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Introduction Date	6/30/21
Enactment Number	21-1243
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By	



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

June 30, 2021

To: Board of Education

From: Kyla Johnson-Trammell, Superintendent  
Andrea Bustamante, Executive Director, Community Schools and Student Services Department  
Michelle Oppen, Wellness Coordinator

Subject: Grant Agreement - Helzel Family Foundation Grant c/o East Bay Community Foundation - Life Academy

**ACTION REQUESTED:**

Approval by the Board of Education of a Grant Agreement between the District and Helzel Family Foundation c/o the East Bay Community Foundation, accepting \$200,000.00 in funding to support mastery of reading and literacy skills in lower grades at Life Academy, for the period July 1, 2021 through June 30, 2023, pursuant to the terms and conditions thereof for the grant years, if any.

**BACKGROUND:**

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

File I.D #	Backup Document Included	Type	Recipient	Grant's Purpose	Time Period	Funding Source	Grant Amount
21-1569	Yes	Grant	Oakland Unified School District, Life Academy	Grant to support mastery of reading and literacy skills in lower grades at Life Academy.	7/1/21-6/30/23	Helzel Family Foundation Grant c/o the East Bay Community Foundation	\$200,000.00

**DISCUSSION:**

The District created a Grant Face sheet process to:

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

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

**FISCAL IMPACT:**

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

- Grants valued at: \$200,000.00

**RECOMMENDATION:**

Approval by the Board of Education of a Grant Agreement for Life Academy for fiscal years 2021-2023, pursuant to the terms and conditions thereof, for the grant year, if any.

**ATTACHMENTS:**

- Grant Face Sheet
- Grant Award Letter
- Grant Agreement

OUSD Grants Management Face Sheet

<b>Title of Grant:</b> Helzel Family Foundation Grant	<b>Funding Cycle Dates:</b> July 1, 2021 – June 30, 2023
<b>Grant’s Fiscal Agent:</b> (contact’s name, address, phone number, email address) Brenda Laribee, Senior Development Officer East Bay Community Foundation De Domenico Building 200 Frank H. Ogawa Plaza Oakland, CA 94612 (5100 836-3223)	<b>Grant Amount for Full Funding Cycle:</b>  \$200,000.00 Distributed over two (2) years.
<b>Funding Agency:</b> Helzel Family Foundation c/o the East Bay Community Foundation De Domenico Building 200 Frank H. Ogawa Plaza Oakland, CA 94612 (5100 836-3223)	<b>Grant Focus:</b> To support mastery of reading and literacy skills in lower grades at Life Academy.
<b>List all School(s) or Department(s) to be Served:</b> Life Academy (Middle and High School)	

Information Needed	School or Department Response
How will this grant contribute to sustained student achievement or academic standards?	The explicit focus of this grant is to provide funds for additional staffing to support mastery of reading and literacy skills with students in lower grade levels at Life Academy. With these funds, we will be able to increase access to small group reading intervention as well as provide coaching support for stronger Tier 1 literacy practice across all of our lower grades.
How will this grant be evaluated for impact upon student achievement?  (Customized data design and technical support are provided at 1% of the grant award or at a negotiated fee for a community-based fiscal agent who is not including OUSD’s indirect rate of 5.56% in the budget. The 1% or negotiated data fee will be charged according to an Agreement for Grant Administration Related Services payment schedule. This fee should be included in the grant’s budget for evaluation.)	We will use a set of internal and external measures for impact on reading and literacy skills, including: 1) CCSS mastery-based grades from Humanities/ELA courses 2) CAASP Benchmark/Summative Assessment data (IABs, SBAC, etc.) 3) Reading Inventory (RI) 4) Performance on internal literacy rubric around school-wide Document-Based Questions essays (given at beginning and end of year)
Does the grant require any resources from the school(s) or district? If so, describe.	Yes, insofar as a hiring processes for a new position (creation of a new PCN, HR onboarding and management).
Are services being supported by an OUSD funded grant or by a contractor paid through an OUSD contract or MOU?  (If yes, include the district’s indirect rate of 5.56% for all OUSD site services in the grant’s budget for administrative support, evaluation data, or indirect services.)	No
Will the proposed program take students out of the classroom for any portion of the school day? (OUSD reserves the right to limit service access to students during the school day to ensure academic attendance continuity.)	No

<p>Who is the contact managing and assuring grant compliance? (Include contact's name, address, phone number, email address.)</p>	<p>Alykhan Boolani Co-Principal, Life Academy of Health and Bioscience Oakland Unified School District 2101 – 35<sup>th</sup> Avenue Oakland, CA 94601 (510) 207-5005 <a href="mailto:alykhan.boolani@ousd.org">alykhan.boolani@ousd.org</a></p>
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**Applicant Obtained Approval Signatures:**

Entity	Name/s	Signature/s	Date
Principal/Administrator	Alykhan Boolani		6/2/2021
Chief Academic Officer	Sondra Aguilera		6/2/2021

**Grant Office Obtained Approval Signatures:**

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

# *Helzel Family Foundation*

c/o Deborah Kirshman, Chair  
651 Vistamont Avenue  
Berkeley, California 94708  
(510) 384-2321

June 7, 2021

Alykhan Boolani & Aryn Bowman, Co-Principals  
Life Academy of Health & Bioscience  
c/o Oakland Unified School District  
ATTN: Tien Truong  
1000 Broadway, Suite 450  
Oakland, CA 94607

Dear Alykhan and Aryn,

The Helzel Family Foundation is pleased to award a two-year grant of \$200,000 to Life Academy of Health and Bioscience for the purpose of underwriting one additional staff position that focuses on Middle School literacy. The first installment of \$100,000 is enclosed. The Helzel Family Foundation intends to award the second installment of \$100,000 in June 2022 provided that the school continues its strategic plan to augment Middle School literacy with this staff position.

We ask that you send the Helzel Family Foundation a progress report on or before March 15, 2022, detailing the use and impact of these funds; please see enclosed the Report Guidelines and instructions for sending in your report.

The Helzel Family Foundation is a “supporting organization” of The East Bay Community Foundation, 200 Frank H. Ogawa Plaza, Oakland, CA 94612. Note on this letterhead the mailing address for Helzel Family Foundation correspondence (c/o Deborah Kirshman, Chair, 651 Vistamont Avenue, Berkeley, CA 94708).

Our Board of Directors is enthusiastic about partnering with Life Academy and the Oakland Unified School District to ensure that Middle School students have the opportunity to improve their literacy skills so they are on solid ground as they enter high school.

With best wishes,

Deborah Kirshman  
Chair, Helzel Family Foundation

Enclosures

cc: Brenda Laribee, East Bay Community Foundation  
Renee Johnson, OUSD

## GRANT AGREEMENT

Between the Helzel Family Foundation Fund and:

**Grantee:** Oakland Unified School District, FBO: Life Academy High School

**Address:** ATTN: Tien Truong  
1000 Broadway, Suite 450, Oakland, CA 94607

**Contact Person:** Alykhan Boolani and Aryn Bowman

**Foundation Contact:** Deborah Kirshman, Chair

**Grant Number:** #20212816

### Purpose and Conditions of the Grant

- 1. Grant Purpose:** Life Academy of Health and Bioscience Expansion of Middle School Literacy Program (\$200K payable over 2 years; this is year 1)
- 2. Grant Period:** 7/1/2021 - 6/30/2022
- 3. Grant Amount:** \$100,000.00
- 4. Reporting Schedule:** Report to be submitted by: 3/15/2022 to [grantsmanagement@eastbaycf.org](mailto:grantsmanagement@eastbaycf.org)
- 5. Special Conditions:** Grant Classification (re: Financial Accounting Standard Board's SFAS 116-117):  
I. Unconditional                       II. Unrestricted   
    Conditional                                       Restricted

Restricted grants can be used only to fund the stated purpose of the grant. Conditional grants are paid only after a condition has been met.

**The Helzel Family Foundation Grant Agreement  
Grant #20212816**

By accepting this grant, your organization certifies to the Helzel Family Foundation that you will use grants funds for the purpose outlined in this Agreement. Furthermore, your organization certifies that (i) no tangible benefit, goods, or services are received by any individuals or entities connected with the Helzel Family Foundation Fund, and (ii) this grant will not be used by you to satisfy the payment of any pledge or other personal financial obligation on behalf of the donors of the Foundation.

By signing this agreement the Grantee signatory acknowledges that he/she has read and understood the Agreement and that the Grantee accepts its terms and conditions.

**Dated as of:** 6/30/2021

**Grantee:**   
Shanthi Gonzales, President, Board of Education 7/1/2021

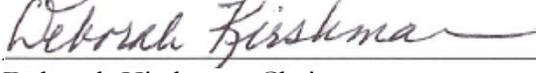
By: Executive Director   
Kyla Johnson Trammell, Secretary, Board of Education 7/1/2021

**Name:** \_\_\_\_\_ **Signature:** \_\_\_\_\_

Approved as to form by OUSD Staff Attorney Joanna Powell on 6/3/2021.



**The Helzel Family Foundation**

By:   
Deborah Kirshman, Chair

**PLEASE RETURN SIGNED GRANT AGREEMENT to**  
[grantsmanagement@eastbaycf.org](mailto:grantsmanagement@eastbaycf.org)

## REPORT GUIDELINES

*Please keep this form in your files. Return it completed to the East Bay Community Foundation on the Report Due Date noted below. Please read these guidelines carefully at the start of your grant period to better address the points below at the grant's conclusion. Attach this sheet as the cover for your report.*

**Grant #:** 20212816 **Amount:** \$100,000.00  
**Agency Name:** Oakland Unified School District, FBO: Life Academy High School  
**Grant Contact:** Alykhan Boolani and Aryn Salazar Bowman  
**Purpose of Grant:** Life Academy of Health and Bioscience Expansion of Middle School Literacy Program (\$200K payable over 2 years; this is year 1)  
**Grant Period:** July 1, 2021 - June 30, 2022  
**Final Report Due:** 3/15/2022  
**EBCF Contact:** [grantsmanagement@eastbaycf.org](mailto:grantsmanagement@eastbaycf.org)

*This report helps us understand the impact of our grants and your goals for the coming period. Please submit a brief narrative report (1-2 pages) addressing the following:*

1. An update on your organization's accomplishments and challenges during the grant period, including any significant changes in your organization's programs, finances or leadership (key staff or board).
2. A brief overview of your organization's major goals for the coming year.
3. A description of how the grant was used and its impact on the organization/individual lives.
4. Your organization's current operating budget, indicating actual and anticipated sources of revenue. If this is a project-specific grant please include a project budget indicating how grant funds were expended.
5. A recent balance sheet.

If you have any questions concerning these guidelines, please use the EBCF Contact indicated above.

**\* Please submit this report electronically to [grantsmanagement@eastbaycf.org](mailto:grantsmanagement@eastbaycf.org).**