 10,000	\$ -	\$ -	\$ 10,000
Total	<u>\$ 10,000</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 10,000</u>

OAKLAND LEAF FOUNDATION
NOTES TO FINANCIAL STATEMENTS
YEAR ENDED JUNE 30, 2023

NOTE K – NET ASSETS WITH DONOR RESTRICTIONS

For the year ended June 30, 2023, net assets with donor restrictions had the following activity:

<u>Nature of Restriction</u>	<u>Beginning Balance</u>	<u>Income and Contribution</u>	<u>Released from Restriction</u>	<u>Ending Balance</u>
Time restricted	\$ 275,000	\$ -	(\$175,000)	\$ 100,000
Total	<u>\$ 275,000</u>	<u>\$ -</u>	<u>(\$175,000)</u>	<u>\$100,000</u>

NOTE L – IN-KIND CONTRIBUTIONS

During the year ended June 30, 2023, the Organization was the recipient of in-kind contributions of services and goods. The values of these contributions, as reflected in the accompanying financial statements, are as follows:

<u>Services or Goods Received and Allocation</u>	<u>Basis for Valuation</u>	<u>Total</u>
<u>Program</u>		
Office Supplies	Based on FMV of donated items	\$47,515
Classroom supplies	Based on FMV of donated items	8,410
Program event supplies	Based on FMV of donated items	4,280
		<u>60,205</u>
<u>Fundraising</u>		
Auction items	Based on FMV of donated items	<u>19,505</u>
<u>Admin</u>		
Pro-bono accounting services	Based on FMV of services	3,000
Office supplies	Based on FMV of donated items	265
		<u>3,265</u>
Total		<u>\$ 82,975</u>

NOTE M – SUBSEQUENT EVENTS

Subsequent to year end, the Organization increased its line of credit from \$100,000 to \$200,000 with an interest rate of prime rate, as stated by the Wall Street Journal, plus 2% and matures July 2028.

In accordance with FASB Accounting Standards Codification Topic 855, "Subsequent Events," Management has evaluated subsequent events through December 18, 2023, the date the financial statements were available to be issued and concluded that there were no subsequent events that require recognition or disclosure in the financial statements for the year ended June 30, 2023.

Cleveland Elementary School

745 Cleveland Street, Oakland CA 94606
510.879.2108



To Whom It May Concern:

At Cleveland Elementary School, we've been working with the Oakland Leaf organization to manage our afterschool program for the last two years, starting in August 2022. We have had an incredible experience that has benefited our students and our entire community.

In the winter and spring of 2021-22, we had an intensive experience in looking for a new partner to manage our after school programs. We were moving from a stable program that had little innovation or clear communication with the site who was looking to shrink the number of schools they were working with, and our community was a little nervous about the change and possible impacts. Through the search, it became very clear that very few organizations had a values-based model that they were looking to replicate at other schools, and that of those few, Oakland Leaf was the stand out. They had many programs in place (such as restorative justice support and academic support) that actually matched with our school and district plans, which was a stark contrast to other programs.

Once selected, they immediately partnered with us in identifying staffing and staffing models to support the school. We collaborated on a site director and they went above and beyond to find staffing, especially in the challenging fall of 2022 when programs across the state were struggling to find staff. They proactively worked with the site, the community, and our district to not only fully staff our program, but to make sure that families with the most need were the ones who were supported first.

Since they were selected, the program director and I have worked closely with multiple meetings and check ins per week to make sure the program is running smoothly and students are getting the individual support needed. Additionally, Oakland Leaf has provided a number of community and student surveys that they have implemented to assess the program. The Executive Director and the central after school program staff have had regular meetings with me where they discussed the data they collected and what changes or improvements they had identified to address the data, all the while asking for my own input and making sure that our most needy families receive the support they need.

Our working relationship has been a joy and has provided a ton of support for our entire community—even outside those students enrolled in Oakland Leaf. We could not be happier with the organization and their programs, and highly recommend that they maintain and expand their relationships with Oakland Unified. Thank you and please reach out with any further questions!

Peter Van Tassel
Principal
peter.vantassel@ousd.org



OAKLAND UNIFIED
SCHOOL DISTRICT

Community Schools,
Thriving Students



2825 International Boulevard
Oakland, CA 94601
(510) 879-2186 phone

June 18, 2024

To Whom It May Concern,

I am writing this letter to recommend Oakland LEAF as an after school provider for OUSD.

My name is Raquel Rodríguez Jones and I am the principal of International Community School (ICS). I have been the principal of ICS for two years. Oakland LEAF has been the after school provider for those two years.

Oakland LEAF has been a responsive and collaborative partner in the education of ICS students. Communication with the Oakland LEAF coordinator, Ana Ivy Peña, is always well received and timely. We meet early on to generate goals for the school year, create avenues for the general ed teachers and the ASP teachers to meet and collaborate, and to collaboratively brainstorm a program that will meet the academic and creative needs of the students. We meet regularly to check in and problem solve any issues that might arise. Ana Ivy is always highly responsive and attentive to the needs of the students and a great thought partner. Ana Ivy is always available to discuss a student's needs when needs issues arise.

This year especially the ASP program has worked to offer a wider variety of programs to better meet the needs of students and to publicize these offerings to families.

I know that students are happy with the after school program because the ASP program staff survey the students and have shared the results with me. I am pleased that students find the ASP offerings fun and interesting.

For the general ed teachers of ICS, they appreciate that homework help continues to be a priority with the ASP staff and to support this the ASP staff purchased a chromebook cart to support students' access to online educational platforms.

I hope that the Oakland LEAF after school program is re-approved as a lead agency for the 2025-2028 school years.

I can be reached at 510-499-4683 if any further information is needed.

Thank you,

Raquel Rodríguez Jones
Principal International Community School
OUSD



OAKLAND LEAF

Sample of Fulfillment of minimum Proposals - Collaboration

MID YEAR PRINCIPAL CHECK INS
02/05/2024
4:00 PM TO 5:00 PM
ENCOMPASS PROGRAM

Outcomes

- Site Leadership team will reflect on the first half of the fiscal year to celebrate our wins and address lessons learned

AGENDA

TIME	Item
4:00 PM 5 min	<u>Welcome (Isa)</u> <ul style="list-style-type: none"> • Review Agenda • Check in question
4:05 PM 5 min	<u>Review Program Compliance (Melissa)</u> <ul style="list-style-type: none"> • Celebrate meeting 89% of target goal for 2023 • Looking forward to 2024
4:10 PM 10 Min	<u>Report out on Youth Surveys (Tania)</u> <ul style="list-style-type: none"> • Manager share out highlights (successes and areas of improvement) • Director share out any ASP wide changes
4:20 PM 20 min	<u>Partnership Reflection (Isa)</u> <ul style="list-style-type: none"> • Are students receiving the academic, enrichment, physical activity, and social-emotional support they need? What works? What needs to shift? • What are the successful alignment elements between the school day and expanded learning programming? What is challenging? • Any other feedback?
4:40 PM 10 min	<u>SubContractors Pulse Check</u> <ul style="list-style-type: none"> • Current subcontractors (Ignite Reading, PushPlay, Mindful life Project, ClassEquity) <ul style="list-style-type: none"> ○ How is it going? What's working? What's not working?
4:50 PM 10 min	<u>Manager Update</u> <ul style="list-style-type: none"> •
5:00 PM 5 min	<u>Closing</u> <ul style="list-style-type: none"> • Review Action Steps <ul style="list-style-type: none"> ○ • Much loves <ul style="list-style-type: none"> ○



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

10/26/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must have **ADDITIONAL INSURED** provisions or be endorsed. If **SUBROGATION IS WAIVED**, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Fidelity Insurance Service a member of United Valley 801 Allston Way Berkeley CA 94710	CONTACT NAME: Aliyyah Harvey PHONE (A/C, No, Ext): (510) 548-8200 FAX (A/C, No): (510) 548-6145 E-MAIL ADDRESS: aharvey@fidelityinsuranceservice.com
INSURED Oakland Leaf Foundation 520 3rd Street #109 Oakland CA 94607	INSURER(S) AFFORDING COVERAGE INSURER A: NIAC INSURER B: Hartford Casualty Ins Co INSURER C: Amwins Brokerage Insurance Services INSURER D: INSURER E: INSURER F:
	NAIC # 99998 29424

COVERAGES**CERTIFICATE NUMBER:** CL23102620948**REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	Y		202316332NPO	10/05/2023	10/05/2024	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 500,000 MED EXP (Any one person) \$ 20,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			202316332NPO	10/05/2023	10/05/2024	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> EXCESS LIAB DED RETENTION \$			202316332UMBPO	10/05/2023	10/05/2024	EACH OCCURRENCE \$ 1,000,000 AGGREGATE \$ 1,000,000
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y / N <input type="checkbox"/>	N / A	57WECAE2JLV	10/30/2023	10/30/2024	<input checked="" type="checkbox"/> PER STATUTE E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
C	Commercial Cyber Liability			C4LRF-252661-CYBER2023	10/16/2023	10/16/2024	Occurrence & Aggregate Retention \$ 1,000,000 \$ 2,500

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Oakland Unified School District is additional insured with respect to the operations of the named insured per written contract.

CERTIFICATE HOLDER**CANCELLATION**Oakland Unified School District Attn: Risk Management
1011 Union St Suite 987

Oakland

CA 94607

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

© 1988-2015 ACORD CORPORATION. All rights reserved.