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| <b>Board Office Use: Legislative File Info.</b> |              |
| File ID Number                                  | 22-1489      |
| Introduction Date                               | 6/29/22      |
| Enactment Number                                | 22-1289      |
| Enactment Date                                  | 6/29/2022 er |

## Board Cover Memorandum

**To** Board of Education

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

**Meeting Date** June 29, 2022

**Subject** Expanded Learning Programs After School Program Master Contract 2022-2025 with Envisioneers, Inc.

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**Ask of the Board**  Approve Services Agreement  
 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 four OUSD school sites listed in Exhibit A.*

**Term** Start Date: 7/1/22 End Date: 7/31/25

**Not-To-Exceed Amount** \$3,846,558

**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 \$915,403.00; Resource 4124 – 21<sup>st</sup> Century Program in the amount of \$531,155.00; Resource 2600 – Expanded Learning Opportunities Program (ELO-P) in the amount of \$2,400,000.00*

## **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 both ASES and 21<sup>st</sup> Century programs and fee-based 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 2022-2025 with Envisioneers, Inc.
- Request for Proposal 21-104ASP and Vendor Bid Materials
- Request for Proposal 21-115ExLO and Vendor Bid Materials

**Expanded Learning Programs  
After School Program Master Contract 2022-2025  
Between Oakland Unified School District and**

Envisioneers, Inc.

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1. **Intent.** This Memorandum of Understanding (“MOU”) 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 Envisioneers, Inc. (“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 MOU 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 and 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 that will exceed 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 21<sup>st</sup> Century Community Learning Centers (21<sup>st</sup> CCLC)
  - US Department of Education 21<sup>st</sup> Century High School After School Safety and Enrichment for Teens (“ASSETS”)
  - Expanded Learning Opportunities - Programs (“ELO-P”)
  - Oakland Fund for Children and Youth - This MOU 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 21<sup>st</sup> CCLC funds.
  - Private grants
4. **Term of MOU.** The term of this MOU shall be July 1, 2022, through July 31, 2025.
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. **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.
- 5.5. **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.
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, and 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 MOU is \$ 3,846,558.15. 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 MOU 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 MOU requirements, attendance reporting, fiscal invoicing, full participation at OUSD required meetings and training and in continuous quality improvement efforts.
- 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 additional 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.** 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 ASEP and 21<sup>st</sup> 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 4% 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, 21<sup>st</sup> CCLC, ASSETS, and ELO-P grants within the grant-mandated allowable 15% for total indirect/administrative costs. The agency administrative fees charged to the ASES and 21<sup>st</sup> 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, 21<sup>st</sup> CCLC, ASSETS, and ELO-P programs. Indirect costs consist of expenditures for administrative activities that are necessary for the general operation of the agency, but that cannot be tied to the ASES, 21<sup>st</sup> 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. **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, which 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.

**6.7. Program Fees.** The intent of the ASES, 21<sup>st</sup> 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 who are 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 21<sup>st</sup> Century Community Learning Center (CCLC) and ASSETS must report all fees collected (i.e.- registration fees, family fees, application fees, etc.) to OUSD After-School Program Office for CDE reporting.

7. **Services.** AGENCY will serve as lead agency at the OUSD school sites identified in the annual Scope of Work , will be responsible for operations and management of the ASES, 21<sup>st</sup> CCLC, ASSETS, ELO-P, OFCY, and private grants contracted to AGENCY by OUSD for fiscal year 2022-2023 through 2024-2025. This shall include the following required activities:

7.1. **Student Outcomes.** AGENCY shall achieve the student outcomes as 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.

7.1.1. **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.

7.1.2. **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.

7.1.3. **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 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, 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.

7.2.**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 21<sup>st</sup> 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.

7.3.**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.

#### 7.4.**Program Requirements**

7.4.1. **Program Hours.** The program shall be offered Monday through Friday, every regular school day annually, commencing immediately upon the conclusion of the regular school day, operating a minimum of 15 hours/week, and until 6:00 pm daily. Instructional activities must include a balance of both academic and enrichment/recreation components. ELO-P funding can be used to support intercession programming and before-school care.

7.4.2. **Program Days.** The program shall be offered a minimum of 177 - 180 days during the 2022–2023 through the 2024-2025 school years. AGENCY will close the ASES, 21<sup>st</sup> CCLC and ASSETS, and ELO-P program(s) no more than a maximum of 3 days in each of the 2022-2023 through the 2024-2025 school years for staff professional development, as permitted by Education Code. Programs that receive 21<sup>st</sup> 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.

7.4.3. **Program Components.** AGENCY agrees to provide programming that supports the guidelines as outlined in the ASES, 21<sup>st</sup> 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.
- **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. 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.

- **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.
- **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 21<sup>st</sup> 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.

7.4.3.1. Super Snacks/Snack/Supper/Beverages: AGENCY shall meet Federal and State meal and snack requirements and all meals and snacks must be provided by OUSD Nutrition Services department. Nutrition Services shall:

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

7.4.3.1.2. 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;

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

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

7.4.3.1.5. Provide annual training to AGENCY.

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

7.4.3.2.1. 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;

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

7.4.3.2.3. Ensure meal count is accurate;

- 7.4.3.2.4. Submit completed MPW to cafeteria staff by the next business day;
  - 7.4.3.2.5. Return leftovers to the cafeteria;
  - 7.4.3.2.6. Ensure that only students are served and receive food from the program;
  - 7.4.3.2.7. Ensure that meals are not removed from campus
  - 7.4.3.2.8. Immediately report to OUSD Site Coordinator and Nutrition Services any concerns related to food safety or food contamination
- 7.4.3.3. AGENCY will be billed at the rates immediately below, for meals by Nutrition Services under the following conditions.
- 7.4.3.3.1. MPW not completed and submitted by the next business day;
  - 7.4.3.3.2. Super Snacks and Snacks are ordered and not picked up
- 7.4.3.4. 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 2021-2022 school year are below; these amounts may change throughout the life of the agreement.
- 7.4.3.4.1. Super Snack: \$3.66
  - 7.4.3.4.2. Supper: \$3.66
- 7.4.3.5. 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.
- 7.4.3.6. 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.
- 7.4.4. **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.
- 7.4.5. **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.
- 7.5.**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:
- 7.5.1. **Accountability Reports.** AGENCY will provide OUSD with the following set of program accountability reports:
- Financial reports
  - Activity reports
  - Outcomes reports: behavioral and academic

- Staff Qualifications

7.5.2. **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.

7.5.3. **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 OUS enrollment packet, in advance of distribution.

7.5.4. **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.

7.6. **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.

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

7.7.1. 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.

7.8. **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.

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

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

- Community organizations and public agencies

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

7.11. **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.

## 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 (eg 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 (eg: 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**

8.4.1.1. 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

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

8.4.1.3. 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.

8.4.2. 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.

8.4.3. 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.

8.4.4. 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.

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

8.4.6. **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 and 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 2021-2022. 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 21<sup>st</sup> 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, 21<sup>st</sup> Century Core Grant, 21<sup>st</sup> Century Direct Access, or 21<sup>st</sup> 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. 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, 21<sup>st</sup> Century, and ELO-P Grants.** For services rendered related to the ASES, 21<sup>st</sup> CCLC, ASSETS, ELO-P grants, OUSD shall pay AGENCY, on a monthly basis, for appropriately documented expenses related to the ASES, 21<sup>ST</sup> CCLC, ASSETS, and ELO-P grants, with a cumulative total for 2022-2025 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 10<sup>th</sup> 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. OUSD will strive to adhere to second Accounts Payable check run per the published schedule of monthly payments if invoices are submitted in accordance with the deadlines and requirements set forth in this section and the accompanying Exhibits.

11. **Ownership of Documents.** AGENCY agrees that, pursuant to California law, it shall maintain program and fiscal documentation for the ASES, 21<sup>st</sup> 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 2022-2023 through the 2024-2025 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 Education Code 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.

- 13.1.4. **Minimum Qualifications.** AGENCY staff and agents who directly supervise students and are included in the 1:20 staff to student ratio 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/21<sup>st</sup> 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 F 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 setting.

**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. Worker's Compensation** insurance, as required by the California Labor Code, with not less than the statutory limits.

**15.3. 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 MOU. 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).

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: Martha Pena  
Site/Dept: 922/ Community Schools & Student Services  
Address: 1000 Broadway, Suite 150  
City, ST Zip: Oakland, CA 94607  
Phone: 510-879-2457  
Email: matha.pena@ousd.ord

**AGENCY**

Name: Maria Sparanga-Drake  
Title: Chief Executive Officer  
Address: 330 Twin Dolphin Drive, #115  
City, ST Zip: Redwood City, CA 94605  
Phone: 415-680-5473  
Email: maria.d@theenvisioneers.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 \$2,500 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. All supplies purchased with grant funding are and remain the property of OUSD and must remain at the site.
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/>

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

**OAKLAND UNIFIED SCHOOL DISTRICT**

850.44 6/30/2022

President, Board of Education Date

State Administrator

Superintendent

J. H. ... 6/30/2022

Secretary,  
Board of Education Date

DocuSigned by:  
Andrea Bustamante 5/31/2022

Executive Director Date  
Community Schools and Student Services Dept.

DocuSigned by:  
Sandra Aguilera 5/31/2022

Chief Academic Officer Date  
Continuous School Improvement

**AGENCY**

DocuSigned by:  
Maria Sparagna Drake 5/31/2022  
Agency Signature Date

Maria Sparagna-Drake, Chief Executive Officer  
Print Name, Title

**Attachments:**

- **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.** Agreement to Allow Distinct and Separate Employment by OUSD and AGENCY

Legislative File ID: 22-1489

*MOU template approved by OUSD Office of the General Counsel May 2022*

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 Three Year Grant: |
|----------------------|--|-----------------------------|
| Claremont Middle     | 95   | \$904,954.08                |
| Greenleaf Elementary | 122  | \$1,131,155.55              |
| Montera Middle       | 67   | \$600,000.00                |
| Westlake Middle      | 150  | \$1,210,448.52              |
|                      |  |                             |
|                      |  |                             |
|                      | Total:                                     | \$3,846,558.15              |

Exhibit B

Blank Template of PPT and Budget Tool

**INSERT HERE**



# 22-23 OUSD Expanded Learning Programs -After-School Program

## ELEMENTARY/MIDDLE & HIGH SCHOOLS - 2022-2023

### ASES, 21st Century, and ELO-P After-School Program Plan

@

| SECTION 1: SCHOOL SITE AND AFTER-SCHOOL PROGRAM INFORMATION             |   |  |  |
|---|---|--|--|
| School Site Name: <input style="width: 100%;" type="text"/>             | School Type: <ul style="list-style-type: none"> <li><input type="checkbox"/> Elementary (TK-5)</li> <li><input type="checkbox"/> Elementary/Middle (TK-8)</li> <li><input type="checkbox"/> Middle (6-8)</li> <li><input type="checkbox"/> High School (9-12)</li> <li><input type="checkbox"/> - Alternative High School</li> <li><input type="checkbox"/> - Continuation High School</li> <li><input type="checkbox"/> - Comprehensive High School</li> </ul> |  |  |
| CDS Code: <i>(This is a 14-digit code, search <a href="#">here</a>)</i> |   | Expanded Learning Lead Agency:               |  |
| Principal Name:   |   | Principal Signature and date:                |  |
| Lead Agency Signatory Name:   |   | Lead Agency Signature and date:              |  |
| Executive Director, Community Schools & Student Services:               |   | Executive Director, CSSS Signature and date: |  |

| SECTION 2: PROGRAM OPERATIONS   |  |
|---|--|
| Average Daily Attendance, Program Dates, Minimum Days & Enrollment  |  |
| <p>To be compliant with 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.</p>  |  |
| Projected daily attendance for 2022-2023 school year program.   |  |
| Program Operations for the 2022-2023 school year. First Day: August 8, 2022 Last Day: May 25, 2023  |  |
| <b>UPDATED ED CODE:</b>   | Per CDE Education Code Section 8483.7(c) allows programs to closed for a <b>maximum of 3 days during a calendar year (not a school year)</b> 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 agenda and staff sign-in sheets. <b>This should be uploaded no later than 5 business days after the closure day.</b> |
| 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 2022).   |  |
| 1st: <input style="width: 100%;" type="text"/>  | 2nd: <input style="width: 100%;" type="text"/>   |
| 3rd: <input style="width: 100%;" type="text"/>  |  |
| <p><b>Minimum Days.</b> When a school holds minimum days, the after-school program is required to begin as soon as the school day ends, and execute programming until 6:00 pm. Minimum days have a significant impact on after-school staff and budget. Thus, during the program planning process, school leadership and the lead agency partner must discuss the anticipated number of minimum days for the program year, and discuss shared resources to fund minimum day programming. <b>There is an expectation already established for the 36 weekly minimum days, however, if the school is planning on more than these and 10 extra days for report card conferencing you should discuss how the staffing fees for these extra days will be funded in partnership with the school day.</b></p> |  |
| Projected Number of Minimum Days for School Year 2022-2023: <input style="width: 100%;" type="text"/>   |  |
| Please note that the grants from CDE do not increase funding for minimum days. If the school adds additional minimum days beyond the projected number above, the school-site should help identify additional funds to support these additional hours of programs?   |  |

**SECTION 3a: PROGRAM MODEL. Average Daily Attendance, Program Dates, Minimum Days & Enrollment**

Which of the following program models will your site operate as for 2022-2023? [\(If you choose Extended Day, please explain why using this link.\)](#)

|                |   |
|----------------|---|
| Program Model: | Please only select <b>ONE</b> of the options below  |
|                | <input type="checkbox"/> Traditional After-school <input type="checkbox"/> Extended Program <input type="checkbox"/> Blended/Hybrid |

|  |   |    |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |    |                          |    |                          |    |                          |
|--|---|----|--------------------------|---|--------------------------|---|--------------------------|---|--------------------------|---|--------------------------|---|--------------------------|---|--------------------------|---|--------------------------|---|--------------------------|---|--------------------------|---|--------------------------|----|--------------------------|----|--------------------------|----|--------------------------|
| <p><b>Traditional After-School:</b> Voluntary program, open to all students, with enrollment priorities targeting certain students.</p> <p><b>Extended Day Program:</b> After-school-program classes offered to an entire group of students from targeted grades and/or for all students of the school after the end of the regular bell schedule. (Note: extended day classes must not appear on the school bell schedule)</p> <p><b>Blended/Hybrid:</b> A combination of some extended day and some traditional after-school programming. (If you are conducting a blended/hybrid program, please use the section below to explain your program model type.)</p> | <p style="text-align: center;"><b>Which grade levels will be served by this program?</b></p> <table style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 80%;">TK</td><td style="text-align: center;"><input type="checkbox"/></td></tr> <tr><td>K</td><td style="text-align: center;"><input type="checkbox"/></td></tr> <tr><td>1</td><td style="text-align: center;"><input type="checkbox"/></td></tr> <tr><td>2</td><td style="text-align: center;"><input type="checkbox"/></td></tr> <tr><td>3</td><td style="text-align: center;"><input type="checkbox"/></td></tr> <tr><td>4</td><td style="text-align: center;"><input type="checkbox"/></td></tr> <tr><td>5</td><td style="text-align: center;"><input type="checkbox"/></td></tr> <tr><td>6</td><td style="text-align: center;"><input type="checkbox"/></td></tr> <tr><td>7</td><td style="text-align: center;"><input type="checkbox"/></td></tr> <tr><td>8</td><td style="text-align: center;"><input type="checkbox"/></td></tr> <tr><td>9</td><td style="text-align: center;"><input type="checkbox"/></td></tr> <tr><td>10</td><td style="text-align: center;"><input type="checkbox"/></td></tr> <tr><td>11</td><td style="text-align: center;"><input type="checkbox"/></td></tr> <tr><td>12</td><td style="text-align: center;"><input type="checkbox"/></td></tr> </table> | TK | <input type="checkbox"/> | K | <input type="checkbox"/> | 1 | <input type="checkbox"/> | 2 | <input type="checkbox"/> | 3 | <input type="checkbox"/> | 4 | <input type="checkbox"/> | 5 | <input type="checkbox"/> | 6 | <input type="checkbox"/> | 7 | <input type="checkbox"/> | 8 | <input type="checkbox"/> | 9 | <input type="checkbox"/> | 10 | <input type="checkbox"/> | 11 | <input type="checkbox"/> | 12 | <input type="checkbox"/> |
| TK   | <input type="checkbox"/>  |    |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |    |                          |    |                          |    |                          |
| K  | <input type="checkbox"/>  |    |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |    |                          |    |                          |    |                          |
| 1  | <input type="checkbox"/>  |    |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |    |                          |    |                          |    |                          |
| 2  | <input type="checkbox"/>  |    |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |    |                          |    |                          |    |                          |
| 3  | <input type="checkbox"/>  |    |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |    |                          |    |                          |    |                          |
| 4  | <input type="checkbox"/>  |    |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |    |                          |    |                          |    |                          |
| 5  | <input type="checkbox"/>  |    |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |    |                          |    |                          |    |                          |
| 6  | <input type="checkbox"/>  |    |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |    |                          |    |                          |    |                          |
| 7  | <input type="checkbox"/>  |    |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |    |                          |    |                          |    |                          |
| 8  | <input type="checkbox"/>  |    |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |    |                          |    |                          |    |                          |
| 9  | <input type="checkbox"/>  |    |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |    |                          |    |                          |    |                          |
| 10   | <input type="checkbox"/>  |    |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |    |                          |    |                          |    |                          |
| 11   | <input type="checkbox"/>  |    |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |    |                          |    |                          |    |                          |
| 12   | <input type="checkbox"/>  |    |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |   |                          |    |                          |    |                          |    |                          |

**ENROLLMENT PROCESS & TIMELINE**

**Instructions:**

Please navigate to the folder for your school. Once inside the folder, click the pencil button in the top right corner. After the dropdown list appears, select 'Upload or Import'. Next, click on the drag or browse window and upload the Enrollment Timeline file. Please name your file in this format: SchoolName\_EnrollmentTimeline

**Please check the box below after completing the above instructions**

Enrollment Timeline has been uploaded to the Program Plan folder

*Important dates to include in your timeline*

**April - June:** Spring enrollment for 2022-2023 programs.  
 Families will be notified of 2022-2023 after-school enrollment before the **last day of school, May 27, 2022.**  
 After-school programs begin on the **first day of school** when enrollment is at a minimum 75% capacity.

**August - September:** new school year enrollment of families for remaining program slots.  
 The remaining program slots will be filled by **September 30, 2022**, except for slots reserved for transitional students (i.e., Homeless, foster youth; Newcomers) entering the program for the first time and/or mid-year  
 All programs must maintain **waitlists** for grades 7-12 after program slots are filled. There should be no waitlists for grades

TK-6 as funding is provided through ELO-P to eliminate waitlists for those grades.

CDE and OUSD have established district-wide guidelines for Target Population and Enrollment in ASES and 21st Century After School Programs. With these guidelines, each school will create a site-specific After School Enrollment Policy that will be made public to the school community. Make sure to include a description of 1-3 enrollment priorities that will be made public and why.

**\*\*This may look different for High School and Continuation schools based on alternative schedules and intercession. Please include the items above that are applicable to your schedule and recruitment process. Describe how your school will identify and recruit students beginning of Spring 2022. Indicate how families will be notified of 2022-2023 enrollment before the last day of school.**

**SECTION 3b: GOLDEN TICKET**

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 *Golden Ticket*. Transitional students are by definition:

- Any OUSD student who is a homeless youth, as defined by the federal **\*McKinney-Vento Homeless Assistance Act (42 U.S.C. Sec. 1143a)**, 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. **\*Subtitle VII-B of the McKinney-Vento Homeless Assistance Act (42 U.S.C. § 11431 et seq.)**
  - 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

**SECTION 4: PROGRAM COMPONENTS (The descriptions below should reflect 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 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.

I am aware of and will implement the required educational component listed above.

**Educational and Literacy Component** that includes tutoring/homework assistance in the core subject (language arts, math, history/social science etc) Make sure to include how you will integrate SIPPS (k-5) and/or Reading with Relevance (6-12).

Describe how the after-school program will provide the educational & literacy component.

**Respond Below:**

|  |
|--|
| <p><b>Homework assistance in the core subjects (language arts, math, history /social science, etc.)</b></p> <p>How are students building academic skills? How is social-emotional academic development being integrated? (Include specific strategies for creating a <a href="#">safe &amp; supporting environment through encouragement and active engaged learning.</a>)</p> |
|--|

**Respond Below:**

Educational Enrichment Component that offers students engaging activities in a variety of areas (fine arts, career technical education, presentation, etc.)

How does the expanded learning program choose which educational enrichment activities are offered? (Include specific strategies designed to foster [skill-building](#), [youth voice and leadership](#) and [diversity, access and equity](#).)

**Respond Below:**

Physical Activity is 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.)

Please check here if you want to partner with Oakland Athletic League to provide organized sports in the **elementary** program.

CDE expects **Elementary** programs to offer 30-60 minutes of developmentally appropriate, **daily physical activity** (to help meet CDE recommendation of 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. Please explain how the after-school program will address physical activity in your program, including type, frequency, and target population. All students should have the opportunity for physical activity).

- Plan and evaluate (review fitness test results, track minutes, etc.)
- Include a variety of activities throughout the year

Describe how the after-school program will provide [structured physical activity](#) for all participants. (Include specific strategies to promote [healthy choices and behaviors](#).)

**Respond Below:**

Family Engagement/Literacy Component that includes 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:**

1. Complete the program schedule form or upload your program schedule.

a. **Make sure your program schedule includes:**

- i. **Any before care offered for TK- 6th grade**
- ii. **Class/Activity title i.e. African Dance, not just enrichment**
- iii. **Day and time offered**

b. Complete this form to design the program component [attached template](#) to describe program components then link them into this document. Program component description link: linked to the [spreadsheet](#) create a drop-box option (a) CDE--academic, enrichment, physical activity "use the same title".

*\*In the fall, sites are required to resubmit updated program schedules. This schedule should be clearly aligned with the supports identified in section 4.*

#### Academic Alignment with School Day and [District Priorities](#)

Please provide a short narrative that identifies how the expanded learning program will support school goals aligned with district student learning goals in the appropriate grade level box below.

- Collaborate with the school site administrator and consult the School Site Plan to align with the school day.
- Consult the descriptions below for the District's priorities for elementary, middle, and high school.

#### [OUSD Student Learning Goals:](#)

- 1- All students build **relationships** to feel connected and engaged in learning
- 2- All students continuously grow towards meeting or exceeding standards in **English Language Arts**
- 3- All students continuously grow towards meeting or exceeding standards in **Math**
- 4- English Learner students continuously develop their language, reaching **English Fluency** in 6 years or less
- 5- All students grow a year or more in **Reading** each year
- 6- All Students graduate college-, career-, and community-ready

**How will the expanded learning program further these OUSD Learning Goals?** (Choose 2-3 to focus on for the 2022-23 School Year)

### **Respond Below:**

#### SECTION 5: CONTINUOUS QUALITY IMPROVEMENT (Alignment with CDE and OUSD)

To increase the effectiveness of a program, it is critical to engage in an ongoing continuous cycle of assessment, planning, and improvement. While the process should be carried out at the site level, documentation of this process should be submitted by the grantee.

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

Fill out this [Google Form](#) to identify where your program is with's quality standards. [Google Form](#)

#### Resources:

- [Definitions: CDE Quality Standards](#)
- [Unpacked: CDE Quality Standards & CQI Spectrum](#)
- [Scoring Key: CDE Quality Standards & CQI Process](#)

**PROGRAM SELF-ASSESSMENT TRUTH \* HOPE \* CHANGE \* CURIOSITY (TH3C)**

Indicate which stakeholders who participated in the Program Self-Assessment in 2021-2022

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> Internal evaluator     | <input type="checkbox"/> External evaluator  | <input type="checkbox"/> School administrator  |
| <input type="checkbox"/> District administrator | <input type="checkbox"/> Certificated staff  | <input type="checkbox"/> Classified staff      |
| <input type="checkbox"/> Program director       | <input type="checkbox"/> Site coordinator    | <input type="checkbox"/> Site-level/line staff |
| <input type="checkbox"/> Parents/guardians      | <input type="checkbox"/> Students            | <input type="checkbox"/> Community partners    |
| <input type="checkbox"/> Advisory group         | <input type="checkbox"/> Other stakeholders: |  |

**TRUTH**

What is currently happening in the program? Use data to identify the truth about 1-2 self-selected aspects of the program.

[Please use this template to help you identify your truth.](#)

**Respond Below:**

**HOPE**

Given what was shared in the **Truth** section, what is the vision for the program as identified by students, families, parents, staff, and site support team?

**Respond Below:**

**CHANGE**

What shifts are needed to realize the **Hope** identified above and what steps are needed to make those shifts happen? (ie: Program components, leadership, organizational management, or fiscal)

**Respond Below:**

**CURIOSITY**

What questions or inquiries need consideration when exploring the "shifts"? What supports or resources are needed to make the "shifts" happen?

**Respond Below:**

**CELEBRATE**

In terms of the current school year, what are some grows or glows (ie. small or big wins) that happened for the program?

**Respond Below:**

**Section 6: The Expanded Learning Opportunities Program (ELO-P)** provides funding for after-school and summer school enrichment programs for transitional kindergarten through sixth grade.

**\*\*\*High school programs do not need to complete this section.\*\*\***

"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. The Legislature intends 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.

**ELO-Program Elements:**

- Offer 9 Hours of Programming (School day hours count toward the 9 hours)
- Support TK-6th
- 175 school days & 30 days intersessions
- TK/K staff ratio 10:1
- Must offer the program to all students
- Parallel ASES Compliance Reporting
- Support [LCAP Goals](#)
- Support Unduplicated Students (UDS) - [CDE Definition](#) of UDS.
  - 2021-2022 School [Site UDS numbers](#)
- ELO-P funding **can not** be used to provide school day supports

**Expanded Learning Priorities**

- Offer Expanded Learning Programming to TK-K students
- Offer Expanded Learning Programming to **ALL** students (Prioritize targeted students - foster youth, unhoused, newcomer, etc)
- Integrated Academic and Enrichment based Summer Learning programming

**TK - Kinder Programming (10:1 student to Staff Ratio) - \$3,500/per student/per year**

Please Indicate below which partner will support TK-K After-School Care:

- Expanded Learning Provider
  OUSD School Staff
  Early Childhood Staff

**Program Information:**

|  |  |         |        |        |
|--|--|---------|--------|--------|
| # Students Served by ExLO Provider<br>(Minimum of 10 students) | X  | \$3,500 | Total: | \$0.00 |
| # Students Served by OUSD/ ECE staff                           | (OUSD staff paid based upon the current ET/OT contracted amount) |         |        |        |
| # Additional Staff   |  |         |        |        |
| If a staff has been identified, please add their name(s):      |  |         |        |        |
| # Additional Facilities (classrooms)                           |  |         |        |        |

Expanded Learning Program Hours: \_\_\_\_\_ Start Time: \_\_\_\_\_  
 End Time: \_\_\_\_\_

List Activities Below:

Please briefly describe which LCAP Goal(s) this program will support: [LCAP Metrics.](#)

**Provide Expanded Learning Opportunities for ALL unduplicated students - (20:1 student to Staff Ratio) - \$10.18/per child/per day**

Please Indicate below which staff or partner will support increasing student enrollment:

- Expanded Learning Provider
  OUSD School Staff

**Program Information:**

|   |                          |        |        |
|---|--------------------------|--------|--------|
| # Students on the waitlist (not funded through ASES or 21st CCLC) | x (\$10.18) x (180/days) | Total: | \$0.00 |
|---|--------------------------|--------|--------|

List Activities Below:

|   |                                 |
|---|---------------------------------|
| <input type="checkbox"/> Before School Care<br><input type="checkbox"/> OAL Sports<br><input type="checkbox"/> RJ Program<br><input type="checkbox"/> | <input type="checkbox"/> Other: |
|---|---------------------------------|

Please briefly describe which LCAP Goal(s) this program will support: [LCAP Metrics.](#)

| Total ELO-P Funding |  |
|---------------------|--|
| \$0.00              | TK-K Expanded Learning Programs              |
| \$0.00              | Access to Expanded Learning Programs for ALL |
| <b>\$0.00</b>       | <b>Total Services</b>                        |

| Total Additional students (non ASES/21st) |                           |
|---|---------------------------|
|   | Total TK-K                |
|   | Total Additional Students |
| 0   | Total Additional Students |

**SECTION 7: 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. Make sure to include bathrooms and snack areas.

(b) Lead Agency Director, will go into [Facilitron website to complete facilities usage requests](http://Facilitron website to complete facilities usage requests) no later than May 15, 2022. Visit Facilitron website at: [www.facilitron.com/dashboard/login](http://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.

| Indoors (specify room numbers and space names) |               |                  | Outdoors                    |               |                  |
|--|---------------|------------------|-----------------------------|---------------|------------------|
| Room Number & Name of Space                    | # of Students | Hours to be used | Room Number & Name of Space | # of Students | Hours to be used |
|  |               |                  |                             |               |                  |
|  |               |                  |                             |               |                  |
|  |               |                  |                             |               |                  |
|  |               |                  |                             |               |                  |
|  |               |                  |                             |               |                  |
|  |               |                  |                             |               |                  |

In addition, choose up to 5 other dates the program will use space outside of normal program hours. This includes any Saturdays or intercession activities. Please specify which space will be needed (IE: showcases, events and family engagement). Be advised any additional dates/spaces used outside of these dates, the lead agency will be responsible for facilities cost.

| Name of Event | Potential Date | Number of Students | Hours of Use/Room Numbers |
|---------------|----------------|--------------------|---------------------------|
|               |                |                    |                           |
|               |                |                    |                           |
|               |                |                    |                           |
|               |                |                    |                           |
|               |                |                    |                           |

**SECTION 8a: PROGRAM FEES**

Will this expanded learning program charge program fees for 2022-2023  Yes  No

If, "YES, program fees will be charged," please complete the following assurances. Both the Principal and Lead Agency boxes must be initialed.

| Principal | Lead Agency | ASSURANCES   |
|-----------|-------------|--|
|           |             | Our program <b>will not turn away</b> any eligible students from program participation due to the inability to pay program fees. We understand that the California Education Code prohibits program fees from being a barrier to program participation   |
|           |             | Our program will <b>communicate</b> in writing and verbally to parents/guardians that an eligible child will not be turned away from program participation due to the inability to pay.<br><br>Per CDE, our programs will communicate in writing and publically to parents/guardians program fee expectations in language parents can understand. <b>This should be included in your enrollment applications, posted in your school (publicly accessible), parent handbooks and any marketing materials. Ensure that all documentation is accessible to families. This means they should be translated into the major languages used by the families in your school.</b> |
|           |             | Our program will publicize the <b>program fee structure</b> in written program materials for school leaders, parents/guardians, and/or community members (i.e. communication letter, meetings agenda, etc.).   |
|           |             | Our program shall not charge a fee to a family for a child if the program once notified that the child is a <b>homeless youth</b> , as defined by the federal McKinney-Vento Homeless Assistance Act (42 U.S.C. Section 1143.a), <b>or for a child who the program knows is in foster care</b> . Fees can not be charged to any unduplicated student.  |
|           |             | Our program will provide <b>receipts</b> to parents/guardians for each payment made.   |
|           |             | The lead agency will <b>manage funds</b> raised by program fees according to standard accounting practices and will provide quarterly Income Statements to the Principal and OUSD Expanded Learning Office detailing the amount collected from program fees and expenditures. This will be turned in quarterly.  |
|           |             | <b>The Use of Fees:</b> Any fees collected by programs shall be used for program activities, services for students, and program administrative costs. CDE guidance calls for all programs to "keep accurate records of fees collected, and fees should be tracked separately from the grant funds received." Keep documents in the event of an annual financial audit and/or Federal Program Monitoring (FPM). Families who receive free and reduced lunch should be prioritized for no cost program admission.  |

**SECTION 8b: PROGRAM FEES (Continued)**

Describe how the school/program plans to collect program fees and who will be exempt from paying fees or receiving a reduced fee?

Describe how all fees collected will be used for expanded learning programming.

Describe how fees will be communicated to school leaders/school community.

**Instructions:**

Please navigate to the folder for the school. Once inside the folder, click the pencil button in the top right corner. After the dropdown list appears, select 'Upload or Import'. Next, click on the drag or browse window and upload your Enrollment Timeline file. Please name your file in this format: SchoolName\_DocumentName

Please check the box below after completing the above instructions

**A copy of written evidence of the program fee materials/process (i.e. parent letters, parent handbook, etc. meeting with agenda/minutes) has been uploaded into the Program Plans folder**

# OUSD EXPANDED LEARNING PROGRAMS

## Partner Assurances & Agreements 2022–2023

|  |  |
|--|--|
| <u>School Site</u>                       |  |
| <u>Lead Agency</u>                       | <u>Date</u>  |
| <u>Name of Expanded Learning Program</u> | <u>Expanded Learning Site Coordinator Name (if known at this time)</u> |

Expanded Learning Safety and Emergency Planning

1. The 2022-2023 Comprehensive School Site Safety Plan includes the **Expanded Learning Emergency Plan**. The Site Administrator and the Expanded Learning Program (ExLO) Site Coordinator will update the Expanded Learning Emergency Plan annually by discussing and aligning plans and procedures for after school and school day safety, including emergency preparedness and crisis response.

Indicate all actions that will occur to ensure after school program safety and alignment with school day procedures for emergency preparedness and emergency response:

|                          |  |
|--------------------------|--|
| <input type="checkbox"/> | The Site Administrator and ExLO Site Coordinator will meet at beginning of the school year to update the Expanded Learning Emergency Plan collaboratively. |
| <input type="checkbox"/> | Site will share the Comprehensive School Site Safety Plan with an expanded learning partner.   |
| <input type="checkbox"/> | School day and expanded learning programs will coordinate emergency drill schedules & procedures (ie. earthquake, fire, and lockdown drills).              |
| <input type="checkbox"/> | Expanded learning staff will participate in site-level faculty safety trainings.   |
| <input type="checkbox"/> | School will provide expanded learning staff with access to disaster supplies and other resources in case there is an emergency after school.               |
| <input type="checkbox"/> | Site Administrator and ExLO Site Coordinator will meet regularly to review expanded learning incidences and update safety plans as needed.                 |
| <input type="checkbox"/> | The completed Expanded Learning Emergency Plan will be submitted to the Expanded Learning Programs Office by 10/1/22.                                      |
| <input type="checkbox"/> | Other:   |

2. List the training and resources the school will provide after school staff on safety procedures, including lockdown procedures and communication protocols for crisis response.

3. 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

Yes   
No

**Facility Keys**

It is critical that the Expanded Learning Coordinator has access to facility keys in order to ensure safety after school should a lockdown or lockout be needed. Will the expanded learning Program **have access to facility keys** for all areas where expanded learning programming occurs?

Yes  No

If no, indicate how the school campus will be secured if a crisis should occur during after school hours and if lockdown is necessary:

**Culture Keeper Staffing**

**Check One:**

- Site will utilize expanded learning and/or school day funds to pay Extra-time/Over-time (ET/OT) for an ExLO Culture Keeper.
- Site does not need a Culture Keeper,
- Site does not have the resources to fund an ExLO Culture Keeper.

## 2022-23 AFTER SCHOOL BUDGET PLANNING SPREADSHEET

| Site Name:  | ASES   |   | 21CCCLC Core           |             | 21CCCLC Equitable Access |             | ELOP                        |   | OFCY Match Funds | Program Fees (if applicable) | Other School Site Funds | Other Lead Agency Funds |             |
|---|--|---|------------------------|-------------|--------------------------|-------------|-----------------------------|---|------------------|------------------------------|-------------------------|-------------------------|-------------|
| Site #:   | Resource 6010, Program 1553  |   | Resource 4214, Program |             | Resource 4124, Program   |             | Resource 2600, Program 1553 |   |                  |                              |                         |                         |             |
| Average # of students to be served daily (ADA):             | 0  | % | OUSD                   | Lead Agency | %                        | OUSD        | Lead Agency                 | % | OUSD             | Lead Agency                  | %                       | OUSD                    | Lead Agency |
| <b>TOTAL GRANT AWARD</b>                                    |  |   | <b>0.00</b>            |             |                          | <b>0.00</b> |                             |   | <b>0.00</b>      |                              |                         | <b>0.00</b>             | <b>0.00</b> |
| <b>CENTRAL COSTS: INDIRECT, ADMIN, EVAL, PD, CUSTODIAL,</b> |  |   |                        |             |                          |             |                             |   |                  |                              |                         |                         |             |
|   | OUSD Indirect (5.00%)  |   | 0.00                   |             |                          | 0.00        |                             |   | 0.00             |                              |                         |                         |             |
|   | OUSD ASPO admin, evaluation, and training/technical assistance costs                         |   | 0.00                   |             |                          | 0.00        |                             |   | 0.00             |                              |                         |                         |             |
|   | Custodial Staffing and Supplies at 3.5%  |   | 0.00                   |             |                          | 0.00        |                             |   | 0.00             |                              |                         |                         |             |
| <b>TOTAL SITE ALLOCATION</b>                                |  |   | <b>0.00</b>            |             |                          | <b>0.00</b> |                             |   | <b>0.00</b>      |                              |                         |                         |             |
| <b>CERTIFICATED PERSONNEL</b>                               |  |   |                        |             |                          |             |                             |   |                  |                              |                         |                         |             |
| 1120  | Quality Support Coach/Academic Liaison   |   | 0.00                   |             |                          | 0.00        |                             |   | 0.00             |                              |                         | 0.00                    |             |
| 1120  | Certificated Teacher Extended Contracts- math or ELA academic intervention (required for MS) |   | 0.00                   |             |                          | 0.00        |                             |   | 0.00             |                              |                         | 0.00                    |             |
| 1120  | Certificated Teacher Extended Contracts- ELL supports  |   |                        |             |                          |             |                             |   |                  |                              |                         |                         |             |
| 1120  | Certificated Teacher Extended Contracts- math or ELA academic                                |   |                        |             |                          |             |                             |   |                  |                              |                         | 0.00                    |             |
|   | <b>Total certificated</b>  |   | <b>0.00</b>            |             |                          | <b>0.00</b> |                             |   | <b>0.00</b>      |                              |                         | 0.00                    | 0.00        |
| <b>CLASSIFIED PERSONNEL</b>                                 |  |   |                        |             |                          |             |                             |   |                  |                              |                         |                         |             |
| 2205  | Site Coordinator (list here, if district employee)   |   | 0.00                   | 0.00        |                          |             |                             |   |                  |                              |                         | 0.00                    | 0.00        |
| 2220  | SSO (optional)   |   | 0.00                   |             |                          | 0.00        |                             |   | 0.00             |                              |                         | 0.00                    |             |
|   |  |   | 0.00                   |             |                          |             |                             |   |                  |                              |                         |                         |             |
|   |  |   | 0.00                   |             |                          |             |                             |   |                  |                              |                         |                         |             |
|   | <b>Total classified</b>  |   | <b>0.00</b>            | <b>0.00</b> |                          | <b>0.00</b> | <b>0.00</b>                 |   | <b>0.00</b>      | <b>0.00</b>                  |                         | <b>0.00</b>             | <b>0.00</b> |
| <b>BENEFITS</b>   |  |   |                        |             |                          |             |                             |   |                  |                              |                         |                         |             |
| 3000's  | Employee Benefits for Certificated Teachers on Extended Contract (benefits at 24.5%)         |   | 0.00                   |             |                          | 0.00        |                             |   | 0.00             |                              |                         |                         |             |
| 3000's  | Employee Benefits for Classified Staff on Extra Time/Overtime (benefits at 28%)              |   | 0.00                   |             |                          | 0.00        |                             |   | 0.00             |                              |                         |                         |             |





Exhibit C (1)



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

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

- ◆ All ELO-P, 21<sup>st</sup> Century and/or ASES attendances and invoices must be submitted via the OUSD/Expanded Learning Salesforce Community.
- ◆ All invoices must be generated on your organization's letterhead. This applies to both agency and individual contractors.
- ◆ 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.
- ◆ To maintain invoicing consistency so that all necessary information is included, please use the attached invoicing format. Simply cut and paste the format onto your organization's letterhead. Please utilize the sample invoice as a guide. All of the information in the top section of the invoice template **MUST** be completed in order to process for payment. Also, in the body of the template, a detailed breakdown of charges must be provided, including a number of hours worked and the hourly rate. **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 1<sup>st</sup> through the 30<sup>th</sup> or 31<sup>st</sup>.
- ◆ Contractor, Agency, Site Coordinator, and Principal signatures must be secured prior to submission of invoices to the After School Programs Office. All of these signatures must be originals.
- ◆ Invoices and attendance for the month are due in the After School Programs Office no later than 5:00 p.m. on the 10<sup>th</sup> of the following month.
- ◆ **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 our office at (510) 879-2888.



Exhibit C (2)

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

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The following procedures are required in submitting fiscal forms for Paid In-service/Extended Time for OUSD employees utilizing the 21<sup>st</sup> 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, 21<sup>st</sup> Century and/or ASES Extended Contracts and Time Sheets must be submitted to the OUSD After School Programs Office in order to be processed and paid. We are located at 1000 Broadway, Suite 150.
- ◆ **Union Contract rate for teachers on extended contracts is \$38.50/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 our office at (510) 879-2888.

Exhibit C (3)



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

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**The following procedures are required in submitting fiscal forms for Extended Time and/or Overtime (ET/OT) for OUSD classified employees utilizing ELO-P, 21<sup>st</sup> 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 21<sup>st</sup> 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 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**



THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

## COMMERCIAL GENERAL LIABILITY BROADENING ENDORSEMENT

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART

### SUMMARY OF COVERAGES

|     |   |          |
|-----|---|----------|
| 1.  | Additional Insured by Contract, Agreement or Permit                                 | Included |
| 2.  | Additional Insured – Primary and Non-Contributory                                   | Included |
| 3.  | Blanket Waiver of Subrogation   | Included |
| 4.  | Bodily Injury Redefined   | Included |
| 5.  | Broad Form Property Damage – Borrowed Equipment, Customers Goods & Use of Elevators | Included |
| 6.  | Knowledge of Occurrence   | Included |
| 7.  | Liberalization Clause   | Included |
| 8.  | Medical Payments – Extended Reporting Period  | Included |
| 9.  | Newly Acquired or Formed Organizations - Covered until end of policy period         | Included |
| 10. | Non-owned Watercraft  | 51 ft.   |
| 11. | Supplementary Payments Increased Limits   |          |
|     | - Bail Bonds  | \$2,500  |
|     | - Loss of Earnings  | \$1000   |
| 12. | Unintentional Failure to Disclose Hazards   | Included |
| 13. | Unintentional Failure to Notify   | Included |

This endorsement amends coverages provided under the Commercial General Liability Coverage Part through new coverages, higher limits and broader coverage grants.

**1. Additional Insured by Contract, Agreement or Permit**

The following is added to **SECTION II – WHO IS AN INSURED:**

**Additional Insured by Contract, Agreement or Permit**

- a. Any person or organization with whom you agreed in a written contract, written agreement or permit that such person or organization to add an additional insured on your policy is an additional insured 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, but only with respect to:

(1) "Your work" for the additional insured(s) designated in the contract, agreement or permit;

(2) Premises you own, rent, lease or occupy; or

(3) Your maintenance, operation or use of equipment leased to you.

- b. The insurance afforded to such additional insured described above:

(1) Only applies to the extent permitted by law; and

(2) Will not be broader than the insurance which you are required by the contract, agreement or permit to provide for such additional insured.

- (3) Applies on a primary basis if that is required by the written contract, written agreement or permit.
  - (4) Will not be broader than coverage provided to any other insured.
  - (5) Does not apply if the "bodily injury", "property damage" or "personal and advertising injury" is otherwise excluded from coverage under this Coverage Part, including any endorsements thereto.
- c. This provision does not apply:
- (1) Unless the written contract or written agreement was executed or permit was issued prior to the "bodily injury", "property damage", or "personal injury and advertising injury".
  - (2) To any person or organization included as an insured by another endorsement issued by us and made part of this Coverage Part.
  - (3) To any lessor of equipment:
    - (a) After the equipment lease expires; or
    - (b) If the "bodily injury", "property damage", "personal and advertising injury" arises out of sole negligence of the lessor
  - (4) To any:
    - (a) Owners or other interests from whom land has been leased which takes place after the lease for the land expires; or
    - (b) Managers or lessors of premises if:
      - (i) The occurrence takes place after you cease to be a tenant in that premises; or
      - (ii) The "bodily injury", "property damage", "personal injury" or "advertising injury" arises out of structural alterations, new construction or demolition operations performed by or on behalf of the manager or lessor.
  - (5) To "bodily injury", "property damage" or "personal and advertising injury" arising out of the rendering of or the failure to render any professional services.
- This exclusion applies even if the claims against any insured allege negligence or other wrongdoing in the supervision, hiring, employment, training or monitoring of others by that insured, if the "occurrence" which caused the "bodily injury" or "property damage" or the offense which caused the "personal and

advertising injury" involved the rendering of or failure to render any professional services by or for you.

- d. With respect to the insurance afforded to these additional insureds, the following is added to **SECTION III – LIMITS OF INSURANCE:**

The most we will pay on behalf of the additional insured for a covered claim is the lesser of the amount of insurance:

- 1. Required by the contract, agreement or permit described in Paragraph a.; or
- 2. Available under the applicable Limits of Insurance shown in the Declarations.

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

**2. Additional Insured – Primary and Non-Contributory**

The following is added to **SECTION IV – COMMERCIAL GENERAL LIABILITY CONDITIONS**, Paragraph 4. **Other insurance:**

**Additional Insured – Primary and Non-Contributory**

If you agree in a written contract, written agreement or permit that the insurance provided to any person or organization included as an Additional Insured under **SECTION II – WHO IS AN INSURED**, is primary and non-contributory, the following applies:

If other valid and collectible insurance is available to the Additional Insured for a loss covered under Coverages **A** or **B** of this Coverage Part, our obligations are limited as follows:

**a. Primary Insurance**

This insurance is primary to other insurance that is available to the Additional Insured which covers the

Additional Insured as a Named Insured. We will not seek contribution from any other insurance available to the Additional Insured except:

- (1) For the sole negligence of the Additional Insured;
- (2) When the Additional Insured is an Additional Insured under another primary liability policy; or
- (3) when **b.** below applies.

If this insurance is primary, our obligations are not affected unless any of the other insurance is also primary. Then, we will share with all that other insurance by the method described in **c.** below.

**b. Excess Insurance**

(1) This insurance is excess over any of the other insurance, whether primary, excess, contingent or on any other basis:

- (a) That is Fire, Extended Coverage, Builder's Risk, Installation Risk or similar coverage for "your work";
- (b) That is Fire insurance for premises rented to the Additional Insured or temporarily occupied by the Additional Insured with permission of the owner;
- (c) That is insurance purchased by the Additional Insured to cover the Additional Insured's liability as a tenant for "property damage" to premises rented to the Additional Insured or temporarily occupied by the Additional Insured with permission of the owner; or
- (d) If the loss arises out of the maintenance or use of aircraft, "autos" or watercraft to the extent not subject to Exclusion g. of **SECTION I – COVERAGE A – BODILY INJURY AND PROPERTY DAMAGE LIABILITY.**

(2) When this insurance is excess, we will have no duty under Coverages A or B to defend the insured against any "suit" if any other insurer has a duty to defend the insured against that "suit". If no other insurer defends, we will undertake to do so, but we will be entitled to the insured's rights against all those other insurers.

(3) When this insurance is excess over other insurance, we will pay only our share of the amount of the loss, if any, that exceeds the sum of:

- (a) The total amount that all such other insurance would pay for the loss in the absence of this insurance; and
- (b) The total of all deductible and self insured amounts under all that other insurance.

We will share the remaining loss, if any, with any other insurance that is not described in this Excess Insurance provision and was not bought specifically to apply in excess of the Limits of Insurance shown in the Declarations of this Coverage Part.

**c. Method Of Sharing**

If all of the other insurance permits contribution by equal shares, we will follow this method also. Under this approach each

insurer contributes equal amounts until it has paid its applicable limit of insurance or none of the loss remains, whichever comes first. If any of the other insurance does not permit contribution by equal shares, we will contribute by limits. Under this method, each insurer's share is based on the ratio of its applicable limit of insurance to the total applicable limits of insurance of all insurers

**3. Blanket Waiver of Subrogation**

The following is added to **SECTION IV – COMMERCIAL GENERAL LIABILITY CONDITIONS, Paragraph 8. Transfer Of Rights Of Recovery Against Others To Us:**

We waive any right of recovery we may have against any person or organization with whom you have a written contract that requires such waiver because of payments we make for damage under this coverage form. The damage must arise out of your activities under a written contract with that person or organization. This waiver applies only to the extent that subrogation is waived under a written contract executed prior to the "occurrence" or offense giving rise to such payments.

**4. Bodily Injury Redefined**

**SECTION V – DEFINITIONS, Definition 3.** "bodily injury" is replaced by the following:

- 3. "Bodily injury" means bodily injury, sickness or disease sustained by a person including death resulting from any of these at any time. "Bodily injury" includes mental anguish or other mental injury resulting from "bodily injury".

**5. Broad Form Property Damage – Borrowed Equipment, Customers Goods, Use of Elevators**

a. **SECTION I – COVERAGES, COVERAGE A – BODILY INJURY AND PROPERTY DAMAGE LIABILITY, Paragraph 2. Exclusions** subparagraph j. is amended as follows:

Paragraph (4) does not apply to "property damage" to borrowed equipment while at a jobsite and not being used to perform operations.

Paragraphs (3), (4) and (6) do not apply to "property damage" to "customers goods" while on your premises nor do they apply to the use of elevators at premises you own, rent, lease or occupy.

b. The following is added to **SECTION V – DEFINITIONS:**

24. "Customers goods" means property of your customer on your premises for the purpose of being:

- a. worked on; or
  - b. used in your manufacturing process.
  - c. The insurance afforded under this provision is excess over any other valid and collectible property insurance (including deductible) available to the insured whether primary, excess, contingent
- 6. Knowledge of Occurrence**  
The following is added to **SECTION IV – COMMERCIAL GENERAL LIABILITY CONDITIONS**, Paragraph 2. **Duties in the Event of Occurrence, Offense, Claim or Suit:**
- e. Notice of an "occurrence", offense, claim or "suit" will be considered knowledge of the insured if reported to an individual named insured, partner, executive officer or an "employee" designated by you to give us such a notice.
- 7. Liberalization Clause**  
The following is added to **SECTION IV – COMMERCIAL GENERAL LIABILITY CONDITIONS:**  
**Liberalization Clause**  
If we adopt any revision that would broaden the coverage under this Coverage Form without additional premium, within 45 days prior to or during the policy period, the broadened coverage will immediately apply to this Coverage Part.
- 8. Medical Payments – Extended Reporting Period**
- a. **SECTION I – COVERAGES, COVERAGE C – MEDICAL PAYMENTS**, Paragraph 1. **Insuring Agreement**, subparagraph a.(3)(b) is replaced by the following:
    - (b) The expenses are incurred and reported to us within three years of the date of the accident; and
  - b. This coverage does not apply if **COVERAGE C – MEDICAL PAYMENTS** is excluded either by the provisions of the Coverage Part or by endorsement.
- 9. Newly Acquired Or Formed Organizations**  
**SECTION II – WHO IS AN INSURED**, Paragraph 3.a. is replaced by the following:
- a. Coverage under this provision is afforded until the end of the policy period.

**10. Non-Owned Watercraft**

**SECTION I – COVERAGES, COVERAGE A BODILY INJURY AND PROPERTY DAMAGE LIABILITY**, Paragraph 2. **Exclusions**, subparagraph g.(2) is replaced by the following:

**g. Aircraft, Auto Or Watercraft**

(2) A watercraft you do not own that is:

- (a) Less than 51 feet long; and
- (b) Not being used to carry persons or property for a charge;

This provision applies to any person who, with your consent, either uses or is responsible for the use of a watercraft.

**11. Supplementary Payments Increased Limits**

**SECTION I – SUPPLEMENTARY PAYMENTS COVERAGES A AND B**, Paragraphs 1.b. and 1.d. are replaced by the following:

**1.b.** Up to \$2,500 for cost of bail bonds required because of accidents or traffic law violations arising out of the use of any vehicle to which the Bodily Injury Liability Coverage applies. We do not have to furnish these bonds.

**1.d.** All reasonable expenses incurred by the insured at our request to assist us in the investigation or defense of the claim or "suit", including actual loss of earnings up to \$1000 a day because of time off from work.

**12. Unintentional Failure to Disclose Hazards**

The following is added to **SECTION IV – COMMERCIAL GENERAL LIABILITY CONDITIONS**, Paragraph 6. **Representations:**

We will not disclaim coverage under this Coverage Part if you fail to disclose all hazards existing as of the inception date of the policy provided such failure is not intentional.

**13. Unintentional Failure to Notify**

The following is added to **SECTION IV – COMMERCIAL GENERAL LIABILITY CONDITIONS**, Paragraph 2. **Duties in the Event of Occurrence, Offense, Claim or Suit:**

Your rights afforded under this policy shall not be prejudiced if you fail to give us notice of an "occurrence", offense, claim or "suit", solely due to your reasonable and documented belief that the "bodily injury" or "property damage" is not covered under this policy.

ALL OTHER TERMS, CONDITIONS, AND EXCLUSIONS REMAIN UNCHANGED.

Exhibit E

Statement of Qualifications

**INSERT HERE**



Sobrato Center for NonProfits  
330 Twin Dolphin drive, suite 115  
Redwood City, Ca 94065

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Date: February 2, 2022

To Whom It Concerns:

Envisioneers Inc is a new nonprofit spun off of our parent company, Citizen Schools. Our work is in the Expanded Learning Sector serving public middle schools in underserved, under resourced communities. We have been doing this work for the past 20 years in the California Bay Area as Citizen Schools and have served over 15,000 scholars to-date.

Our expanded learning schedule is different from most in that we have staff and Americorps members who work in the morning hours with the school day teaching staff and then transition into the expanded learning portion of the day. In the expanded learning portion of the day we focus on cultivating and fostering the academic and social emotional skills of our scholars. We hold academic labs, clubs, explorations and the largest part of our week is dedicated to relevant, project based, hands-on learning with mentors from the community teaching their passion or profession over a 10 week duration. Our mentors are the experts in the field they are teaching and our staff are the experts in classroom engagement and management. Together they work to bring passion, curiosity, collaboration, and career pathway knowledge to our scholars.

Our mission is to combat the systemic inequity in education and our vision is that all scholars, no matter their zip code or background, know all the many opportunities that are available and the skills and abilities to envision and engineer their dreams.

A five year impact study done by Abts Associates showed our programming to be one of the top in the country for middle school scholar success. It showed, against matched peers, a 2x greater on-time graduation rate from high school, a 2x college attendance rate and a 3+ month increase in math performance in one year.

Our staff work in collaboration with the school administration building a partnership of support in both directions. We hold weekly meetings with the school Principals and bi weekly calls with the scholar parents. We create professional development opportunities for our staff and have had a teacher pipeline program prior to COVID. We have a formal 8th grade academy program where we support the transition from middle to high school for our scholars. Our values begin with Service and end with Joy.

Respectfully submitted,

Maria Sparagna Drake, MNA  
Envisioneers, CEO

---

Sobrato Center for NonProfit, 330 Twin Dolphin Drive, #115, Redwood City, CA 94065  
[www.theenvisioneers.org](http://www.theenvisioneers.org)



Sobrato Center for NonProfits  
330 Twin Dolphin drive, suite 115  
Redwood City, Ca 94065

---

Oakland Unified School District  
1000 Broadway, Suite 300  
Oakland, CA 94067

April 11, 2022

To Whom It Concerns:

Envisioneers Inc assurances that all staff have had the following prior to joining a team on campus: assurance regarding DOJ, TB, CPR, First Aide, mandated reporting training and fingerprinting practices for all staff

- ❖ All staff must successfully pass Department of Justice and FBI background checks as set forth in Education Code section 45125.1 et seq., and the tuberculosis certification requirements of Education Code section 49406, prior to their coming into contact with students
- ❖ All staff must take the mandated reporter training before they can have contact with students. Staff can take the training online or in person. Staff needs to take the mandated reporter training once a year
- ❖ All staff must take the First Aide, CPR and EPI pen training every two years

Respectfully submitted,

*Maria Sparagna Drake*

Maria Sparagna Drake  
Envisioneers, CEO

## EXHIBIT F

### 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 Memorandum of Understanding 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 (RFP) 21-104ASP**

**EXPANDED LEARNING  
FOR AFTER SCHOOL PROGRAMS**

\* Submit proposals and all questions/inquiries to:

**OAKLAND UNIFIED SCHOOL DISTRICT**

**Attention: Martha Pena**

**1000 Broadway, Suite 150**

**OAKLAND, CA 94607**

**\*\* Organizations will need to Pre-Register with the OUSD Expanded Learning Office to receive access to an assigned Google Folder for submission. \*\***

email: [martha.pena@ousd.org](mailto:martha.pena@ousd.org)

phone: (510) 879-2457

**Proposals Due:**

**6/30/2021 at 2:00 PM**

THE TERMS AND CONDITIONS OF THIS CONTRACT ARE GOVERNED BY  
THE CALIFORNIA EDUCATION AND PUBLIC CONTRACT CODES.



OAKLAND UNIFIED  
SCHOOL DISTRICT

*Community Schools, Thriving Students*

# Expanded Learning Lead Agency Request for Qualifications

EXPANDED LEARNING OFFICE

[WWW.OUSD.ORG](http://WWW.OUSD.ORG)

## **OUSD RFQ Application Submission Instructions and Deadline**

**All applications must be completed, submitted electronically, and received by June 30, 2021 by 5:00 pm (PST)\*:**

1. Organizations will need to [Pre-Register with the OUSD Expanded Learning Office](#) to receive access to an assigned Google Folder.
2. The complete RFQ application, the signature pages and required supporting documentation in Appendix III must be uploaded into their assigned Google Folder.\*\*
3. All uploaded files must be converted to a PDF format and made accessible to OUSD. Any files missing could result in a disqualification from the current RFQ process.

*\* Applications submitted after 5:00 pm (PST) on June 30, 2021 will not be considered.*

*\*\* Applications submitted by facsimile, telephone or electronic mail will not be accepted.*


**Request for Qualifications RFQ - 2021**
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*This RFQ document and additional materials referenced within can be accessed at the OUSD website: [www.ousd.org/afterschool](http://www.ousd.org/afterschool). Select the “2021 Lead Agency Request for Qualifications” link under “Afterschool Programs.” Any updates on the RFQ process will be posted here and you may sign up for our mailing list, so applicants are encouraged to visit the webpage.*



## B. Schedule

| Event   | Date  | Info   |
|---|---|--|
| <b>RFR Process 2021 Announced</b>                                       | May 4, 2021   | Save-the-Date  |
| <b>RFQ Digital Application Released</b>                                 | May 25, 2021  |  |
| <b>RFQ Bidders' Conference (Virtual)</b><br><br><b>RFQ Office Hours</b> | Session 1: June 2, 2021 @ 10am<br>Session 2: June 2, 2021 @ 4pm | Register using link below:<br><ul style="list-style-type: none"> <li>■ <a href="#">Session 1: 10:00 am – 11:30 am</a></li> <li>■ <a href="#">Session 2: 4:00 pm – 5:30 pm</a></li> </ul> |
| <b>RFQ 101 for New Organizations</b>                                    | June 9, 2021, @ 4:00 pm   | <ul style="list-style-type: none"> <li>■ <a href="#">Session Registration Link</a></li> </ul>  |
| <b>Google Folder Registration</b>                                       | June 15, 2021   | <ul style="list-style-type: none"> <li>■ <a href="#">Google Folder Registration</a></li> </ul>   |
| <b>RFQ Submission Dates</b>   | June 30, 2021 by 5:00 pm (PST)                                  | Digital application date/time stamped  |
| <b>Lead Agency Status Notifications</b>                                 | Aug 20, 2021  |  |
| <b>Deadline to Appeal Decision</b>                                      | Aug 27, 2021  |  |
| <b>Status Notification Publicized</b>                                   | September 3, 2021   |  |
| <b>School Site/Lead Agency Matching Process</b>                         | Sept 3 - Dec 1, 2021 (tentative)                                |  |
| <b>OUSD MOU Approval Season</b>   | May/June 2022   |  |
| <b>Lead Agency Service Contract</b>                                     | July 1, 2022 - June 30, 2025                                    |  |



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

**What is a Bidders Conference?** A bidder's conference is an informational meeting open to the public that the OUSD Dept. of Expanded Learning hosts upon releasing the RFQ. The bidder's conference is designed to give interested and eligible non-profit youth-serving organizations the opportunity to receive information regarding the RFQ process for OUSD expanded learning programs. This event is designed to provide clarity to non-profit organizations who are interested in applying. Organizations will consider whether they are positioned to demonstrate the capacity to facilitate comprehensive expanded learning after-school program services with fidelity.

## C. Required Supporting Documentation

To support RFQ responses and verify organizational qualifications, 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. These documents do not count towards the 10-page limit for the RFQ application described in Appendix II. Additionally, please label all supporting documents clearly according to this list:

- 1) One (1) sample Expanded Learning Program weekly schedule -  
Please list all activities with a short description of each activity
- 2) Program budget pertaining to the program schedule (see Application Question 2 in Appendix II for details)
- 3) Profit and loss statement and/or Copy of 2020 990 Tax Form
- 4) Copy of Monitoring Reports and/or other external evaluations of the program (maximum of 1)
- 5) Organizational chart of agency that illustrates how the OUSD Expanded Learning Program is to be supported administratively and programmatically (indicate specific names next to titles of staff whenever possible)



- 6) Copy of organization's 501(c)(3) letter
- 7) Bank Statements to show proof of operating cash reserves (see Application Question 2 in Appendix II for details)
- 8) Job description for Site Coordinator and Program Instructor
- 9) Copy of IRS Letter Certifying Tax Exempt Status
- 10) Proof of "Active" status with the office of the California Secretary of State
- 11) Board Roster and Minutes – Include the current board roster indicating officers and affiliations as well as Minutes from the 2020-2021 school year.
- 12) Signed Letter of Agreement (see Section N)
- 13) Most recent audited financial statements within 2 years and summary of the audit findings
- 14) Letters of Reference (maximum of 2)
- 15) Documents demonstrating fulfillment of minimum qualifications (see Section M)
- 16) Certificate of current insurance



## D. Introduction and Overview

The Oakland Unified School District (OUSD) Department of Expanded Learning invites interested nonprofit organizations to respond with their qualifications to serve as an Expanded Learning Program Provider in designing, planning, administering, and operating effective, high-quality expanded learning programs. Programs must support and align with the OUSD's goal of ensuring that every student graduates college, career, and community ready. Eligible providers will be committed to OUSD's strategic plan and shared 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 every day. Expanded Learning supports this mission while holding our values of equity, joy, and liberation for youth and adults with the express purpose of interrupting inequity, examining biases, and creating inclusive and just conditions for all students to achieve equally high outcomes.

Select Lead Agencies will commit to working in partnership with school sites and the OUSD Expanded Learning Office (ExLO). Through the RFQ process, OUSD seeks organizations who demonstrate the capacity to work within the established OUSD model of school and community partnerships and 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 our district, expanded learning system, and community.

### Term of the List of Qualified Agencies

This Request for Qualifications (RFQ) 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. Supplemental school programs will be chosen by the district. Yearly



program plans are created through a 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 continue there, 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 elementary, middle, and high schools across the city of Oakland.

When programming is conducted in-person, over 8,000 students across 73 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 (75%) and English Learners (31%). Additionally, approximately 25% of OUSD after-school participants are African American and 45% 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/<br>Physical<br>Activity            | 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<br>Career                          | Career & Job Training, Entrepreneurial Education, Technology/Telecommunications Training, Community Service & Service Learning, Internships and Apprenticeships           |
| Leadership<br>Development                      | Peer Mentoring, Peer Tutoring, Youth-Led Community Service  |
| Science<br>Technology<br>Engineering &<br>Math | Gardening, Coding, Robotics, Making, Forensics, Cooking   |
| Outdoor<br>Education                           | Community Mapping, Hiking, Backcountry Camping, Kayaking, Bicycling   |

## E. 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 funds are awarded to specific school sites through a competitive process. The base grants that CDE awards to OUSD for after-school programs represent three 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.

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.

In addition to state grants, the City of Oakland's Oakland for Children and Youth have a long partnership with OUSD to support expanded learning programs. OUSD is looking for Lead Agencies that can competitively apply for OFCY's comprehensive after-school strategy. OFCY funding is awarded on a three-year grant cycle; therefore, schools and lead agencies are required to develop long-term partnerships that last over the course of the three-year OFCY grant cycle. 2021-2022 school year will be the third and final year of the OFCY grant cycle from 2018. As such, Lead Agencies will be able to apply for 2022 - 2025 OFCY funding. OFCY RFP is anticipated to be released in winter 2021 for programming starting in the 2022 school year.

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. ASES and 21<sup>st</sup> Century grant dollars are currently awarded at a rate of:

- ASES: \$8.88/student/day for K-8 students
- 21<sup>st</sup> Century: \$7.50/student/day for K-8 students
- 21<sup>st</sup> Century ASSETS: \$10/student/day for high school students

## Other considerations for the allocations of funds

- Distance/Remote/Hybrid Programming:
  - During a state or national emergency CDE could expand learning programs to have the flexibility to provide adaptive services that best meet the needs of our students and communities and are required by OUSD, Region 4 ACOE and CDE.
- Other considerations for the allocations of funds are that:
  - 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 21<sup>st</sup> Century related grants including Supplemental funding (to support summer programming).
  - ASES and 21<sup>st</sup> CCLC grant funds are intended to complement, but not supplant, other funding provided by OUSD, school sites, or community partners.
  - ASES and 21<sup>st</sup> 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.

***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.***

## F. OUSD Expanded Learning / Program Operation

We know in recent years, the field of education and expanded learning programs had to pivot due to global pandemic, power outage, wildfires, etc. Here in Oakland, approved Lead Agencies must be equipped and have organizational infrastructure to provide remote programs, hybrids, or any other configuration of programs mutually agreed upon in the MOUs.

In addition, 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 students. As school-day teachers focus on providing high quality instruction in the classroom, youth development workers provide high quality expanded learning opportunities to students during the after school and outside of regular school hours when youth are most vulnerable to crime, violence, and risky behavior.

**Below is an outline of operational requirements.**

*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.*

## G. 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
- To satisfy **21st CCLC E/M**:
  - Educational and literacy component to provide tutoring and/or homework assistance,
  - Educational enrichment component,
  - Physical activity/recreation component, and
- To satisfy **ASSETs**:
  - Educational and literacy component to provide tutoring and/or homework assistance,
  - Educational enrichment component,
  - Physical activity/recreation component, and

In addition, **all programs** must provide a nutritious snack or supper each day.



## Required Program Hours

- 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.

## H. 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 qualification for an instructional aide 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. Unless otherwise advised due to the health and safety of the students. It is highly recommended that each expanded learning program have a Site Coordinator who is full-time and situated at the school site during the day. 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 of any expanded learning staff changes.

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, 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 extended contracts.

## I. 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, 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. 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.

## J. Contract and Payments

Agencies that are approved through the process described in this RFQ 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 June/August 2022 Board meeting.

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 late winter/early 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 2-3 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.

## K. Guidelines for Charging Fees

The intent of ASES and 21st CCLC grants, which aligns with OUSD values, is to establish local programs that offer academic support and enrichment to students in need of such services regardless of a families inability to pay.

Both the CDE and OUSD discourage charging fees as that could exclude students in need from attending and taking advantage of the expanded learning program. ASES and 21st Century grants do not prohibit charging fees for expanded learning programs; however, programs which 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 21st Century and ASSETS grants will be required to report any fees collected (i.e.- registration fees, family fees, application fees, etc.). Fees collected could be deducted from the 21st CCLC grant amount received by the California Department of Education (CDE).

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 child will be denied services due to inability to pay.

## L. RFQ Process

Any agency that is interested in serving in the OUSD Expanded Learning Lead Agency role for the 2022 - 25 school year and/or beyond must successfully complete the Lead Agency RFQ process and earn *highly recommended* or *conditionally recommended* status, detailed below. Therefore, an organization that does not successfully complete the Lead Agency RFQ process or does not earn a *highly recommended* or *conditionally recommended* status will not be contracted with OUSD to serve in the Lead Agency role in the 2022-23 school year. If the OUSD ASPO moves forward with the adoption of an annual RFQ as anticipated, organizations that are not selected during this year's RFQ process will have the opportunity to qualify as a Lead Agency for future school years beyond 2025. Additionally, any agency that participated in the 2022 RFQ and earned *highly recommended* or *conditionally recommended* status does not have to submit a new RFQ for three years.



Organizations that submit an RFQ by the deadline will be assessed based on their RFQ responses, an interview between the community organization and the RFQ Review Team, and any additional supporting materials requested by the RFQ Review Team to determine the organization's qualifications to serve in the Lead Agency role. Applications that have the potential to earn the *highly recommended* or *conditionally recommended* status and require additional information will be invited for an interview with the RFQ Review Team.

Organizations completing this 2021 RFQ process will be assessed and scored into one of the following three categories:

- 1) **Highly Recommended:** Community organization has adequately demonstrated its capacity to serve in the Lead Agency role and to fulfill *all* Lead Agency responsibilities outlined by OUSD and listed in Section III of this RFQ. This *highly recommended* status will be valid for up to 3 years, depending on the organization's successful results in OUSD's annual Lead Agency evaluation process.
- 2) **Conditionally Recommended:** Community organization has adequately demonstrated its capacity to serve in the Lead Agency role and to fulfill *most, though not all*, of the Lead Agency responsibilities outlined by OUSD and listed in Section III of this RFQ. Organizations receiving this *conditionally recommended* status will be provided with specific feedback from the RFQ Review Team on areas of responsibility where the organization has not adequately demonstrated effective capacity. This *conditionally recommended* status will be valid for up to one year. Within that year, the community organization will be asked to provide the OUSD EXLO with additional evidence of its ability to fulfill all Lead Agency responsibilities, including documentation of the organization's efforts to improve based on feedback from the RFQ Review Team. At the end of this first conditional year, the community partner will be re-assessed by the OUSD EXLO team and re-categorized as *highly recommended*, *conditionally recommended*, or *not recommended*. Re-assessment will include results of the annual Lead Agency evaluation process, if the organization is currently serving as a Lead Agency.
- 3) **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 RFQ. Organizations receiving this *not recommended* status will not be included in the list of qualified community organizations that will be shared with Principals and stakeholders. An organization receiving this *not recommended* status may submit another Lead Agency RFQ at a future date when the OUSD ASPO opens up a new RFQ cycle, if the organization has made significant improvements in strengthening its capacity to serve in the Lead Agency role. Organizations can appeal by following the instructions in the appeals process described in Appendix V.

OUSD will notify an agency of its determination by August 22, 2021 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 Section L.

The school site administrator may choose a new Lead Agency, or may choose to continue to work with the same Lead Agency on an annual basis; subject to the District's annual availability of funds, satisfactory contractor performance with respect to meeting targeted attendance goals,



the contractor's ability to provide a quality program that supports school and district objectives, community partner evaluation criteria set forth by the District, and/or any other factors relevant to the school site. Beginning in 2021, OUSD will implement a new annual evaluation process to assess each community partner's effectiveness in fulfilling Lead Agency responsibilities.

## M. Minimum Qualifications

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

Lead Agency: Elementary School

Lead Agency: Middle School (including K-8)

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 2 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) being applied for. Specifically, evidence of a positive track record of the capacity to effectively coordinate the entirety of a school's afterschool and/or extended 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 of appropriately 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.

## N. 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, a copy will also be included in the RFQ [Google Folder](#) once an organization registers)
- 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 10 double-spaced pages in response to the four (4) 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 RFQ (Appendix IV, version for Fiscal Year 21-22),



and that your firm is willing to comply with OUSD contracting requirements.

- 6) **Sample Program Schedule and Summary:** Based on the sample program budget in question (2), please provide a sample program schedule along with a short description of each activity. No more than (2) pages.

## O. Application Submission Details

Applications must be received by, **June, 30, 2021**

All applications will be submitted electronically:

- Organizations will need to [Pre-Register with the Expanded Learning Office](#) and receive access to a Google Folder.
- The complete RFQ application as well as signature pages and required supporting documentation will need to be uploaded into their assigned Google Folder.

*\*\* Applications submitted after 5:00 pm on June 30, 2021 will not be considered.*

*\*\* Applications submitted by facsimile, telephone or electronic mail will not be accepted.*

### FORMAT

All submissions must be on the RFQ 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 four (4) titled sections below in no more than 10 pages total. Organizations may elaborate on specific documents provided in the Required Supporting Documentation (Appendix III)



## P. Evaluation and Selection

For all applications, the completion of the application will be assessed first; applications that do not submit complete documentation demonstrating the capacity to meet the minimum requirements will not have the application reviewed.

Applications demonstrating the capacity to meet minimum requirements will have their qualifications evaluated and scored by an RFQ Review Team made up of individuals with expertise in the relevant subject matter for which the application is submitted.

### Evaluation Rubric

| Performance Area  | Expectations for Highly Recommended Lead Agencies   |
|---|---|
| <p><b>Organizational Capacity and District Alignment</b></p> <p>(25 Points)</p> | <ul style="list-style-type: none"> <li>• Agency has a clear mission and vision that complements OUSD’s vision for community schools and college, career, and community ready students.</li> <li>• Agency can clearly articulate how expanded learning partnership with Oakland schools makes sense for their organization, and why they are well positioned to engage in partnership with OUSD.</li> <li>• Agency has extensive experience serving the Oakland community and/or in communities of similar demographics, assets, and challenges.</li> <li>• Agency has extensive experience working in partnership with school sites and district leaders.</li> <li>• Agency has organizational experience in the hiring, retention, and provision of professional development to appropriately 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.</li> <li>• Agency has the capacity to serve OUSD’s diverse student demographics.</li> </ul> |
| <p><b>Fiscal Management and Resource Development</b></p> <p>(25 Points)</p>     | <ul style="list-style-type: none"> <li>• Agency has accurate documentation that highlights how the Lead Agency will allocate funds to run quality expanded learning programs based on grant requirements detailed in the funding description. i.e. 1:20 ratio etc.</li> <li>• Agency has a strong budget template that clearly illustrates staffing costs, a salaried full time coordinator, supplies, administrative costs and additional contributions to enhanced programming.</li> <li>• Agency clearly describes how they will secure additional funding to match the contracted funds.</li> <li>• Agency is able to clearly describe its systems, structures and processes to ensure sound fiscal management of grant funds and how to comply with grant-related record keeping for auditing purposes.</li> <li>• Agency has audited financial statements and can produce accurate fiscal reports upon request.</li> </ul>  |



|  |  |
|--|--|
| <p><b>Agency Infrastructure</b><br/>(25 Points)</p>                              | <ul style="list-style-type: none"> <li>• Agency has an organizational chart that supports successful program implementation and clearly describes agency staffing systems, and processes that will ensure that all Lead Agency responsibilities will be fulfilled effectively and with fidelity.</li> <li>• Agency has designated administrative systems and procedures in place to ensure that expanded learning programs are operating in full compliance of requirements set forth by OUSD and the California Department of Education (CDE).</li> <li>• There is clearly at least one designated manager/director level staff person in the agency that is the primary point of contact for the OUSD expanded learning partnership. This individual regularly participates in all district expanded learning collaborative meetings, required professional development, and is regularly present at program sites to support the site coordinator and the school partnership.</li> <li>• Agency shows capacity to hire and support a clearly designated coordinator at each school site to facilitate and maintain active collaboration with the school site administrator and other school faculty.</li> </ul> |
| <p><b>Youth Development Expertise and District Alignment</b><br/>(25 Points)</p> | <ul style="list-style-type: none"> <li>• Agency’s program model clearly supports youth development. Agency provides descriptions of successes and challenges serving Oakland youth.</li> <li>• Agency has strong systems and processes in place to support ongoing Continuous Quality Improvement (CQI), including: structured development plans;</li> <li>• Agency utilizes district opportunities, other partners and the greater community to continuously innovate and grow their youth development practices to better serve the community.</li> </ul>  |

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 Principals for a period of up to three (3) years pending funding availability to select a Lead Agency to administer the after-school program on his/her school site.

## Q. Terms & Conditions for Receipt of Applications

### Errors and Omissions by Applicant

Applicants are responsible for reviewing all portions of this RFQ, and promptly notifying the District, in writing, if they discover any ambiguity, discrepancy, omission, or other error in the RFQ. 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 RFQ prior to the application due date by issuing Change Notices, which will be posted on the Afterschool Programs page of the OUSD website. 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. Therefore, the District recommends that applicants consult the website frequently, including shortly before the application due date, or sign up for our mailing list (<https://www.ousd.org/Page/12206>) for updates to ensure they have downloaded all Change Notices.

### 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 RFQ or excuse the vendor from full compliance with the specifications of the RFQ or any contract awarded pursuant to the RFQ.

### Financial Responsibility

The District accepts no financial responsibility for any costs incurred by applicants in responding to this RFQ. Submissions of the RFQ 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 After-School 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 RFQ 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 Qualifications;
- 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 RFQ, or the requirements for contents or format of the



applications;

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

## No Waiver

No waiver by the District of any provision of this RFQ 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 RFQ.

## R. Standard Contract Provisions

Any agency selected from the *Expanded Learning Program Lead Agency Qualified List* by a school site Principal, 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: RFQ Application

### 2021 OUSD Request for Qualifications Application (Template)

ASES, 21st CCLC, and ASSETS After-School 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 (TK-5)         |
|  | Elementary/Middle (TK-8)  |
|  | Middle (6-8)              |
|  | High School (9-12)        |
|  | Alternative High School   |
|  | Continuation High School  |
|  | Comprehensive High School |

|   |  |     |
|---|--|-----|
|   |  |     |
| 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  |

**EXPANDED LEARNING**



|  |  |         |
|--|--|---------|
| Have you served as an OUSD Lead Agency partner before in past years?<br><br>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      |
| <b>If yes</b> , 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 RFQ narrative, please respond to all of the questions within all four (4) titled sections below in no more than 10 double-spaced pages in 12pt Font. Organizations may elaborate on specific documents provided in the Required Supporting Documentation (Appendix III)

### 1. ORGANIZATIONAL CAPACITY (2-3 pages double space)

- OUSD's 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 educators, every day. Our vision is that all Oakland Unified School District students will find joy in their academic experience while graduating with the skills to ensure they are caring, competent, fully-informed, critical thinkers who are prepared for college, career, and community success. Please explain why your organization is uniquely positioned to engage in partnership with the OUSD Expanded Learning Office to serve students. What is your organization's mission and vision and how does it align with OUSD?
- Describe your experience and approach to serving the Oakland community and/or other communities with similar demographics, assets, challenges, etc. Discuss your background working with Oakland families and other community partners. (Reference the supporting documents required under Eligible Applicant Qualifications Appendix III to support your experience).
- OUSD Expanded Learning Office is looking for partners who can demonstrate the ability to collaborate with transparency and commit to shared decision making with Oakland students, families, site leaders and district leaders. Provide our office with clear examples of how your agency has or will approach working with stakeholders and engage in collaborative leadership.
- Describe your organization's strategy in hiring, retention, and providing professional development of appropriate qualified staff to provide services to OUSD students in a culturally appropriate manner. Please include artifacts to support your description. i.e. Job announcements.

### 2. FISCAL MANAGEMENT AND RESOURCE DEVELOPMENT (2 pages)

- Using your organization's budget and profit and loss statement provided in the required supporting documentation, create a budget narrative showing how your agency would allocate funds to run a high-quality expanded learning program. These budgets will need to be based on the grant requirements detailed in the Funding description above (Section E.); including a required staffing ratio of 1:20 (or better). Utilize any of the following anticipated contract amounts to develop your budget.
- Your budget should also show secured leveraged funds and resources that you would



- contribute to the operational costs of running an after-school program.
  - Elementary: \$133,000 to serve 84 students for 180 days of school year
    - (approx. 17 hours/week)
  - Middle school: \$177,000 to serve 112 students for 180 days of school year
    - (approx. 17 hours/week)
  - High school: \$250,000 to serve 140 students for 180 days
    - (approximately 15 hours/week)
- Your budget must detail:
  - Staffing costs for service delivery, staff training, and prep time
  - Full time site coordinator
  - Any agency management-level staff who will be paid by grant funds for support of direct service programming
  - Supplies, materials, curriculum, books, field trips, etc.
  - Agency administrative costs not to exceed 4% of contracted amount Note:
    - Your budget does not need to include snack costs
- Describe how your organization will secure additional funding to match the contracted funds from OUSD. The CDE requires that each ASES program provide cash or in-kind local funds totaling no less than one-third of the grant amount. Facilities or space usage may fulfill no more than 25 percent of the required local contribution (EC sections 8483.7[a][5] and 8483.75[a][4]). Allowable match includes cost of services provided by the local educational agency (LEA) and/or their subcontractors, using non-ASES funds. All ASES and 21st CCLC grantees are required to allocate a minimum of 30% of the grant amount. What additional grant dollars and resources will your agency secure to help cover the costs of running an OUSD expanded learning program? Indicate sources and dollar value of contributions already secured and resources already leveraged. Describe your funding strategies and potential funding opportunities.
- Describe your organization's system, structures and processes to ensure sound fiscal management of grant funds, including expenditure reporting and payroll processes. How will your organization ensure compliant use of grant funds and proper maintenance of fiscal and other grant-related records for auditing purposes? Also discuss whether your organization has audited financial statements and the audit results secured within the last 2 years.

### 3. AGENCY INFRASTRUCTURE (2 Pages)

- Using an organizational chart, describe how the OUSD expanded learning program will be supported administratively and programmatically. Specifically, identify and describe the agency staffing, systems, and processes that will ensure each of the listed Lead Agency responsibilities will be fulfilled effectively.
- Describe the administrative systems and procedures your agency will put in place to ensure that your expanded learning program(s) is/are operating fully in compliance with



requirements set forth by OUSD and the CA Dept. of Education. (*Unless otherwise stated by CDE under extenuating circumstances all sites are required to*):

- Student ratio of 1:20 or better;
  - Staff meet OUSD Instructional Aide requirement (48 college units or Instructional Aid Certificate)
  - Full time school Site Coordinator stationed at each school site during the day
  - 85% attendance documented by daily OUSD mandated attendance protocols
  - Professional record keeping and reproduction upon request for district audits
- Describe the role of the Site Coordinator who will be the primary point(s) of contact for the OUSD expanded learning partnership, and who will maintain active collaboration with the school site leadership. Describe how this individual will ensure strong partnership with OUSD, the partnering school site(s), and other community partners working within OUSD expanded learning programs.

#### 4. YOUTH DEVELOPMENT EXPERTISE, PROGRAM QUALITY ASSESSMENT PROCESS, AND SCHOOL DISTRICT ALIGNMENT (3 Pages)

- Describe how your organization's program model supports youth development. Cite prior noteworthy successes and challenges serving Oakland youth. How do you ensure each program is aligned with OUSD priorities? How does your program demonstrate that diversity, equity and inclusion are foundational in serving OUSD students?
- Please review the CDE's quality standards which are accessible on the [CDE Website](#). These standards identify organization, staff and programmatic touchpoints used by CDE to guide program quality. Please identify and discuss your agency's strengths and key areas for improvement in providing quality youth development programming.
- How does your organization ensure that all of your expanded learning staff have baseline knowledge and understanding of youth development best practices? What tools and training does your organization utilize to build the capacity of your staff and programs to create responsive high quality youth development practices?
- What types of data does your organization use to evaluate program quality? How has your organization used this information to inform program quality growth? Please share what indicators demonstrate that your organization is making the desired impact.



## APPENDIX III. Instructions for RFQ Application Submission:

Please use [this link to register to receive access to a Google RFQ folder](#). The Google folder will house the RFQ application and supporting documents that will need to be uploaded there. Access to this link will be available until June 15, 2021. Deadline for submission for a completed RFQ application and supporting documentation is June 30, 2021 by 5:00 pm.

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

### Required Supporting Documentation Instructions:

All uploaded files will need to be in PDF format and accessible to OUSD. Any files missing could result in a disqualification from the RFQ 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
- Profit and loss statement and/or copy of 2020 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 (indicate specific names next to titles of staff whenever possible)
- Copy of organization's 501(c)(3) letter
- Bank statements to show proof of operating cash reserves (reference application question 2 in appendix II for details)
- Job description for site coordinator and program instructor
- 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 2020-2021 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 qualifications (outlined in Section 13)
- Copy of certificate of current insurance



## 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 ASESP and 21<sup>st</sup> 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 Qualifications
- 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 MOU SAMPLE CONTRACT](#)

The contract template that is currently being used by lead agencies can be accessed by clicking the following link. However, please be aware that we are in the process of revising the contract template in 2 main respects: (1) the revised 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 (2) that master contract will last for 3 years (but note that agencies and sites will continue be matched in 1-year relationships, as they are currently). The other terms will be substantially similar to those in the current contract template.

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

*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.*




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**Signature**


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**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 Community Schools 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 August 27, 2021 (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, whether by administrative process, judicial process, or any other legal process or proceeding.

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 Executive Director of Community Schools Student Services, whose decision will be final. Appellant should submit the appeal and any supporting documents should be sent electronically by email to:

Andrea Bustamante, Executive Director  
Community Schools Student Services  
andrea.bustamante@ousd.org

Appellants will receive written notice of the outcome of their appeal by September 3, 2021. In the event that an applicant’s appeal is successful, the agency will be treated as all other prequalified agencies.



**2021 OUSD Request for Qualifications Application**  
ASES, 21st CCLC, and ASSETS After-School Programs

Cover Sheet:

|                      |   |                                      |                                  |
|----------------------|---|--------------------------------------|----------------------------------|
| Organization Name    | Envisioneers Inc (formerly Citizen Schools California)                          |                                      |                                  |
| Address, City, State | Sobrato Center for NonProfits, 330 Twin Dolphin Dr, #115, Redwood City CA 94065 |                                      |                                  |
| Lead Contact's Name: | Maria Drake   | 2 <sup>nd</sup> Leads Contact's Name | Gene'a Mitchell                  |
| Email:               | Mariadrake@citizenschools.org   | Email:                               | geneamitchell@citizenschools.org |
| Telephone #:         | 415-680-5473  | Telephone #:                         | 954-425-2234                     |

|   |                           |
|---|---------------------------|
| <b>Service Category: Check the grade levels your organization is interested in serving.</b> |                           |
| <input type="checkbox"/>  | Elementary (TK-5)         |
| <input checked="" type="checkbox"/>   | Elementary/Middle (TK-8)  |
| <input checked="" type="checkbox"/>   | Middle (6-8)              |
| <input type="checkbox"/>  | High School (9-12)        |
| <input type="checkbox"/>  | Alternative High School   |
| <input type="checkbox"/>  | Continuation High School  |
| <input type="checkbox"/>  | Comprehensive High School |

|   |   |         |
|---|---|---------|
| Does your organization have 501c3 status? Please provide documentation of this status in your supporting documentation section.<br><i>A copy of Envisioneers' filing for 501c3 incorporation is included in supporting documents.</i> | <input checked="" type="checkbox"/> Yes |         |
|   | <input type="checkbox"/> No             |         |
| Are you currently an OUSD Lead Agency Partner?<br><i>Envisioneers' legacy organization, Citizen Schools California is currently a Lead Agency partner of OUSD, providing services at Westlake Middle and Greenleaf K-8.</i>           | <input checked="" type="checkbox"/> Yes |         |
|   | <input type="checkbox"/> No             |         |
| Have you served as an OUSD Lead Agency partner before in past years?<br><i>Envisioneers' legacy organization, Citizen Schools California has been an OUSD Lead Agency partner at Greenleaf since 2015 and Westlake since 2019.</i>    | <input checked="" type="checkbox"/> Yes |         |
|   | <input type="checkbox"/> No             |         |
|   | 6                                       | # Years |
| Do you currently serve in the Lead Agency role for any other school districts besides OUSD?   | <input checked="" type="checkbox"/> Yes |         |
|   | <input type="checkbox"/> No             |         |
| <b>If yes, please list all school districts you have served.</b>  |   |         |
| <ul style="list-style-type: none"> <li>• Alum Rock Union School District</li> <li>• Redwood City School District</li> <li>• West Contra Costa Unified (SY 2021-22)</li> </ul>   |   |         |
| How many school sites does your organization have the capacity to serve as a lead agency?   | 8                                       | # Sites |



In the box below, please briefly explain your rationale for this number of sites?

*Envisioneers is committed to serving the Oakland community . As a newly untethered organization, we have the capacity to increase the number of schools served. Our ELT model is designed to self-sustain through state and federal public funding.*

---

On behalf of Envisioneers, Inc (agency), I, Maria Drake (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: June 30, 2021



# ENVISIONEERS

June 30, 2021

Martha Pena  
Coordinator, After-School Programs  
Oakland Unified School District  
1000 Broadway, Suite 150  
Oakland CA 94607

Dear Ms. Pena,

This letter shall serve as an introduction to Envisioneers as an applicant for Lead Agency status with Oakland Unified School District. Envisioneers is a newly formed organization, derived from OUSD's long-term partner, Citizen Schools California. Envisioneers will operate under the fiscal sponsorship of Citizen Schools Inc during the 2021-2022 school year while the transition is finalized. As a Lead Agency, Envisioneers is willing and able to perform the commitments contained in this application.

The leadership and staff of Envisioneers have been working collaboratively with schools in the Bay Area as Citizen Schools for 20 years to reimagine the learning day and provide students with rigorous and engaging experiences that connect students' current learning to their future.

Envisioneers accelerates student learning and skill development through an innovative expanded learning time model that is rigorous and evidence-based. We partner with middle schools to provide "apprenticeships" (hands-on projects taught by volunteers from business and civic organizations), academic support and a culture of high expectations. As a result, our students develop the skills, knowledge and beliefs they need to succeed in middle school, advance towards college, and become leaders in their careers and communities. Our goal is to demonstrate that these approaches, taken together, can transform schools and communities. In Service,

Maria Drake  
Executive Director  
Envisioneers

## **ORGANIZATIONAL CAPACITY**

Beginning in School Year 2021-2022, Citizen Schools California will become Envisioneers. Operating out of the Bay Area and led by a coalition of Citizen Schools California's legacy staff and board members, Envisioneers will continue to offer a safe, learner-centric approach to middle school intervention and enrichment.

The mission of Envisioneers is to combat systemic inequity in education by fostering and cultivating the academic and social emotional skills of our students while exposing them to project-based learning and community-based career mentors - building upon Citizen Schools' successful 26-year history of after-school apprenticeships and academic support during the school day. Our vision is that all students will realize their opportunities, have the skills to envision their passion, and the freedom to achieve their dreams. Our Expanded Learning Time Model not only yields a school day that is 30-40% longer, but also allows for 3-4 hours of staff support during the instructional school day. It contains the following elements:

EXPERIENTIAL LEARNING THROUGH APPRENTICESHIPS: Over 10 weeks, community volunteers lead students through weekly hands-on sessions that introduce new fields and associated careers from marketing to law to solar energy and photography, helping students see how academic and 21st century skills apply in the real world. Students participate in 2 apprenticeships per semester, and at the end of apprenticeship, students demonstrate their learning at a community celebration. Our apprenticeships focus on strengthening and testing student's skills and abilities like mindset and planning for success while developing 21st Century skills like collaboration, communication, innovation and critical thinking. These skills are core competencies required for students to thrive in high school, college, and the modern economy.

HEALING-CENTERED ENGAGEMENT & SOCIAL-EMOTIONAL LEARNING: Our comprehensive model, based upon research from organizations like the Search Institute, provides the foundation for healthy and positive youth development. We strive to build a school culture where every student, staff member, parent and caregiver feels valued, welcomed and physically

and emotionally safe. With adult mentors and experiential learning, students are grounded in a solid sense of meaning, self-perception, and purpose. In apprenticeships, students build critical 21st-century and human capital dependent Social Emotional Learning (SEL) skills.

ACADEMIC SUPPORT & UNFINISHED LEARNING: The COVID-19 crisis has broadened the inequities that exist in our communities, widened the opportunity and achievement gaps for the students we serve, and has created a critical focus on unfinished learning. Since 2011, our staff have worked alongside core content teachers to provide “push-in” and “pull-out” supplemental instruction in small groups, helping all students meet and exceed proficiency standards in literacy and math. They also engage families as partners, including bi-weekly conversations with each student’s parent or guardian as part of our whole child engagement.

Citizen Schools underwent a rigorous 5-year external evaluation of the ELT model which determined the most pronounced student impacts are in the critical area of SEL. Based on student and teacher survey responses, participants are significantly more likely to report that the program helps their self-esteem and pro-social behaviors. They are also more likely to participate in activities that help them learn about college and careers. The academic impact is also clear - Citizen Schools alumni are 2x more likely to enroll in a college-track high school than matched peers, and are 2x more likely to graduate from a four-year college or university than low-income students nationally. As Envisioneers, we will build upon this foundation to increase students’ access and connections, closing the opportunity and achievement gaps to address the systemic inequities in education.

Envisioneers exclusively partners with public high-need schools and communities, seeking to work with schools that serve low-income populations, demonstrate low baseline academic performance, and lack existing high-quality afterschool and mentoring programs. On average, 97% of our students are nonwhite, 88% are eligible for free or reduced price lunch, and 35% are categorized as English Language Learners. The leadership and staff of Envisioneers have been working collaboratively with schools in the San Francisco Bay Area as Citizen

Schools since 2002 and have partnered with schools in East Palo Alto, Daly City, Campbell, Redwood City, Oakland, and East San Jose to serve more than 12,600 unduplicated students and engage more than 2,750 volunteers. Envisioneers, led by Executive Director Maria Drake, has a track record of impact, growth, and innovation. Beginning in the 2021-2022 school year, Envisioneers will be the elected ELT partner at 4 school sites in Oakland; Claremont Middle School, Greenleaf K-8 and Westlake Middle School, and Aurum Preparatory Academy Charter School.

Envisioneers is recruiting Teaching Fellows specifically for their interest in youth development and urban education. A regional Program Director supports local recruitment efforts while collecting data to support the continuous improvement of system-wide recruitment and retention practices. All staff participate in culturally-responsive, trauma-informed training to better understand, disrupt, and act upon oppressive systems. As an organization that is striving to bring equal opportunities to our youth, it is vital that our youth see themselves in those future opportunities. We work to create a diverse workforce on our campuses (90% of our Oakland staff identify as people of color) as well as recruit community-based volunteers.

Envisioneers full-time staff work in the school all day, consult regularly with teachers and other school personnel, and often attend grade and content area meetings to ensure academic alignment between the “first and second shifts.” This coordination also extends to a school’s support staff, counselors, social workers, etc - a true example of a community school. When a situation arises and a student needs more support, the Envisioneers team will problem-solve in collaboration with the counselor and social worker to provide wrap-around support for the student and their family across the two domains of the school day. At the end of each semester, school administrators and site coordinators are surveyed about the health of the partnership and at the end of each school year.

## **FISCAL MANAGEMENT AND RESOURCE DEVELOPMENT**

Our legacy organization of Citizen Schools California has a long and proven track record of securing match and supplemental funding to ensure its programs operate uninterrupted in the event of a delay in disbursement of funds from federal and state-level grants. In the 2021-2022 school year, Envisioneers will operate under the fiscal sponsorship of Citizen Schools Inc. until their IRS determination letter is awarded. With the relationships built by legacy leaders of Citizen Schools California, Envisioneers will receive financial support from a diverse array of sources in both the public and private sectors including corporations, foundations, public funds, and individuals. We are fully committed to securing sufficient funding to serve as a lead agency as described in this application, including allocating portions of unrestricted grants. As Citizen Schools California, we have secured funding from supporters including: Sergey Brin Family Foundation, Lucile Packard Foundation, Koshland Foundation, Crescent Porter Hale Foundation, Western Digital, and Cisco to name a few. Furthermore, as a Bay Area-centric organization, Envisioneers will be able to better develop a local fundraising pipeline.

### **Budget Narrative**

For the 2021-22 school year, Envisioneers will operate with an organizational budget of approximately \$2.7m. The program budget submitted with this proposal meets all requirements of the OUSD RFP and leverages diverse funding sources and resources to support our program. Envisioneers program costs include personnel and non-personnel expenses explained below:

#### Personnel Costs

**North Bay Program Director-** Gene'a Mitchell will serve as Program Director for sites in OUSD and will be the primary point of contact. As the direct supervisor of Campus Directors (CD), she maintains a regular collaboration schedule with the school site administration to provide leadership-level oversight over the partnership. She meets weekly with CDs to ensure quality programming and to support their partnerships with the school site administrators.

Gene'a will attend OUSD's required meetings to be able to provide the best practical guidance to her CDs regarding compliance, professional development, and other OUSD-specific items.

Gene'a works in partnership with the Managing Director of Program and The Executive Director to oversee the district relationships.

**Campus Directors (Site Coordinator)** - Full-time site coordinators, oversee school partnerships, program implementation, and staff management. Our Campus Directors are part of each school's leadership committee - holistically assessing the needs of individual students and the school community at large. CDs oversee stakeholder measurement and evaluation at their campus including school continuous improvement plans, and weekly audits. Preferred qualifications for the role include a Bachelor's Degree, four years professional, post-undergraduate experience; and at least two years' experience leading a K-12 classroom.

**Teaching Fellows ( Full-Time Instructional Staff)** - Serving a 2-year commitment, Teaching Fellows (TF) maintain safety protocols and maintain the ASES required 1:20 ratio. TFs lead students through all program elements (academic support, apprenticeships, and explorations), build relationships with students and families, and coordinate with school faculty and staff. Each TF has a partnership role that supports program and school priorities, such as overseeing data entry and use for the campus, recruiting and managing volunteers, developing academic support lessons, or providing classroom support for the district teachers. Preferred qualifications for the TF role include a Bachelor's degree, strong academic skills in Math and English, a commitment to Envisioneers' mission, and the ability to build relationships with people from diverse backgrounds.

**Teaching Associates (Part-Time Instructional Staff)** - Instructors who work only in the afternoon hours. TAs may lead their own class or support volunteers in apprenticeships. TAs are responsible for maintaining program safety and maintaining the 1:20 student ration.

**Fringe Benefits** - For all salaries, Envisioneers will cover costs for FICA, unemployment insurance, and health insurance .

## Non-personnel Costs

**Program Supplies and Materials** - General office supplies such as pens, markers, stationary, as well as program-specific supplies such as solar car kits, art supplies, and sporting equipment.

**Travel** - While most apprenticeships take place primarily at school sites, some include travel to other locations to visit professional workplaces or learn about their apprenticeship topic. Travel has been paused due to COVID-19, but we hope to resume it soon.

**Technology** - Licenses for virtual apprenticeships, Zoom Accounts, Chromebooks for classwork, and computers for programs that require additional access like 3D printing. Computers are also used for enrichment clubs like Outschool and Rhymes with Reason.

**Professional Development** - Teaching staff undergo a rigorous Summer Institute training rooted in trauma-informed practices through a lens of equity and cultural humility, focusing on implicit bias and racial equity. Monthly professional development sessions are led by the Director of Professional Development - staff learn and practice skills to foster resilience for students and staff through building connection, coping skills, and competence, while focusing on individual and community wellness.

**Administrative** - Costs associated with human resource and accounting staff, portions of Regional Staff salaries, and information technologies for assessment and evaluation.

## AGENCY INFRASTRUCTURE

Envisioneers’ organizational infrastructure aligns with the responsibilities of a Lead Agency in OUSD, which are covered by at least one position with an additional layer of internal checks-and-balances.

| RESPONSIBILITY  | ENVISIONEERS STAFF   | ACTIONS   |
|---|--|---|
| Hiring, supervision, training, support of program staff and leaders | <ul style="list-style-type: none"> <li>● Regional leadership</li> <li>● Managing Director of Program</li> </ul>                | Highly systematized process for recruitment and hiring led by Regional leadership. Detailed scope-and-sequence for ongoing training, coaching, and PD for all staff.                          |
| Compliance with OUSD and CA DoE requirements                        | <ul style="list-style-type: none"> <li>● Program Director</li> <li>● Regional Leadership</li> </ul>                            | Regional leadership builds compliance systems for CA DoE requirements into all operational procedures.  |
| Fund Management   | <ul style="list-style-type: none"> <li>● Program Director</li> <li>● Regional Leadership</li> </ul>                            | Program Director oversees CDs’ management on site-based budgets, which are also monitored weekly by Regional leadership. Regional leadership manages fund development, grants, and invoicing. |
| Program planning in collaboration with school leadership            | <ul style="list-style-type: none"> <li>● Campus Director</li> <li>● Program Director</li> <li>● Regional Leadership</li> </ul> | The model is integrated and in full alignment with the school’s goals and priorities.   |
| Partnership w/ OUSD   | <ul style="list-style-type: none"> <li>● Program Director</li> <li>● Regional Leadership</li> </ul>                            | Regional positions are dedicated to ensuring effective district partnerships.   |

- **Student Ratio of 1:20 or better** –Our ELT model yields 5-6 staff members serving 120 students at each school site. Each campus has a Campus Director who oversees the school partnership and the Teaching Fellows/Associates who are Line/Program staff, providing direct service to youth.
- **Staff meet OUSD Instructional Aide positions** - Program staff members are emerging educators who participate in a highly selective two-year AmeriCorps Teaching Fellowship. All staff meet the minimum standard of 48 credits required for educational aides. Staff and Volunteers are focused on creating a positive learning environment grounded in student voice.

- **Full-Time School Site Coordinator** - Each campus site has (1) full-time Campus Director who oversees the entire campus program and is stationed at each school site during the day and throughout program hours. Paperwork is audited on a weekly basis.
- **85% attendance documented by** daily sign in and out by students - At each program site we record and compile daily attendance and retention information. Our enrollment packets are augmented with OUSD's forms and we keep internal attendance and in OUSD systems. Our organizational goal is 90% school attendance.
- **Professional record keeping and reproduction upon request for district audits** - Envisioneers' Regional Leadership staff have developed official organizational policies inclusive of reporting, accounting, and record keeping procedures. These policies are designed to help Envisioneers achieve its mission by ensuring that we; allocate resources in a manner consistent with our mission, objectives and values, demonstrate to and document for our key stakeholders (students, families, partners and funders) that we are using our resources appropriately and judiciously, and meet fiduciary responsibilities as outlined by the 501(c)(3) standards outlined set by the government and enforced by our auditors.

## **YOUTH DEVELOPMENT EXPERTISE AND DISTRICT ALIGNMENT**

Envisioneers and its partner schools develop program goals that meet specific school and community needs, and all program sites implement the same core elements. The theory of change for the program anticipates that the core activities of Envisioneers' program, result in direct outputs of student enrollment and attendance; increased time for academics; and increased exposure to real-world applications of academic skills. Envisioneers will implement a robust monitoring and evaluation infrastructure reflecting our commitment to achieving a significant, measurable, and long-term impact on students' skills, attitudes, and beliefs. Our Core Program Profile captures key implementation best practices, dosage, and short-term student outcomes. Data collected through program observations, surveys, data sharing agreements with our school

partners, and performance assessments that evaluate students' mastery of 21st century skills are stored in a secure, online database that supports flexible, on-demand reporting. Staff at each site and on our Regional Leadership team analyze data and partner with external evaluation organizations to inform program improvement and establish impact. Envisioneers will use evaluation results to assess the consistency of program implementation, inform program improvement, improve partnership selection, guide monitoring discussions with partners, and ultimately demonstrate impact to stakeholders. This level of adoption ensures everyone at the organization holds responsibility for outcomes and is invested in using performance data to improve performance and achieve outcome targets through our cumulative work and service to communities. Envisioneers' model is a collaborative, student-centered, results-driven model that is meeting California's Quality Standards for Expanded Learning by:

- 1. Safe and supportive environment** -All program staff receive site-specific training emergency protocols. Healing-centered practices are used to resolve conflicts in alignment with site-based practices. Students work with their team leaders to establish rules and consequences of violating rules
- 2. Active and engaged learning** - Our model creates differentiated spaces for sustained effort, growth, grit, and accomplishments, both in traditional learning outcomes and non-cognitive skills like perseverance and problem-solving. Twice a year, youth celebrate their success with their families and school community through formal community celebrations.
- 3. Skill building** - We expose students to hands-on learning, diverse careers, academic skill-building, high school and college readiness to develop essential academic, 21st-century, and social-emotional learning skills.
- 4. Youth voice and leadership** - Students elect their apprenticeships and build leadership skills during their projects. During the program, staff seek viewpoints and input from students on activities and norms.

- 5. Healthy choices and behaviors** - Envisioneers staff work in a collaborative environment with school-based staff and parents. A 'value star' system is used to reward positive behaviors and values. Students engage in daily physical activity.
- 6. Diversity, access and equity** - Envisioneers has a commitment to DEI and actively recruits staff and volunteers from the communities we serve. Staff participate in ongoing cultural responsiveness training and continually work to holistically serve students. . Similarly, we intentionally seek volunteers and partners for their reliability and credibility to youth.
- 7. Quality staff** - Staff are hired based on their experience and commitment to serving middle school students. Staff are paid a competitive salary.
- 8. Clear vision, mission and purpose** - Campus Directors oversee the measurement and evaluation at their campus including school continuous improvement, and weekly audits to make data-driven decisions.
- 9. Collaborative partnerships** - Envisioneers staff collaborate with teachers and school leaders throughout the year to build a common vision, coordinate operations, align staff development, and share data about student progress to target instruction. We collaborate with private and non-profit organizations to recruit volunteers, offer experiential learning opportunities, and infuse curriculum.
- 10. Continuous quality improvement** - All staff members are provided continuous training and coaching to ensure high program quality and to foster transferable professional skills for emerging youth development workers.
- 11. Program management** -The program has a clear organizational/reporting structure, which allows staff to focus on the needs of students. Each year, Envisioneers creates parent handbooks that describe program policies and procedures.
- 12. Sustainability** - Resource development and financial management is the responsibility of Regional Leadership. Envisioneers maintains a diverse portfolio of funding sources.



**Sample 2021-2022 OUSD Site Program Schedule**

|                           | <b>Monday</b>              | <b>Tuesday</b>             | <b>Wednesday</b>           | <b>Thursday</b>            | <b>Friday</b>              |
|---------------------------|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|
| <b>10:00 AM - 2:15 PM</b> | Non-ASES Funded "Push-In"  |                            |                            |                            |                            |
| <b>2:15 PM - 2:25 PM</b>  |                            | Supper & Sign-In           | Supper & Sign-In           |                            |                            |
| <b>2:25 PM - 3:30 PM</b>  |                            | AIM                        | AIM                        |                            |                            |
| <b>3:30 PM - 4:00 PM</b>  | Supper & Sign -In          | Supper                     | Supper                     | Supper & Sign-In           | Supper & Sign-In           |
| <b>4:00 PM - 4:01 PM</b>  | Daily Affirmation          |
| <b>4:01 PM - 5:00 PM</b>  | AIM                        | Apprenticeships            | AIM                        | Apprenticeships            | AIM                        |
| <b>5:00 PM - 5:30 PM</b>  | Skills Lab                 |                            | Skills Lab                 |                            | Skills Lab                 |
| <b>5:30 PM - 6:00 PM</b>  | Physical Activity          |
| <b>6:00 PM</b>            | Sign-Out & Program Closure |

## Activity Descriptions

| Activity                                 | Description  | Staff Support                                 | CDE Correlation   |
|--|--|---|---|
| AIM<br>Aspire, Invest,<br>Make the Grade | This program element provides a focused homework and tutoring time that results in quality, on-time assignment completion and targeted learning outcomes.  | Teaching Fellows                              | <i>Education &amp; Literacy Component</i><br>AIM is a space in which each student has a space to independently challenge themselves, academically, as well as one on one and group tutoring. Teaching Fellows' have access to students' assignments, through their support of day time classes and Aeries.com. This allows for TFs to check for understanding and ensure quality assignment completion and deeper learning. First Shift Teachers, the Instructional Leadership Team, and other Westlake Staff are consulted for input, as well. |
| Skills Lab                               | Skills Labs are 30-minute, common core aligned, foundational lessons facilitated after AIM. students are challenged to engage in English Language Arts, Math, Science, and History activities, which are designed to enable students with the skills and mindsets required to meet college and career readiness expectations | Teaching Fellows                              | <i>Education &amp; Literacy Component</i><br>Teaching Fellows review Common Core Standards, student assessment results, course grades, etc. to create thoughtful, rigorous, foundational lessons. students' progress is tracked throughout the semester to ensure growth is being made, and/or to adjust lessons as necessary.  |
| Enrichment                               | Enrichment hour, facilitated twice a week, gives our Teaching Fellows the opportunity to teach, refine, and differentiate various STEAM curriculum(s).   | Teaching Fellows                              | <i>Educational Enrichment</i><br>Teaching Fellows facilitate STEAM curriculum that is adapted to grade-level student needs, allowing for socio-emotional skill development, relationship development, and quality dialogue. These lessons are pulled from curriculums; such as, Every Monday Matters, goIT, etc.; any adaptations are reviewed by the Campus Director at the site.  |
| Choice Time                              | This program element offers the space to engage in activities, both academic and socio-emotional, that students and Teaching Fellows simply find enjoyable.  | Teaching Fellows                              | <i>Educational Enrichment</i><br>Choice Time supports the CDE socio-emotional skill development requirements. It is a creative, active, and supportive space where both student and Teaching Fellow voices are utilized to build a space with a sense of belonging.   |
| Apprenticeships                          | These 90-minute classes give our students an opportunity to interact and build relationships with professionals, who demonstrate passion for the work they do every day, who support students growing 21ST Century Skills through a variety of college and career aligned classes.   | Community-based volunteers / Teaching Fellows | <i>Educational Enrichment</i><br><i>Apprenticeships engage students in career and college-aligned classes, while expanding their social and professional networks through exposure to community members and volunteers with a passion to facilitate engaging, skill-building classes. Over the 10 weeks, Teaching Fellows, students, and Citizen Teachers actively review and adapt the curriculum to ensure quality.</i>   |
| Sports                                   | SPAAT sports are facilitated each season, and are designed to empower student athletes by providing them with academic support, socio-emotional skill development, and structured physical activity  | SPAAT Sports                                  | <i>Physical Activity</i><br><i>SPAAT sports are structured and planned to ensure students learn the foundational elements of the sports they are playing. Additionally, students are provided the opportunity to warm-up, cool down, and spend 45+ minutes actively engaged in physical activity.</i>   |

| Based on 3 OUSD Sites<br>Westlake Middle School<br>Greenleaf K-8<br>Claremont Middle School |             | <b>OUSD Allocation</b> | <b>Envisioneers Match</b> |
|---|-------------|------------------------|---------------------------|
| <b>REVENUE</b>  |             |                        |                           |
| Public  | \$612,460   | \$346,411              |                           |
| Private   | \$975,000   |                        |                           |
| <b>TOTAL REVENUE</b>  | \$1,587,460 |                        | \$1,241,049               |
| <b>EXPENSES</b>   |             |                        |                           |
| Director of Programming @ 50%   | \$45,000    | \$0                    |                           |
| Campus Directors  | \$204,000   | \$133,925              |                           |
| Teaching Fellows & Associates   | \$677,850   | \$143,876              |                           |
| <b>Subtotal Staff Salaries</b>  | \$926,850   | \$277,801              |                           |
| Fringe Benefits & Taxes   | \$203,907   | \$49,975               |                           |
| <b>Total Personnel</b>  | \$1,130,757 | \$327,776              | \$802,981                 |
| <b>Direct Campus Expenses</b>   |             |                        |                           |
| Supplies & Materials  | \$11,740    | \$3,182                |                           |
| Staff Training & Development  | \$36,000    | \$3,500                |                           |
| Technology  | \$4,700     | \$0                    |                           |
| Travel & Transportation   | \$3,100     | \$2,500                |                           |
| Professional Development  | \$7,500     | \$1,000                |                           |
| Administrative  | \$46,314    | \$8,453                |                           |
| <b>Total Direct Campus Expenses</b>   | \$109,354   | \$18,635               |                           |
| <b>TOTAL EXPENSES</b>   | \$1,240,111 | \$346,411              | \$893,700                 |

**ELT - Bay Area Campus P&Ls for FY21**

|  | OUSD             |                  | ARUSD                          |                  |                  | RWC              | Special Programs | Regional           | TOTAL              |
|--|------------------|------------------|--------------------------------|------------------|------------------|------------------|------------------|--------------------|--------------------|
|  | Westlake         | Greenleaf        | Renaissance<br>(both campuses) | William Sheppard | Joseph George    | MIT              |                  |                    |                    |
| <b>REVENUE</b>                                 |                  |                  |                                |                  |                  |                  |                  |                    |                    |
| Public funding                                 |                  |                  |                                |                  |                  |                  |                  |                    |                    |
| District contracts+                            | \$234,500        | \$102,000        | \$320,000                      | \$160,000        | \$160,000        | \$150,000        | \$20,000         |                    | \$1,146,500        |
| AmeriCorps                                     | \$20,000         | \$20,000         | \$40,000                       | \$20,000         | \$20,000         | \$20,000         |                  |                    | \$140,000          |
| <b>Total public</b>                            | <b>\$254,500</b> | <b>\$122,000</b> | <b>\$360,000</b>               | <b>\$180,000</b> | <b>\$180,000</b> | <b>\$170,000</b> | <b>\$20,000</b>  | <b>\$0</b>         | <b>\$1,286,500</b> |
| Private funding (large, dedicated)             |                  |                  |                                |                  |                  |                  |                  |                    |                    |
| Corporate                                      |                  |                  |                                | \$20,000         |                  |                  | \$232,000        | \$80,000           | \$332,000          |
| Foundations                                    | \$285,000        |                  | \$200,000                      |                  |                  |                  |                  | \$200,000          | \$685,000          |
| Other private                                  |                  |                  |                                |                  |                  |                  |                  | \$350,000          | \$350,000          |
| <b>Total private</b>                           | <b>\$285,000</b> | <b>\$0</b>       | <b>\$200,000</b>               | <b>\$20,000</b>  | <b>\$0</b>       | <b>\$0</b>       | <b>\$232,000</b> | <b>\$630,000</b>   | <b>\$1,367,000</b> |
| <b>Total Revenue</b>                           | <b>\$539,500</b> | <b>\$122,000</b> | <b>\$560,000</b>               | <b>\$200,000</b> | <b>\$180,000</b> | <b>\$170,000</b> | <b>\$252,000</b> | <b>\$630,000</b>   | <b>\$2,653,500</b> |
| <b>CAMPUS EXPENSE</b>                          |                  |                  |                                |                  |                  |                  |                  |                    |                    |
| Direct Expense                                 |                  |                  |                                |                  |                  |                  |                  |                    |                    |
| Personnel (salary, stipends, benefits, fringe) | \$157,146        | \$117,626        | \$300,746                      | \$145,940        | \$165,896        | \$151,396        | \$20,000         | \$399,918          | \$1,458,668        |
| Program expense*                               | \$1,368          | \$1,238          | \$2,606                        | \$1,368          | \$1,368          | \$1,368          |                  | \$53,389           | \$62,705           |
| <b>Total direct expense</b>                    | <b>\$158,514</b> | <b>\$118,864</b> | <b>\$303,352</b>               | <b>\$147,308</b> | <b>\$167,264</b> | <b>\$152,764</b> | <b>\$20,000</b>  | <b>\$453,307</b>   | <b>\$1,521,373</b> |
| Allocation of National Expense**               |                  |                  |                                |                  |                  |                  |                  |                    |                    |
| Personnel                                      |                  |                  |                                |                  |                  |                  |                  | \$652,114          | \$652,114          |
| Administrative                                 |                  |                  |                                |                  |                  |                  |                  | \$236,637          | \$236,637          |
| <b>Total indirect expense</b>                  | <b>\$0</b>       | <b>\$0</b>       | <b>\$0</b>                     | <b>\$0</b>       | <b>\$0</b>       | <b>\$0</b>       | <b>\$0</b>       | <b>\$888,750</b>   | <b>\$888,750</b>   |
| <b>Total Expense</b>                           | <b>\$158,514</b> | <b>\$118,864</b> | <b>\$303,352</b>               | <b>\$147,308</b> | <b>\$167,264</b> | <b>\$152,764</b> | <b>\$20,000</b>  | <b>\$1,342,057</b> | <b>\$2,410,123</b> |
| Surplus/(deficit)                              | \$380,986        | \$3,136          | \$256,648                      | \$52,692         | \$12,736         | \$17,236         | \$232,000        | -\$712,057         | \$243,377          |
| Required non-public support                    | 0                | 0                | 0                              | 0                | 0                | 0                | 0                | \$1,342,057        |                    |

Notes

\* In FY21, Program Expenses are lower than usual because of COVID-19 restrictions on in-person programming. In a non-COVID year, additional program costs would increase by a total of about \$50,000, including student and staff transportation and volunteer engagement costs. These would spread across campuses and regional expense lines.

\*\* Allocation of CS National Costs. In FY20, CS started fully allocating costs

+ Special program public revenue includes Oakland Education Foundation funding for Learning Pods

| <b>REVENUE (all sites)</b> | <b>2019</b>        | <b>2020</b>        | <b>2021 (projected)</b>   |
|----------------------------|--------------------|--------------------|---|
| Corporate                  | \$110,797          | \$134,397          | \$271,966 <i>includes corp in-kind and special programs</i>   |
| Foundation                 | \$651,000          | \$627,500          | \$685,000   |
| Individual                 | \$205,020          | \$166,837          | \$60,000  |
| Events                     | \$123,570          | \$167,878          | \$80,000  |
| National Partner           | \$138,695          | \$138,824          | \$139,000 <i>assumes similar revenue allocation as FY19 and FY20</i>  |
| Public                     | \$1,290,906        | \$1,443,705        | \$1,142,552 <i>Decrease stems from AmeriCorps funding. FY21 funding flowed through a sub-grant with a smaller per-member amount (\$9,500 per member vs \$13,500 per member)</i> |
| <b>TOTAL</b>               | <b>\$2,519,988</b> | <b>\$2,679,142</b> | <b>\$2,378,518</b>  |

Associated Funding by Region

At this time, CS does not receive any further district funding such as title one or LCAP from any of our districts. The grants below are county or city specific and are tied to our general programming and impact reporting. We also receive corporate matching funds and volunteer hours. In-person apprenticeships include student "explorations" to corporate offices. The costs for transportation (bussing) are covered through corporate sponsorship, which are **not** included below.

| Funding Source                      | Alum Rock |           |           | Oakland Unified |           |           | Redwood City |           |           | Regional  | Term of grant   |
|-------------------------------------|-----------|-----------|-----------|-----------------|-----------|-----------|--------------|-----------|-----------|-----------|---|
|                                     | 2019      | 2020      | 2021      | 2019            | 2020      | 2021      | 2019         | 2020      | 2021      |           |   |
| <b>Public</b>                       |           |           |           |                 |           |           |              |           |           |           |   |
| ASES                                | \$640,000 | \$640,000 | \$640,000 | \$134,000       | \$134,000 | \$134,000 |              | \$127,000 | \$150,000 |           |   |
| 21st Century equitable access       |           |           |           | \$91,016        | \$91,016  | \$91,016  |              |           |           |           |   |
| Oakland Fund for Children and Youth |           |           |           | \$15,153        | \$15,153  | \$15,153  |              |           |           |           |   |
| San Mateo County                    |           |           |           | \$100,000       | \$100,000 | \$97,000  |              |           |           |           |   |
|                                     |           |           |           |                 |           |           | \$20,000     | \$20,000  | \$0       |           |   |
| <b>Private Specific</b>             |           |           |           |                 |           |           |              |           |           |           |   |
| Koshland Foundation                 |           |           |           | \$250,000       | \$250,000 | \$250,000 |              |           |           |           | 3 year  |
| Crescent Porter Hale                |           |           |           |                 | \$35,000  | \$35,000  |              |           |           |           | 1 year  |
| Lucille Packard                     | \$75,000  | \$75,000  | \$75,000  |                 |           |           |              |           |           |           | 2 year  |
| Shortino                            | \$50,000  | \$50,000  | \$50,000  |                 |           |           |              |           |           |           | 1 year  |
| <b>Private General Operating</b>    |           |           |           |                 |           |           |              |           |           |           |   |
| BofA                                |           |           |           |                 |           |           |              |           |           | \$20,000  | 1 year  |
| Western Digital                     |           |           |           |                 |           |           |              |           |           | \$70,000  | 3 year cycle- 1 off sponsorship<br>Volunteer engagement |
| Comerica                            |           |           |           |                 |           |           |              |           |           | \$20,000  | Volunteer engagement                                    |
| Sergey Brin                         |           |           |           |                 |           |           |              |           |           | \$200,000 | 3 year  |
| Argo                                |           |           |           |                 |           |           |              |           |           | \$10,000  | sponsorship annual                                      |
| Star One                            |           |           |           |                 |           |           |              |           |           | \$10,000  | sponsorship annual                                      |
| WGBH                                |           |           |           |                 |           |           |              |           |           | \$125,000 | over 2 years - thru 2022                                |
| Outschool                           |           |           |           |                 |           |           |              |           |           | \$100,000 | in-kind curriculum hours<br>over 2 years - thru 2022    |
| Google                              |           |           |           |                 |           |           |              |           |           | \$40,000  | CA Portion of national gift                             |



# Evaluation of Citizen Schools' Expanded Learning Time Model: Executive Summary



March 9, 2016

*Prepared for:*

**Citizen Schools**

308 Congress St., 5th Floor  
Boston, MA 02210



*Submitted by:*

*Alyssa Rulf Fountain*

*Beth Gamse*

*Melissa Velez*

*Matthew Hillard*

*Porsha Cropper*

**Abt Associates**

55 Wheeler Street  
Cambridge, MA 02138



# Executive Summary

## Introduction and Background

Academic achievement in the nation’s lowest performing schools is troubling. Despite improvements in students’ overall academic achievement over the past few decades, proficiency gaps in reading and mathematics still persist across income, racial, and ethnic groups (National Center for Education Statistics, 2013). One promising strategy for reducing the achievement gaps is the use of a longer school day, often called Expanded Learning Time (ELT); evidence suggests that students’ increased access—through ELT programming—to enrichment activities can have positive effects on their academic motivation and social-emotional skill development.

The number of schools across the country implementing ELT continues to grow; by 2013–14, the most recent school year for which data are available, over 2,000 schools were using ELT strategies (National Center for Time and Learning (NCTL)). Nearly half of these schools were charter schools, and the remaining schools include many low-performing regular district schools that adopted ELT strategies in response to federal requirements for the School Improvement Grant (SIG) program. A recent GAO report indicates that approximately 1,800 SIG-funded schools, and 69 schools funded under the 21<sup>st</sup> Century Community Learning Program are implementing some form of ELT strategies.<sup>1</sup> Current guidance under the SIG program defines increased learning time as “increasing the length of the school day, week, or year to significantly increase the total number of school hours” for instruction in core academic subjects and other subjects, enrichment activities, and teacher collaboration, planning, and professional development (U.S. Department of Education, 2012a, p. 23).

The definition of ELT may seem straightforward, yet its implementation varies considerably in practice. ELT can occur via additional days in the school year, more hours in a school day, or summer programming above and beyond the regular year or day. ELT participation is sometimes mandatory for designated students, grades, or schools, and is sometimes optional. ELT programming is offered by local schools/districts, community-based organizations or non-profit groups, and is delivered by teachers, tutors, community volunteers, or other adults. Further, schools implementing ELT may rely upon the same *structure* (i.e., all after-school or summer or longer day programming), yet may vary substantially in the content of ELT, how additional time is distributed across subjects or extracurricular activities, and in who provides instruction.

Regardless of structure or content, using additional time effectively requires attending to multiple factors or strategies that all affect program implementation. Both the Afterschool Alliance (2012) and NCTL (2012) have articulated some guiding principles as essential for high-quality ELT programming. These include strong school community partnerships; focused learning; family engagement; intentional programming; diverse, prepared staff; participation and access; safety, health, and wellness; and ongoing assessment and improvement.

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<sup>1</sup> See <http://www.gao.gov/products/GAO-16-141>

### Key Elements of Successful Expanded Learning Time Approaches

Key elements<sup>a</sup> of expanded learning time initiatives include:

- Increase time in schools for students
- Provide academic support, individualized learning support, and enrichment activities to prepare students for college and career success
- Ensure opportunities for teacher collaboration and professional development to improve the quality of instruction
- Build strong school leadership and support of ELT
- Promote data-driven and evidence-based support to improve student performance
- Cultivate dedicated partnerships with external organizations
- Build a culture of high expectations and accountability

<sup>a</sup> See After School Alliance (January 2012), *Principles of Effective Expanded Learning Programs: A Vision Built on the Afterschool Approach*. Washington, DC: Author. Retrieved from [http://www.afterschoolalliance.org/Principles%20of%20Expanded%20Learning%20Programs\\_Jan\\_2012\(2\).pdf](http://www.afterschoolalliance.org/Principles%20of%20Expanded%20Learning%20Programs_Jan_2012(2).pdf); see also Claire Kaplan & Roy Chan (2011), *Time Well Spent: Eight Powerful Practices of Successful Expanded-Time Schools*, National Center for Time and Learning. Retrieved from <http://timeandlearning.org/sites/default/files/resources/timewellspent.pdf>

Since 1995, Citizen Schools has developed and implemented its own ELT model. Citizen Schools partners with middle schools serving predominantly low income (90% nationally) racial or ethnic minority (94% nationally), and academically struggling students. The Citizen Schools model relies upon an additional shift of educators and community volunteers to engage middle school students in hands-on apprenticeships, while simultaneously providing individualized supports to ensure academic and future success. Initially, Citizen Schools offered optional out-of-school time (OST) programming to middle school students in Boston, MA; it expanded to other districts in 2002, and further expanded to serve entire grade levels in an ELT framework in 2006. By 2010, Citizen Schools had shifted its focus from opt-in OST to mandatory full-grade ELT programming, and it began its national ELT initiative in 2010. Over the past six years, Citizen Schools ELT programming has expanded to schools in seven states, including California, Illinois, Massachusetts, New Jersey, New Mexico, New York, and Texas.

Abt Associates has been working as an evaluation partner with Citizen Schools since 2010, to learn how schools are implementing and integrating the Citizen Schools ELT model, and whether participation in ELT affects students' shorter-term behavioral and aspirational outcomes as well as students' academic performance. The evaluation was designed to examine implementation and impact from the beginning of Citizen Schools' national ELT expansion in fall 2010. This final report summarizes what the evaluation has learned about ELT implementation and outcomes over five consecutive school years, from 2010–11 through 2014–15.

## Background and Findings from Prior Research

The research foundation for identifying the most effective strategies for implementing ELT has not kept pace with the steady expansion of ELT across the country. While there have been numerous studies, relatively few have been both rigorous and multi-faceted enough to assess the diversity of targeted outcomes and the heterogeneity of implementation. On the surface, for example, a study of a summer learning program and a study of ELT may each examine the impact of additional time, yet a summer-based program intervention is quite distinct from an expansion of instructional time during the regular school day. While some research does suggest positive findings about OST or summer

programming, those findings may not be applicable to an integrated ELT program model (McCombs et al., 2011; Redd et al., 2012). Studies that assess whether students attending charter schools (in which longer school days are required) outperform peers in regular district schools have found positive impacts on academic outcomes (Angrist et al., 2010; Tuttle et al., 2013; Tuttle et al., 2015). One of the strongest studies is a large-scale random assignment investigation of the Knowledge is Power Program (KIPP), a multi-faceted school improvement effort with many simultaneously implemented strategies, including ELT; this study found convincing positive effects on academic outcomes, yet cannot disentangle the effects of a longer school day from other key program elements (the seven principles that govern KIPP schools focus on academics, learning, and leadership<sup>2</sup>).

Several recent meta-analyses have examined studies of different strategies for increasing learning time, prioritizing studies based on stronger research designs, and the findings are mixed. For example, some research suggests that expanded learning time improves non-academic student outcomes (e.g., students' attendance, study skills, behavior, social skills, and motivation to learn); however, the evidence is based primarily on non-experimental research, including studies that used simple pre- and post-program comparisons of ELT participants and other quasi-experimental designs to identify correlations between ELT participation and youth outcomes (Zief et al., 2006; Redd et al., 2012). Kidron and Lindsay (2014) synthesized 30 studies, some of which were experimental and some quasi-experimental, and found that OST programs (before- and after-school and weekend programs) had a small, positive, and statistically significant effect on students' academic motivation. Another meta-analysis of the effects of afterschool programs on socio-emotional skill development found some positive and statistically significant effects on socio-emotional skill development, behavior management, school bonding, and positive self-perceptions (Durlak et al., 2010), but because the interventions could occur within and outside the regular school day, the effects of ELT cannot be examined separately from other school improvement strategies.

Overall, the evidence suggests three key findings on the implementation of ELT. First, ELT models vary in focus, structure, and content across school environments (Rocha, 2007). Second, time alone is not sufficient to improve student performance; quality academic learning time matters. Third, schools with successful expanded learning time programs share common features, including bold, visionary leadership; strong community support and partners; ongoing assessment and improvement; engaged students; high attendance and participation; and a culture of high expectation.

Given the large variability in ELT types and elements, in mandatory or voluntary ELT participation, and the concomitant implementation of other school-wide improvement initiatives, it can be difficult to pinpoint the source of any positive effects on students, both academically and non-academically. Further, the observed impacts largely reflect the benefits of instructional time within programs or interventions that are quite distinct from the Citizen Schools ELT model. Describing specific elements of the Citizen Schools' ELT model can help situate findings about both the implementation and impact of Citizen Schools ELT, relative to other research about ELT. The report turns next to a discussion of the Citizen Schools ELT program.

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<sup>2</sup> See [www.kipp.org/our-approach](http://www.kipp.org/our-approach) for more detail about key KIPP approaches.

## The Citizen Schools ELT Program Model

The Citizen Schools Expanded Learning Time model is defined by three separate components: Apprenticeships, Academic Support, and Explore, which are built into a lengthened school day. The Apprenticeships are the cornerstone of the Citizen Schools ELT program model; they connect students to adult volunteers who teach a skill or content area about which they are passionate. The adult volunteers, called Citizen Teachers, teach about such varied topics as robotics, mock trials, poetry, dance, and numerous other areas. Students learn about possible apprenticeship topics early each semester via an Apprenticeship Fair; they rank their top choices after hearing Citizen Teachers present short pitches. Citizen Schools staff then assign students to apprenticeships based on a combination of student preference and availability. Students take four apprenticeships each year, two each semester. Each apprenticeship consists of 10 90-minute sessions per semester that culminates in a showcase called the WOW! during which students “teach back” to friends, family, and community members what they learned.

Apprenticeships are complemented by two distinct types of academic support. Structured homework time is generally offered for an hour each program day; it includes one-on-one goal setting and tutoring, and is known as AIM, or “aspire, invest, and make the grade.” Academic League includes targeted academic support in either math or English/Language Arts (at each school’s discretion); it is offered twice a week for between 30 and 90 minutes.

The third program component, called Explore, provides additional enrichment activities through team-building exercises. The Explore block generally reflects each participating school’s priorities and circumstances, while establishing connections between students’ middle school experiences, knowledge/guidance about college and careers (earlier, this component was known as C3—College to Career Connections), and how students can develop a pathway to future goals. Citizen Schools ELT also includes an eighth grade-specific program element, the Eighth Grade Academy (8GA), a capstone program that supports students as they navigate from middle to high school.

The chief mechanism by which program components are delivered is through an embedded “second shift” of educators, funded by AmeriCorps, hired to support the schools’ extended day, either as Teaching Fellows (TFs) or Teaching Associates (TAs). Teaching Fellows generally work full-time and are expected to serve for two years. The requirements have become more explicit over time: TFs are required to have had prior experience working with children, have earned some college credit, and to be U.S. citizens. Teaching Associates, half-time Citizen Schools employees, generally provide Citizen Schools

### Illustrative Weekly Schedule for Students

- **Monday:** 60 minutes of homework support, followed by 90-minute Academic League lesson on fractions
- **Tuesday:** 60 minutes of homework support, followed by 90-minute *Robotics* Apprenticeship taught by Citizen Teachers from Google
- **Wednesday:** 60 minutes of homework support, followed by 30 minutes of refresh/review on fractions, then 60 minutes of team-building exercises
- **Thursday:** 60 minutes of homework support, followed by 90-minute *Mock Trials* Apprenticeship taught by Citizen Teachers from local law firm
- **Friday:** No Citizen Schools programming typically offered

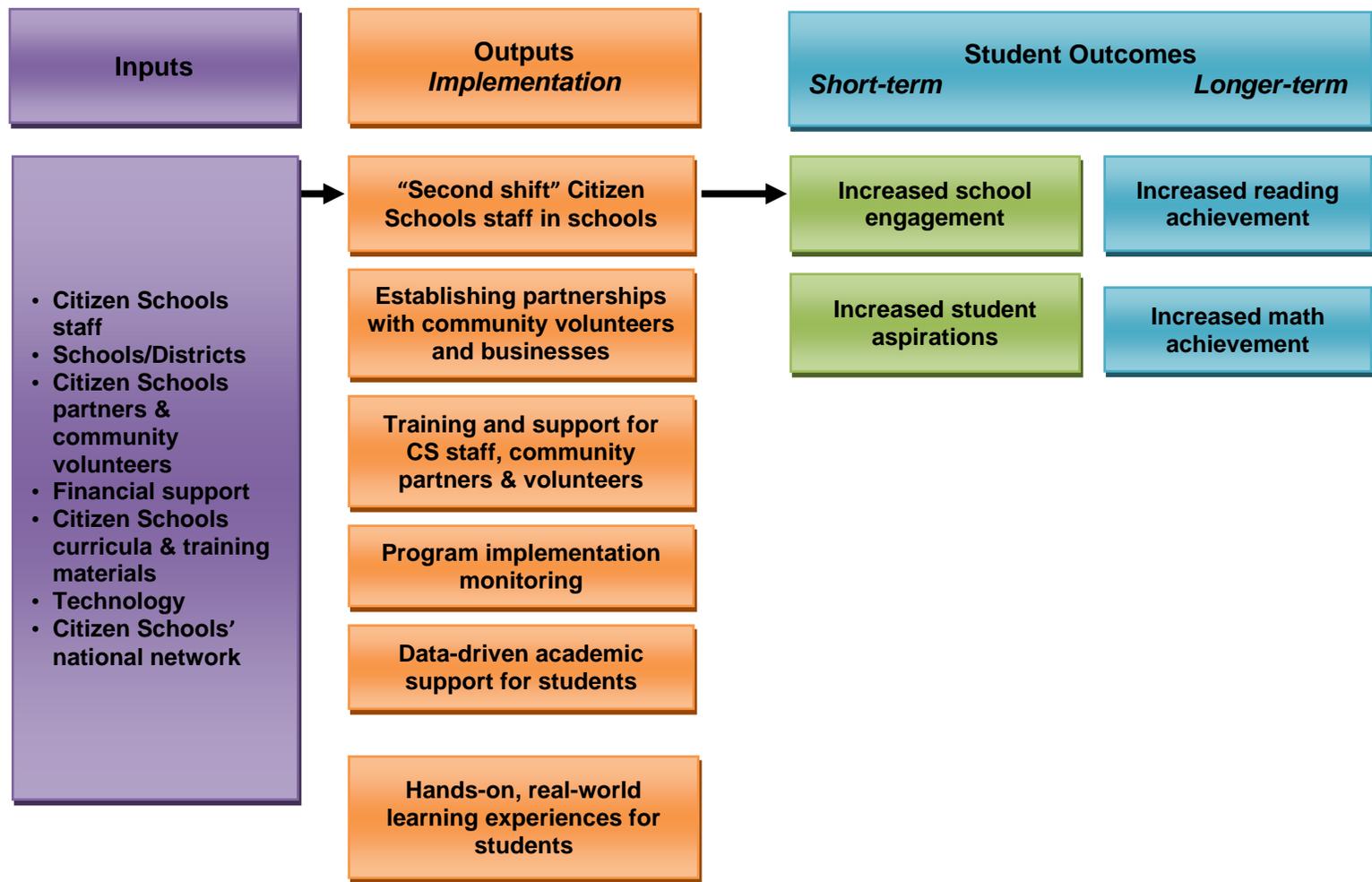
programming to students during the extended portion of the day, while TFs spend their mornings engaged in varied activities (e.g., providing support for the school, preparing for the afternoon programming). ELT programming generally begins around 3:00 PM, and concludes by 6:00 pm.

Although partner schools do not necessarily adhere to the same universal schedule network-wide, schools typically schedule activities across all three program components each week.

Through its systematic and loosely structured model, Citizen Schools provides consistency to students and their staff, and takes the burden of additional teaching away from first shift educators in their partner schools. Citizen Schools' ELT model also establishes clear expectations against which it can be evaluated. And, as noted above, the Citizen Schools ELT model is both similar to and different from other programs that include additional instructional time.

The evaluation of the Citizen Schools ELT Model incorporates the program elements described above into a logic model (Exhibit 1). The model illustrates the inputs, outputs, and expected outcomes, moving from left to right. The inputs represent the elements that, in combination, comprise the Citizen Schools ELT model, including the school/district, the Citizen Schools staff, partners and community volunteers, materials (e.g., curricula), supports, and technology. The outputs (e.g., activities/personnel represented in the model) include a second shift of ELT staff, establishing partnerships with community members and organizations, training, supporting, and monitoring Citizen Schools staff, and providing hands-on experiences for students. The underlying hypothesis is that if the model is implemented with fidelity, student engagement in school and student aspirations would increase (short-term outcomes), and correspondingly, student English/Language Arts (ELA) and math achievement, as measured by state standardized test scores, would then increase (longer-term outcomes).

Exhibit 1: Citizen Schools ELT Logic Model



## Study Design and Research Questions

The Citizen Schools ELT Evaluation examined how Citizen Schools ELT programming is being implemented across sites nationally, and assesses whether there are impacts of Citizen Schools ELT participation on engagement, aspirational, and academic outcomes.

### Key Study Design Features

- **Multi-site, multi-year study:** staggered cohorts of schools (2010-11 through 2014-15)
  - 35 schools in four cohorts have implemented Citizen Schools ELT for one or more years
  - The cumulative achievement results include up to 27 schools (Cohorts 1, 2, 3, and 4)
- **Implementation and outcome components**
  - Implementation focuses on Citizen Schools ELT programming
  - Non-academic outcome component focuses on student engagement and aspirational outcomes
  - Academic component uses quasi-experimental design to assess whether Citizen Schools has an impact on student achievement

This final report summary focuses on implementation and student outcomes from 2010-11 through the 2014-15 school years (achievement data are available only through the 2013-14 year). The implementation component of the study incorporates surveys, interviews, and site visits to assess how schools integrate Citizen Schools ELT into their school days, organizationally and instructionally. The data on implementation purposefully draw from multiple sources over different points in time to (1) ensure representation from the various stakeholders engaged in Citizen Schools ELT and (2) attempt to corroborate perspectives across stakeholder groups. Survey analyses assess the student engagement and aspirational outcomes from teacher, Citizen School staff, and student perspectives. Comparative analyses assess differences in these outcomes between Citizen Schools teachers and students and matched comparison individuals. The study also uses these data sources to assess the level of implementation more systematically in an implementation index.

The impact component of the study uses a comparative interrupted time series quasi-experimental (QED) research design; the design heeds the What Works Clearinghouse (WWC) guidance, and its sampling and analytic approaches are intended to meet WWC standards with reservations, which is the highest possible rating for a QED. The comparative interrupted time series is one of the strongest alternatives to a random control trial (RCT) to assess whether there are systematic differences in academic achievement for students in Citizen Schools ELT schools, compared to the same outcomes for their counterparts attending similar schools without Citizen Schools ELT. The study design relies upon carefully matching up to four local comparison schools to each Citizen Schools ELT campus, based on demographic and achievement profiles, to assess differences in academic achievement. Survey analyses are based on results from two of the four comparison schools for each Citizen Schools campus.<sup>3</sup>

The table below illustrates the study's data collection schedule.

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<sup>3</sup> If a Citizen Schools ELT campus exits the study, so too do its matched comparison school counterparts.

**Exhibit 2. Data Collection Schedule**

| Data Collection Activity               | Study Year<br>School Year |              |              |              |              |
|--|---------------------------|--------------|--------------|--------------|--------------|
|  | 1<br>2010–11              | 2<br>2011–12 | 3<br>2012–13 | 4<br>2013–14 | 5<br>2014–15 |
| Site visit (CS ELT only)               | ✓                         | ✓            | ✓            |              |              |
| Principal Telephone Interview (CS ELT) |                           | ✓            | ✓            | ✓            | ✓            |
| Principal Telephone Interview (MC)     |                           | ✓            | ✓            | ✓            |              |
| Campus Director Telephone Interview    |                           | ✓            | ✓            | ✓            | ✓            |
| Survey                                 |                           |              |              |              |              |
| *Student (CS ELT & MC)                 |                           | ✓            | ✓            |              |              |
| **Teacher (CS ELT & MC)                |                           | ✓            | ✓            | ✓            |              |
| CS staff (CS ELT only)                 |                           | ✓            | ✓            | ✓            |              |
| Extant (test score) data               | ✓                         | ✓            | ✓            | ✓            |              |

\*Student surveys were not collected in years 4 and 5.

\*\*Teacher surveys were administered in Citizen Schools ELT schools (not comparison schools) in year 4; no surveys were administered in year 5.

In 2014–15, interviews were conducted with a subset of Citizen Schools campus administrators and campus directors, focusing specifically on schools designated as high implementers in the 2013–14 school year.

The study's guiding research questions include one question about implementation, one about shorter-term non-academic outcomes, and one about longer-term academic outcomes:

- How successfully are schools implementing and integrating expanded learning opportunities into their school days?
- What are the differences between Citizen Schools ELT and MC schools on student engagement and aspirations?
- What are the differences between Citizen Schools ELT and MC schools on student achievement (e.g., on English/Language Arts (ELA) and math achievement test scores)?

## Key Findings

The study has found consistent patterns in survey, interview, and achievement findings. Implementation of the Citizen Schools ELT model takes time to establish and operate adequately, yet it also continues to vary substantially across Citizen Schools ELT schools, even as participating schools have demonstrably implemented several core principles of Citizen Schools ELT. Findings about short-term non-academic outcomes indicate some positive findings as well as some negative perceptions.

The data on student achievement in ELA and math indicated no statistically significant impacts of Citizen Schools ELT, on average. Exploratory subgroup analyses suggest a significant positive impact of Citizen Schools ELT on math achievement in the first year of implementation and a marginally significant positive effect of Citizen Schools ELT on 7<sup>th</sup> grade math achievement. In the context of other research about the impact of ELT on student achievement outcomes, these findings are not surprising. Few studies have found consistent positive outcomes, and the most positive

findings to date, from the most recent KIPP study (Tuttle et al., 2015) reflect implementation of a highly structured program model that emphasizes academic achievement rather than the considerably more flexible Citizen Schools ELT model that emphasizes varied learning opportunities designed to increase student engagement and aspirations.

Below, we summarize key findings about implementation and the implementation index, about student non-academic outcomes, and about impacts on student achievement.

### **Key Findings about Implementation**

Over the course of several years, common patterns in implementation have become more evident. Attention to planning, along with clear and early communication with both school and district partners about roles and responsibilities helped set the stage for smoother program launch and implementation. Once program operations began in earnest, schools faced a number of common challenges, including changes in district or school leadership, and therefore changes in priorities, as well as maintaining program consistency given high staff turnover among the Teaching Fellows.

Because Citizen Schools programming occurs primarily through its staff, recruitment, hiring, preparation and support of staff directly affect how the program operates and is perceived. Participating campuses experienced similar challenges over the study's duration, including training and experience, hiring practices, staff turnover, and staff diversity. Establishing strong working relationships early on was consistently described as essential, as was ensuring that staff had access to training that helped them understand local school needs. Citizen Schools Fellows' capacity to manage student behavior effectively and provide focused instruction was consistently reported as a challenge by Citizen School staff and campus administrators, and staff turnover was a challenge in about half the schools.

Integrating Citizen Schools staff into schools generally occurred through three mechanisms: 1) structured overlap and joint participation between the first and second shift staff; 2) alignment of content, pedagogy, and especially behavior management systems; and 3) establishing and maintaining relationships between stakeholder groups. Developing purposefully structured overlaps between first and second shifts generated benefits, goodwill, and enhanced integration efforts. In about half the schools, Citizen Schools staff had shared access to information about student performance, typically via schools' data systems or joint participation in meetings with first shift teachers. Integration also proceeded more smoothly when there were positive working relationships between Citizen Schools staff and first shift teachers.

Over the past several years, the Citizen Schools Program model has demonstrably changed in response to network schools' continued adaptations of core program elements and the national curricula. The Citizen Schools organization adjusted its approach to developing and using its national curricula to make it more responsive to schools' needs. Even as the national organization has become more flexible, network campuses continued to adapt core program elements to meet their own students' needs.

By the end of the 2014–15 school year, the Citizen Schools network included campuses in their second through fifth years of implementation. The network schools and the Citizen Schools organization have faced persistent questions about how to sustain school/district commitment and participation, particularly for schools relying upon time-limited federal funding. The two most

prevalent concerns include (1) financial sustainability, and (2) campus stability—and therefore programmatic sustainability—given frequent staff transitions.

### Implementing the Seven Key Elements of the Citizen Schools ELT Model across the Network and Over Time

Over the course of the Citizen Schools ELT evaluation, it has become and remains evident that implementation varies substantially across participating campuses. The Citizen Schools organization is keenly interested in understanding how the Citizen Schools ELT schools vary in their implementation of the model. The study team, working collaboratively with Citizen Schools, developed a summary metric, called the implementation index, to capture individual campus and network-wide progress on implementation of core Citizen Schools ELT program elements—the seven “non-negotiable” processes and activities that together, represent what successful implementation of the program would require. The implementation index draws from surveys administered in schools’ second and subsequent years of implementation as well as annual interviews. The index incorporates information from multiple school-based respondents, including principals, classroom teachers, Citizen Schools CDs and Citizen Schools Teaching Fellows.

The multi-dimensional index includes the following key elements of the Citizen Schools program model:

- 1) Planning;
- 2) Leadership;
- 3) Data collection;
- 4) Training and professional development;
- 5) Family/community engagement;
- 6) Alignment/coordination between partner school and CS; and
- 7) Perceptions of program quality.

Each school’s implementation (in a given year) is characterized as limited, moderate, or full (corresponding to ratings of 1, 2, or 3), for each of the seven core program constructs listed above. School ratings could vary between 7 (representing limited implementation of each construct) and 21 (full implementation across all seven constructs). The index provides information about progress, consistency, and variability—whether for individual campuses, for cohorts of schools that began implementation at specific times, or for the entire network, both at a given point in *time* (e.g., as of the 2012–13 academic year) as well as at a given point in *implementation* duration (e.g., as of the second year of program implementation).

Overall index scores remain clustered in the moderate range, with average scores hovering around 17 (out of 21) across multiple cohorts and up to four implementation years. There are few patterns evident in schools’ levels of implementation over time. While schools with lower index scores tended to exit the network over time, continuing schools’ implementation levels do not change substantially from one year to the next. The specific constructs schools were most consistently able to implement fully *across* implementation years include planning, leadership, perceived quality, and data collection. For example, 16 schools (of 19 for which index scores are available) in their second year, 9 (of 11) in their third year, and 3 (of 3) in their fourth year scored a “3” for the planning construct. Fewer schools implemented either the family and community engagement or alignment of partner school and Citizen Schools constructs fully, again, *across* implementation years.

## How Does Citizen Schools ELT Affect Student and Teacher Perceptions?

Survey findings help to describe teacher and student perceptions about the Citizen Schools ELT model, and provide some insight into whether and how the program is progressing toward the shorter-term outcomes depicted in the logic model. The results are consistent with implementation findings that some program elements are positively perceived (exposure to learning about colleges and careers), and that there are some ongoing puzzles and challenges (less positive perceptions of Citizen Schools staff).

Overall, significantly more students in Citizen Schools ELT campuses than the counterfactual reported positive behavioral engagement of peers, that the ELT program helped their self-esteem and pro-social behaviors, and that they participated in activities to help them learn about college and careers. At the same time, however, significantly more Citizen Schools students also reported concerns with Citizen Schools staff and the Citizen Schools ELT program than those comparison students who reported that they attended after-school programming.

Student and faculty staff perceptions differed on some dimensions. Specifically, significantly more Citizen Schools' ELT students indicated that they were positively engaged and had high aspirations, while more school teachers/Citizen Schools staff reported student engagement and student aspirations were a problem than occurred in schools without ELT.

## How Does Citizen Schools ELT Affect Student Achievement?

Following the recommendations of the U.S. Department of Education's What Works Clearinghouse (WWC) standards for rigorous designs, the student achievement analyses were divided into confirmatory (central hypotheses to the evaluation) and exploratory analyses (hypotheses that are important yet are not central and may not be well powered).<sup>4</sup> The data on student achievement in ELA and math indicated no statistically significant impacts of Citizen Schools ELT, on average. Exploratory subgroup analyses suggest a significant positive impact of Citizen Schools ELT on math achievement in the first year of implementation and a marginally significant positive effect of Citizen Schools ELT on 7<sup>th</sup> grade math achievement. In the context of other research about the impact of ELT on student achievement outcomes, these findings are not surprising. Few studies have found consistent positive outcomes, and the most positive findings to date, from the most recent KIPP study (Tuttle et al., 2015) reflect implementation of a highly structured program model that emphasizes academic achievement rather than the considerably more flexible Citizen Schools ELT model that emphasizes varied learning opportunities designed to increase student engagement and aspirations.

## Discussion

This final report provides a comprehensive overview of the Citizen Schools ELT model after five years of implementation. Over that time, the Citizen Schools ELT network has matured and expanded as new schools joined each year, and schools exited after one, two, three, or four years. The ELT program model has become more flexible as partner schools have refined and adapted the program model to meet their needs. Over the past five years, the study has examined both implementation and outcomes in detail.

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<sup>4</sup> [http://ies.ed.gov/ncee/wwc/pdf/reference\\_resources/wwc\\_procedures\\_v3\\_0\\_draft\\_standards\\_handbook.pdf](http://ies.ed.gov/ncee/wwc/pdf/reference_resources/wwc_procedures_v3_0_draft_standards_handbook.pdf)

The implementation-focused findings presented in this report center on implementation variability. Overall, the ELT schools are clearly committed to implementing Citizen Schools' ELT programming with fidelity, and at the same time, Citizen Schools has continued to recognize the need for flexibility with its campus partners. As a result, there is considerable variation across individual campuses in how the model is incorporated into their respective school contexts; indeed, that variability seems to be essential for the model to be adaptable across such diverse contexts. The implementation findings also highlight some of the challenges associated with launching a multi-faceted model in dynamic settings, coupled with built-in staffing changes.

The outcome-focused findings described in this report are mixed. The study finds both positive effects on student engagement and aspirations and negative perceptions about students' Citizen Schools ELT experiences. The confirmatory findings indicate no overall significant impact on student performance, as measured by standardized achievement test scores in ELA and math; exploratory findings indicated a significant positive impact of Citizen Schools ELT on math achievement in the first year of implementation and suggest a marginally significant positive effect of Citizen Schools ELT on 7<sup>th</sup> grade math achievement. Statically significant impacts on student achievement have proven persistently elusive and it is unclear whether this is a function of variability in implementation, model variation across campuses, statistical power, the fit between the intervention and the outcome measures, or some combination of the above.

Prior research on other interventions that include expanded learning time has yielded mixed evidence; few studies found positive achievement impacts, most studies found no achievement impacts, and some found negative effects. Perhaps unsurprisingly, interventions designed to improve academic achievement, such as KIPP, or Higher Achievement, were more likely to affect academic outcomes than were more holistic interventions designed to broaden students' enrichment, socio-emotional, or other non-academic experiences. One of the distinctive features of the Citizen Schools ELT model is its emphasis on non-academic learning opportunities that are hypothesized to be necessary precursors to improved achievement. Perhaps student engagement and aspirational short-term outcomes are more appropriate outcomes on which to focus, given Citizen Schools' emphasis on team-building and exposing students to novel, hands-on, real-world experiences through apprenticeships.

### Limitations

The study was designed to answer key questions about implementation and impact using the strongest possible approaches, yet the study's analytic approaches have some limitations. For example, data on implementation relied upon semi-structured interviews in which respondents could and did answer questions in varying detail, and, because campuses differed in the number (and availability) of stakeholders participating in interviews, the study was not necessarily able to interview staff members with comparable positions at each site. Additionally, interviews and surveys were completed after the ELT program had been introduced, and while student achievement data could be obtained retrospectively—dating back to before the program was implemented—data about school climate and short-term outcomes reflect experiences *after* schools had begun to implement Citizen Schools ELT, and may or may not reflect *changes* as a result of ELT.

Two other limitations are worth heeding: one, the study examines Citizen Schools' specific approach to ELT, and two, it uses a purposefully constructed sample of schools. The Citizen Schools ELT model is distinctive, and lessons derived from this study apply to this specific approach to ELT, and reflect the idiosyncrasies of the study sample. The study sample has experienced considerable

fluctuation over its duration, and while some attrition may occur because either schools or the Citizen Schools organization recognize the “fit” (or lack thereof) for the ELT model, the fluidity of the sample raises a concern about external validity and the sample’s representativeness. The study describes implementation progress and challenges for all 35 schools for at least one year of implementation—but the program is not currently designed as a one-year or even a two-year intervention. The cumulative results (both implementation and outcomes) are therefore based on a subset of schools and may not apply to all schools that had ever participated in the Citizen Schools network.

Finally, one other consideration is noteworthy. Performance on standardized achievement tests may not be the most sensitive measure of ELT’s potential impact on student learning. Perhaps achievement outcomes are too distal a measure for Citizen Schools’ ELT model, given its emphasis on such non-academic outcomes as student motivation, engagement, and aspiration, as well as on better understanding the high school application processes and what comes after secondary school (e.g., college and careers). Performance on core academic subject assessments is clearly important, but it may not be the right outcome for the ELT model.

## **Future Steps**

At the conclusion of this five-year evaluation, the Citizen Schools ELT initiative continues to anticipate its school partners’ needs, as new campuses join the network and some current school partners exit. The Citizen Schools’ ELT model has undergone some fundamental changes as well, responding to school partners and secular shifts in both academic and non-academic priorities. Citizen Schools’ programming will also likely adjust to changes in the education landscape resulting from the recently authorized Every Student Succeeds Act (ESSA), as the legislation simultaneously reduces federal reach into local education decisions and provides states and districts more control over teacher evaluation, standards, school turnarounds, and accountability. Given that Citizen Schools has focused chiefly on working with turnaround schools, the new legislation will undoubtedly influence not only how the organization engages new district and school partners, but also how it will adjust its programming and staffing. Hopefully the findings described in this report can provide useful information as the Citizen Schools organization plans for the future.

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# Envisioneers

## 2021-2022 Organizational Chart



**ARTICLES OF INCORPORATION**

**OF**

**ENVISIONEERS INC.**

**I.**

The name of this corporation is Envisioneers Inc.

**II.**

This corporation is a nonprofit public benefit corporation and is not organized for the private gain of any person. It is organized under the Nonprofit Public Benefit Corporation Law for public and charitable purposes. Consistent with section 501(c)(3) of the Internal Revenue Code of 1986, as amended, or the corresponding section of any future federal tax code (the "Code"), the specific purpose of this corporation is to build equity in education through various charitable and educational activities, including, but not limited to, operating an expanded learning program in a variety of educational institutions, demonstrating programs in the field of education and volunteerism and collecting and publishing data on this corporation's work and efficacy.

This corporation is organized and shall be operated exclusively for charitable and educational purposes within the meaning of section 501(c)(3) of the Code, including for such purposes, the making of distributions to organizations that qualify as exempt organizations under section 501(a) of the Code as organizations described in section 501(c)(3).

**III.**

This corporation shall have no members.

**IV.**

The name and address in the State of California of this corporation's initial agent for service of process is:

Maria Drake  
330 Twin Dolphin Drive, Suite 115  
Redwood City, CA 94065

**V.**

The initial street address and initial mailing address of the corporation is 330 Twin Dolphin Drive, Suite 115, Redwood City, CA 94065.

**VI.**

The property of this corporation is irrevocably dedicated to charitable and educational purposes set forth above. No part of the net earnings of the corporation shall inure to the benefit

of, or be distributable to its members, directors, trustees, officers, or other private persons, except that the corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the charitable and educational purposes set forth in Article II hereof.

No substantial part of the activities of the corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the corporation shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office.

Notwithstanding any other provisions of these articles, the corporation shall not carry on any other activities not permitted to be carried on (a) by a corporation exempt from federal income tax under section 501(a) of the Code as an organization described in section 501(c)(3) of the Code, or (b) by a corporation, contributions to which are deductible under Section 170(c)(2) of the Code.

In the event the corporation is ever determined to be a private foundation within the meaning of Section 509(a) of the Code, the corporation shall be subject to the following restrictions:

(a) The corporation shall distribute its income for each taxable year at such time and in such manner as not to become subject to the tax on undistributed income imposed by Section 4942 of the Code.

(b) The corporation shall not engage in any act of self-dealing as defined in Section 4941(d) of the Code, retain any excess business holdings as defined in Section 4943(c) of the Code, make any investments in such manner as to subject it to tax under Section 4944 of the Code, or make any taxable expenditure as defined in Section 4945(d) of the Code.

## **VII.**

Upon the dissolution or winding up of this corporation, its assets remaining after payment, or provision for payment, of all debts and liabilities of this corporation shall be distributed to a nonprofit fund, foundation or corporation which is organized and operated exclusively for charitable purposes and which has established its tax-exempt status under Section 501(c)(3) of the Code.

IN WITNESS WHEREOF, the undersigned incorporator has executed these Articles of Incorporation on the date below.

DATE: December 28 2020

*Maria Drake*

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Maria Drake, Incorporator

**Application for Recognition of Exemption  
Under Section 501(c)(3) of the Internal Revenue Code**

Do not enter social security numbers on this form as it may be made public.

Go to [www.irs.gov/Form1023](http://www.irs.gov/Form1023) for instructions and the latest information.**Note:** *If exempt status is approved, this application will be open for public inspection.*

Use the "?" buttons throughout this form for help in completing this application. For additional help, call IRS Exempt Organizations Customer Account Services toll-free at 1-877-829-5500.

If you cannot complete required responses within the textbox limits throughout this form, upload your additional narratives with the other required documents.

**Part I Identification of Applicant**

|   |  |  |                                       |  |                              |
|---|--|--|---------------------------------------|--|------------------------------|
| <b>1a</b> Full Name of Organization (exactly as it appears in your organizing document)<br>ENVISIONEERS INC |  |  | <b>b</b> Care of Name (if applicable) |  |                              |
| <b>c</b> Mailing Address (Number, street and room/suite)<br>330 TWIN DOLPHIN DRIVE SUITE 115                |  | <b>d</b> City<br>REDWOOD CITY                  |                                       | <b>e</b> Country<br>UNITED STATES  |                              |
| <b>f</b> State<br>CALIFORNIA  |  | <b>g</b> Zip Code + 4<br>94065                 | <b>h</b> Foreign Province (or State)  |  | <b>i</b> Foreign Postal Code |
| <b>2</b> Employer Identification Number<br>86-2828543   |  | <b>3</b> Month Tax Year Ends<br>JUNE           |                                       | <b>4</b> Person to Contact if More Information is Needed (officer, director, trustee, or authorized representative)<br>ROBERT LOUTHIAN |                              |
| <b>5</b> Contact Telephone Number<br>415-680-5473   |  | <b>6</b> Fax Number (optional)<br>202-591-2942 |                                       | <b>7</b> User Fee Submitted<br>\$600.00  |                              |
| <b>8</b> Organization's Website (if available):   |  |  |                                       |  |                              |
| <b>9</b> List the names, titles, and mailing addresses of your officers, directors, and/or trustees.        |  |  |                                       |  |                              |
| First Name: ROBERT  |  | Last Name: FRANCE                              |                                       | Title: DIRECTOR  |                              |
| Mailing Address: 330 TWIN DOLPHIN DRIVE SUITE 115   |  | City: REDWOOD CITY                             |                                       |  |                              |
| State (or Province): CALIFORNIA (CA)  |  | Zip Code (or Foreign Postal Code): 94065       |                                       |  |                              |
| First Name: WESLEY  |  | Last Name: FORD                                |                                       | Title: DIRECTOR  |                              |
| Mailing Address: 330 TWIN DOLPHIN DRIVE SUITE 115   |  | City: REDWOOD CITY                             |                                       |  |                              |
| State (or Province): CALIFORNIA (CA)  |  | Zip Code (or Foreign Postal Code): 94065       |                                       |  |                              |
| First Name: ITZIK   |  | Last Name: GILBOA                              |                                       | Title: DIRECTOR  |                              |
| Mailing Address: 330 TWIN DOLPHIN DRIVE SUITE 115   |  | City: REDWOOD CITY                             |                                       |  |                              |
| State (or Province): CALIFORNIA (CA)  |  | Zip Code (or Foreign Postal Code): 94065       |                                       |  |                              |
| First Name: MARIA   |  | Last Name: DRAKE                               |                                       | Title: PRESIDENT   |                              |
| Mailing Address: 330 TWIN DOLPHIN DRIVE SUITE 115   |  | City: REDWOOD CITY                             |                                       |  |                              |
| State (or Province): CALIFORNIA (CA)  |  | Zip Code (or Foreign Postal Code): 94065       |                                       |  |                              |
| First Name: KARIN   |  | Last Name: MEYER                               |                                       | Title: DIRECTOR AND SECRETARY  |                              |
| Mailing Address: 330 TWIN DOLPHIN DRIVE SUITE 115   |  | City: REDWOOD CITY                             |                                       |  |                              |
| State (or Province): CALIFORNIA (CA)  |  | Zip Code (or Foreign Postal Code): 94065       |                                       |  |                              |

 Check here to add more officers, directors, and/or trustees.

Annie Khalid (Director), 330 Twin Dolphin Drive, Suite 115, Redwood City, CA 94065 Kelly Stuart (Director), 330 Twin Dolphin Drive, Suite 115, Redwood City, CA 94065 Alena Taylor (Director), 330 Twin Dolphin Drive, Suite 115, Redwood City, CA 94065 Bret Wallace (Director, Treasurer), 330 Twin Dolphin Drive, Suite 115, Redwood City, CA 94065 Jamie Zepeda (Director), 330 Twin Dolphin Drive, Suite 115, Redwood City, CA 94065 Tracy Meng (Director), 330 Twin Dolphin Drive, Suite 115, Redwood City, CA 94065

**Part II Organizational Structure**

**1** You must be a corporation, limited liability company (LLC), unincorporated association, or trust to be tax exempt.

Select your type of organization.

Corporation

At the end of this form, you must upload a copy of your articles of incorporation (and any amendments) that shows proof of filing with the appropriate state agency.

Limited Liability Company (LLC)

At the end of this form, you must upload a copy of your articles of organization (and any amendments) that shows proof of filing with the appropriate state agency. Also, if you adopted an operating agreement, upload a copy, along with any amendments.

Unincorporated Association

At the end of this form, you must upload a copy of your articles of association, constitution, or other similar organizing document that is dated and includes at least two signatures. Include signed and dated copies of any amendments.

Trust

At the end of this form, you must upload a signed and dated copy of your trust agreement. Include signed and dated copies of any amendments.

**2** Enter the date you formed. (MM/DD/YYYY)

12/30/2020

**3** Select your state (or U.S. territory) of incorporation or other formation. If you were formed under the laws of a foreign country, select Foreign Country.

California

**4** Have you adopted bylaws? If "Yes," at the end of this form, upload a current copy showing the date of adoption. If "No," explain how you select your officers, directors, or trustees.

Yes  No

**5** Are you a successor to another organization?

Yes  No

Answer "Yes" if you have taken or will take over the activities of another organization, you took over 25% or more of the fair market value of the net assets of another organization, or you were established upon the conversion of an organization from for-profit to nonprofit status. If "Yes," complete Schedule G.

**Part III Required Provisions in Your Organizing Document**

Part III helps ensure that, when you submit this application, your organizing document contains the required provisions to meet the organizational test under section 501(c)(3).

If you cannot check "Yes" in both Lines 1 and 2, your organizing document does not meet the organizational test. DO NOT file this application until you have amended your organizing document. Remember to upload your original and amended organizing documents at the end of this form.

- 1** Section 501(c)(3) requires that your organizing document limit your purposes to one or more exempt purposes within section 501(c)(3), such as charitable, religious, educational, and/or scientific purposes.

*The following is an example of an acceptable purpose clause: The organization is organized exclusively for charitable, religious, educational, and scientific purposes under section 501(c)(3) of the Internal Revenue Code, or corresponding section of any future federal tax code.*

Does your organizing document meet this requirement?

Yes  No

- 1a** State specifically where your organizing document meets this requirement, such as a reference to a particular article or section in your organizing document (Page/Article/Paragraph):

Article II

- 2** Section 501(c)(3) requires that your organizing document provide that upon dissolution, your remaining assets be used exclusively for section 501(c)(3) exempt purposes, such as charitable, religious, educational, and/or scientific purposes. Depending on your entity type and the state in which you are formed, this requirement may be satisfied by operation of state law.

*The following is an example of an acceptable dissolution clause: Upon the dissolution of this organization, assets shall be distributed for one or more exempt purposes within the meaning of section 501(c)(3) of the Internal Revenue Code, or corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for a public purpose.*

Does your organizing document meet this requirement?

Yes  No

- 2a** State specifically where your organizing document meets this requirement, such as a reference to a particular article or section in your organizing document (Page/Article/Paragraph) or indicate that you rely on state law.

Article VII

**Part IV Your Activities**

1 Describe completely and in detail your past, present, and planned activities. Do not refer to or repeat the purposes in your organizing document. For each past, present, or planned activity, include information that answers the following questions:

- a. What is the activity?
- b. Who conducts the activity?
- c. Where is the activity conducted?
- d. What percentage of your total time is allocated to the activity?
- e. How is the activity funded (for example, donations, fees, etc.) and what percentage of your overall expenses is allocated to this activity?
- f. How does the activity further your exempt purposes?

Citizen Schools, Inc, an existing Section 501(c)(3) organization, operates a variety of educational programs including the Expanded Learning Time (ELT) program. The ELT Program is operated primarily in Massachusetts and California. Citizen Schools recently made the determination to spin off its ELT Program in California to a newly-created charitable organization, so that Citizen Schools could focus on its other charitable and educational activities.

Envisioneers Inc. was created to be the charitable organization that takes over the ELT Program activities in California. The ELT Program is specifically designed to engage students during the crucial middle grades, a time when too many young people veer off track, and is implemented in partnership with urban middle public schools. Envisioneers will continue to strive to consistently align the ELT Program with advances in brain science and educational research that increasingly call for interventions that bring social-emotional learning, 21st century skills, hands on STEM projects, and content experts into underserved classrooms.

Envisioneers will work with underserved middle schools to provide academic intervention and high school and college pathway programming throughout the school day and in the afterschool hours. Envisioneers' staff provide critical support to students in person and virtually since the COVID-19 pandemic. At the very heart of its strategy are Apprenticeships hands-on learning experiences in which adult mentors from the community and local corporations, work side-by-side with students to build robots, design apps, hold mock trials, create investment portfolios, and more. Each apprenticeship incorporates hands-on, relevant engaging activities, which develops critical skills such as collaboration or innovation, and incorporates discussion about the education required for a career in that field.

Envisioneers currently works with seven schools in Oakland, San Jose, and Redwood City. On average, 88% of its students with whom Envisioneers works qualify for free and reduced priced lunch, 55% are English Language Learners, and 92% are students of color. Envisioneers' mission is to close the opportunity and achievement gaps for low income students. Envisioneers will serve approximately 100-110 students per site in the afterschool time and another 30-150 students per site with its in-school support on a daily basis.

Envisioneers will be funded through both public and private funds. Envisioneers' public revenue will come primarily from the State of California through the California After School Education and Safety funds in the form of general grants/contributions. Envisioneers also receives some funding for use of Americorps service members in its program. All other funding is from general contributions from the general public.

**Part IV** Your Activities (continued)

2 Enter the 3-character NTEE Code that best describes your activities.

Or check here if you want the IRS to select the NTEE Code that best describes your activities.

3 Do any of your programs limit the provision of goods, services, or funds to a specific individual or group of specific individuals? For example, answer "Yes" if goods, services, or funds are provided only for a particular individual, your members, individuals who work for a particular employer, or graduates of a particular school. If "Yes," explain the limitation and how recipients are selected for each program.

 Yes No

4 Do any individuals who receive goods, services, or funds through your programs have a family or business relationship with any officer, director, trustee, or with any of your highest compensated employees or highest compensated independent contractors? If "Yes," explain how these related individuals are eligible for goods, services, or funds.

 Yes No

5 Do you or will you support or oppose candidates in political campaigns in any way? If "Yes," explain.

 Yes No

6 Do you or will you attempt to influence legislation? If "Yes," explain how you attempt to influence legislation.

 Yes No

**Part IV** Your Activities (continued)

- 6a** Did you or will you make an election to have your legislative activities measured by expenditures by filing Form 5768? If "No," describe whether your attempts to influence legislation are a substantial part of your activities. Include the time and money spent on your attempts to influence legislation as compared to your total activities.  Yes  No

- 7** Do you or will you publish, own, or have rights in music, literature, tapes, artworks, choreography, scientific discoveries, or other intellectual property? If "Yes," describe who owns or will own any copyrights, patents, or trademarks, whether fees are or will be charged, how the fees are determined, and how any items are or will be produced, distributed, and marketed.  Yes  No

- 8** Do you or will you provide educational information to the general public on budgeting, personal finance, financial literacy, saving and spending practices, the sound use of consumer credit, and/or assist individuals and families with financial problems such as credit card debt and foreclosure by providing them with counseling? If "Yes," explain.  Yes  No

- 9** Do you or will you make grants, loans, or other distributions to organizations? If "Yes," describe the type and purpose of the grants, loans, or distributions, how you select your recipients including submission requirements (such as grant proposals or application forms), and the criteria you use or will use to select recipients. Also describe how you ensure the grants, loans, and other distributions are or will be used for their intended purposes (including whether you require periodic or final reports on the use of funds and any procedures you have if you identify that funds are not being used for their intended purposes). Finally, describe the records you keep with respect to grants, loans, or other distributions you make and identify any recipient organizations and any relationships between you and the recipients. If "No," continue to Line 10.  Yes  No

**Part IV** Your Activities (continued)

- 9a** Do you or will you make grants, loans, or other distributions to organizations that are not recognized by the IRS as tax exempt under section 501(c)(3)? If "Yes," name and/or describe the non-section 501(c)(3) organizations to whom you do or will make distributions and explain how these distributions further your exempt purposes.  Yes  No

- 9b** Do you or will you make grants, loans, or other distributions to foreign organizations? If "Yes," name each foreign organization (if not already provided), the country and region within each country in which each foreign organization operates, any relationship you have with each foreign organization, and whether the foreign organization accepts contributions earmarked for a specific country or organization (if so, specify which countries or organizations). If "No," continue to Line 10.  Yes  No

- 9c** Do your contributors know that you have ultimate authority to use contributions made to you at your discretion for purposes consistent with your exempt purposes? If "Yes," describe how you relay this information to contributors.  Yes  No

- 9d** Do you or will you make pre-grant inquiries about the recipient organization? If "Yes," describe these inquiries, including whether you inquire about the recipient's financial status, its tax-exempt status under the Internal Revenue Code, its ability to accomplish the purpose for which the resources are provided, and other relevant information.  Yes  No

- 9e** Do you or will you use any additional procedures to ensure that your distributions to foreign organizations are used in furtherance of your exempt purposes? If "Yes," describe these procedures, including periodic reporting requirements, auditing grantees, site visits by your employees or compliance checks by impartial experts, etc., to verify that grant funds are being used appropriately.  Yes  No

**Part IV** Your Activities (continued)

**9f** Do you share board members or other key personnel with the recipient organization(s)? If "Yes," identify the relationships.  Yes  No

**9g** When you make grants, loans, or other distributions to foreign organizations, will you check the OFAC List of Specially Designated Nationals and Blocked Persons for names of individuals and entities with whom you are dealing to determine if they are included on the list? Describe any other practices you will engage in to ensure that foreign expenditures or grants are not diverted to support terrorism or other non-charitable activities.  Yes  No

**9h** Will you comply with all United States statutes, executive orders, and regulations that restrict or prohibit U.S. persons from engaging in transactions and dealings with designated countries, entities, or individuals, or otherwise engaging in activities in violation of economic sanctions administered by OFAC?  Yes  No

**9i** Will you acquire from OFAC the appropriate license and registration where necessary?  Yes  No

**10** Do you or will you operate in a foreign country or countries? If "Yes," name each foreign country and region within each country in which you do or will operate and describe your operations in each one. If "No," continue to Line 11.  Yes  No

**10a** When you conduct activities in foreign countries, will you check the OFAC List of Specially Designated Nationals and Blocked Persons for names of individuals and entities with whom you are dealing to determine if they are included on the list? Describe any other practices you will engage in to ensure that foreign expenditures or grants are not diverted to support terrorism or other non-charitable activities.  Yes  No

**10b** Will you comply with all United States statutes, executive orders, and regulations that restrict or prohibit U.S. persons from engaging in transactions and dealings with designated countries, entities, or individuals, or otherwise engaging in activities in violation of economic sanctions administered by OFAC?  Yes  No

**10c** Will you acquire from OFAC the appropriate license and registration where necessary?  Yes  No

**Part IV** Your Activities (continued)

- 11 Are you a sponsoring organization that maintains one or more donor advised funds? If yes, please provide a complete description of your program, including the specific advice that such donors may provide. Describe in detail the control you maintain (or will maintain) over the use of the funds.  Yes  No

- 12 Do you or will you operate a school?  Yes  No  
If "Yes," complete Schedule B.

- 13 Is your principal purpose or function to provide hospital or medical care?  Yes  No  
If "Yes," complete Schedule C.

- 14 Do you or will you provide low-income housing?  Yes  No  
If "Yes," complete Schedule F.

- 15 Do you or will you provide scholarships, fellowships, educational loans, or other educational grants to individuals, including grants for travel, study, or other similar purposes?  Yes  No  
If "Yes," complete Schedule H - Section I.

- 16 Check any of the following fundraising activities that you will undertake (check all that apply):

- |  |  |
|--|--|
| <input checked="" type="checkbox"/> Website, mail, email, personal, and/or phone solicitations | <input checked="" type="checkbox"/> Foundation grant solicitations |
| <input type="checkbox"/> Receive donations from another organization's website                 | <input checked="" type="checkbox"/> Government grant solicitations |
| <input type="checkbox"/> Bingo   | <input type="checkbox"/> Other (non-bingo) gaming activities       |
| <input type="checkbox"/> Other (describe)  |  |

- We will not engage in fundraising activities.

- 17 Do you or will you engage in fundraising activities for other organizations? If "Yes," describe these arrangements, including the names or descriptions of the organizations for which you raise funds.  Yes  No

**Part V Compensation and Other Financial Arrangements**

- 1** Do you or will you compensate officers, directors, or trustees, or do or will you have highest compensated employees, or highest compensated independent contractors? If "No," continue to Line 2.  Yes  No

In establishing compensation for your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors:

- 1a** Do or will the individuals that approve compensation arrangements follow a conflict of interest policy?  Yes  No
- 1b** Do or will you approve compensation arrangements in advance of paying compensation?  Yes  No
- 1c** Do or will you document in writing the date and terms of approved compensation arrangements?  Yes  No
- 1d** Do or will you record in writing the decision made by each individual who decided or voted on compensation arrangements?  Yes  No
- 1e** Do or will you approve compensation arrangements based on information about compensation paid by similarly situated taxable or tax-exempt organizations for similar services, current compensation surveys compiled by independent firms, or actual written offers from similarly situated organizations?  Yes  No
- 1f** Do or will you record in writing both the information on which you relied to base your decision and its source?  Yes  No
- 1g** Do or will you have any other practices you use to set reasonable compensation? If "Yes," describe these practices.  Yes  No

- 2** Have you adopted a conflict of interest policy consistent with the sample conflict of interest policy in Appendix A to the instructions? If you are a hospital, answer "Yes" if your conflict of interest policy includes provisions consistent with the additional healthcare related provisions in the sample document. If "No," describe the procedures you will follow to ensure that persons who have a conflict of interest will not have influence over setting their own compensation or regarding business deals with themselves.  Yes  No

- 3** Do you or will you compensate any of your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors through non-fixed payments, such as discretionary bonuses or revenue-based payments? If "Yes," describe all non-fixed compensation arrangements, including how the amounts are determined, who is eligible for such arrangements, whether you place a limitation on total compensation, and how you determine or will determine that you pay no more than reasonable compensation for services.  Yes  No

**Part V Compensation and Other Financial Arrangements** (continued)

- 4 Do you or will you purchase or sell any goods, services, or assets from or to: (i) any of your officers, directors, or trustees; (ii) any family of any of your officers, directors, or trustees; (iii) any organizations in which any of your officers, directors, or trustees are also officers, directors, or trustees, or in which any individual officer, director, or trustee owns more than a 35% interest; (iv) your highest compensated employees; or (v) your highest compensated independent contractors? If "Yes," describe any such transactions that you made or intend to make, with whom you make or will make such transactions, how the terms are or will be negotiated at arm's length, and how you determine you pay no more than fair market value or you are paid at least fair market value.  Yes  No

Envisioneers may contract with a business on an occasional basis that is owned, in whole or in part, by a family member of a director or officer of Envisioneers. There are no signed agreements at this time. In the event Envisioneers contracts with the family member's business for any services, such arrangements shall be reviewed and approved by disinterested members of Envisioneers Board of Directors. Any fees charged by such business to Envisioneers will be at or below what such business charges its other customers.

- 5 Do you or will you have any leases, contracts, loans, or other agreements with: (i) your officers, directors, or trustees; (ii) any family of any of your officers, directors, or trustees; (iii) any organizations in which any of your officers, directors, or trustees are also officers, directors, or trustees, or in which any individual officer, director, or trustee owns more than a 35% interest; (iv) your highest compensated employees; or (v) your highest compensated independent contractors? If "Yes," describe any written or oral arrangements that you made or intend to make, with whom you have or will have such arrangements, how the terms are or will be negotiated at arm's length, and how you determine you pay no more than fair market value or you are paid at least fair market value.  Yes  No

- 6 Do you or will you contract with another organization to develop, build, market, or finance your facilities?  Yes  No  
If "Yes," describe each facility, the role of the other organization, and any business or family relationship between the organization and your officers, directors, or trustees. Explain how that entity is selected, how the terms of any contract(s) are negotiated at arm's length, and how you determine you will pay no more than fair market value for services.

**Part V Compensation and Other Financial Arrangements** *(continued)*

- 7 Does or will someone other than your own employees or volunteers manage your activities or facilities?  Yes  No
- If "Yes," describe the activities or facilities that will be managed by others, the names of the persons or organizations that manage or will manage your activities or facilities, and any business or family relationship between the organization and your officers, directors, or trustees. Explain how these managers were or will be selected, how the terms of any contracts or other agreements were or will be negotiated, and how you determine you will pay no more than fair market value for services.

- 8 Do you participate in any joint ventures, including partnerships or limited liability companies treated as partnerships, in which you share profits and losses with partners? If "Yes," state your ownership percentage in each joint venture, list your investment in each joint venture, describe the tax status of other participants in each joint venture (including whether they are section 501(c)(3) organizations), describe the activities of each joint venture, describe how you exercise control over the activities of each joint venture, and describe how each joint venture furthers your exempt purposes.  Yes  No

**Part VI Financial Data**

- 1 Select the option that best describes you to determine the years of revenues and expenses you need to provide.
- You completed less than one tax year.  
Provide a total of three years of financial information (including the current year and two future years of reasonable and good faith projections of your future finances) in the following Statement of Revenues and Expenses.
- You completed at least one tax year but fewer than five.  
Provide a total of four years financial information (including the current year and three years of actual financial information or reasonable and good faith projections of your future finances) in the following Statement of Revenues and Expenses.
- You completed five or more tax years.  
Provide financial information for your five most recent tax years (including the current year) in the following Statement of Revenues and Expenses.

**Part VI** Financial Data (continued)**A. Statement of Revenues and Expenses**

| Type of revenue   | Current tax year                   | 4 prior tax years or 2 succeeding tax years |                                    |                          |                          |
|---|------------------------------------|---|------------------------------------|--------------------------|--------------------------|
|   | From: 12/30/2020<br>To: 06/30/2021 | From: 07/01/2021<br>To: 06/30/2022          | From: 07/01/2022<br>To: 06/30/2023 | From: _____<br>To: _____ | From: _____<br>To: _____ |
| <b>1</b> Gifts, grants, and contributions received (do not include unusual grants)  | \$2,342,979                        | \$2,608,229                                 | \$2,991,029                        |                          |                          |
| <b>2</b> Membership fees received   |                                    |   |                                    |                          |                          |
| <b>3</b> Gross investment income  |                                    |   |                                    |                          |                          |
| <b>4</b> Net unrelated business income  |                                    |   |                                    |                          |                          |
| <b>5</b> Taxes levied for your benefit  |                                    |   |                                    |                          |                          |
| <b>6</b> Value of services or facilities furnished by a governmental unit without charge (not including the value of services generally furnished to the public without charge)                       |                                    |   |                                    |                          |                          |
| <b>7</b> Any revenue not otherwise listed above or in lines 9 - 12 below (provide an itemized list below)   |                                    |   |                                    |                          |                          |
| <b>8</b> Total of lines 1 through 7   | \$2,342,979                        | \$2,608,229                                 | \$2,991,029                        | \$0                      | \$0                      |
| <b>9</b> Gross receipts from admissions, merchandise sold or services performed, or furnishing of facilities in any activity that is related to your exempt purposes (provide an itemized list below) |                                    |   |                                    |                          |                          |
| <b>10</b> Total of lines 8 and 9  | \$2,342,979                        | \$2,608,229                                 | \$2,991,029                        | \$0                      | \$0                      |
| <b>11</b> Net gain or loss on sale of capital assets (provide an itemized list below)   |                                    |   |                                    |                          |                          |
| <b>12</b> Unusual grants (provide an itemized list below)   |                                    |   |                                    |                          |                          |
| <b>13</b> Total Revenue (add lines 10 through 12)   | \$2,342,979                        | \$2,608,229                                 | \$2,991,029                        | \$0                      | \$0                      |
| Type of expense   | Current tax year                   | 4 prior tax years or 2 succeeding tax years |                                    |                          |                          |
| <b>14</b> Fundraising expenses  |                                    |   |                                    |                          |                          |
| <b>15</b> Contributions, gifts, grants, and similar amounts paid out (provide an itemized list below)   |                                    |   |                                    |                          |                          |
| <b>16</b> Disbursements to or for the benefit of members (provide an itemized list below)   |                                    |   |                                    |                          |                          |
| <b>17</b> Compensation of officers, directors, and trustees   |                                    |   |                                    |                          |                          |
| <b>18</b> Other salaries and wages  | \$1,466,358                        | \$2,212,092                                 | \$2,515,664                        |                          |                          |
| <b>19</b> Interest expense  |                                    |   |                                    |                          |                          |
| <b>20</b> Occupancy (rent, utilities, etc.)   | \$30,000                           | \$30,600                                    | \$31,212                           |                          |                          |
| <b>21</b> Depreciation and depletion  |                                    |   |                                    |                          |                          |
| <b>22</b> Professional fees   | \$185,000                          | \$185,000                                   | \$185,000                          |                          |                          |
| <b>23</b> Any expense not otherwise classified, such as program services (provide an itemized list below)   | \$215,000                          | \$223,750                                   | \$228,000                          |                          |                          |
| <b>24</b> Total Expenses (add lines 14 through 23)  | \$1,896,358                        | \$2,651,442                                 | \$2,959,876                        | \$0                      | \$0                      |

**25** Itemized financial data

See attached supplemental response.

**Part VI** Financial Data (continued)

| <b>B. Balance Sheet (for your most recently completed tax year)</b> |   | Year End: 12/31/2020 |
|---|---|----------------------|
| <b>Assets</b>   |   |                      |
| <b>1</b>  | Cash  | \$0                  |
| <b>2</b>  | Accounts receivable, net  |                      |
| <b>3</b>  | Inventories   |                      |
| <b>4</b>  | Bonds and notes receivable (provide an itemized list below)             |                      |
| <b>5</b>  | Corporate stocks (provide an itemized list below)                       |                      |
| <b>6</b>  | Loans receivable (provide an itemized list below)                       |                      |
| <b>7</b>  | Other investments (provide an itemized list below)                      |                      |
| <b>8</b>  | Depreciable assets (provide an itemized list below)                     |                      |
| <b>9</b>  | Land  |                      |
| <b>10</b>   | Other assets (provide an itemized list below)                           |                      |
| <b>11</b>   | Total Assets (add lines 1 through 10)                                   | \$0                  |
| <b>Liabilities</b>  |   |                      |
| <b>12</b>   | Accounts payable  | \$0                  |
| <b>13</b>   | Contributions, gifts, grants, etc. payable                              |                      |
| <b>14</b>   | Mortgages and notes payable (provide an itemized list below)            |                      |
| <b>15</b>   | Other liabilities (provide an itemized list below)                      |                      |
| <b>16</b>   | Total Liabilities (add lines 12 through 15)                             | \$0                  |
| <b>Fund Balances or Net Assets</b>                                  |   |                      |
| <b>17</b>   | Total fund balances or net assets                                       |                      |
| <b>18</b>   | Total Liabilities and Fund Balances or Net Assets (add lines 16 and 17) | \$0                  |

**19** Itemized financial data

**Part VII Foundation Classification**

Part VII is designed to classify you as an organization that is either a private foundation or a public charity. Public charity classification is a more favorable tax status than private foundation classification. If you are a private foundation, this part will further determine whether you are a private operating foundation.

**1** Select the foundation classification you are requesting from the list below.

- You are described in 509(a)(1) and 170(b)(1)(A)(vi) as an organization that receives a substantial part of its financial support in the form of contributions from publicly supported organizations, from a governmental unit, or from the general public.
- You are described in 509(a)(2) as an organization that normally receives not more than one-third of its financial support from gross investment income and receives more than one-third of its financial support from contributions, membership fees, and gross receipts from activities related to its exempt functions (subject to certain exceptions).
- You are described in 509(a)(1) and 170(b)(1)(A)(i) as a church or a convention or association of churches. Complete Schedule A.
- You are described in 509(a)(1) and 170(b)(1)(A)(ii) as a school. Complete Schedule B.
- You are described in 509(a)(1) and 170(b)(1)(A)(iii) as a hospital, a cooperative hospital service organization, or a medical research organization operated in conjunction with a hospital. Complete Schedule C.
- You are described in 509(a)(1) and 170(b)(1)(A)(iv) as an organization operated for the benefit of a college or university that is owned or operated by a governmental unit.
- You are described in 509(a)(1) and 170(b)(1)(A)(ix) as an agricultural research organization directly engaged in the continuous active conduct of agricultural research in conjunction with a college or university.
- You are described in 509(a)(3) as an organization supporting either one or more organizations described in 509(a)(1) or 509(a)(2) or a publicly supported section 501(c)(4), (5), or (6) organization. Complete Schedule D.
- You are described in 509(a)(4) as an organization organized and operated exclusively for testing for public safety.
- You are a publicly supported organization and would like the IRS to decide your correct classification.
- You are a private foundation.

**1a** As a private foundation, section 508(e) requires special provisions in your organizing document in addition to those that apply to all organizations described in section 501(c)(3). Check this box to confirm that your organizing document includes these provisions or you rely on state law.

State specifically where your organizing document meets this requirement, such as a reference to a particular article or section in your organizing document (Page/Article/Paragraph) or state that you rely on state law.

**1b** Do you or will you provide scholarships, fellowships, educational loans, or other educational grants to individuals, including grants for travel, study, or other similar purposes?  Yes  No  
If "Yes," complete Schedule H - Section II.

**1c** Are you a private operating foundation?  Yes  No

To be a private operating foundation you must engage directly in the active conduct of charitable, religious, educational, and similar activities, as opposed to indirectly carrying out these activities by providing grants to individuals or other organizations.

**Part VII Foundation Classification** *(continued)*

- 1d** Describe how you meet the requirements for private operating foundation status, including how you meet the income test and either the assets test, the endowment test, or the support test. If you've been in existence for less than one year, describe how you are likely to satisfy the requirements for private operating foundation status.

- 2** If you have been in existence more than 5 years, you must confirm your public support status. To confirm your qualification as a public charity described in 509(a)(1) and 170(b)(1)(A)(vi) in existence for five or more tax years, you must have received one-third or more of your total support from governmental agencies, contributions from the general public, and contributions or grants from other public charities; or 10% or more of your total support from governmental agencies, contributions from the general public, and contributions or grants from other public charities and the facts and circumstances indicate you are a publicly supported organization. Calculate whether you meet this support test for your most recent five-year period.

- i.** Did you receive contributions from any person, company, or organization whose gifts totaled more than the 2% amount of line 8 in Part VI-A?  Yes  No

If "Yes," identify each person, company, or organization by letter (A, B, C, etc.) and indicate the amount contributed by each. Keep a list showing the name of and amount contributed by each of these donors for your records.

- ii.** Based on your calculations, did you receive at least one-third of your support from public sources or did you normally receive at least 10 percent of your support from public sources and you have other characteristics of a publicly supported organization?  Yes  No

- 2a** If you have been in existence more than 5 years, you must confirm your public support status. To confirm your qualification as a public charity described in 509(a)(2) in existence for five or more tax years, you must have normally received more than one-third of your support from contributions, membership fees, and gross receipts from activities related to your exempt functions, or a combination of these sources, and not more than one-third of your support from gross investment income and net unrelated business income. Calculate whether you meet this support test for your most recent five-year period.

- i.** Did you receive amounts from any disqualified persons?  Yes  No

If "Yes," identify each disqualified person by letter (A, B, C, etc.) and indicate the amount contributed by each. Keep a list showing the name of and amount contributed by each of these donors for your records.

- ii.** Did you receive amounts from individuals or organizations other than disqualified persons that exceeded the greater of \$5,000 or 1% of the amount on line 10 of Part VI-A Statement of Revenues and Expenses?  Yes  No

If "Yes," identify each individual or organization by letter (A, B, C, etc.) and indicate the amount contributed by each. Keep a list showing the name of and amount contributed by each of these donors for your records.

- iii.** Based on your calculations, did you normally receive more than one-third of your support from a combination of gifts, grants, contributions, membership fees, and gross receipts (from permitted sources) from activities related to your exempt functions and normally receive not more than one-third of your support from investment income and unrelated business taxable income?  Yes  No

**Part VIII Effective Date**

In general, a determination letter recognizing exemption of an organization described in section 501(c)(3) is effective as of the date of formation of an organization if: (1) its purposes and activities prior to the date of the determination letter have been consistent with the requirements for exemption; and (2) it has filed an application for recognition of exemption within 27 months from the end of the month in which it was organized.

- 1 Are you submitting this application within 27 months of the end of the month in which you were legally formed?  Yes  No

If "No," complete Schedule E.

**Part IX Annual Filing Requirements**

*If you fail to file a required information return or notice for three consecutive years, your exempt status will be automatically revoked.*

- 1 Certain organizations are not required to file annual information returns or notices (Form 990, Form 990-EZ, or Form 990-N, e-Postcard). If you are granted tax-exemption, are you claiming to be excused from filing Form 990, Form 990-EZ, or Form 990-N?  Yes  No

If "Yes," are you claiming you are excused from filing because you are:

- A church or association of churches
- An integrated auxiliary (such as a men's or women's organization, religious school, mission society, or religious group)
- A church-affiliated organization (other than a section 509(a)(3) organization) that is exclusively engaged in managing funds or maintaining retirement programs and is described in Revenue Procedure 96-10, 1996-1 C.B. 577
- A school below college level affiliated with a church or operated by a religious order
- A mission society (other than a section 509(a)(3) supporting organization) sponsored by, or affiliated with, one or more churches or church denominations, if more than half of the society's activities are conducted in, or directed at, persons in foreign countries
- An affiliate of a governmental unit that meets the requirements of Revenue Procedure 95-48, 1995-2 C.B. 418 (other than a section 509(a)(3) supporting organization)
- Other (describe)

**Part X Signature**

- I declare under the penalties of perjury that I am authorized to sign this application on behalf of the above organization and that I have examined this application, and to the best of my knowledge it is true, correct, and complete.

Maria Drake

(Type name of signer)

PRESIDENT

(Type title or authority of signer)

04/13/2021

(Date)

**Upload checklist:**

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- Organizing document (and any amendments)
- Bylaws, if adopted
- Form 2848, Power of Attorney and Declaration of Representative (if applicable)
- Form 8821, Tax Information Authorization (if applicable)
- Supplemental responses (if applicable)
- Expedited handling request (if applicable)

**Schedule A. Churches**

- 1 Do you have a written creed, statement of faith, or summary of beliefs? If "Yes," describe your written creed, statement of faith, or summary of beliefs.  Yes  No

- 2 Do you have a literature of your own? If "Yes," describe your literature.  Yes  No

- 3 Do you have a formal code of doctrine and discipline? If "Yes," describe your code of doctrine and discipline.  Yes  No

- 4 Describe your religious hierarchy or ecclesiastical government.

- 5 Are you part of a group of churches with similar beliefs and structures? If "Yes," explain.  Yes  No

- 6 Do you have a form of worship? If "Yes," describe your form of worship.  Yes  No

- 7 Do you have regularly scheduled religious services? If "Yes," describe the nature of the services.  Yes  No

- 7a What is the average attendance at your regularly scheduled religious services?

- 8 Do you have an established place of worship? If "Yes," describe your established place of worship or where you meet to hold regularly scheduled religious services.  Yes  No

**Schedule A. Churches** (continued)

**9** Do you have an established congregation or other regular membership group? If "No," continue to Line 10.  Yes  No

**9a** How many members do you have?

**9b** Do you have a process by which an individual becomes a member? If "Yes," describe the process.  Yes  No

**9c** Do your members have voting rights, rights to participate in religious functions, or other rights? If "Yes," describe the rights your members have.  Yes  No

**9d** May your members be associated with another denomination or church?  Yes  No

**9e** Are all of your members part of the same family?  Yes  No

**10** Do you conduct baptisms, weddings, funerals, or other religious rites?  Yes  No

**11** Do you have a school for the religious instruction of the young?  Yes  No

**12** Do you have ministers or religious leaders? If "Yes," describe these roles and explain whether the ministers or religious leaders are ordained, commissioned, or licensed after a prescribed course of study.  Yes  No

**13** Do you have schools for the preparation of your ordained ministers or religious leaders?  Yes  No

**14** Do you ordain, commission, or license ministers or religious leaders? If "Yes," describe the requirements for ordination, commission, or licensure.  Yes  No

**15** Do you have other information you believe should be considered regarding your status as a church? If "Yes," explain.  Yes  No

**Schedule B. Schools, Colleges, and Universities**

**1** Do you normally have a regularly scheduled curriculum, a regular faculty of qualified teachers, a regularly enrolled student body, and facilities where your educational activities are regularly carried on?  Yes  No

**2** Is the primary function of your school the presentation of formal instruction? If "No," continue to Line 3.  Yes  No

**2a** Select the best description(s) of your school:

- Elementary school
- Secondary school
- Charter school
- College or university
- Technical school
- Other school (describe)

**3** Are you a public school because you are operated by a state or subdivision of a state or operated wholly or predominantly from government funds or property? If "Yes," explain how you are operated by a state or subdivision of a state. Do not complete the remainder of Schedule B.  Yes  No

**4** Were you formed or substantially expanded at the time of public school desegregation in the school district or county in which you are located?  Yes  No

**5** Has a state or federal administrative agency or judicial body ever determined that you are racially discriminatory? If "Yes," explain.  Yes  No

**6** Has your right to receive financial aid or assistance from a governmental agency ever been revoked or suspended? If "Yes," explain.  Yes  No

**Information Required by Revenue Procedure 75-50 as Modified by Revenue Procedure 2019-22**

**7** Have you adopted a racially nondiscriminatory policy as to students in your organizing document, bylaws, or by resolution of your governing body?  Yes  No

State where the policy is located or if adopted by resolution of your governing body.

**8** Do your brochures, application forms, advertisements, and catalogues dealing with student admissions, programs, and scholarships contain a statement of your racially nondiscriminatory policy? If "Yes," continue to Line 9.  Yes  No

**8a**  By checking this box, you agree that all future printed materials, including website content, will contain the required nondiscriminatory policy statement.



**Schedule B. Schools, Colleges, and Universities** *(continued)*

**13** List your incorporators, founders, board members, and donors of land or buildings, whether individuals or organizations.

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**14** Do any of your incorporators, founders, board members, and donors of land or buildings, whether individuals or organizations, have an objective to maintain segregated public or private school education? If "Yes," explain.

Yes  No

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**15** Will you maintain records according to the nondiscrimination provisions contained in Revenue Procedure 75-50? If "No," explain.

Yes  No

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**Schedule C. Hospitals and Medical Research Organizations**

- 1** Are you a medical research organization (an organization whose principal purpose or function is medical research and which is directly engaged in the continuous active conduct of medical research) operated in conjunction with a hospital? If "No," continue to Line 2.  Yes  No

- 1a** Name the hospitals with which you have a relationship and describe the relationship.

- 1b** List your assets showing their fair market value and the portion of your assets directly devoted to medical research.

Do not complete the remainder of Schedule C.

- 2** Are you applying for exemption as a cooperative hospital service organization described in section 501(e)? If "Yes," explain.  Yes  No

Do not complete the remainder of Schedule C.

- 3** Are all the doctors in the community eligible for staff privileges? If "No," give the reasons why and explain how the medical staff is selected.  Yes  No

**Schedule C. Hospitals and Medical Research Organizations** (continued)

- 4** Do or will you provide medical services to all individuals in your community who can pay for themselves or are able to pay through some form of insurance? If "No," explain.  Yes  No

- 5** Do you or will you maintain a full-time emergency room? If "Yes," continue to Line 6.  Yes  No

- 5a** Are you a specialty hospital or would emergency services be duplicative based on your region or locality?  Yes  No

- 6** Do you provide free or below cost services? If "Yes," describe your policy for determining when and to whom you provide these services and how these services promote the organization's benefit to the community.  Yes  No

- 7** Do you or will you carry on a formal program of medical training or medical research? If "Yes," describe such programs, including the type of programs offered, the scope of such programs, and affiliations with other hospitals or medical care providers with which you carry on the medical training or research programs.  Yes  No

- 8** Do you or will you carry on a formal program of community education? If "Yes," describe such programs, including the type of programs offered, the scope of such programs, and affiliation with other hospitals or medical care providers with which you offer community education programs.  Yes  No

**Schedule C. Hospitals and Medical Research Organizations** (continued)

- 9** Is your board of directors composed of a majority of individuals who are representative of the community you serve, or do you operate under a parent organization whose board of directors is composed of a majority of individuals who are representative of the community you serve? If "Yes," continue to Line 10.  Yes  No

- 9a** List each board member's name and business, financial, or professional relationship with the hospital. Also, identify each board member who is representative of the community and describe how that individual is a community representative. If you operate under a parent organization whose board of directors is not composed of a majority of individuals who are representative of the community you serve, provide the requested information for your parent's board of directors as well.

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- 10** Do you operate a facility which is required by a state to be licensed, registered, or similarly recognized as a hospital? If "No," do not complete the rest of Schedule C.  Yes  No

- 10a** Do you conduct a community health needs assessment (CHNA) at least once every three years and adopt an implementation strategy to meet the community health needs identified in the assessment as required by section 501(r)(3)? If "No," explain.  Yes  No

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- 10b** Do you have a written financial assistance policy (FAP) and a written policy relating to emergency medical care as required by section 501(r)(4)? If "No," explain.  Yes  No

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**Schedule C. Hospitals and Medical Research Organizations** *(continued)*

**10c** Do you both (1) limit amounts charged for emergency or other medically necessary care provided to individuals eligible for assistance under your FAP to not more than amounts generally billed to individuals who have insurance covering such care, and (2) prohibit use of gross charges as required by section 501(r)(5)? If "No," explain.  Yes  No

**10d** Do you make reasonable efforts to determine whether an individual is FAP-eligible before engaging in extraordinary collection actions as required by section 501(r)(6)? If "No," explain.  Yes  No

**Schedule D. Section 509(a)(3) Supporting Organizations**

**1** List the names, addresses, and EINs of the organizations you support.

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**2** Are all your supported organizations public charities under section 509(a)(1) or (2)? If "Yes," continue to Line 3.

Yes  No

**2a** Are your supported organizations tax exempt under section 501(c)(4), 501(c)(5), or 501(c)(6) and do your supported organizations meet the public support test under section 509(a)(2)? If "No," explain how each organization you support is a public charity under section 509(a)(1) or 509(a)(2).

Yes  No

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**3** Which of the following describes your relationship with your supported organization(s)?

A majority of your governing board or officers are elected or appointed by your supported organization(s). (Type I supporting organization)

Your control or management is vested in the same persons who control or manage your supported organization(s). (Type II supporting organization)

One or more of your officers, directors, or trustees are elected or appointed by the officers, directors, trustees, or membership of your supported organization(s), or one or more of your officers, directors, trustees, or other important office holders, are also members of the governing body of your supported organization(s), or your officers, directors, or trustees maintain a close and continuous working relationship with the officers, directors, or trustees of your supported organization(s). (Type III supporting organization)

**4** Describe how your governing board and officers are selected. If you are a Type III organization, also describe how your officers, directors, or trustees maintain a close and continuous working relationship with the officers, directors, or trustees of your supported organization(s).

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**Schedule D. Section 509(a)(3) Supporting Organizations** (continued)

- 5** Do any persons who are disqualified persons (except individuals who are disqualified persons only because they are foundation managers) with respect to you or persons who have a family or business relationship with any disqualified persons appoint any of your foundation managers? If "Yes," (1) describe the process by which disqualified persons appoint any of your foundation managers, (2) provide the names of these disqualified persons and the foundation managers they appoint, and (3) explain how control is vested over your operations (including assets and activities) by persons other than disqualified persons.  Yes  No

- 6** Do any persons who are disqualified persons (except individuals who are disqualified persons only because they are foundation managers) have any influence regarding your operations, including your assets or activities? If "Yes," (1) provide the names of these disqualified persons, (2) explain how influence is exerted over your operations (including assets and activities), and (3) explain how control is vested over your operations (including assets and activities) by individuals other than disqualified persons.  Yes  No

- 7** Does your organizing document specify your supported organization(s) by name?  Yes  No  
 If "Yes" and you selected Type I above, continue to Line 8.  
 If "Yes," and you selected Type II, do not complete the rest of Schedule D.  
 If "No" and you selected Type III above, amend your organizing document to specify your supported organization(s) by name or you will not meet the organizational test and need to reconsider your requested public charity classification; then continue to Line 8.

- 7a** Does your organizing document name a similar purpose or charitable class of beneficiaries as to your supported organization(s)? If "No," amend your organizing document to specify your supported organization(s) by name, purpose, or class or you will not meet the organizational test and need to reconsider your requested public charity classification.  Yes  No

If you selected Type II above, do not complete the rest of Schedule D.

- 8** Do you or will you receive contributions from any person who alone, or combined with family members or an entity at least 35% controlled by that person, controls any of your supported organizations, or will you receive contributions from any family member of, or an entity at least 35% controlled by, any person who controls any of your supported organizations? If "Yes," explain.  Yes  No

If you selected Type I above, do not complete the rest of Schedule D.

**Schedule D. Section 509(a)(3) Supporting Organizations** (continued)

- 9 Do the officers, directors, or trustees of your supported organization have a significant voice in your investment policies, the timing and making of grants, the selection of grant recipients, and in otherwise directing the use of your income or assets? If "Yes," explain.  Yes  No

- 10 In each taxable year, do you or will you provide each of your supported organizations with (a) a written notice addressed to a principal officer of the supported organization describing the type and amount of all of the support you provided to the supported organization during the immediately preceding taxable year, (b) a copy of your most recently filed Form 990-series return or notice, and (c) a copy of your governing documents? If 'No,' explain.  Yes  No

- 11 Do you exercise a substantial degree of direction over the policies, programs, and activities of your supported organization(s) and appoint or elect (directly or indirectly) a majority of the officers, directors, or trustees of your supported organization(s)? If "Yes," explain.  Yes  No

- 12 Do substantially all of your activities directly further the exempt purposes of one or more supported organizations to which you are responsive by performing the functions of, or carrying out the purposes of, such supported organization(s) and but for your involvement would normally be engaged in by such supported organization(s). If "Yes," explain and do not complete the rest of Schedule D.  Yes  No

**Schedule D. Section 509(a)(3) Supporting Organizations** *(continued)*

**13** Do you distribute at least 85% of your annual net income or 3.5% of the aggregate fair market value of all of your non-exempt-use assets (whichever is greater) to your supported organization(s)? If "No," explain.  Yes  No

**13a** How much do you contribute annually to each supported organization?

**13b** What is the total annual revenue of each supported organization?

**13c** Do you or the supported organization(s) earmark your funds for support of a particular program or activity? If "Yes," explain.  Yes  No

**Schedule E. Effective Date**

**1** Are you applying for reinstatement of exemption after being automatically revoked for failure to file required returns or notices for three consecutive years? If "No," continue to Line 2.  Yes  No

**1a** Revenue Procedure 2014-11, 2014-1 C.B. 411, provides procedures for reinstating your tax-exempt status. Select the section of Revenue Procedure 2014-11 under which you want us to consider your reinstatement request.

Section 4. You are seeking retroactive reinstatement under section 4 of Revenue Procedure 2014-11. By selecting this line, you attest that you meet the specified requirements of section 4, that your failure to file was not intentional, and that you have put in place procedures to file required returns or notices in the future. Do not complete the rest of Schedule E.

Section 5. You are seeking retroactive reinstatement under section 5 of Revenue Procedure 2014-11. By selecting this line, you attest that you meet the specified requirements of section 5, that you have filed required annual returns, that your failure to file was not intentional, and that you have put in place procedures to file required returns or notices in the future.

Describe how you exercised ordinary business care and prudence in determining and attempting to comply with your filing requirements in at least one of the three years of revocation and the steps you have taken or will take to avoid or mitigate future failures to file timely returns or notices. Do not complete the rest of Schedule E.

Section 6. You are seeking retroactive reinstatement under section 6 of Revenue Procedure 2014-11. By selecting this line, you attest that you meet the specified requirements of section 6, that you have filed required annual returns, that your failure to file was not intentional, and that you have put in place procedures to file required returns or notices in the future.

Describe how you exercised ordinary business care and prudence in determining and attempting to comply with your filing requirements in each of the three years of revocation and the steps you have taken or will take to avoid or mitigate future failures to file timely returns or notices. Do not complete the rest of Schedule E.

Section 7. You are seeking reinstatement under section 7 of Revenue Procedure 2014-11, effective the date you are filling this application. Do not complete the rest of Schedule E.

**2** Generally, if you did not file Form 1023 within 27 months of formation, the effective date of your exempt status will be the date you filed Form 1023 (submission date). Requests for an earlier effective date may be granted when there is evidence to establish you acted reasonably and in good faith and the grant of relief will not prejudice the interests of the government.

Check this box if you accept the submission date as the effective date of your exempt status. Do not complete the rest of Schedule E.

Check this box if you are requesting an earlier effective date than the submission date.

**2a** Explain why you did not file Form 1023 within 27 months of formation, how you acted reasonably and in good faith, and how granting an earlier effective date will not prejudice the interests of the Government.

You may want to include the events that led to the failure to timely file Form 1023 and to the discovery of the failure, any reliance on the advice of a qualified tax professional and a description of the engagement and responsibilities of the professional as well as the extent to which you relied on the professional, a comparison of (1) what your aggregate tax liability would be if you had filed this application within the 27-month period with (2) what your aggregate liability would be if you were exempt as of your formation date, or any other information you believe will support your request for relief.

**Schedule F. Low-Income Housing**

- 1** Describe each facility including the type of facility, whether you own or lease the facility, how many residents it can accommodate, the current number of residents, and whether the residents purchase or rent housing from you.

- 2** Describe who qualifies for your housing in terms of income levels or other criteria and explain how you select residents.

- 3** Do you meet the safe harbor requirements outlined in Revenue Procedure 96-32, 1996-1 C.B. 717, which provides guidelines for providing low-income housing that will be treated as charitable, including for each project that (a) at least 75 percent of the units are occupied by residents that qualify as low-income and (b) either at least 20 percent of the units are occupied by residents that also meet the very low-income limit for the area or 40 percent of the units are occupied by residents that also do not exceed 120 percent of the area's very low-income limit, and less than 25 percent of the units are provided at market rates to persons who have incomes in excess of the low-income limit?  Yes  No

- 4** Is your housing affordable to low-income residents? If "Yes," describe how your housing is made affordable to low-income residents.  Yes  No

- 5** Do you impose any restrictions to make sure that your housing remains affordable to low-income residents? If "Yes," describe these restrictions.  Yes  No

**Schedule F. Low-Income Housing** *(continued)*

- 6 In addition to rent or mortgage payments, do residents pay periodic fees or maintenance charges? If "Yes," describe what these charges cover and how they are determined.  Yes  No

- 7 Do you provide social services to residents? If "Yes," describe these services.  Yes  No

- 8 Do you participate in any government housing programs? If "Yes," describe these programs.  Yes  No

**Schedule G. Successors to Other Organizations**

- 1** List the name, last address, and EIN of your predecessor organization and describe its activities.

As discussed above, Envisioneers Inc will take over the California operations of Citizen Schools, Inc. a Section 501(c)(3) organization that operates in multiple states. Citizen Schools will continue to operate its programs in all other states in which it currently operates. Citizen Schools Inc. EIN is 04-3259160 and its address is 1 Beacon Street, Boston, MA 02108.

- 2** List the owners, partners, principal stockholders, officers, and governing board members of your predecessor organization. Include their names, addresses, and share/interest in the predecessor organization (if for-profit).

The predecessor organization is a Section 501(c)(3) organization. Officers include Emily McCann (CEO) and Mike Keating (Board Chair). Their address is 1 Beacon Street, Boston, MA 02108.

- 3** Are you a successor to a for-profit organization? If "Yes," explain your relationship with the predecessor organization that resulted in your creation and explain why you took over the activities or assets of a for-profit organization or converted from for-profit to nonprofit status; continue to Line 4.  Yes  No

- 3a** Explain your relationship with the other organization that resulted in your creation and why you took over the activities or assets of another organization.

Citizen Schools made the determination to focus on its core activities but also wanted to make certain that its ELT education program continued in the Bay Area of California where it has had great success with students. Envisioneers was established to take over the ELT educational program activities in the Bay Area.

**Schedule G. Successors to Other Organizations** (continued)

- 4 Do or will you maintain a working relationship with any of the persons listed in question 2 or with any for-profit organization in which these persons own more than a 35% interest? If "Yes," describe the relationship.  Yes  No

- 5 Were any assets transferred, whether by gift or sale, from the predecessor organization to you? If "Yes," provide a list of assets, indicate the value of each asset, explain how the value was determined, and attach an appraisal, if available. For each asset listed, also explain if the transfer was by gift, sale, or combination thereof and describe any restrictions that were placed on the use or sale of the assets.  Yes  No

- 6 Were any debts or liabilities transferred from the predecessor for-profit organization to you? If "Yes," provide a list of the debts or liabilities that were transferred to you, indicating the amount of each, how the amount was determined, and the name of the person to whom the debt or liability is owed.  Yes  No

- 7 Will you lease or rent any property or equipment to or from the predecessor organization or any persons listed in Line 2 or a for-profit organization in which these persons own more than a 35% interest? If "Yes," describe the arrangement(s) including how the lease or rental value was determined.  Yes  No

**Schedule H. Organizations Providing Scholarships, Fellowships, Educational Loans, or Other Educational Grants to Individuals and Private Foundations Requesting Advance Approval of Individual Grant Procedures****Section I** Public charities and private foundations complete lines 1 through 8 of this section.

- 1** Describe the types of educational grants you provide to individuals, such as scholarships, fellowships, loans, etc., including the purpose, number and amount(s) of grants, how the program is publicized, and if you award educational loans, the terms of the loans.

- 2** Do you maintain case histories showing recipients of your scholarships, fellowships, educational loans, or other educational grants, including names, addresses, purposes of awards, amount of each grant, manner of selection, and relationship (if any) to officers, trustees, or donors of funds to you? If "No," explain.  Yes  No

- 3** Describe the specific criteria you use to determine who is eligible for your program (for example, eligibility selection criteria could consist of graduating high school students from a particular high school who will attend college, writers of scholarly works about American history, etc.).

- 4** Describe the specific criteria you use to select recipients (for example, specific selection criteria could consist of prior academic performance, financial need, etc.).

**Schedule H. Organizations Providing Scholarships, Fellowships, Educational Loans, or Other Educational Grants to Individuals and Private Foundations Requesting Advance Approval of Individual Grant Procedures** *(continued)*

- 5 Describe any requirement or condition you impose on recipients to obtain, maintain, or qualify for renewal of a grant (for example, specific requirements or conditions could consist of attendance at a four-year college, maintaining a certain grade point average, teaching in public school after graduation from college, etc.).

- 6 Describe your procedures for supervising the scholarships, fellowships, educational loans, or other educational grants. Explain whether you obtain reports and grade transcripts from recipients, or you pay grants directly to a school under an arrangement whereby the school will apply the grant funds only for enrolled students who are in good standing. Also, describe your procedures for taking action if the terms of the award are violated.

- 7 How do you determine who is on the selection committee for the awards made under your program?

- 8 Are relatives of members of the selection committee, or of your officers, directors, or substantial contributors eligible for awards made under your program? If "Yes," what measures do you take to ensure unbiased selections?

Yes  No

Do not complete the rest of Schedule H. If you are a private foundation, you will be directed to complete Section II of Schedule H later in the application.

**Schedule H. Organizations Providing Scholarships, Fellowships, Educational Loans, or Other Educational Grants to Individuals and Private Foundations Requesting Advance Approval of Individual Grant Procedures** *(continued)*

**Section II** Private foundations complete lines 1 through 7 of this section. Public charities do not complete this section.

- 1** As a private foundation, do you want this application to be considered as a request for advance approval of grant making procedures?  Yes  No

If "No," do not complete the rest of Schedule H.

- 1a** Check the box(es) indicating under which section(s) you want your grant making procedures to be considered.

- 4945(g)(1) - Scholarship or fellowship grant to an individual for study at an educational institution
- 4945(g)(3) - Other grants, including loans, to an individual for travel, study, or other similar purposes, to enhance a particular skill of the grantee or to produce a specific product

- 2** Do you represent that you will (1) arrange to receive and review grantee reports annually and upon completion of the purpose for which the grant was awarded, (2) investigate diversions of funds from their intended purposes, and (3) take all reasonable and appropriate steps to recover diverted funds, ensure other grant funds held by a grantee are used for their intended purposes, and withhold further payments to grantees until you obtain grantees' assurances that future diversions will not occur and that grantees will take extraordinary precautions to prevent future diversions from occurring?  Yes  No

- 3** Do you represent that you will maintain all records relating to individual grants, including information obtained to evaluate grantees, identify whether a grantee is a disqualified person, establish the amount and purpose of each grant, and establish that you undertook the supervision and investigation of grants described in Line 2?  Yes  No

- 4** Do you or will you award scholarships, fellowships, and educational loans to attend an educational institution based on the status of an individual being an employee of a particular employer?  Yes  No

If "No," do not complete the rest of Schedule H.

- 5** Will you comply with the seven conditions and either the percentage tests or facts and circumstances test for scholarships, fellowships, and educational loans to attend an educational institution as set forth in Revenue Procedures 76-47, 1976-2 C.B. 670, and 80-39, 1980-2 C.B. 772, which apply to inducement, selection committee, eligibility requirements, objective basis of selection, employment, course of study, and other objectives?  Yes  No

- 6** Do you or will you provide scholarships, fellowships, or educational loans to attend an educational institution to employees of a particular employer? If "No," continue to Line 7.  Yes  No

- 6a** Will you award grants to 10% or fewer of the eligible applicants who were actually considered by the selection committee in selecting recipients of grants in that year as provided by Revenue Procedures 76-47 and 80-39?  Yes  No

- 7** Do you provide scholarships, fellowships, or educational loans to attend an educational institution to children of employees of a particular employer?  Yes  No

If "No," do not complete the rest of Schedule H.

- 7a** Will you award grants to 25% or fewer of the eligible applicants who were actually considered by the selection committee in selecting recipients of grants in that year as provided by Revenue Procedures 76-47 and 80-39?  Yes  No

If "Yes," do not complete the rest of Schedule H.

**Schedule H. Organizations Providing Scholarships, Fellowships, Educational Loans, or Other Educational Grants to Individuals and Private Foundations Requesting Advance Approval of Individual Grant Procedures** *(continued)*

- 7b** Will you award grants to 10% or fewer of the number of employees' children who can be shown to be eligible for grants (whether or not they submitted an application) in that year, as provided by Revenue Procedures 76-47 and 80-39? If "Yes," describe how you will determine who can be shown to be eligible for grants without submitting an application, such as by obtaining written statements or other information about the expectations of employees' children to attend an educational institution; do not complete the rest of Schedule H.  Yes  No

- 7c** Will you award grants based on facts and circumstances that demonstrate that the grants will not be considered compensation for past, present, or future services or otherwise provide a significant benefit to the particular employer? If "Yes," describe the facts and circumstances you believe will demonstrate that the grants are neither compensatory nor a significant benefit to the particular employer. In your explanation, describe why you cannot satisfy either the 25% test or the 10% test in questions 7a and 7b.  Yes  No



P.O. Box 15284  
Wilmington, DE 19850

**Customer service information**

☎ Customer service: 1.888.400.9009

🌐 bankofamerica.com

✉ Bank of America, N.A.  
P.O. Box 25118  
Tampa, FL 33622-5118

CITIZEN SCHOOLS INC  
1 BEACON ST STE 1500  
BOSTON, MA 02108-3139

# Your Full Analysis Business Checking - Small Business

for May 1, 2021 to May 31, 2021

Account number: 0094 1836 6019

**CITIZEN SCHOOLS INC**

## Account summary

|                                       |                     |
|---------------------------------------|---------------------|
| Beginning balance on May 1, 2021      | \$300,001.80        |
| Deposits and other credits            | 958,061.07          |
| Withdrawals and other debits          | -523,755.26         |
| Checks                                | -0.00               |
| Service fees                          | -0.00               |
| <b>Ending balance on May 31, 2021</b> | <b>\$734,307.61</b> |

# of deposits/credits: 27

# of withdrawals/debits: 18

# of days in cycle: 31

Average ledger balance: \$576,975.49

## IMPORTANT INFORMATION: BANK DEPOSIT ACCOUNTS

**How to Contact Us** - You may call us at the telephone number listed on the front of this statement.

**Updating your contact information** - We encourage you to keep your contact information up-to-date. This includes address, email and phone number. If your information has changed, the easiest way to update it is by visiting the Help & Support tab of Online Banking.

**Deposit agreement** - When you opened your account, you received a deposit agreement and fee schedule and agreed that your account would be governed by the terms of these documents, as we may amend them from time to time. These documents are part of the contract for your deposit account and govern all transactions relating to your account, including all deposits and withdrawals. Copies of both the deposit agreement and fee schedule which contain the current version of the terms and conditions of your account relationship may be obtained at our financial centers.

**Electronic transfers: In case of errors or questions about your electronic transfers** - If you think your statement or receipt is wrong or you need more information about an electronic transfer (e.g., ATM transactions, direct deposits or withdrawals, point-of-sale transactions) on the statement or receipt, telephone or write us at the address and number listed on the front of this statement as soon as you can. We must hear from you no later than 60 days after we sent you the FIRST statement on which the error or problem appeared.

- Tell us your name and account number.
- Describe the error or transfer you are unsure about, and explain as clearly as you can why you believe there is an error or why you need more information.
- Tell us the dollar amount of the suspected error.

For consumer accounts used primarily for personal, family or household purposes, we will investigate your complaint and will correct any error promptly. If we take more than 10 business days (10 calendar days if you are a Massachusetts customer) (20 business days if you are a new customer, for electronic transfers occurring during the first 30 days after the first deposit is made to your account) to do this, we will provisionally credit your account for the amount you think is in error, so that you will have use of the money during the time it will take to complete our investigation.

For other accounts, we investigate, and if we find we have made an error, we credit your account at the conclusion of our investigation.

**Reporting other problems** - You must examine your statement carefully and promptly. You are in the best position to discover errors and unauthorized transactions on your account. If you fail to notify us in writing of suspected problems or an unauthorized transaction within the time period specified in the deposit agreement (which periods are no more than 60 days after we make the statement available to you and in some cases are 30 days or less), we are not liable to you and you agree to not make a claim against us, for the problems or unauthorized transactions.

**Direct deposits** - If you have arranged to have direct deposits made to your account at least once every 60 days from the same person or company, you may call us to find out if the deposit was made as scheduled. You may also review your activity online or visit a financial center for information.

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**Deposits and other credits**

| Date     | Transaction description   | Customer reference | Bank reference  | Amount     |
|----------|---|--------------------|-----------------|------------|
| 05/03/21 | Preencoded Deposit  | 0000000001         | 813008352322257 | 250,959.23 |
| 05/04/21 | United Way of Ma DES:CONCUR INV<br>ID:C024ZPC3X005 INDN:Citizens Schools CO<br>ID:5911608052 CTX ADDITIONAL INFORMATION<br>IS AVAILABLE FOR THIS PMT. CONTACT A<br>TREASURY SALES OFFICER FOR ASSISTANCE. |                    | 902324012486188 | 2,500.00   |
| 05/04/21 | MerchPayout SV9T DES:8447752748 ID:<br>INDN:Citizen Schools, Inc. CO ID:1043575881 PPD  |                    | 902324010300754 | 1,098.08   |
| 05/07/21 | THE CITY OF NEW DES:Payments<br>ID:202105054607953 INDN:0003233005<br>CO ID:7136400434 CTX ADDITIONAL<br>INFORMATION IS AVAILABLE FOR THIS PMT.<br>CONTACT A TREASURY SALES OFFICER FOR<br>ASSISTANCE.    |                    | 902326011555711 | 13,250.00  |
| 05/07/21 | STRIPE DES:TRANSFER<br>ID:ST-E7S3E609A205 INDN:CITIZEN SCHOOLS<br>INC CO ID:1800948598 CCD  |                    | 902326015167427 | 34.74      |
| 05/11/21 | LEO M SHORTINO F DES:ACH Pmt<br>ID:5287661235 INDN:Citizen Schools INC CO<br>ID:9200502235 CCD  |                    | 902331007890828 | 50,000.00  |
| 05/11/21 | MerchPayout SV9T DES:8447752748 ID:<br>INDN:Citizen Schools, Inc. CO ID:1043575881 PPD  |                    | 902331007756764 | 2,074.11   |
| 05/12/21 | FIDELITY INVESTM DES:GrantPaymt ID:614400<br>INDN:CITIZEN SCHOOLS INC CO ID:1110303001<br>CCD   |                    | 902331010694867 | 750.00     |
| 05/13/21 | RESEARCH TRIANGL DES:EFT ID:067817<br>INDN:CITIZEN SCHOOLS CO ID:1560686338<br>CTX ADDITIONAL INFORMATION IS AVAILABLE<br>FOR THIS PMT. CONTACT A TREASURY SALES<br>OFFICER FOR ASSISTANCE.               |                    | 902332016379957 | 35,771.00  |
| 05/14/21 | STRIPE DES:TRANSFER<br>ID:ST-A9K8D2E0G106 INDN:CITIZEN SCHOOLS<br>INC CO ID:1800948598 CCD  |                    | 902333019847204 | 25,687.30  |

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**Deposits and other credits - continued**

| Date     | Transaction description   | Customer reference | Bank reference  | Amount     |
|----------|---|--------------------|-----------------|------------|
| 05/14/21 | ALLIANCEBERNSTEIN DES:VENDOR PMT<br>ID:V043259160001 INDN:CITIZEN SCHOOLS,<br>CO ID:9134064930 CTX PMT INFO:FYXXXXXXXXXX<br>202103310002425356 000000005000.00C   |                    | 902332016808845 | 5,000.00   |
| 05/14/21 | BENEVITY FUND DES:DONATION<br>ID:5VG553FRCP INDN:CITIZEN SCHOOLS INC<br>CO ID:1810739940 CCD  |                    | 902333019672762 | 509.00     |
| 05/17/21 | WIRE TYPE:WIRE IN DATE: 210517 TIME:1533 ET<br>TRN:2021051700500949<br>SEQ:FTJ2105170323366/000876 ORIG:THE<br>WILLIAM & FLORA HEWLE ID:0000066397 SND<br>BK:THE BANK OF NEW YORK MELLON<br>ID:011001234 PMT DET:2021 2922 51944 CITIZEN<br>SCHOOLS INC |                    | 903705170500949 | 371,546.00 |
| 05/17/21 | Preencoded Deposit  | 0000000001         | 813008352514648 | 131,765.47 |
| 05/18/21 | MerchPayout SV9T DES:8447752748 ID:<br>INDN:Citizen Schools, Inc. CO ID:1043575881 PPD  |                    | 902338007142818 | 9,718.06   |
| 05/20/21 | FIDELITY INVESTM DES:GrantPaymt ID:621386<br>INDN:CITIZEN SCHOOLS INC CO ID:1110303001<br>CCD   |                    | 902339013767680 | 3,000.00   |
| 05/20/21 | FACEBOOK PAYMENT DES:BAMQML768K<br>ID:BAMQML768K INDN:CITIZEN SCHOOLS INC<br>CO ID:BXXXXXXXXX CCD PMT<br>INFO:RMR*IK*FACEBOOK PAYOUT BAMQML768K\  |                    | 902339026038021 | 2,820.00   |
| 05/21/21 | STRIPE DES:TRANSFER<br>ID:ST-H8G7K5N3M9Q7 INDN:CITIZEN SCHOOLS<br>INC CO ID:1800948598 CCD  |                    | 902340016713430 | 499.97     |
| 05/24/21 | Counter Credit  |                    | 813002852435008 | 10,500.00  |
| 05/24/21 | CONSOLIDATED EDI DES:XXXXXXXXX<br>ID:000058091005879 INDN:CITIZEN SCHOOLS<br>CO ID:8135009340 CTX PMT<br>INFO:INV#-000055735*INVDT-052021*AMT-10000<br>*DS CT-O*SHRTPY-\  |                    | 902344014182009 | 10,000.00  |
| 05/24/21 | BENEVITY FUND DES:DONATION<br>ID:5W9LLYJUT1 INDN:CITIZEN SCHOOLS INC<br>CO ID:1810739940 CCD  |                    | 902344014144611 | 147.00     |
| 05/24/21 | AMZNGZN500V6 DES:AmazonSmil<br>ID:6N4MOK4FEHWLRJO INDN:Citizen Schools, Inc.<br>CO ID:9215319235 CCD PMT<br>INFO:payments.amazon.com<br>ID#6N4MOK4FEHWLRJO  |                    | 902344015090395 | 103.18     |
| 05/25/21 | MerchPayout SV9T DES:8447752748 ID:<br>INDN:Citizen Schools, Inc. CO ID:1043575881 PPD  |                    | 902345009127963 | 1,168.31   |
| 05/27/21 | DELL DES:CORPORATE ID:XXXXXXXXX<br>INDN:CITIZEN SCHOOLS, INC. CO ID:2260638742<br>CCD   |                    | 902346020804816 | 10,000.00  |

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**Deposits and other credits - continued**

| Date     | Transaction description   | Customer reference | Bank reference  | Amount    |
|----------|---|--------------------|-----------------|-----------|
| 05/28/21 | Massachusetts Se DES:Bill.com<br>ID:025TJIQADA1G4EW INDN:Citizen Schools, Inc.<br>CO ID:1204895317 CCD PMT INFO:Massachusetts<br>Service Alliance Bill.com 025TJIQADA1G4EW PER<br>19AFH 2021-04 |                    | 902348009263678 | 16,650.21 |
| 05/28/21 | Fiduciary Trust DES:CDNOTHER ID:Fiduciary Trust<br>INDN:CITIZEN SCHOOLS CO ID:1002007079<br>CCD   |                    | 902348010749936 | 2,500.00  |
| 05/28/21 | STRIPE DES:TRANSFER<br>ID:ST-Z809V2V6M4J4 INDN:CITIZEN SCHOOLS<br>INC CO ID:1800948598 CCD  |                    | 902347016158576 | 9.41      |

**Total deposits and other credits** **\$958,061.07**

**Withdrawals and other debits**

| Date     | Transaction description  | Customer reference | Bank reference  | Amount      |
|----------|--|--------------------|-----------------|-------------|
| 05/03/21 | Online Banking transfer to CHK 8368<br>Confirmation# 1304635377  |                    | 943205036269415 | -40,000.00  |
| 05/03/21 | AMERICAN UNITED DES:PENSIONPMT<br>ID:20210430.G76270 INDN:G76270CITIZEN<br>SCHOOLS, CO ID:2350145825 PPD   |                    | 902323009978306 | -6,878.11   |
| 05/03/21 | BKCD PROCESSING DES:FEES<br>ID:015701000832928 INDN:CITIZEN SCHOOLS,<br>INC. CO ID:9000477845 CCD  |                    | 902323010844804 | -112.10     |
| 05/04/21 | WEWORK DES:J1049 RCUR<br>ID:CZ1000007ZDBC INDN:CITIZEN SCHOOLS, INC.<br>CO ID:8263863381 CCD PMT<br>INFO:TRN*1*CZ1000007ZDBC\RMR*IK*XXXXXXXXXX<br>171 6200573033602\ |                    | 902324010865637 | -5,971.90   |
| 05/04/21 | WEWORK DES:J1049 RCUR<br>ID:CZ1000007ZS2C INDN:CITIZEN SCHOOLS INC<br>CO ID:8263863381 CCD PMT<br>INFO:TRN*1*CZ1000007ZS2C\RMR*IK*XXXXXXXXXX<br>131 9200585513667\   |                    | 902324010865647 | -2,305.00   |
| 05/04/21 | AUTHNET GATEWAY DES:BILLING<br>ID:XXXXXXXXX INDN:CITIZEN SCHOOLS, INC. CO<br>ID:1870568569 CCD   |                    | 902323021783149 | -35.00      |
| 05/06/21 | BENEFIT STRATEGI DES:Claims ID:CNS<br>INDN:CITIZEN SCHOOLS, INC. CO ID:1260003294<br>CCD   |                    | 902325018031704 | -1,334.07   |
| 05/06/21 | BKCD PROCESSING DES:FEES<br>ID:015701000832928 INDN:CITIZEN SCHOOLS,<br>INC. CO ID:9000477845 CCD  |                    | 902326006310865 | -25.05      |
| 05/11/21 | Online Banking transfer to CHK 0794<br>Confirmation# 7374711901  |                    | 943205116765336 | -195,000.00 |

*continued on the next page*

## Withdrawals and other debits - continued

| Date     | Transaction description  | Customer reference | Bank reference  | Amount      |
|----------|--|--------------------|-----------------|-------------|
| 05/11/21 | Online Banking transfer to CHK 8368<br>Confirmation# 7175704122  |                    | 943205116765335 | -40,000.00  |
| 05/13/21 | BENEFIT STRATEGI DES:Claims ID:CNS<br>INDN:CITIZEN SCHOOLS, INC. CO ID:1260003294<br>CCD                 |                    | 902332011104657 | -1,377.11   |
| 05/14/21 | CONCUR TECHNOLOG DES:0000319821<br>ID:080800054328 INDN:CITIZEN SCHOOLS<br>CO ID:1911608052 CCD          |                    | 902334008110201 | -765.90     |
| 05/18/21 | AMERICAN UNITED DES:PENSIONPMT<br>ID:20210514.G76270 INDN:G76270CITIZEN<br>SCHOOLS, CO ID:2350145825 PPD |                    | 902337023701346 | -7,212.23   |
| 05/19/21 | Online Banking transfer to CHK 0794<br>Confirmation# 3242408912  |                    | 943205196006749 | -200,000.00 |
| 05/19/21 | Online Banking transfer to CHK 8368<br>Confirmation# 2544332206  |                    | 943205196006748 | -10,000.00  |
| 05/20/21 | BENEFIT STRATEGI DES:Claims ID:CNS<br>INDN:CITIZEN SCHOOLS, INC. CO ID:1260003294<br>CCD                 |                    | 902339024295849 | -2,245.18   |
| 05/25/21 | Online Banking transfer to CHK 8368<br>Confirmation# 1297913884  |                    | 943205256323329 | -10,000.00  |
| 05/27/21 | BENEFIT STRATEGI DES:Claims ID:CNS<br>INDN:CITIZEN SCHOOLS, INC. CO ID:1260003294<br>CCD                 |                    | 902346010904179 | -493.61     |

### Total withdrawals and other debits

**-\$523,755.26**

## Daily ledger balances

| Date  | Balance (\$) | Date  | Balance(\$) | Date  | Balance (\$) |
|-------|--------------|-------|-------------|-------|--------------|
| 05/01 | 300,001.80   | 05/12 | 329,006.73  | 05/20 | 693,223.14   |
| 05/03 | 503,970.82   | 05/13 | 363,400.62  | 05/21 | 693,723.11   |
| 05/04 | 499,257.00   | 05/14 | 393,831.02  | 05/24 | 714,473.29   |
| 05/06 | 497,897.88   | 05/17 | 897,142.49  | 05/25 | 705,641.60   |
| 05/07 | 511,182.62   | 05/18 | 899,648.32  | 05/27 | 715,147.99   |
| 05/11 | 328,256.73   | 05/19 | 689,648.32  | 05/28 | 734,307.61   |

## Campus Director

Reports to Director of Programs    Full Time/Exempt

### Who We Are

The leadership and staff of Envisioneers have been working collaboratively with schools in the San Francisco Bay Area as Citizen Schools for 20 years. Middle school students benefit from mentorship and hands-on learning experiences that spark curiosity and illuminate the world of opportunity available through education. Our proven Extended Learning Time (ELT) and Apprenticeship program models connect students with a second shift of educators that includes Teaching Associate Leads, AmeriCorps service members and volunteer Career Mentors from community organizations, local businesses and major corporations like Cisco and Western Digital.

**Join us as we launch Envisioneers** and help accelerate student outcomes in social emotional learning, academic growth, and equity in education. You can learn more about our mission, history and results on our website.

### What We Offer

- An established program model with immediate and long-term impact on the lives of middle school students, existing relationships in four Bay Area School districts, and a reputation for high quality engagement with student scholars, classroom teachers and volunteers.
- Frequent collaboration with passionate, curious, driven leaders focused on student impact.
- Regular participation and active engagement in leadership training through meetings with job-alike colleagues and supervisors in the Envisioneers network.
- A welcoming atmosphere for individuals interested in growing their own skills in leadership, supervision, instruction and program quality.
- Competitive salary and full benefits: health care, 401(K), Flexible PTO and a month-long sabbatical awarded after five years of employment.
- Annual professional development stipend after eight months of employment.

### The Opportunity

Envisioneers seeks a talented, enthusiastic, and diverse cohort of educators to lead ELT and Apprenticeship programs at public and charter schools sites in San Pablo, Oakland, Redwood City and/or San Jose. A successful Campus Director will see students measurably increase their SEL skills in self-efficacy and self-confidence while also achieving significant gains in math, reading, and writing.

With a strong organizational mission and vision to bring more justice, equity, diversity and inclusion into our organization, you will:

- **Lead**
  - Inspire others by modeling outstanding performance, unrelenting optimism, and a dedicated focus on Envisioneers' core values.
  - Express confidence in self and others, as well as a strong belief in the Envisioneers program as a vehicle for student success.
  - Maintain a keen focus on goals and the vision for sustained success.
- **Supervise**
  - Supervise a team of AmeriCorps Teaching Fellows, Teaching Associate Leads, Community Volunteers, and Career Mentors with curiosity, empathy, and confidence and always ask for clarity and understanding.
  - Ensure that all elements of the Envisioneers' program are delivered as designed.
  - Support teaching leads so that all scholars are benefiting from social emotional and academic support.
- **Elevate**
  - Raise all stakeholders' voices ensuring all are heard, especially the voices of our students, families and partners.
- **Deliver**
  - Fulfill all aspects of the Envisioneers program, mission and vision: to bring equity to education and the social emotional skills of self awareness, self confidence and belonging: " I am; I can; I belong."
- **Communicate**
  - Message Envisioneers' Theory of Impact clearly and consistently to all constituencies as one of the organization's lead influencers and brand ambassadors.
- **Collaborate**
  - Work effectively with regional team members, volunteers, educators, school staff, funders and sponsors.

## **Drive our Theory of Impact** ***The Responsibilities***

- **Campus Culture**
  - Promote a safe and nurturing environment for all staff and students.
  - Develop and support a strong, positive campus culture for both the Envisioneers team and the community-at-large utilizing an asset-based, inclusive approach.

- Work to ensure all team leads feel heard, supported and appreciated with the goal of 100% annual retention
- **Program Quality**
  - Collaborate with school administration and campus team to plan and implement programming that adheres to Envisioneers' Theory of Impact
  - Support SEL activities to create meaningful academic, behavioral and career growth for all scholars.
  - Utilize campus data and survey analysis to assess and redesign as needed and to fulfill the following grant requirements:
    - *ASES attendance requirements of 85% attendance rate for student scholars*
    - *80% of Volunteers report experience met or exceeded expectations with a Net Promoter Score (NPS) of 9 or above*
    - *80% of Envisioneers scholars reach grade level proficiency*
    - *80% of school partners rate our partnership with NPS of 9 or above*
    - *75% of scholars show an increase in self regulation*
- **Performance Management**
  - Conduct weekly one-on-one coaching meetings and quarterly performance conversations for all direct reports, emphasize strengths and areas for growth.
  - Regularly update staff and coach on any performance challenges and implement performance improvement plans when necessary.
  - Set meaningful individual and team SMART goals and create concrete plans to attain them.
  - Serve as supervisor, coach, and mentor for a team of AmeriCorps service members, teaching associate leads, and others, supporting their growth as educators and professionals.
    - Develop and lead training that meets individual needs and team goals.
    - Serve as instructional leader delivering well designed Friday professional development workshops.
    - Co-lead monthly regional professional development sessions.
    - Conduct consistent classroom and/or online observations providing constructive feedback to staff and volunteers, modeling high quality teaching that conforms to a culturally responsive and healing centered teaching approach.
- **Operations Management**
  - Hold responsibility for campus budget, program schedule, all survey distribution and completion, and support on student data collection.
  - Ensure safety of all program participants and compliance with all Envisioneers policies, state and local standards, and grant mandates.

- Ensure Americorps compliance on attendance, fundraising, branding, etc.
- **Stakeholder Engagement**
  - Build and support collaborative relationships with all of our stakeholders - families, the community partners and volunteers, students, regional team, campus admin and staff.
  - Design to develop meaningful roles and leadership opportunities for students.
  - Establish effective, measurable family engagement and communication strategies that support the development of meaningful relationships, including conducting quarterly family nights, and ensuring staff make weekly calls to families.
  - Cultivate community, philanthropic, volunteer and local partnerships through site visits and events that increase participation and financial support.
  - Act as Envisioneers Site Coordinator to the district
    - Attend all mandatory Site Coordinator meetings
    - Oversee state and district attendance reporting
    - Support Envisioneers' Continuous Quality Improvement (CQI) Plans
- **Hiring**
  - Participate in annual and ongoing talent recruitment and selection for campus staff and service members. Give clear and accurate feedback on candidates aligned with Envisioneers' hiring practices.
  - Ensure effective new hire orientation including introduction to school staff, regional staff, families and various stakeholders.

## Requirements and Qualifications

The ideal candidate will have:

- **Educational Leadership:** a track record of driving student academic and social emotional learning (SEL) outcomes and at least one year of experience providing coaching and/or mentorship to new teachers. Experience with middle school students is preferred.
- **Inspiration:** demonstrated success in moving a team to achieving goals through culturally-responsive teaching and student support.
- **Achievement:** a goal-oriented focus with personal ownership of results and experience overcoming barriers to achieving ambitious outcomes.
- **Community:** appreciation for the importance of diversity, equity, and inclusion as a core driver of all decisions and a belief that education is vital and requires community-wide support.
- **Team Building:** a proven record establishing and maintaining strong relationships with staff and external partners, and an ability to create buy-in from multiple

stakeholders.

- **Solution-Oriented:** a leader ready to work with their team with an attitude of joy and a passion for the work A mindset of positivity and grit.
- **Experience**
  - Bachelor's degree required; Master's degree in a relevant subject preferred.
  - Two years of experience leading a K-12 classroom or similar experience working with middle schoolers preferred
  - Four years of professional, post-undergraduate experience preferred.
  - At least one year of experience managing or leading a group of adults towards measurable outcomes.
  - Some experience managing a small to moderate budget
  - Spanish language skills are highly preferred.

## Compensation

Salary will be competitive with similar roles at non-profit organizations of comparable size and includes a robust benefits package. We offer medical and dental insurance, flexible PTO, a 401(k) plan, professional development stipend, and more.

*Envisioneers is an equal opportunity employer and enthusiastically encourages qualified individuals of all backgrounds to apply for employment. Envisioneers does not discriminate on the basis of race, ethnicity, gender identity, sexual orientation, religion, national origin, disability, or military veteran status.*

## To Apply

Email [mariadrake@citizenschools.org](mailto:mariadrake@citizenschools.org) with **Campus Director** in the subject line. Include your cover letter and resume in the body of your email. Attachments will NOT be opened. No calls please.

*EQUAL OPPORTUNITY STATEMENT: Envisioneers is an equal opportunity employer and does not discriminate on the basis of sex, race, color, religion, sexual orientation, national origin, cultural heritage, ancestry, political belief, age, marital status, pregnancy, physical or mental disability or veteran status. Envisioneers is compliant with the American with Disabilities Act and we are committed to making special accommodations for your interview or work as a member of our team. If specific accommodations are needed, please notify csandoval and we will work to accommodate your needs.*



## Help students discover and achieve their dreams. Join the National Teaching Fellowship in California.

As an AmeriCorps National Teaching Fellow at Envisioneers, you'll change the lives of middle school students. You'll serve as a member of a diverse team of caring adults dedicated to transforming the school day for middle school students in low income communities. We do this by adding three hours to the end of the school day, during which students receive additional academic support in math or language arts, complete homework in structured sessions and participate in hands-on apprenticeships taught by volunteer professionals from the community.

As a National Teaching Fellow, you will be performing an extraordinary act of citizenship, helping the nation to address one of its greatest challenges, educating our youth in ways that promote self belief, college readiness, and the skills needed to achieve their dreams. It is an opportunity that leads to a better future for students, yet also holds rich benefits for those willing to dedicate two years of their life to national service through AmeriCorps. That's why we call the opportunity: Teach, Serve, Grow.

All National Teaching Fellow positions begin in July 2021 with Summer Institute, an intensive training program during which you will learn the skills needed to successfully serve in low income schools and deliver high quality academic enrichment to students.

### **Essential Duties and Service Member Functions:**

*During your two years as a National Teaching Fellow you will:*

**SERVE:** The ability to connect with students day-to-day and help them through the difficult years of middle school is a profound opportunity for many individuals who join the Fellowship. Fellows are eager to impact the academics of students directly, but also have the opportunity to influence student growth through the lens of a mentor and coach.

- Act as a liaison and advocate for students in the school community
- Communicate regularly with families to discuss student progress and program updates
- Partner with volunteers from businesses, nonprofits, universities, and other local organizations, to create relevant, real world learning experiences for students
- Identify assets that already exist in the communities we serve, and support with making direct connections to our students and families
- Create and reinforce a culture of achievement
- Build lasting relationships with students, families, and volunteers that increase the school's impact in the community •

Create opportunities for students that strengthen the connection between academic success, college, and career

**TEACH:** Driving academic outcomes is a core component of our mission. On many campuses our Fellows push in or pull out small groups of students to aide instruction that is occurring during the first shift. (*occasionally TFs may deliver new content in select regions only and may vary by campus*). Teaching Fellows have an important role to play in the extension of learned content or "reteaching" / reinforcing what was previously delivered by a member of the first shift.

- Deliver hands-on, engaging lessons in Math and/or English Language Arts and provide structured homework/project support

- Partner with first shift teachers and families to support student academic and personal growth
- Inspire students to set and achieve ambitious goals, and hold students to consistently high expectations
- Monitor and use student learning data to inform instructional/ program decisions
- Prepare students for college by cementing college-to-career-connections
- Motivate students to attain the knowledge, skills, and beliefs to achieve personal goals
- Explicitly communicate the idea that hard work + opportunity = success
- Steward good classroom practice, including the creation of a safe learning environment

**GROW:** Training and support are critical components of the Teaching Fellowship experience and contribute greatly to our Teaching Fellows' overall successes, both in their direct service, and their personal/professional development. We are committed to providing

2

ongoing coaching opportunities throughout their two years of service that will lead to student impact, as well as career advancement. • Be challenged by diverse professional experiences at school, in the regional office, and with partner organizations • Impact program results through direct responsibility for school/ region-wide projects

- Plan, execute, and participate in a variety of school and regional events.
- Network with senior professionals in diverse disciplines including: technology, law, finance, and higher education • Collect, analyze, and use data to inform decision-making
- Operate in an entrepreneurial environment with access to campus, regional, and national leadership • Give and receive feedback, strengthening personal and professional skills
- Grow cultural competencies through the opportunity to work as part of a diverse professional and school community
- Receive career pathway development training and opportunities in your second year of service, such as resume coaching, job identification that aligns with your interests, as well as interviewing coaching techniques.

## **QUALIFICATIONS**

It takes a special person to work in education reform and to meet the challenges of today's schools. Before applying, please consider the following qualifications, skills, and experiences that we have found lead to success as a Teaching Fellow. No one candidate will meet every criteria; however, it is a good exercise to review the list in advance of submitting your application to ensure you believe you have "what it takes" to support middle school students to help them *discover and achieve their dreams*.

- Education Requirement- Must have completed at least 60 credit hours or its equivalent at an accredited college or university (*according to the standard 1 credit hour, per hour spent in class per week*), with a 2.5 cumulative GPA. Bachelor's degree, *preferred*.
- Knowledge of and commitment to the Envisioneers' mission to serve students in low income communities • Experience working or volunteering with students
- Passion for changing the lives of middle school students
- Desire to work with students and families in low income communities
- Strong academic skills in Math and English

- Ability to coach and mentor others
- Ability to solicit and receive adjusting feedback
- Commitment to teamwork and collaboration with colleagues from diverse backgrounds
- Ability to build relationships and influence students, colleagues, and community members
- Outstanding communication skills, strong detail orientation, time management, and organization skills •

Demonstrated leadership ability

- Demonstration of Envisioneers' values: Pride, Joy, Respect, Courage, Teamwork, Perseverance, and Vision

## **COMPENSATION AND BENEFITS**

National Teaching Fellows receive an annual living stipend of \$23,550 pre- tax, paid out in bi-weekly installments. You will also be eligible to receive:

- \$5,775 Segal Education Award for each year of service successfully completed
- Forbearance of qualified student loans during your two years of service
- Access to high quality health, dental and vision insurance
- Childcare benefits
- A national support network of members and alumni
- Ongoing professional development throughout 2-year service commitment

*\*For a more comprehensive view for each of the above benefits, please follow this [link](#).*

## **APPLICATION PROCESS**

### **Physical, Environmental and Health and Safety Requirements**

Serving as a National Teaching Fellow with Envisioneers requires members to be able to meet essential requirements in the following categories:

- **Physical Requirements:** Frequent movement and physical abilities to perform writing, communication and visual responsibilities are key in this service role.
- **Health and Safety:** Ability to maintain safety and respond to safety situations that commonly occur at schools.
- **Environmental Conditions:** Placement in urban school settings comes with exposure to many factors
- **Technology/Equipment use:** There are baseline technology requirements in this position that require ability to use and leverage a computer and other technology aids in schools.

### **Keeping Schools Safe**

Qualified candidates are required to successfully complete local and AmeriCorps directed criminal history and sexual offender checks. The requirements for clearance differ by region and school district based on applicable law and what are defined allowable convictions locally.

**EQUAL OPPORTUNITY STATEMENT:** Envisioneers is an equal opportunity employer and does not discriminate on the basis of sex, race, color, religion, sexual orientation, gender identity, national origin, cultural heritage, ancestry, political belief, age, marital status, pregnancy, physical or mental disability or veteran status. Envisioneers is compliant with the American with Disabilities Act and we are committed to making special accommodations for your interview or work as a member of our team.



## Envisoneers Board of Directors 2021-2022

| Name         | Title/Organization  | Preferred Email                                  | HOME Address                                  |
|--------------|---|--|---|
| Bob France   | Marvell Semiconductors<br>Chief of StaffProcessors Business<br>Group<br>Executive committee / Board Chair | france.bob@gmail.<br>com                         | 14501 Oak St<br>Saratoga, California<br>95070 |
| Wesley Ford  | Argo AI, Engineering Vice President<br>AdHoc benefitED  | twsford@gmail.com                                | PO Box 1400<br>Los Altos, CA 94023            |
| Itzik Gilboa | Western Digital, Senior Director<br>Strategic Accounts<br>ProgramChair/ Board Vice Chair                  | Itzik.Gilboa@sandisk.<br>com                     | 223 Carlyn Ave<br>Campbell, CA 95008          |
| Tracy Meng   | VP Commercial Partnerships,<br>Checkout.com   | tmeng21@gmail.co<br>m                            | 353 King St, #409, San<br>Francisco, CA 94107 |
| Karin Meyer  | Advisor / Technology &<br>Management Consultant<br>Strategy/mentorship chair                              | karin@karinmeyer.or<br>g                         | 301 Bryant St<br>Palo Alto, CA 94301          |
| Annie Khalid | <i>Director, Legal &amp; Compliance</i><br>Caffeine Inc.,   | anniekhkhalid@gmail<br>.com                      | 858 Avery Drive;<br>Mountain View,<br>94043_  |
| Kelly Stuart | COO, Collaborative Classroom ,<br>Strategy Chair  | kstuart@collaborativ<br>e classroom.org          | 217 Picnic Avenue<br>San Rafael, CA 94901     |
| Alena Taylor | Director<br>PricewaterhouseCoopers Advisory<br>Services LLC   | alena.k.taylor@gma<br>il.comalena.taylor@<br>PWC | 355 Jerome Ave,<br>Piedmont, CA 94610         |
| Bret Wallace | Senior Associate at Surveyor<br>Capital<br>Development/Board Finance Chair                                | bret.j.wallace@gma<br>il.com                     | 408 Eureka Avenue<br>San Francisco, 94114     |
| Jaime Zepeda | Regional Manager of Customer<br>Success at LinkedIn   | jazepeda@linkedin.<br>com<br>jryz83@gmail.cim    | 2231 Vegas Ave,<br>Castro Valley CA<br>94546  |

# Citizen Schools California Additional Advisory Board Meeting February 19, 2021

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## In attendance (all via Zoom)

Board: Bob France, Wesley Ford, Alena Taylor, Karin Meyer, Itzik Gilboa, Kelly Stuart, Jaime Zepeda, Annie Khalid

Tracy Meng

Staff: Maria Drake, Allison Knight, Charlie Skidmore, Seung Lee

Excused: Kayla Norris, Bret Wallace, Tracy Meng

**Minutes**: Allison

**Meeting came to order**: 12:05 PM PST

**Meeting came to a close**: 01:45 PM PST

## Notables and To Dos:

- Virtual benefitEd 2021 confirmed for 5/07/21
- Review idea and send feedback
- Board Contracts are due
- [Elevating Voices for Equity Events](#)

## Resource links:

- [Feb 19, 2021 Board Meeting Recording](#)
- [Citizen Schools COVID-19 Updates](#)
- [Virtual Volunteering](#)
- [California Budget Summary: K-12 Education](#)
- [SXSW EDU Online 2021](#)

**OUR MISSION**: Citizen Schools helps all students to thrive in school and beyond through hands-on learning and career mentors.

**OUR VISION**: Our vision is all students have experiences and career mentors that ignite curiosity, build confidence, and help them develop into the next generation of leaders.

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## 1. Welcome/Opening Remarks

(Maria)

- Welcome by Bob

## 2. Approval of Minutes

(Bob)

- Motion by Bob, Itzik approve, Kelly second, All Approve

### 3. **Formal Vote on Potential Board Member: Annie Khalid**

- Annie is currently in-house counsel at Caffeine Inc, formerly with Intuit and Apple
- Has been an advocate for CS programs since 2014 when she was a CT
- Annie is aware of planned spin-off/untethering and has been made aware of the board shifting from advisory to fiduciary
  - Motion to Approve Karin
  - Motion seconded, Kelly
  - No objections

### 4. **Strategy Committee Report**

**(Maria & Bob)**

#### • **Acquisition/Think Together**

- Citizen Schools Board voted to accept the non-binding LOI from Think Together and proceed into due diligence on the sale of ELT Assets.
- CS will retain ELT program in MA in FY22, while providing Afterschool Education Professional Development to an entity in Somerville.
- Offer price is \$800k for ownership of ELT assets, with licensing allowances for Citizen Schools in MA
- Offer also includes up to \$50k for staff vacation payouts
  - [Question] Itzik - Has this been released to staff and are there communication guidelines?
  - [Answer] Maria - Maria there is a communication plan, very transparent with staff along the way. Seung, Emily, Maria has been meeting with staff almost weekly. Some districts have had more in-depth conversations, others only preliminary. Further communications to external partners will not happen until we are deeper in due diligence period
- MA will stay with CS Inc next year to build out the capacity for schools to take it on, thereby building out community schools,
- Decisions will be finalized soon, CA will sell ELT and give use to Think Together, specifics for Somerville will be negotiated
- MA going to be working with Seung/Emily/Maria to gauge staff participation – the transition is reliant on their participation
- Several conversations with Think Together during this due diligence. They have met many staff members, upcoming days and weeks further conversations will be had with the goal of painting clearer picture of our work
- We are able to break our lease at Sobrato – Think Together would be able to easily move into the space, Envisioneers may have to go on a waiting list
- Moving forward with district contacts, if TT doesn't get district contract, they won't want to continue with acquisition
  - [Comment] Bob – Originally the deal was going to be a license to Think Together, now it would purchase the IP, be a grant back . Ultimately they get ownership in perpetuity rather than licensing. Assets aren't hard assets, the offer (800K) is significant and there won't have to be future collaboration with TT

#### • **Spin-Off /Enisioneers**

- Making progress in terms of completing required paperwork. Karin has been helpful in helping us identify banks
- Conversations with Zenefits and ADP and Upworth for back-of-house admin needs
  - [Question]; Itzik – In the Envisioneers scenario, what happens to MA ? –
  - [Answer] Maria - I believe they will be staying with CS Inc due to their funding scenarios. Consensus is the program in MA would be better if not connected to the CA team – hard to manage across the regions and different cultures. CS will transition the program to Somerville . Think Together expressed no interest in CS MA, only California . Eventually the CS program will wind down and concepts will be integrated and implemented at the

school level- no attachments to CS INC or Citizen Schools California

- [Question] Kelly - How are staff feeling about this?
- [Answer] Seung - Not all campus staff have been part of the calls w/ TT. The conversations have been optimistic as they see the move as an opportunity. The TT teams are interested in understanding our complex model. All campus teams have been briefed individually. Their main concern is around the mission of TT and ensuring continuity in culture (specifically around DEI)
- [Answer] Charlie - TFs are very excited. 2nd year TFs think there may be opportunity for advancement. Staff are reassured that everyone will have a place
- [Comment] The original MOU made notion to an "Escape Hatch" which states TT can walk away, no penalties. I Appreciate that TT is committed to retaining positions for staff. TT is pro-growth and this is a high point for discussion.
- [Question] Itzik - What about gaps in benefits and equity?
- [Answer] Maria - TT has Agreed to bring everyone in at their current rate. Not sure about implications in the future. TT does know that California staff have different salary expectations. Their intentions are good. The need for staff is equally as great as the desire to expand .They can't expand without staff. TT has 3200 people (6:1 from CS) – this shows our staff there's a way to grow
- There are earmarked funds in Governor Newsom's budget to fund exactly what we do (Expanded Learning Time). This can help solidify the continuation of "push-in."
- There is also an emphasis on "professionalize" the Expanded Learning market, showing career pathways for those working in the space
  - [Comment] Karin - Want to recognize Maria and staff - the spin-off/acquisition has been a ton of work coupled with the continuation of the program.

## 5. Sustainability

- Bret has reviewed the Pro Forma budget for Envisioneers
- From a revenue standpoint, we are on track for a surplus
- Not shown is a 200K "goodbye gift" from the Sergei Brin Foundation
- We have lost some gifts this year, but there are still a lot of outstanding gifts
- The organization's current financial standing is very healthy
- We have gotten 2 rounds of PPP which has yielded a healthy cash flow
- If the TT sale goes through, CS will be experience the best financial standing in recent memory
- In California, our fundraising is on target
  - Foundation Sector: surpassed fundraising goal - Shortino pending for 50K, likely to come in - WGBH recent grant for programming
  - Corporate Sector: 60% raised - Outcoming asks with WD, Sandia, and Bank of America
  - Individual Sector - We did not do as great in individual giving in Dec which is typically the biggest month, some gifts simply didn't come in. Some are coming in now, but didn't see that happen this year. Hopefully benefitEd make up the difference
  - benefitEd - 30K in sponsorships in, individual and corp sponsorships
  - Corp Engagement (Maria)
    - benefitEd pledges from Star One, Grupology, Twilio, and Okta
    - Pending pledges from Dome Construction, Western Digital, Argo, and Star One (additional 10K)
    - Outstanding grants: Bank of America (30K) Western Digital (50K), Sandia (25K), Shortino Foundation (50K)
    - Programming with funding; WGBH, Outschoool, Tata Consulting
      - Outschoool has many barriers for students to take advantage of program
      - Bob would be able to assist in closing the technology gap
      - Jaime is connecting with different companies to source laptops/tablets, connect

- with Jaime if there is more interest
- Might want to incentivize the gift of a computer for completing the program
- Also might want to consider parent/family computer

**6. benefitEd 2021**

**(Maria)**

- Doing another wine down, but switching it up a bit
- This year we are looking at the program through a DEI lens, seeking to partner with wineries that are owner by people of color - We have 3 wineries on the horizon
- Instead of wine tasting with a sommelier, we will hear from the wine proprietors and learn their backstory, specifically the grit and perseverance pieces of their history. This will be a way to talk about barriers in the industry
- [Mi Sueno Winery](#) has a great backstory, we are seeking to package these stories and present the themes (i.e. career pathways, grit) in our event
- Ticketing and sponsorships will be the same as last year
- Cisco will produce the event again, A save the date will have the link to the Cisco tv address to add to calendar
  - [Comment] Bob - The production quality of Cisco last year has been unmatched
  - [Comment] Maria - There has been advancement in virtual event streaming, but having Cisco do the production is very valuable/ The Cisco producers also wanted to come back after their experience last year
  - [Comment] Bob - We could do a fermentation apprenticeship (probably not with wine), but could offer something with hot sauce or fermentation to tie in students' learning

**7. Program**

**(Seung)**

- Campus Snapshot:
  - 359 students in apprenticeships
  - 1344 students via push-in
  - 39 TA/TF
  - 42 apprenticeships
  - 163 CTS
- Consistent attendance issues, there has been an uptick in attendance in the new year, participation ebbs and flows, average 15-20 students being served after school per day
- Virtual Apprenticeships have been successful for students as they have enjoyed their experiences, helps with attendance
- Teaching Associates have historically only supported in after school hours, but virtual programming allows them to serve students during push-in too, that's why we have such high numbers for push-in students served
- Mid-Year Report
  - Enrollments is lower than projected as we believed a hybrid/in-person model would be an option by now -but up 5% since last report
  - Student SEL measures have been high, particularly 79% of students feel strongly positive in relationships they have at Citizen Schools (this as #1 goal for the school year for virtual learning)
    - [Question] Bob - Is this score higher than pre-COVID?
    - [Answer] Seung - I believe this is higher than we typically see
    - [Comment] Seung - program is smaller, more intimate interactions with students
    - [Comment] Bob - probably more self-selection too. As high-performing students are attending regularly
  - CTs have given us a NPS of 72, 95% agreed that the team leader exhibited high-level professionalism. This is an area we targeted as previous CTs provided feedback that CS staff were not actively engaged. Many CTs who volunteered in Fall and are returning in Spring
  - 100% of principals rate the partnership as positive and healthy, noting the impact we are making on students and the community

- [Comment] Itzik - These are amazing results for our community in a year that hasn't been easy. Kudos to Seung and everyone who has helped make this an impactful year
  - [Comment] Seung - This is teaching us that distance learning won't stop when students return to campus, rather this is another platform. Students will continue using virtual resources
  - [Question] Bob - Is distance learning, program adaptation part of the conversation in due diligence?
  - [Answer] Seung - We haven't gotten into all of the details of our impact, we have given overviews, helping them understand push-in, partnerships and CT pipeline.
  - [Comment] Bob- This is important to work into the conversation as the results are very important, especially during distance learning
- Somerville - Teachers Union have signed an MOA to return to school, issues with replacing HEPA filters in schools, but there is a scaled timeline
- Alum Rock & Redwood City- Waiting to hear what negotiations are, no concrete return date
- Oakland - Care Pods will support March 1st. We received a grant to hire on staff to support
  - [Question] Has there been any conversations about next school year?
  - [Answer] Maria- There is a statewide push for full-time, in-person return next Fall. The student return date would be much earlier than it has been in the past (at least 8 days). There is state funding to incentivize schools and nonprofit parents to return earlier
  - [Question] Karin - Is the push to open earlier to make up for lost time?
  - [Answer] Maria - It is, but not only for students most in need.
  - [Comment] Itzik - In addition to starting school early, districts are also discussing a switch to a hybrid model which would happen any day. Need to plan for this.
  - [Answer] Seung - Fall year will likely begin in a hybrid model, but there may be potential for distance learning to be permanent - parents could opt in to this. Virtual apprenticeships may be a consistent offering for students. May need to navigate having two different curriculums
  - [Comment] Annie - There are variations between counties in terms of scheduling.
  - [Comment] Maria - We are currently in 3 counties. There are so many schools are back full time, I believe that federal and state governments are going to push schools (and us) to resume full-time, in-person schools this Fall. There will be hurdles (Teachers Unions).
  - [Comment] Jaime - The latest budgets have money for schools who are deemed "COVID-Ready" in April, and that is based on county case data. Cases have plummeted in some counties - if schools are open, they get that grant.
  - [Comment] Annie - Not all parents will send children to school, there will still be significant distance learning.
  - [Comment] Jaime - The majority of schools who have already opened are affluent (they have technology and support structure at home), this may not be the reality for our students
  - [Comment] Maria - It is likely that CTs will be virtual for a while and students will be in-person. This is something we tried to pilot years ago to address barriers to in-person volunteering
  - [Comment] Bob - Maybe I will finally be able to teach at an Oakland campus!
- CT survey has been emailed
- All apprenticeships are filled with by volunteers
- Apprenticeship Fairs have been well received by students
- 70-75% returning from last semester
- Have created intentional support structures for volunteers including bi-weekly gatherings
  - [Comment] Itzik - Most of the feedback from the CT survey (regarding desire for more support and resources) has already been implemented
  - [Comment] Maria - I don't believe we've ever seen 70% retention rate for semester over semester - maybe it has been closer to 45% . This can be attributed to the effort in

**8. Talent**

**(Maria/Seung)**

- We are working hard to shore up staff during this transitional period
- We are restructuring our Quarterly employee performance conversations
- February - Encouraging reflection on vision setting and progress
- March - Competency mapping and a 360 review
- April - Determination of next steps for TL's development. We are launching Maximizing Career Choices - a series of opportunities for TLs to engage in. Outside partner will facilitate it
- Weeklong workshop the second week of March - Sessions for resume writing and interview skills which will be relevant and practical for staff if they transition
- Thank you to our board members who have signed up to mentor our Teaching Fellows. Will be our staff, but also Maker Fellows
- Karin and Maria will discuss reinstating mentorship for the remainder of the semester for the staff. Program was deprioritized, but much needed now to assist staff (TLs and CDs)
- Seung will collect interest areas and share with Karin

**9. ED Report**

**(Maria)**

- Citizen Schools Inc received 2nd influx of PPP funding, putting organization in sound financial position
- Refer to California State Budget for insights into educational funding and focus as well as COVID relief
- Oakland Learning Pods launch soon
- Some board contracts have been received, please sign and return as soon as possible
- West Contra Costa Unified School District has selected us to be the ELT partner for Helms Middle School, there will be further conversations with district leadership regarding a potential pivot
- Think Together did apply for WCCUSD so should have lead agency status for the district and able to execute programming at Helms
- [Aurum- Preparatory School](#) in Oakland would also like Citizen Schools programming in SY 21-22, informed that we will get back to them in April, believe they would welcome Think Together, and TT would not have to go through the RFQ, but would have to do the application for other schools
- These additions are proof that growth is possible
- Elevating Voices for Equity (BIPOC Series) are still happening
- Webinar with Nicole Hannah Jones from 1619 Project
- National Board Meeting 2/25
- Citizen Schools California Board Meeting 4/16
- Upcoming conversation with Salesforce regarding the Ohana Room, will keep group abreast of changes in reservation
- Citizen Schools selected for SXSW education panel



## THE DEPARTMENT OF EXPANDED LEARNING

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July 30, 2020

To Whom It May Concern:

I am writing this letter in support and recommendation of the work that Citizen Schools has been doing in our Oakland Unified School District. While Citizen Schools has been delivering their signature ELT program to our Oakland community for over 14 years, our current After School team has been working in partnership with them over the last three years.

At Greenleaf Elementary, a diverse, K-8 underserved community school in East Oakland, Citizen Schools, serves the 6<sup>th</sup> through 8<sup>th</sup> grades. They weathered three principals, a school construction overhaul, and still, the student and family impact remains impressive. As a partner to the school administration over the years, the use of their Citizen Teacher volunteers, and their willingness to support the wishes of the school administration in considering individuals for leadership roles in their organization and on the school's site team, the students have shown an overall academic increase in SBAC Math & ELA proficiency between their 6<sup>th</sup>-grade score of 38% to an 8<sup>th</sup>-grade score of 89%.

At Roots Academy, Citizen Schools was a critical ELT, a partner which was only a 2-year engagement during a difficult time for the school (it was subsequently closed in 2019). Their work, again with the administration, had a direct effect on the students. They supported the students' social-emotional wellbeing by helping them navigate Roots' closure and transition to other schools. During the academic year, they supported the academic challenges of the students through iReady assessments and small group tutoring. Our Campus Director took it upon herself to work with the school's Restorative Justice liaison. The Citizen Schools team also offered support to many of the students on a daily basis and created a bridge to families with daily phone calls.

After the closure of Roots Academy last year, Citizen Schools was asked to partner with another school in Oakland, Westlake Middle school. Working in unison with the school administration, the students not only had the academic support of the Citizen schools, the school site teachers did as well. Citizen Schools embedded a staff member into the classroom of four teachers daily to support their students. The students also had the opportunity to explore career possibilities with a number of volunteers from careers in photography to robotics and everything in between.

When COVID closed the school in mid-March, the staff remained involved in the school push-in and tried to continue the career apprenticeships. They remained actively



## THE DEPARTMENT OF EXPANDED LEARNING

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engaged in supporting the students by calling home, getting computers to the families, offering office hours for academic and emotional support.

All in all, Citizen Schools is a true example of an Expanded Learning Program fully integrated into and with their school partners, working together to build social-emotional and academic skills in order to help close the education gap.

I want to thank you for supporting their work and in turn our Oakland scholars. We cannot do this work alone, but with your financial support and the support of organizations like Citizen Schools, we are making a difference in bringing equity to education. Feel free to contact me at [Martha.Pena@ousd.org](mailto:Martha.Pena@ousd.org) if you have any questions.

Regards,

Martha Pena, Coordinator of Expanded Learning Office



**FINANCIAL STATEMENTS  
JUNE 30, 2019 AND 2018**

**CITIZEN SCHOOLS, INC.**

Contents  
June 30, 2019 and 2018

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50 Washington Street  
Westborough, MA 01581  
508.366.9100  
aafcpa.com

## Independent Auditor's Report

To the Board of Directors of  
Citizen Schools, Inc.:

### **Report on the Financial Statements**

We have audited the accompanying financial statements of Citizen Schools, Inc. (a Massachusetts corporation, not for profit) (the Agency), which comprise the statements of financial position as of June 30, 2019 and 2018, and the related statements of activities and changes in net assets, cash flows and functional expenses for the years then ended, and the related notes to the financial statements.

### ***Management's Responsibility for the Financial Statements***

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes 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.

### ***Auditor's Responsibility***

Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audits to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements 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 the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

### ***Opinion***

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Citizen Schools, Inc. as of June 30, 2019 and 2018, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

***Emphasis of Matter***

As disclosed in Note 2 to the financial statements, in fiscal year 2019, the Agency adopted Accounting Standards Update No. 2016-14, *Not-for-Profit Entities (Topic 958): Presentation of Financial Statements of Not-for-Profit Entities*. Our opinion is not modified with respect to that matter.

As disclosed in Note 12, the June 30, 2018 financial statements have been restated to record expenses associated with fiscal year 2018 that were not properly recorded. Our opinion is not modified with respect to this matter.

*AAFCPA, Inc.*

Westborough, Massachusetts  
December 5, 2019

**CITIZEN SCHOOLS, INC.**Statements of Financial Position  
June 30, 2019 and 2018

| <b>Assets</b>   | <b>2019</b>  | <b>2018</b><br><b>(As Restated)</b> |
|---|--------------|-------------------------------------|
| Current Assets:   |              |                                     |
| Cash  | \$ 237,691   | \$ 741,315                          |
| Current portion of pledges receivable   | 1,744,755    | 1,885,123                           |
| Public sector receivable  | 974,986      | 534,198                             |
| Prepaid expenses and other  | 29,605       | 11,487                              |
| Total current assets  | 2,987,037    | 3,172,123                           |
| Restricted Cash and Cash Equivalents  | 29,999       | 139,058                             |
| Pledges Receivable, net of current portion, allowance<br>for doubtful accounts and discount | 1,202,916    | 2,014,426                           |
| Property and Equipment, net   | 102,134      | 448,459                             |
| Total assets  | \$ 4,322,086 | \$ 5,774,066                        |
| <b>Liabilities and Net Assets</b>   |              |                                     |
| Current Liabilities:  |              |                                     |
| Accounts payable and accrued expenses   | \$ 1,143,457 | \$ 1,094,071                        |
| Current portion of accrued rent   | -            | 45,723                              |
| Total current liabilities   | 1,143,457    | 1,139,794                           |
| Accrued Rent, net of current portion  | -            | 202,910                             |
| Total liabilities   | 1,143,457    | 1,342,704                           |
| Net Assets:   |              |                                     |
| Without donor restrictions:   |              |                                     |
| Operating   | 269,498      | (272,858)                           |
| Property and equipment  | 102,134      | 448,459                             |
| Total without donor restrictions  | 371,632      | 175,601                             |
| With donor restrictions   | 2,806,997    | 4,255,761                           |
| Total net assets  | 3,178,629    | 4,431,362                           |
| Total liabilities and net assets  | \$ 4,322,086 | \$ 5,774,066                        |

The accompanying notes are an integral part of these statements.

Page 2

**CITIZEN SCHOOLS, INC.**

Statements of Activities and Changes in Net Assets  
For the Years Ended June 30, 2019 and 2018

|   | 2019                       |                         |              | 2018 (As Restated)         |                         |              |
|---|----------------------------|-------------------------|--------------|----------------------------|-------------------------|--------------|
|   | Without Donor Restrictions | With Donor Restrictions | Total        | Without Donor Restrictions | With Donor Restrictions | Total        |
| <b>Operating Support and Revenue:</b>         |                            |                         |              |                            |                         |              |
| Grants and contributions - private            | \$ 5,922,702               | \$ 600,000              | \$ 6,522,702 | \$ 5,082,717               | \$ 3,995,807            | \$ 9,078,524 |
| Public sector                                 | 3,794,921                  | -                       | 3,794,921    | 5,526,120                  | -                       | 5,526,120    |
| Donated goods and services                    | 2,028,106                  | -                       | 2,028,106    | 238,178                    | -                       | 238,178      |
| Release of net assets with donor restrictions | 2,048,764                  | (2,048,764)             | -            | 2,203,111                  | (2,203,111)             | -            |
| Total operating support and revenue           | 13,794,493                 | (1,448,764)             | 12,345,729   | 13,050,126                 | 1,792,696               | 14,842,822   |
| <b>Operating Expenses:</b>                    |                            |                         |              |                            |                         |              |
| Program services:                             |                            |                         |              |                            |                         |              |
| State Services                                | 2,019,963                  | -                       | 2,019,963    | 2,298,558                  | -                       | 2,298,558    |
| National Services                             | 1,059,917                  | -                       | 1,059,917    | 1,265,496                  | -                       | 1,265,496    |
| Field Development                             | 4,039,927                  | -                       | 4,039,927    | 3,337,049                  | -                       | 3,337,049    |
| Campus Operations                             | 3,351,871                  | -                       | 3,351,871    | 5,630,249                  | -                       | 5,630,249    |
| Total program services                        | 10,471,678                 | -                       | 10,471,678   | 12,531,352                 | -                       | 12,531,352   |
| Support services:                             |                            |                         |              |                            |                         |              |
| Development                                   | 1,438,377                  | -                       | 1,438,377    | 1,656,343                  | -                       | 1,656,343    |
| General and Administrative                    | 1,688,407                  | -                       | 1,688,407    | 2,093,764                  | -                       | 2,093,764    |
| Total support services                        | 3,126,784                  | -                       | 3,126,784    | 3,750,107                  | -                       | 3,750,107    |
| Total operating expenses                      | 13,598,462                 | -                       | 13,598,462   | 16,281,459                 | -                       | 16,281,459   |
| Changes in net assets                         | 196,031                    | (1,448,764)             | (1,252,733)  | (3,231,333)                | 1,792,696               | (1,438,637)  |
| <b>Net Assets:</b>                            |                            |                         |              |                            |                         |              |
| Beginning of year, as restated                | 175,601                    | 4,255,761               | 4,431,362    | 3,406,934                  | 2,463,065               | 5,869,999    |
| End of year                                   | \$ 371,632                 | \$ 2,806,997            | \$ 3,178,629 | \$ 175,601                 | \$ 4,255,761            | \$ 4,431,362 |

**CITIZEN SCHOOLS, INC.**Statements of Cash Flows  
For the Years Ended June 30, 2019 and 2018

|  | <u>2019</u>       | <u>2018</u><br><u>(As Restated)</u> |
|--|-------------------|-------------------------------------|
| <b>Cash Flows from Operating Activities:</b>   |                   |                                     |
| Changes in net assets  | \$ (1,252,733)    | \$ (1,438,637)                      |
| Adjustments to reconcile changes in net assets to net cash used in operating activities: |                   |                                     |
| Depreciation   | 346,325           | 588,009                             |
| Bad debts (recoveries)   | (21,066)          | 74,697                              |
| Change in pledges receivable discount  | (142,424)         | 153,040                             |
| Changes in operating assets and liabilities:   |                   |                                     |
| Pledges receivable   | 1,115,368         | (1,413,427)                         |
| Public sector receivable   | (440,788)         | 572,932                             |
| Prepaid expenses and other   | (18,118)          | 162,423                             |
| Restricted cash and cash equivalents   | 109,059           | (30,008)                            |
| Accounts payable and accrued expenses  | 49,386            | 164,858                             |
| Accrued rent   | (248,633)         | (79,353)                            |
| Net cash used in operating activities  | (503,624)         | (1,245,466)                         |
| <b>Cash Flows from Investing Activities:</b>   |                   |                                     |
| Acquisition of property and equipment  | -                 | (94,130)                            |
| <b>Net Change in Cash</b>  | (503,624)         | (1,339,596)                         |
| <b>Cash:</b>   |                   |                                     |
| Beginning of year  | 741,315           | 2,080,911                           |
| End of year  | <u>\$ 237,691</u> | <u>\$ 741,315</u>                   |

**CITIZEN SCHOOLS, INC.**

Statement of Functional Expenses

For the Year Ended June 30, 2019

(With Summarized Comparative Totals for the Year Ended June 30, 2018)

|                                       | 2019                 |                      |                      |              |                              | 2018                                  |              |               |               |
|---------------------------------------|----------------------|----------------------|----------------------|--------------|------------------------------|---------------------------------------|--------------|---------------|---------------|
|                                       | Program Services     |                      |                      |              | Total<br>Program<br>Services | Support Services                      |              | Total         |               |
| State<br>Services                     | National<br>Services | Field<br>Development | Campus<br>Operations | Development  |                              | General<br>and<br>Adminis-<br>trative | Total        |               |               |
| <b>Personnel and Related:</b>         |                      |                      |                      |              |                              |                                       |              |               |               |
| Salaries                              | \$ 1,183,830         | \$ 480,579           | \$ 1,741,042         | \$ 2,230,700 | \$ 5,636,151                 | \$ 919,473                            | \$ 545,999   | \$ 7,101,623  | \$ 10,004,015 |
| Fringe benefits                       | 206,558              | 108,767              | 208,190              | 226,947      | 750,462                      | 99,177                                | 155,479      | 1,005,118     | 1,124,004     |
| Payroll taxes                         | 88,457               | 35,101               | 127,603              | 165,626      | 416,787                      | 65,848                                | 39,705       | 522,340       | 738,909       |
| Total personnel and related           | 1,478,845            | 624,447              | 2,076,835            | 2,623,273    | 6,803,400                    | 1,084,498                             | 741,183      | 8,629,081     | 11,866,928    |
| <b>Occupancy:</b>                     |                      |                      |                      |              |                              |                                       |              |               |               |
| Rent                                  | 851                  | 34,203               | 52,168               | 138,562      | 225,784                      | 48,101                                | 147,650      | 421,535       | 673,936       |
| Utilities                             | 26,467               | 24,841               | 25,513               | 33,013       | 109,834                      | 13,053                                | 59,150       | 182,037       | 259,614       |
| Repairs and maintenance               | 9,045                | 9,255                | 7,789                | 8,241        | 34,330                       | 3,794                                 | 21,877       | 60,001        | -             |
| Depreciation                          | 5,580                | 3,457                | 6,261                | 9,133        | 24,431                       | 2,770                                 | 7,431        | 34,632        | 58,801        |
| Total occupancy                       | 41,943               | 71,756               | 91,731               | 188,949      | 394,379                      | 67,718                                | 236,108      | 698,205       | 992,351       |
| <b>Other:</b>                         |                      |                      |                      |              |                              |                                       |              |               |               |
| In-kind services                      | 87,750               | 87,750               | 1,404,000            | -            | 1,579,500                    | 87,750                                | 282,088      | 1,949,338     | 238,177       |
| Professional fees and services        | 219,006              | 164,034              | 254,076              | 131,478      | 768,594                      | 105,773                               | 258,888      | 1,133,255     | 1,228,765     |
| Depreciation                          | 50,220               | 31,115               | 56,353               | 82,199       | 219,887                      | 24,929                                | 66,877       | 311,693       | 529,208       |
| Equipment/software                    | 74,901               | 45,063               | 55,061               | 20,816       | 195,841                      | 21,672                                | 67,184       | 284,697       | 328,044       |
| Transportation                        | -                    | -                    | -                    | 140,788      | 140,788                      | -                                     | -            | 140,788       | 155,047       |
| Travel                                | 17,171               | 9,036                | 39,774               | 10,986       | 76,967                       | 15,116                                | 5,011        | 97,094        | 236,292       |
| Direct campus expenses                | -                    | -                    | -                    | 87,720       | 87,720                       | -                                     | -            | 87,720        | 87,897        |
| Meetings and trainings                | 8,496                | 1,095                | 17,165               | 23,922       | 50,678                       | 6,568                                 | 1,098        | 58,344        | 110,145       |
| Other                                 | 8,104                | 8,576                | 8,512                | 6,712        | 31,904                       | 8,491                                 | 10,875       | 51,270        | 77,111        |
| Insurance                             | 7,322                | 3,741                | 9,879                | 11,079       | 32,021                       | 6,163                                 | 4,494        | 42,678        | 81,875        |
| Communications                        | 13,443               | 6,344                | 8,567                | 4,400        | 32,754                       | 1,284                                 | 6,660        | 40,698        | 72,853        |
| Office                                | 7,478                | 4,275                | 6,283                | 4,260        | 22,296                       | 2,885                                 | 6,086        | 31,267        | 77,031        |
| Promotional materials and advertising | 4,847                | 2,299                | 9,252                | 1,660        | 18,058                       | 3,401                                 | 1,455        | 22,914        | 51,571        |
| Entrance and membership fees          | 437                  | 386                  | 2,439                | 13,629       | 16,891                       | 2,129                                 | 400          | 19,420        | 20,195        |
| Bad debts                             | -                    | -                    | -                    | -            | -                            | -                                     | -            | -             | 74,697        |
| Professional fees - evaluation        | -                    | -                    | -                    | -            | -                            | -                                     | -            | -             | 53,272        |
| Total other                           | 499,175              | 363,714              | 1,871,361            | 539,649      | 3,273,899                    | 286,161                               | 711,116      | 4,271,176     | 3,422,180     |
| Total expenses                        | \$ 2,019,963         | \$ 1,059,917         | \$ 4,039,927         | \$ 3,351,871 | \$ 10,471,678                | \$ 1,438,377                          | \$ 1,688,407 | \$ 13,598,462 | \$ 16,281,459 |

**CITIZEN SCHOOLS, INC.**

Statement of Functional Expenses  
For the Year Ended June 30, 2018 (As Restated)

|                                       | Program Services    |                     |                     |                     |                        | Support Services    |                            |                      |
|---------------------------------------|---------------------|---------------------|---------------------|---------------------|------------------------|---------------------|----------------------------|----------------------|
|                                       | State Services      | National Services   | Field Development   | Campus Operations   | Total Program Services | Development         | General and Administrative | Total                |
| <b>Personnel and Related:</b>         |                     |                     |                     |                     |                        |                     |                            |                      |
| Salaries                              | \$ 1,344,483        | \$ 605,179          | \$ 2,199,999        | \$ 3,897,727        | \$ 8,047,388           | \$ 1,063,193        | \$ 893,434                 | \$ 10,004,015        |
| Fringe benefits                       | 149,939             | 63,918              | 236,285             | 459,338             | 909,480                | 125,829             | 88,695                     | 1,124,004            |
| Payroll taxes                         | 99,763              | 42,671              | 162,169             | 299,105             | 603,708                | 72,303              | 62,898                     | 738,909              |
| Total personnel and related           | <u>1,594,185</u>    | <u>711,768</u>      | <u>2,598,453</u>    | <u>4,656,170</u>    | <u>9,560,576</u>       | <u>1,261,325</u>    | <u>1,045,027</u>           | <u>11,866,928</u>    |
| <b>Occupancy:</b>                     |                     |                     |                     |                     |                        |                     |                            |                      |
| Rent                                  | 111,569             | 127,128             | 83,586              | 102,624             | 424,907                | 59,887              | 189,142                    | 673,936              |
| Utilities                             | 44,285              | 56,437              | 25,742              | 28,398              | 154,862                | 23,233              | 81,519                     | 259,614              |
| Depreciation                          | 7,994               | 4,735               | 11,184              | 22,127              | 46,040                 | 4,863               | 7,898                      | 58,801               |
| Total occupancy                       | <u>163,848</u>      | <u>188,300</u>      | <u>120,512</u>      | <u>153,149</u>      | <u>625,809</u>         | <u>87,983</u>       | <u>278,559</u>             | <u>992,351</u>       |
| <b>Other:</b>                         |                     |                     |                     |                     |                        |                     |                            |                      |
| In-kind services                      | 8,033               | -                   | 15,966              | 46,984              | 70,983                 | 2,821               | 164,373                    | 238,177              |
| Professional fees and services        | 262,044             | 187,835             | 211,134             | 115,518             | 776,531                | 124,322             | 327,912                    | 1,228,765            |
| Depreciation                          | 71,948              | 42,614              | 100,659             | 199,142             | 414,363                | 43,763              | 71,082                     | 529,208              |
| Equipment/software                    | 83,117              | 66,463              | 41,404              | 29,309              | 220,293                | 28,382              | 79,369                     | 328,044              |
| Transportation                        | -                   | -                   | -                   | 155,047             | 155,047                | -                   | -                          | 155,047              |
| Travel                                | 34,331              | 20,741              | 71,761              | 24,031              | 150,864                | 28,895              | 56,533                     | 236,292              |
| Direct campus expenses                | -                   | -                   | -                   | 87,897              | 87,897                 | -                   | -                          | 87,897               |
| Meetings and trainings                | 10,604              | 2,650               | 35,201              | 40,907              | 89,362                 | 10,953              | 9,830                      | 110,145              |
| Other                                 | 12,252              | 8,568               | 12,300              | 19,266              | 52,386                 | 13,772              | 10,953                     | 77,111               |
| Insurance                             | 10,543              | 4,377               | 16,348              | 36,315              | 67,583                 | 5,819               | 8,473                      | 81,875               |
| Communications                        | 17,359              | 11,525              | 9,798               | 15,896              | 54,578                 | 4,683               | 13,592                     | 72,853               |
| Office                                | 10,112              | 4,179               | 17,683              | 30,432              | 62,406                 | 5,578               | 9,047                      | 77,031               |
| Promotional materials and advertising | 9,378               | 4,395               | 12,811              | 6,683               | 33,267                 | 14,889              | 3,415                      | 51,571               |
| Entrance and membership fees          | 1,286               | 1,239               | 8,443               | 2,200               | 13,168                 | 4,730               | 2,297                      | 20,195               |
| Bad debts                             | 9,518               | 10,842              | 11,304              | 11,303              | 42,967                 | 18,428              | 13,302                     | 74,697               |
| Professional fees - evaluation        | -                   | -                   | 53,272              | -                   | 53,272                 | -                   | -                          | 53,272               |
| Total other                           | <u>540,525</u>      | <u>365,428</u>      | <u>618,084</u>      | <u>820,930</u>      | <u>2,344,967</u>       | <u>307,035</u>      | <u>770,178</u>             | <u>3,422,180</u>     |
| Total expenses                        | <u>\$ 2,298,558</u> | <u>\$ 1,265,496</u> | <u>\$ 3,337,049</u> | <u>\$ 5,630,249</u> | <u>\$ 12,531,352</u>   | <u>\$ 1,656,343</u> | <u>\$ 2,093,764</u>        | <u>\$ 16,281,459</u> |

The accompanying notes are an integral part of these statements.

## CITIZEN SCHOOLS, INC.

Notes to Financial Statements  
June 30, 2019 and 2018

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### 1. OPERATIONS AND NONPROFIT STATUS

#### Operations

Citizen Schools, Inc. (the Agency) is a Massachusetts nonprofit corporation founded in 1995 to educate the youth, strengthen communities and bring new solutions to the challenge of young adult education. Currently, the Agency seeks to close opportunity and achievement gaps by bringing project-based, citizen-powered learning experiences to public school classrooms in low-income communities through a combination of school-based Expanded Learning Time and after-school programming in four states, a national Science, Technology, Engineering and Math (STEM) mentoring network, and field-building and policy initiatives. Beginning in fiscal year 2018, the Agency expanded its programming to include a pilot program to conduct its programmatic offerings during the traditional school day.

In fiscal year 2019, the Agency operated extended learning time programs at sixteen sites, enrolling approximately 3,432 students from schools in underserved communities across three states, and engaged approximately 650 "citizen teacher" volunteers. The Agency also operated school-day programs in support of twenty-five classrooms, supporting nearly 1,200 students and engaging an additional 83 volunteers. The Agency also supported a network of regional coalitions creating STEM-based hands-on learning for students in twenty-one cities, ultimately impacting over 150,000 students and over 20,000 volunteers.

In fiscal year 2018, the Agency operated at twenty-three sites, enrolling approximately 3,540 low-income students across four states and engaged approximately 900 citizen teacher volunteers.

Students are enrolled for the entire school year and participate in an integrated program of skill-building, leadership, and teamwork. The Agency works with students intensively and consistently to build students' academic skills and expand their opportunities.

Specifically, the Agency:

- Provides students with the skills to navigate their school landscapes,
- Teaches twenty-first century skills through hands-on projects that connect current learning to future opportunities,
- Engages volunteers from all walks of life to teach apprenticeship courses,
- Builds bridges to civic and cultural institutions and teaches students to access them,
- Raises students' awareness and aspirations for college attainment through visits to college campuses, and
- Instills and celebrates the values of courage, respect, motivation, and teamwork.

In fiscal year 2019, the Agency operated programs in the following states and cities:

- Massachusetts - five programs located in Boston and Somerville
- California - seven programs located in East Palo Alto, Oakland, and San Jose
- New York - four programs located in Brooklyn, Bronx, and Harlem

The Agency's programs consist of the following:

**State Services** - Services provided by the Agency's state offices to directly support campus operations. Services include campus staff and citizen teacher recruiting, local relationship and key stakeholder management, regional best practice sharing, regionally-based staff training, and direct management and professional development of campus directors.

## CITIZEN SCHOOLS, INC.

Notes to Financial Statements  
June 30, 2019 and 2018

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### 1. OPERATIONS AND NONPROFIT STATUS (Continued)

#### Operations (Continued)

**National Services** - Services provided by the Agency's national office to support state offices and campus operations. Services include campus staff and citizen teacher national recruitment, national relationships and key stakeholder management, nationwide best practice sharing, nationally-based staff training, program research and evaluation, and curriculum, instruction and training support. National Services also include US2020 STEM mentorship services.

**Field Development** - The Agency is dedicated to mobilizing public and community support for high-quality hands-on project-based learning and apprenticeship style programs. The Agency's focus is in these areas: twenty-first century skills, public policy initiatives, and resources for apprenticeship style learning. Specific activities include innovative Teaching Fellow program, a two-year leadership development program for aspiring young educators that can include earning a Master's of Education degree, Support for STEM programming and initiatives, including the US2020 STEM mentorship initiatives, new campus and new state cultivation, and other efforts by Agency staff to professionalize the field of after-school and expanded learning time study and to influence national and regional public policy.

**Campus Operations** - Campus Operations includes all costs incurred to operate the Agency's campuses, which includes front-line managers and staff (Campus Directors, Teaching Fellows, Teaching Associates) salary and benefits and all other expenses (e.g. supplies, transportation) related to program incurred at the campus level.

#### Nonprofit Status

The Agency is exempt from Federal income taxes as an organization (not a private foundation) formed for charitable purposes under Section 501(c)(3) of the Internal Revenue Code (IRC). The Agency is also exempt from state income taxes. Donors may deduct contributions made to the Agency within IRC requirements.

### 2. SIGNIFICANT ACCOUNTING POLICIES

The Agency prepares its financial statements in accordance with generally accepted accounting standards and principles (U.S. GAAP) established by the Financial Accounting Standards Board (FASB). References to U.S. GAAP in these notes are to the FASB Accounting Standards Codification (ASC).

#### Recently Adopted Accounting Pronouncement

In fiscal year 2019, the Agency adopted FASB's Accounting Standards Update (ASU) 2016-14, *Not-for-Profit Entities (Topic 958): Presentation of Financial Statements of Not-for-Profit Entities*. This ASU addresses the complexity and understandability of net asset classification, deficiencies in information about liquidity and availability of resources, and the lack of consistency in the type of information provided about expenses. The Agency has adjusted the presentation of these financial statements accordingly. This ASU has been applied retrospectively to all periods presented. This ASU provides an option to omit the disclosures about liquidity and availability of resources for the year ended June 30 2018.

## CITIZEN SCHOOLS, INC.

Notes to Financial Statements  
June 30, 2019 and 2018

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### 2. SIGNIFICANT ACCOUNTING POLICIES (Continued)

#### Recently Adopted Accounting Pronouncement (Continued)

The adoption of this ASU resulted in the following changes to the Agency's net asset classes as of June 30, 2018:

|   | <b>Without<br/>Donor<br/>Restrictions</b> | <b>With<br/>Donor<br/>Restrictions</b> | <b>Total</b>        |
|---|---|--|---------------------|
| Unrestricted  | \$ 202,600                                | \$ -                                   | \$ 202,600          |
| Temporarily restricted  | <u>-</u>                                  | <u>4,441,619</u>                       | <u>4,441,619</u>    |
| Total net assets, as previously classified  | 202,600                                   | 4,441,619                              | 4,644,219           |
| Adjustments required by ASU 2016-14:<br>Reclassification of net assets previously not released for capital projects placed in service | <u>185,858</u>                            | <u>(185,858)</u>                       | <u>-</u>            |
| Total net assets, as reclassified   | <u>\$ 388,458</u>                         | <u>\$ 4,255,761</u>                    | <u>\$ 4,644,219</u> |

The adoption of this ASU resulted in the following changes to the Agency's net asset classes as of June 30, 2017:

|   | <b>Without<br/>Donor<br/>Restrictions</b> | <b>With<br/>Donor<br/>Restrictions</b> | <b>Total</b>        |
|---|---|--|---------------------|
| Unrestricted  | \$ 2,913,917                              | \$ -                                   | \$ 2,913,917        |
| Temporarily restricted  | <u>-</u>                                  | <u>2,956,082</u>                       | <u>2,956,082</u>    |
| Total net assets, as previously classified  | 2,913,917                                 | 2,956,082                              | 5,869,999           |
| Adjustments required by ASU 2016-14:<br>Reclassification of net assets previously not released for capital projects placed in service | <u>493,017</u>                            | <u>(493,017)</u>                       | <u>-</u>            |
| Total net assets, as reclassified   | <u>\$ 3,406,934</u>                       | <u>\$ 2,463,065</u>                    | <u>\$ 5,869,999</u> |

#### Revenue Recognition

Grants and contributions without donor restrictions - private are recorded as revenue when received or unconditionally pledged. Grants and contributions with donor restrictions - private are recorded as revenues and net assets with donor restrictions when received or unconditionally pledged. Transfers are made to net assets without donor restrictions as costs associated with purpose restrictions are incurred or time restrictions have lapsed.

## **CITIZEN SCHOOLS, INC.**

Notes to Financial Statements  
June 30, 2019 and 2018

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### **2. SIGNIFICANT ACCOUNTING POLICIES (Continued)**

#### **Revenue Recognition (Continued)**

Public sector revenue includes certain earned and granted revenues derived directly from governmental sources or pass-through entities. These revenues are recognized as earned.

The Agency has cost reimbursable contracts from governmental agencies. Reimbursements totaled approximately \$1,196,000 and \$1,519,000 for the years ended June 30, 2019 and 2018, respectively. Payments to the Agency are subject to audit by the appropriate government agency. In the opinion of management, the results of such audits, if any, will not have a material effect on the financial position of the Agency as of June 30, 2019 and 2018, or on its results of operations for the years then ended.

The Agency also receives services of volunteers and donated classroom space in various aspects of its programs. The value of these services and this space is not reflected in the accompanying financial statements since the value of these donations is not readily ascertainable.

All other revenue is recognized when earned.

#### **Donated Goods and Services**

The Agency receives donated goods and services (see Note 10) in support of various aspects of its programs, which are reflected as revenue and expense in the accompanying financial statements based upon the estimated value assigned to them by the donors.

#### **Allowance for Doubtful Accounts**

An allowance for doubtful accounts is calculated based on management's best estimate of the amount of uncollectible pledges receivable (see Note 7). The estimate of uncollectible pledges receivable is based on past collection experience together with a review of the current status of existing receivables.

#### **Expense Allocation**

Expenses related directly to a program or function are distributed to that program or function, while other expenses are allocated based upon records that accurately reflect the work performed and are supported by a system of internal control which provides reasonable assurance that the charges are accurate, allowable, and properly allocated.

Certain categories of expenses are attributable to more than one program or supporting function and are allocated on a reasonable basis that is consistently applied. The expenses that are allocated are personnel and related, which are allocated on the basis of estimates of time and effort; occupancy, which is allocated on a square footage basis; and office expenses, which are allocated based on usage studies conducted annually.

#### **Advertising**

The Agency expenses advertising costs as they are incurred. Total advertising expenses were \$21,590 and \$39,952 for the years ended June 30, 2019 and 2018, respectively, and are included in promotional materials and advertising in the accompanying statements of functional expenses.

## CITIZEN SCHOOLS, INC.

Notes to Financial Statements  
June 30, 2019 and 2018

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### 2. SIGNIFICANT ACCOUNTING POLICIES (Continued)

#### Property and Equipment and Depreciation

Purchased property and equipment are recorded at cost. Donated property and equipment are recorded at fair value at the time of donation. Renewals and betterments are capitalized as an addition to the related asset accounts, while repairs and maintenance are expensed as incurred. Depreciation is computed using the straight-line method over estimated useful lives of three to ten years.

#### Net Assets

##### *Net Assets Without Donor Restrictions*

Net assets without donor restrictions are those net resources that bear no external restrictions and are generally available for use by the Agency. The Agency has grouped its net assets without donor restrictions into the following categories:

**Operating** - represent resources available to carry on the operations of the Agency.

**Property and Equipment** - reflect net book value of the Agency's property and equipment.

##### *Net Assets With Donor Restrictions*

The Agency receives contributions and grants that are restricted by donors for specific purposes or for future periods. These contributions are recorded as net assets with donor restrictions until they are released from restriction in accordance with donor designations (see page 9).

Included in net assets with donor restrictions are pledges that are restricted to the time period in which they are payable to the Agency. These amounts are recorded at the present value of their estimated future cash flows (see Note 7).

Net assets with donor restrictions consist of the following at June 30:

|  | <u>2019</u>         | <u>2018</u>         |
|--|---------------------|---------------------|
| Subject to the passage of time               | \$ 2,806,997        | \$ 3,954,599        |
| Subject to expenditure for specified purpose | <u>-</u>            | <u>301,162</u>      |
| Total  | <u>\$ 2,806,997</u> | <u>\$ 4,255,761</u> |

Net assets were released from donor restrictions by incurring expenses satisfying the restricted purpose or by occurrence of the passage of time or other events specified by the donors as follows for the years ended June 30:

|                                      | <u>2019</u>         | <u>2018</u>         |
|--------------------------------------|---------------------|---------------------|
| Expiration of time restrictions      | \$ 1,747,602        | \$ 2,111,089        |
| Satisfaction of purpose restrictions | <u>301,162</u>      | <u>92,022</u>       |
| Total                                | <u>\$ 2,048,764</u> | <u>\$ 2,203,111</u> |

## CITIZEN SCHOOLS, INC.

Notes to Financial Statements  
June 30, 2019 and 2018

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### 2. SIGNIFICANT ACCOUNTING POLICIES (Continued)

#### Estimates

The preparation of financial statements in accordance with U.S. GAAP requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the reported period. Actual results could differ from those estimates.

#### Fair Value Measurements

The Agency follows the accounting and disclosure standards pertaining to ASC Topic, *Fair Value Measurements*, for qualifying assets and liabilities. Fair value is defined as the price that the Agency would receive upon selling an asset or pay to settle a liability in an orderly transaction between market participants.

The Agency uses a framework for measuring fair value that includes a hierarchy that categorizes and prioritizes the sources used to measure and disclose fair value. This hierarchy is broken down into three levels based on inputs that market participants would use in valuing the financial instruments based on market data obtained from sources independent of the Agency. Inputs refer broadly to the assumptions that market participants would use in pricing the financial instrument, including assumptions about risk. Inputs may be observable or unobservable. Observable inputs are inputs that reflect the assumptions market participants would use in pricing the financial instrument developed based on market data obtained from sources independent of the reporting entity. Unobservable inputs are inputs that reflect the reporting entity's own assumptions about the assumptions market participants would use in pricing the asset developed based on the best information available. The three-tier hierarchy of inputs is summarized in the three broad levels as follows:

- Level 1 - Inputs that reflect unadjusted quoted prices in active markets for identical assets at the measurement date.
- Level 2 - Inputs other than quoted prices that are observable for the asset either directly or indirectly, including inputs in markets that are not considered to be active.
- Level 3 - Inputs that are unobservable and which require significant judgment or estimation.

An asset or liability's level within the framework is based upon the lowest level of any input that is significant to the fair value measurement.

#### *Restricted Cash and Cash Equivalents*

Restricted cash and cash equivalents in the accompanying statements of financial position consist of security deposits required by certain lease agreements (see Note 4). These security deposits are held in a savings account and a certificate of deposit (CD). The CD had a maturity date of October 9, 2018, and was not extended upon maturity. Restricted cash and cash equivalents are valued using Level 1 inputs.

#### *All Other Assets and Liabilities*

The carrying values of all other qualifying assets and liabilities do not differ materially from their estimated fair values and are considered Level 1 in the fair value hierarchy.

## CITIZEN SCHOOLS, INC.

Notes to Financial Statements  
June 30, 2019 and 2018

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### 2. SIGNIFICANT ACCOUNTING POLICIES (Continued)

#### Cash

Management considers cash and savings accounts to be cash for statement of cash flow purposes, excluding those amounts considered to be restricted cash (see page 12).

#### Accounting for Uncertainty in Income Taxes

The Agency accounts for uncertainty in income taxes in accordance with ASC Topic, *Income Taxes*. This standard clarifies the accounting for uncertainty in tax positions and prescribes a recognition threshold and measurement attribute for the financial statements regarding a tax position taken or expected to be taken in a tax return. The Agency has determined that there are no uncertain tax positions which qualify for either recognition or disclosure in the financial statements at June 30, 2019 and 2018. The Agency's informational returns are subject to examination by Federal and state jurisdictions.

#### Subsequent Events

Subsequent events have been evaluated through December 5, 2019, which is the date the financial statements were available to be issued. There were no events that met the criteria for recognition or disclosure in the financial statements.

### 3. LIQUIDITY

The Agency's financial assets available within one year from the June 30, 2019 statement of financial position date for general operating expenses are as follows:

|  |                     |
|--|---------------------|
| Cash   | \$ 237,691          |
| Pledges receivable   | 1,744,755           |
| Public sector receivable   | <u>974,986</u>      |
| Total financial assets   | 2,957,432           |
| Less - net assets with donor restrictions included in current assets     | (1,604,091)         |
| Plus - net assets with donor restrictions designated for 2020 operations | <u>1,050,000</u>    |
|  | <u>\$ 2,403,341</u> |

The Agency is substantially supported by restricted contributions. Because a donor's restriction requires resources to be used in a particular manner or in a future period, the Agency must maintain sufficient resources to meet those responsibilities to its donors. Thus, financial assets may not be available for general expenditure within one year. As part of the Agency's liquidity management, the Agency has a policy to structure its financial assets to be available as its general expenditures, liabilities, and other obligations come due.

## CITIZEN SCHOOLS, INC.

Notes to Financial Statements  
June 30, 2019 and 2018

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### 4. LEASE AGREEMENTS

The Agency leases space for its headquarters and its program sites under multiple operating leases. For one of the lease agreements, the landlord has agreed to waive all but \$1 of the monthly base rent that would otherwise be due under this lease so long as the tenant is a nonprofit entity (see Note 10). The program site leases expire at various times through July 2023. Certain leases require the Agency to maintain insurance coverage and the headquarters lease requires the Agency to pay for its proportionate share of real estate taxes and operating expenses. The Agency was recognizing rent expense on a straight-line basis over the terms of the headquarters lease in accordance with ASC Topic, *Leases*. Accrued rent as of June 30, 2018, was \$248,633, of which \$45,723 was expected to be utilized during fiscal year 2019 and, thus, had been reflected as a current liability in the accompanying 2018 statement of financial position. In June 2019, the existing headquarters lease was cancelled and the remaining accrued rent liability was relieved. A new headquarters lease was signed in June 2019 and expires in July 2021. Gross rent expense under the facility leases was approximately \$343,000 and \$836,000 for the years ended June 30, 2019 and 2018, respectively.

Future minimum cash lease payments under these agreements are as follows:

| <u>Year Ending<br/>June 30,</u> | <u>Rent</u> | <u>Common<br/>Area Fees</u> |
|---------------------------------|-------------|-----------------------------|
| 2020                            | \$ 79,417   | \$ 8,250                    |
| 2021                            | \$ 30,805   | \$ 750                      |
| 2022                            | \$ 12       | \$ -                        |
| 2023                            | \$ 1        | \$ -                        |
| 2024                            | \$ 1        | \$ -                        |

The Agency had two sublease agreements for a portion of the headquarters' space and a program site. Revenue under the subleases of approximately \$152,000 and \$162,000 for the years ended June 30, 2019 and 2018, respectively, has been netted against rent expense in the accompanying statements of functional expenses.

### 5. RETIREMENT PLAN

The Agency sponsors a defined contribution retirement plan under IRC Section 403(b) covering all eligible employees. Employees become eligible to participate after completing one year of service and attaining the age of 21. The Agency matches employee contributions up to 3% per year, based on tenure. For the years ended June 30, 2019 and 2018, the Agency contributed \$91,321 and \$131,236, respectively, which are included in fringe benefits in the accompanying statements of functional expenses.

### 6. CONCENTRATIONS OF RISK

The Agency maintains its cash balances in a bank in Massachusetts, which is insured within the limits of the Federal Deposit Insurance Corporation (FDIC). At certain times during the year, cash balances may exceed the insured amounts. The Agency has not experienced any losses in such accounts. The Agency believes it is not exposed to any significant credit risk on cash and cash equivalents.

Approximately 51% and 70% of net pledges and public sector accounts receivables were due from two and three organizations as of June 30, 2019 and 2018, respectively. Approximately 15% of the Agency's operating support and revenue was from one organization during fiscal year 2018. There were no concentrations of the Agency's operating support and revenue for the year ended June 30, 2019.

## CITIZEN SCHOOLS, INC.

Notes to Financial Statements  
June 30, 2019 and 2018

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### 7. PLEDGES RECEIVABLE

As of June 30, 2019 and 2018, the Agency has unconditional pledges for current and future operations (see Note 2). As of June 30, 2019 and 2018, these pledges are due as follows:

|                          | <u>2019</u>         | <u>2018</u>         |
|--------------------------|---------------------|---------------------|
| Due within one year      | \$ 1,744,755        | \$ 1,885,123        |
| Due in two to four years | <u>1,275,000</u>    | <u>2,250,000</u>    |
|                          | 3,019,755           | 4,135,123           |
| Less - discount          | 43,003              | 185,427             |
| Less - allowance         | <u>29,081</u>       | <u>50,147</u>       |
|                          | 2,947,671           | 3,899,549           |
| Less - current portion   | <u>1,744,755</u>    | <u>1,885,123</u>    |
|                          | <u>\$ 1,202,916</u> | <u>\$ 2,014,426</u> |

Pledges receivable due in greater than one year have been discounted to present value using various discount rates ranging from 0.45% to 2.33%.

The Agency had \$469,757 and \$185,122 of pledges receivable which were recorded as net assets without donor restrictions at June 30, 2019 and 2018, respectively. These amounts were released from restrictions during fiscal years 2019 and 2018 based on the donors' intent. All remaining pledges receivable are included within net assets with donor restrictions (see Note 2).

### 8. CONDITIONAL GRANTS

During fiscal year 2018, the Agency received a grant that was conditional based on various criteria, as defined in the agreement, with a remaining installment of \$60,000 due at June 30, 2018. Remaining installments on this grant were conditional upon the Agency reaching specific milestones, as defined in the grant agreement. The milestones were met during fiscal year 2019 and payment was received.

In addition, the Agency has been informed by the Corporation for National and Community Service, which administers the AmeriCorps program that supports the Agency's teaching fellowship program and its direct service work, that their current grant has been extended through June 30, 2020. The total award is up to \$4,749,084 (or \$1,583,028 annually), and is contingent upon the Agency incurring adequate expenses to draw down the funds under this grant.

### 9. PROPERTY AND EQUIPMENT

Property and equipment consist of the following as of June 30:

|                                   | <u>2019</u>       | <u>2018</u>       |
|-----------------------------------|-------------------|-------------------|
| Furniture, fixtures and equipment | \$ 2,794,492      | \$ 3,464,297      |
| Leasehold improvements            | <u>22,469</u>     | <u>1,199,308</u>  |
|                                   | 2,816,961         | 4,663,605         |
| Less - accumulated depreciation   | <u>2,714,827</u>  | <u>4,215,146</u>  |
|                                   | <u>\$ 102,134</u> | <u>\$ 448,459</u> |

**CITIZEN SCHOOLS, INC.**Notes to Financial Statements  
June 30, 2019 and 2018**10. DONATED GOODS AND SERVICES**

The value of donated goods and services is as follows for the years ended June 30:

|                      | <u>2019</u>         | <u>2018</u>       |
|----------------------|---------------------|-------------------|
| Program consulting   | \$ 1,755,000        | \$ -              |
| Legal consulting     | 194,338             | 159,410           |
| Rent and maintenance | <u>78,768</u>       | <u>78,768</u>     |
|                      | <u>\$ 2,028,106</u> | <u>\$ 238,178</u> |

**11. CONTINUING OPERATIONS**

In fiscal years 2019 and 2018, the Agency had changes in net assets without donor restrictions from operations of \$196,031 and \$(3,231,333), respectively. Depreciation expense represents \$346,325 and \$588,009 of the changes in net assets from operations for the years ended June 30, 2019 and 2018, respectively.

During fiscal year 2019, the Agency continued with its leaner operating model, both at the programmatic level and in the indirect infrastructure. The Agency maintains a smaller headquarters and regional staff compliment, and continues to diversify its program offerings to include lighter cost service models, while maintaining or increasing the number of students served. The Agency continues to implement its five-year strategy, with a goal to diversify impactful services and stabilize the Agency financially.

During fiscal year 2020, the Agency intends to deliver both Extend Learning Time and Catalyst program models, maintaining the focus of the extended learning day program to key districts and growing the Catalyst program, whereby the Agency will integrate the hands-on project-based apprenticeship programming into the traditional school day. The Agency has secured approximately 52% of the \$10,000,000 revenue goal as of December 5, 2019.

**12. PRIOR PERIOD ADJUSTMENTS**

The Agency discovered during fiscal year 2019 that certain expenses restated to fiscal year 2018 were not properly accrued at June 30, 2018. As a result, the Agency restated the June 30, 2018 financial statements, which resulted in an increase in accrued expenses of \$212,587 and corresponding increase in personnel and related, travel and professional fees expenses. Net assets as of June 30, 2018, have been restated as follows:

|  | <u>Without<br/>Donor<br/>Restrictions</u> | <u>With<br/>Donor<br/>Restrictions</u> | <u>Total</u>        |
|--|---|--|---------------------|
| Balance, June 30, 2018, as previously stated,<br>reclassified (see page 9)             | \$ 388,458                                | \$ 4,255,761                           | \$ 4,644,219        |
| To properly state accrued professional<br>fees, severance and employee travel<br>costs | <u>(212,857)</u>                          | <u>-</u>                               | <u>(212,857)</u>    |
| Balance, June 30, 2018, as restated  | <u>\$ 175,601</u>                         | <u>\$ 4,255,761</u>                    | <u>\$ 4,431,362</u> |

**CITIZEN SCHOOLS, INC.**Notes to Financial Statements  
June 30, 2019 and 2018

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**12. PRIOR PERIOD ADJUSTMENTS (Continued)**

Changes in net assets for the year ended June 30, 2018, have been restated as follows based on the adjustment noted above and the adoption of ASU 2016-14 (see page 9):

|  | <b><u>Without<br/>Donor<br/>Restrictions</u></b> | <b><u>With<br/>Donor<br/>Restrictions</u></b> | <b><u>Total</u></b>   |
|--|--|---|-----------------------|
| Changes in net asset for the year ended<br>June 30, 2018, as previously stated<br>(see page 9) | \$ (2,711,317)                                   | \$ 1,485,537                                  | \$ (1,225,780)        |
| Adoption of ASU 2016-14  | (307,159)  | 307,159                                       | -                     |
| To record expenses restated to fiscal year<br>2018 not properly recorded                       | <u>(212,857)</u>                                 | <u>-</u>                                      | <u>(212,857)</u>      |
| Balance, June 30, 2018, as restated  | <u>\$ (3,231,333)</u>                            | <u>\$ 1,792,696</u>                           | <u>\$ (1,438,637)</u> |



# Renaissance Academy of Arts, Sciences, and Social Justice



1720 Hopkins Dr. · San Jose, CA 95122 · Phone: (408) 928-1950 · Fax: (408) 928-1951

June 29, 2021

To Whom It May Concern:

As middle school principals, we are pleased to support The Envisioneers Program, a continuation of the Citizen Schools Program which served our campuses for the past several years. We believe that the high quality, Extended Learning Time (ELT) programming that Citizen Schools provided our students will continue in The Envsioneers format and will be hugely beneficial to the students in the Oakland Unified School District.

Our students at Renaissance at Mathson (RAM) and Renaissance at Fischer (RAF) received outstanding ELT services over the past several years. The Campus Directors who oversee the campus-based staff ensure that Teaching Fellows (TFs) and Teaching Associates (TAs) have the skills they need to provide the tutoring and mentoring middle school students need and deserve. During the school day, Citizen Schools Teaching Fellows provided push-in services, assisting our teachers with classroom instruction. After school, our students worked with the same Teaching Fellows to complete homework assignments and projects. Our students also participated in apprenticeship programs where they explored career pathways and were mentored by career professionals. The apprenticeships are ten-week, project-based learning experiences that culminate in a public demonstration of knowledge, called the WOW, which is open to the school and parent community. For many parents and students, the Fall and Spring WOW events are two of the most important nights on the school calendar.

Over the past few years, Maria Drake, as Executive Director, and Seung Lee, as Program Manager, have moved the Citizen School program to use Social Emotional Learning (SEL) as an underlying principle supporting all activities in the ELT program. This focus on helping students to learn the skills and competencies to: make better decisions, develop better relationships with peers and adults, and become comfortable with their own identities is an extremely important function of ELT programming. Several of our students have improved their SEL skills as a result of participation in the program, and we are sure that this focus on SEL will continue as Citizen Schools reorganizes itself as The Envisioneers.

There are several choices for after school programming. In our mind, The Envisioneers Program is the most effective in terms of providing students with a rigorous yet engaging curriculum that helps students grow academically, socially, and vocationally. We highly recommend The Envisioneers program for the Oakland Unified School District.

Sincerely,

Doug Kleinhenz, Principal  
Renaissance at Fischer  
doug.kleinhenz@arusd.org  
408-757-1043 cell

Anna Nguyen, Principal  
Renaissance at Mathson  
anna.nguyen@arusd.org  
310-803-4140 cell



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

7/30/2020

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 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<br>Hays Companies Inc.<br>133 Federal Street, 4th Floor<br>Boston MA 02110 | CONTACT NAME: Kevin Nolan  |
|   | PHONE (A/C No. Ext): (617)723-7775 FAX (A/C No):<br>E-MAIL ADDRESS: knolan@hayscompanies.com |
| INSURER(S) AFFORDING COVERAGE   |  |
| INSURER A: Massachusetts Bay Insurance Company                                      | NAIC # 22306   |
| INSURER B: Allmerica Financial Benefit Insurance C                                  | 41840  |
| INSURER C: Hanover Insurance Companies  |  |
| INSURER D: The Hanover Insurance Company  | 22292  |
| INSURER E:  |  |
| INSURER F:  |  |

**COVERAGES**

CERTIFICATE NUMBER: 20-21 GL, Auto, Umb, WC

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<br><input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR<br>GEN'L AGGREGATE LIMIT APPLIES PER:<br><input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC<br>OTHER: | X         |          | ZDN-A667317-06 | 7/1/2020                | 7/1/2021                | EACH OCCURRENCE                           | \$ 1,000,000 |
|          |   |           |          |                |                         |                         | DAMAGE TO RENTED PREMISES (Ea occurrence) | \$ 100,000   |
|          |   |           |          |                |                         |                         | MED EXP (Any one person)                  | \$ 5,000     |
|          |   |           |          |                |                         |                         | PERSONAL & ADV INJURY                     | \$ 1,000,000 |
|          |   |           |          |                |                         |                         | GENERAL AGGREGATE                         | \$ 3,000,000 |
|          |   |           |          |                |                         |                         | PRODUCTS - COMP/OP AGG                    | \$ 3,000,000 |
|          |   |           |          |                |                         |                         |   | \$           |
| B        | AUTOMOBILE LIABILITY<br><input type="checkbox"/> ANY AUTO<br><input type="checkbox"/> ALL OWNED AUTOS<br><input checked="" type="checkbox"/> HIRED AUTOS<br><input type="checkbox"/> SCHEDULED AUTOS<br><input checked="" type="checkbox"/> NON-OWNED AUTOS   |           |          | AWN-A663607-06 | 7/1/2020                | 7/1/2021                | COMBINED SINGLE LIMIT (Ea accident)       | \$ 1,000,000 |
|          |   |           |          |                |                         |                         | BODILY INJURY (Per person)                | \$           |
|          |   |           |          |                |                         |                         | BODILY INJURY (Per accident)              | \$           |
|          |   |           |          |                |                         |                         | PROPERTY DAMAGE (Per accident)            | \$           |
|          |   |           |          |                |                         |                         |   | \$           |
| C        | <input checked="" type="checkbox"/> UMBRELLA LIAB<br><input type="checkbox"/> EXCESS LIAB<br><input checked="" type="checkbox"/> RETENTION \$ 10,000  |           |          | UHN-A676885-06 | 7/1/2020                | 7/1/2021                | EACH OCCURRENCE                           | \$ 2,000,000 |
|          |   |           |          |                |                         |                         | AGGREGATE                                 | \$ 2,000,000 |
|          |   |           |          |                |                         |                         |   | \$           |
| D        | WORKERS COMPENSATION AND EMPLOYERS' LIABILITY<br>ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)<br>If yes, describe under DESCRIPTION OF OPERATIONS below  |           | N/A      | WHN-5956358-13 | 7/1/2020                | 7/1/2021                | PER STATUTE                               |              |
|          |   |           |          |                |                         |                         | OTH-ER                                    |              |
|          |   |           |          |                |                         |                         | E.L. EACH ACCIDENT                        | \$           |
|          |   |           |          |                |                         |                         | E.L. DISEASE - EA EMPLOYEE                | \$           |
|          |   |           |          |                |                         |                         | E.L. DISEASE - POLICY LIMIT               | \$           |
| A        |   |           |          | ZDN-A667317-06 | 7/1/2020                | 7/1/2021                |   |              |

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

Oakland Unified School District, its Councilmembers, directors, officers, agents, employees and volunteers are included as Additional Insured under the general liability policy where required by written contract. A waiver of Subrogation applies as respects Workers Compensation coverage where required by written contract.

**CERTIFICATE HOLDER****CANCELLATION**

|  |  |
|--|--|
| Oakland Unified School District<br>1000 Broadway, Suite 680<br>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<br>James Hays/GSCHIC                            |

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ACORD 25 (2014/01)

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INS025 (201401)

**Instructions for RFQ Application Submission:**

Please use this link to register to receive access to a [Google RFQ folder](#). The Google folder will house the RFQ application and supporting documents which will need to be uploaded there. Access to this link will be available until June 15, 2021. Deadline for submission for a completed RFQ application and supporting documentation is June 30, 2021 by 5:00 pm. Any documents submitted after the deadline will not be accepted or reviewed.

**Required Supporting Documentation Instructions:**

All uploaded files will need to be in PDF format and accessible to OUSD. Any files missing could result in a disqualification from the RFQ 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
- Profit and loss statement and/or copy of 2020 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 (indicate specific names next to titles of staff whenever possible)
- Copy of organization’s 501(c)(3) letter
- Bank statements to show proof of operating cash reserves (reference application question 2 in appendix II for details)
- Job description for site coordinator and program instructor
- 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 2020-2021 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 qualifications (outlined in Section 13)
- Copy of certificate of current insurance

On behalf of Envisioneers (agency), I, Maria Drake (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: 06/30/2021



# OAKLAND UNIFIED SCHOOL DISTRICT

*Community Schools, Thriving Students*

**Request for Proposal (RFP) 21-115ExLO**

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

\* **Submit proposals and all questions/inquiries to:**

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

email: [procurement@ousd.org](mailto:procurement@ousd.org)

phone: (510) 434-4337

**Proposals Due:  
03/31/2022 at 2:00PM**

THE TERMS AND CONDITIONS OF THIS CONTRACT ARE GOVERNED BY  
THE CALIFORNIA EDUCATION AND PUBLIC CONTRACT CODES.

## **Submission Deadline & Process:**

Bids must be received prior to or on **March 31, 2022 at 2:00pm**

### **Provider to submit:**

- (1) Hardcopy Proposal
- (1) USB - Electronic RFP version

Proposal shall be clearly marked: **“Response to RFP No. 21-115ExLO”**

Proposal shall be submitted to:

**OAKLAND UNIFIED SCHOOL DISTRICT  
EXPANDED LEARNING LEAD AGENCY  
FOR EXPANDED LEARNING OFFICES  
Attention: PROCUREMENT DEPARTMENT  
900 High Street  
OAKLAND, CA 94601**

Bids received later than the designated time and specified date will be returned to the proposer unopened. **Facsimile (FAX) copies of the proposal will not be accepted.**

The District reserves the right to accept or reject any or all proposals or any combination thereof and to waive any irregularity in the bidding process.

Copies of the RFP/Bid documents may be obtained from **Oakland Unified School District, Procurement Department’s website** <https://www.ousd.org/procurement>, if you have specific questions or concerns regarding RFP, you may contact us by email to: [procurement@ousd.org](mailto:procurement@ousd.org).

*\* Applications submitted after 2:00 pm (PST) on March 31, 2022 will not be considered.*

*\*\* Applications submitted by facsimile, telephone or electronic mail will not be accepted.*

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*This RFP document and additional materials referenced within can be accessed at the OUSD website: [www.ousd.org/afterschool](http://www.ousd.org/afterschool). Select the “2022 Lead Agency Request for Proposals ” link under “Afterschool Programs.” Any updates on the RFP process will be posted here and you may sign up for our mailing list, so applicants are encouraged to visit the webpage.*

## B. Schedule

| Event   | Date                                       | Info   |
|---|--|--|
| RFP Process 2022 Announced                          | March 16, 2022                             | Save-the-Date                                    |
| RFP Digital Application Released                    | March 16, 2022                             |  |
| RFP Pre -Bid Conference (Virtual)                   | Session: March 22, 2022<br>@ 4:00 pm (PST) | Zoom link on <a href="#">Procurement Website</a> |
| RFP Deadline for Questions                          | March 25, 2022                             |  |
| <b>RFP Submission Dates</b>                         | <b>March 31, 2022 by 2:00 pm (PST)</b>     |  |
| RFP Proposal/Bid Opening (Virtual)                  | April 5, 2022<br>@ 11:00 am (PST)          | Zoom link on <a href="#">Procurement Website</a> |
| Lead Agency Status Notifications                    | April 12, 2022                             |  |
| Deadline to Appeal Decision                         | April 17 , 2022                            |  |
| Status Notification Publicized                      | April 17, 2022                             |  |
| School Site/Lead Agency Confirmation of Partnership | April 17 - April 24, 2022 (tentative)      |  |
| OUSD MOU Approval Season                            | April 2022                                 |  |
| Lead Agency Service Contract                        | July 1, 2022 - June 30, 2025               |  |

\*\*OUSD will use every effort to adhere to the schedule. However, OUSD reserves the right to amend the schedule, as it deems necessary, and will post a notice of amendment at [www.ousd.org/procurement](http://www.ousd.org/procurement).\*\*

Proposers are advised that the District reserves the right to amend this RFP at any time. Amendments will be done formally by providing written amendments to all potential Proposers known to have received a copy of the RFP. Proposers must acknowledge receipt of any and all RFP amendments. This shall be done by signing the Acknowledgement of Amendment(s) to RFP form. If a Proposer desires an explanation or clarification of any kind regarding this RFP, the Proposer must make a written request for such explanation. Requests should be addressed via email to:

***Rosaura M. Altamirano***  
*Senior Manager, Supply Chain & Logistics*  
[rosaura.altamirano@ousd.org](mailto:rosaura.altamirano@ousd.org)

The District will advise all Proposers known to have received a copy of the RFP of the explanation or clarification, by email or by formal RFP amendment via email as the District may in its sole discretion deem appropriate.

**What is an RFP?** An RFP (Request for Proposals ) is a Proposals -based selection process, in accordance with Public Contracts Code section 20111.5. It is a request by OUSD Dept. of Expanded Learning 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 expanded learning after-school program services, after which OUSD will determine which providers are qualified and award contracts based on that determination.

**What is a Pre-Bid Conference?** A pre-bid conference is an informational meeting open to the public that the OUSD Dept. of Expanded Learning hosts upon releasing the RFP. The pre-bid conference is designed to give interested and eligible non-profit youth-serving organizations the opportunity to receive information regarding the RFP process for OUSD expanded learning programs. This event is designed to provide clarity to non-profit organizations who are interested in applying. Organizations will consider whether they are positioned to demonstrate the capacity to facilitate comprehensive expanded learning after-school program services with fidelity.

## C.Required Supporting Documentation

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. These documents do not count towards the 10-page limit for the RFP application described in Appendix II. Additionally, please label all supporting documents clearly according to this list:

- 1) One (1) sample Expanded Learning Program weekly schedule -  
Please list all activities with a short description of each activity
- 2) Program budget pertaining to the program schedule (see  
Application Question 2 in Appendix II for details)
- 3) Profit and loss statement and/or Copy of 2021 990 Tax Form
- 4) Copy of Monitoring Reports and/or other external evaluations of the program  
(maximum of 1)

- 5) Organizational chart of agency that illustrates how the OUSD Expanded Learning Program is to be supported administratively and programmatically (indicate specific names next to titles of staff whenever possible)
- 6) Copy of organization's 501(c)(3) letter
- 7) Bank Statements to show proof of operating cash reserves (see Application Question 2 in Appendix II for details)
- 8) Job description for Site Coordinator and Program Instructor
- 9) Copy of IRS Letter Certifying Tax Exempt Status
- 10) Proof of "Active" status with the office of the California Secretary of State
- 11) Board Roster and Minutes – Include the current board roster indicating officers and affiliations as well as Minutes from the 2022-2023 school year.
- 12) Signed Letter of Agreement (see Section N)
- 13) Most recent audited financial statements within 2 years and summary of the audit findings
- 14) Letters of Reference (maximum of 2)
- 15) Documents demonstrating fulfillment of minimum Proposals (see Section M)
- 16) Certificate of current insurance

## D. Introduction and Overview

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 expanded learning programs. Programs must support and align with the OUSD's goal of ensuring that every student graduates college, career, and community ready. Eligible providers will be committed to OUSD's strategic plan and shared 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 every day. Expanded Learning supports this mission while holding our values of equity, joy, and liberation for youth and adults with the express purpose of interrupting inequity, examining biases, and creating inclusive and just conditions for all students to achieve equally high outcomes.

Select Lead Agencies will commit to working in partnership with school sites and the OUSD Expanded Learning Office (ExLO). Through the RFP process, OUSD seeks organizations who demonstrate the capacity to work within the established OUSD model of school and community partnerships and 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 our district, expanded learning system, and community.

### 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 fee-based 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 Fee-Based 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 fee-based 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. Supplemental school programs will be chosen by the district. Yearly program plans are created through a 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 continue there, 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 elementary, middle, and high schools across the city of Oakland.

When programming is conducted in-person, over 9,000 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 (75%) and English Learners (31%). Additionally, approximately 25% of OUSD after-school participants are African American and 45% 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/<br>Physical<br>Activity            | 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<br>Career                          | Career & Job Training, Entrepreneurial Education, Technology/Telecommunications Training, Community Service & Service Learning, Internships and Apprenticeships           |
| Leadership<br>Development                      | Peer Mentoring, Peer Tutoring, Youth-Led Community Service  |
| Science<br>Technology<br>Engineering &<br>Math | Gardening, Coding, Robotics, Making, Forensics, Cooking   |
| Outdoor<br>Education                           | Community Mapping, Hiking, Backcountry Camping, Kayaking, Bicycling   |

## E. 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 three 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 21<sup>st</sup> Century grant dollars are currently awarded at a rate of:

- ASES: \$10.18/student/day for K-8th Grade students
- 21<sup>st</sup> Century: \$10.18/student/day for K-8th Grade students
- 21<sup>st</sup> Century ASSETS: \$10.10/student/day for high school students
- ELO-P: \$10.18/student/day for 1st-6th Grade students
- ELO-P: \$19.88/student/day for Tk-K students

## Other considerations for the allocations of funds

- Distance/Remote/Hybrid Programming:
  - During a state or national emergency CDE could expand learning programs to have the flexibility to provide adaptive services that best meet the needs of our students and communities and are required by OUSD, Region 4 ACOE and CDE.
- Other considerations for the allocations of funds are that:
  - 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 21<sup>st</sup> Century related grants including Supplemental funding (to support summer programming).
  - ASES and 21<sup>st</sup> CCLC grant funds are intended to complement, but not supplant, other funding provided by OUSD, school sites, or community partners.
  - ASES and 21<sup>st</sup> 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/21<sup>st</sup> 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.***

## F. OUSD Expanded Learning / Program Operation

We know in recent years, the field of education and expanded learning programs had to pivot due to global pandemic, power outage, wildfires, etc. Here in Oakland, approved Lead Agencies must be equipped and have organizational infrastructure to provide remote programs, hybrids, or any other configuration of programs mutually agreed upon in the MOUs.

In addition, 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 students. As school-day teachers focus on providing high quality instruction in the classroom, youth development workers provide high quality expanded learning opportunities to students during the after school and outside of regular school hours when youth are most vulnerable to crime, violence, and risky behavior.

**Below is an outline of operational requirements.**

*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.*

## G. 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
- To satisfy **21st CCLC E/M**:
  - Educational and literacy component to provide tutoring and/or homework assistance,
  - Educational enrichment component,
  - Physical activity/recreation component, and
- To satisfy **ASSETs**:
  - Educational and literacy component to provide tutoring and/or homework assistance,
  - Educational enrichment component,
  - Physical activity/recreation component, and
- 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](#))

In addition, **all programs** must provide a nutritious snack or supper each day.

### Required Program Hours

- 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.

## H. 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 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 highly recommended that each expanded learning program have a Site Coordinator who is full-time and situated at the school site during the day. 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 of any expanded learning staff changes.

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, 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 extended contracts.

## I. 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 for free. 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.

## J. 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 June/August 2022 Board meeting.

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 2-3 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.

## K. Guidelines for Charging Fees

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

Both the 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 which 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 can not 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.). Fees collected could be deducted from the 21st CCLC grant amount received by the California Department of Education (CDE).

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.

## L. RFP Process

Any agency that is interested in serving in the OUSD Expanded Learning Lead Agency (ExLO) role for the 2022 - 25 school year and/or beyond must successfully complete the Lead Agency RFP process and earn *highly recommended* or *conditionally recommended* status, detailed below. Therefore, an organization that does not successfully complete the Lead Agency RFP process or does not earn a *highly recommended* or *conditionally recommended* status will not be contracted with OUSD to serve in the Lead Agency role in the 2022-23 school year. If the OUSD ASPO moves forward with the adoption of an annual RFP as anticipated, organizations that are not selected during this year's RFP process will have the opportunity to qualify as a Lead Agency for future school years beyond 2025. Additionally, any agency that participated in the 2022 RFP and earned *highly recommended* or *conditionally recommended* status does not have to submit a new RFP for three years.

Organizations that submit an RFP by the deadline will be assessed based on their RFP responses, an interview between the community organization and the RFP Review Team, and any additional supporting materials requested by the RFP Review Team to determine the organization's Proposals to serve in the Lead Agency role. Applications that have the potential to earn the *highly recommended* or *conditionally recommended* status and require additional information will be invited for an interview with the RFP Review Team.

Organizations completing this 2022 RFP process will be assessed and scored into one of the following three categories:

- 1) **Highly Recommended:** Community organization has adequately demonstrated its capacity to serve in the Lead Agency role and to fulfill *all* Lead Agency responsibilities outlined by OUSD and listed in Section III of this RFP. This *highly recommended* status will be valid for up to 3 years, depending on the organization's successful results in OUSD's annual Lead Agency evaluation process.
- 2) **Conditionally Recommended:** Community organization has adequately demonstrated its capacity to serve in the Lead Agency role and to fulfill *most, though not all*, of the Lead Agency responsibilities outlined by OUSD and listed in Section III of this RFP. Organizations receiving this *conditionally recommended* status will be provided with specific feedback from the RFP Review Team on areas of responsibility where the organization has not adequately demonstrated effective capacity. This *conditionally recommended* status will be valid for up to one year. Within that year, the community organization will be asked to provide the OUSD EXLO with additional evidence of its ability to fulfill all Lead Agency responsibilities, including documentation of the organization's efforts to improve based on feedback from the RFP Review Team. At the end of this first conditional year, the community partner will be re-assessed by the OUSD EXLO team and re-categorized as *highly recommended*, *conditionally recommended*, or *not recommended*. Re-assessment will include results of the annual Lead Agency evaluation process, if the organization is currently serving as a Lead Agency.

- 3) **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 community organizations that will be shared with Principals and stakeholders. An organization receiving this *not recommended* status may submit another Lead Agency RFP at a future date when the OUSD ASPO opens up a new RFP cycle, if the organization has made significant improvements in strengthening its capacity to serve in the Lead Agency role. Organizations can appeal by following the instructions in the appeals process described in Appendix V.

OUSD will notify an agency of its determination by April 22, 2022 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 Section L.

The school site administrator may choose an approved Lead Agency to work on an annual basis; subject to the District's annual availability of funds, satisfactory contractor performance with respect to meeting targeted attendance goals, the contractor's ability to provide a quality program that supports school and district objectives, community partner evaluation criteria set forth by the District, and/or any other factors relevant to the school site. Beginning in 2022, OUSD will implement a new annual evaluation process to assess each community partner's effectiveness in fulfilling Lead Agency responsibilities.

## M. Minimum Proposals

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

Lead Agency: Elementary School

Lead Agency: Middle School (including K-8)

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 2 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) being applied for. Specifically, evidence of a positive track record of the capacity to effectively coordinate the entirety of a school’s afterschool and/or extended 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 of appropriately 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.

## N. 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 10 double-spaced pages in response to the four (4) 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 21-22), and that your firm is willing to comply with OUSD contracting requirements.
- 6) **Sample Program Schedule and Summary:** Based on the sample program budget in question (2), please provide a sample program schedule along with a short description of each activity. No more than (2) pages.

## O. Application Submission Details

Applications must be received by, **March 31, 2022**

All applications will be submitted:

- (1) Hardcopy Proposal
- (1) USB - Electronic RFP version

Proposal shall be clearly marked: “**Response to RFP No. 21-114CSSS**”  
Proposal shall be submitted to:

**OAKLAND UNIFIED SCHOOL DISTRICT**  
**INCREASING POSITIVE CULTURE & CLIMATE**  
**COMMUNITY SCHOOLS STUDENT SERVICES**

**Attention: PROCUREMENT DEPARTMENT**

**900 High Street**  
**OAKLAND, CA 94601**

*\*\* Applications submitted after 2:00 pm on March 31, 2022 will not be considered.*

*\*\* Applications submitted by facsimile, telephone or electronic mail will not be accepted.*

## 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 four (4) titled sections below in no more than 10 pages total. Organizations may elaborate on specific documents provided in the Required Supporting Documentation (Appendix III)

## P. Evaluation and Selection

For all applications, the completion of the application will be assessed first; applications that do not submit complete documentation demonstrating the capacity to meet the minimum requirements will not have the application reviewed.

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.

### Evaluation Rubric

| Performance Area  | Expectations for Highly Recommended Lead Agencies  |
|---|--|
| <p><b>Organizational Capacity and District Alignment</b></p> <p>(25 Points)</p> | <ul style="list-style-type: none"> <li>● Agency has a clear mission and vision that complements OUSD’s vision for community schools and college, career, and community ready students.</li> <li>● Agency can clearly articulate how expanded learning partnership with Oakland schools makes sense for their organization, and why they are well positioned to engage in partnership with OUSD.</li> <li>● Agency has extensive experience serving the Oakland community and/or in communities of similar demographics, assets, and challenges.</li> <li>● Agency has extensive experience working in partnership with school sites and district leaders.</li> <li>● Agency has organizational experience in the hiring, retention, and provision of professional development to appropriately 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.</li> <li>● Agency has the capacity to serve OUSD’s diverse student demographics.</li> </ul>  |
| <p><b>Fiscal Management and Resource Development</b></p> <p>(25 Points)</p>     | <ul style="list-style-type: none"> <li>● Agency has accurate documentation that highlights how the Lead Agency will allocate funds to run quality expanded learning programs based on grant requirements detailed in the funding description. i.e. 1:20 ratio for 1-12 grade and 1:10 ratio for TK-k programs etc.</li> <li>● Agency has a strong budget template that clearly illustrates staffing costs, a salaried full time coordinator, supplies, administrative costs and additional contributions to enhanced programming.</li> <li>● Agency clearly describes how they will secure additional funding to support the contracted funds.</li> <li>● Agency is able to clearly describe its systems, structures and processes to ensure sound fiscal management of grant funds and how to comply with grant-related record keeping for auditing purposes.</li> <li>● Agency has audited financial statements and can produce accurate fiscal reports upon request.</li> <li>● Agency has strong fee structures in place to support a fee-based program. Including processes to identify unduplicated students and ensure that fees are not charge to these families.</li> </ul> |

|  |  |
|--|--|
| <p><b>Agency Infrastructure</b><br/>(25 Points)</p>                              | <ul style="list-style-type: none"> <li>● Agency has an organizational chart that supports successful program implementation and clearly describes agency staffing systems, and processes that will ensure that all Lead Agency responsibilities will be fulfilled effectively and with fidelity.</li> <li>● Agency has designated administrative systems and procedures in place to ensure that expanded learning programs are operating in full compliance of requirements set forth by OUSD and the California Department of Education (CDE).</li> <li>● There is clearly at least one designated manager/director level staff person in the agency that is the primary point of contact for the OUSD expanded learning partnership. This individual regularly participates in all district expanded learning collaborative meetings, required professional development, provided crisis management, and is regularly present at program sites to support the site coordinator and the school partnership.</li> <li>● Agency shows capacity to hire and support a clearly designated coordinator at each school site to facilitate and maintain active collaboration with the school site administrator and other school faculty.</li> </ul> |
| <p><b>Youth Development Expertise and District Alignment</b><br/>(25 Points)</p> | <ul style="list-style-type: none"> <li>● Agency’s program model clearly supports youth development. Agency provides descriptions of successes and challenges serving Oakland youth.</li> <li>● Agency has strong systems and processes in place to support ongoing Continuous Quality Improvement (CQI), including: structured development plans;</li> <li>● Agency utilizes district opportunities, other partners and the greater community to continuously innovate and grow their youth development practices to better serve the community.</li> </ul>  |

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 Principals for a period of up to three (3) years pending funding availability to select a Lead Agency to administer the after-school program on his/her school site.

## Q. 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 posted on the Afterschool Programs page of the OUSD website. 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. Therefore, the District recommends that applicants consult the website frequently, including shortly before the application due date, or sign up for our mailing list (<https://www.ousd.org/Page/12206>) for updates to ensure they have downloaded all Change Notices.

### 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 After-School 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.

## R. Standard Contract Provisions

Any agency selected from the *Expanded Learning Program Lead Agency Qualified List* by a school site Principal, 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

## 2022 OUSD Request for Proposals Application (Template)

(Email [procurement@ousd.org](mailto:procurement@ousd.org) for template)

ASES, 21st CCLC, ELO-P, and ASSETS After-School 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 (TK-5)        |
|  | Elementary/Middle (TK-8) |
|  | Middle (6-8)             |

|  |  |         |
|--|--|---------|
| 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?<br><br>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      |
| <b>If yes</b> , 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 questions within all four (4) titled sections below in no more than 10 double-spaced pages in 12pt Font. Organizations may elaborate on specific documents provided in the Required Supporting Documentation (Appendix III)

### 1. ORGANIZATIONAL CAPACITY (2-3 pages double space)

- OUSD's 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 educators, every day. Our vision is that all Oakland Unified School District students will find joy in their academic experience while graduating with the skills to ensure they are caring, competent, fully-informed, critical thinkers who are prepared for college, career, and community success. Please explain why your organization is uniquely positioned to engage in partnership with the OUSD Expanded Learning Office to serve students. What is your organization's mission and vision and how does it align with OUSD?
- Describe your experience and approach to serving the Oakland community and/or other communities with similar demographics, assets, challenges, etc. Discuss your background working with Oakland families and other community partners. (Reference the supporting documents required under Eligible Applicant Proposals Appendix III to support your experience).
- OUSD Expanded Learning Office is looking for partners who can demonstrate the ability to collaborate with transparency and commit to shared decision making with Oakland students, families, site leaders and district leaders. Provide our office with clear examples of how your agency has or will approach working with stakeholders and engage in collaborative leadership.
- Describe your organization's strategy in hiring, retention, and providing professional development of appropriate qualified staff to provide services to OUSD students in a culturally appropriate manner. Please include artifacts to support your description. i.e. Job announcements.

### 2. FISCAL MANAGEMENT AND RESOURCE DEVELOPMENT (2 pages)

- Using your organization's budget and profit and loss statement provided in the required supporting documentation, create a budget narrative showing how your agency would allocate funds to run a high-quality expanded learning program. These budgets will need to be based on the grant requirements detailed in the Funding description above (Section E.); including a required staffing ratio of 1:20 (or better). Utilize any of the following anticipated contract amounts to develop your budget.

- Your budget should also show secured leveraged funds (including program fees), and resources that you would contribute to the operational costs of running an after-school program.
  - Elementary/Middle School Funding:  $(\$10.18 \times (65\% \text{-total UDS}) \times 175 \text{days})$ 
    - Ex:  $(100 \text{ Unduplicated students} \times \$10.18 \times 175 \text{day}) \times 65\% = \mathbf{\$115,797}$
  - Your budget must detail:
    - Projected Program Fees
    - Staffing costs for service delivery, staff training, and prep time
    - Full time site coordinator
    - Any agency management-level staff who will be paid by grant funds for support of direct service programming
    - Supplies, materials, curriculum, books, field trips, etc.
    - Agency administrative costs not to exceed 4% of contracted amount Note:
      - Your budget does not need to include snack costs
  
- Describe how your organization will secure fees to ensure that program operations can sustain both ELO-P funded students and fee-based families. Organization's are recommended to have a digital fee platform to accurately track revenue from fees and should be available upon request for audit purposes. How will fees and additional funding help cover the costs of operating an OUSD expanded learning program? Indicate sources and dollar value of contributions already secured and resources already leveraged. Describe your funding strategies and potential funding opportunities.
  
- Describe your organization's system, structures and processes to ensure sound fiscal management of grant funds, including expenditure reporting and payroll processes. How will your organization ensure compliant use of grant funds and proper maintenance of fiscal and other grant-related records for auditing purposes? Also discuss whether your organization has audited financial statements and the audit results secured within the last 2 years.

### 3. AGENCY INFRASTRUCTURE (2 Pages)

- Using an organizational chart, describe how the OUSD expanded learning program will be supported administratively and programmatically. Specifically, identify and describe the agency staffing, systems, and processes that will ensure each of the listed Lead Agency responsibilities will be fulfilled effectively.
  
- Describe the administrative systems and procedures your agency will put in place to ensure that your expanded learning program(s) is/are operating fully in compliance with requirements set forth by OUSD and the CA Dept. of Education. (*Unless otherwise stated by CDE under extenuating circumstances all sites are required to*):
  - Student ratio of 1:20 or better;
  - Staff meet OUSD Instructional Aide requirement (48 college units or Instructional Aid Certificate)

- Full time school Site Coordinator stationed at each school site during the day
  - 85% attendance documented by daily OUSD mandated attendance protocols
  - Professional record keeping and reproduction upon request for district audits
- Describe the role of the Site Coordinator who will be the primary point(s) of contact for the OUSD expanded learning partnership, and who will maintain active collaboration with the school site leadership. Describe how this individual will ensure strong partnership with OUSD, the partnering school site(s), and other community partners working within OUSD expanded learning programs.

#### 4. YOUTH DEVELOPMENT EXPERTISE, PROGRAM QUALITY ASSESSMENT PROCESS, AND SCHOOL DISTRICT ALIGNMENT (3 Pages)

- Describe how your organization's program model supports youth development. Cite prior noteworthy successes and challenges serving Oakland youth. How do you ensure each program is aligned with OUSD priorities? How does your program demonstrate that diversity, equity and inclusion are foundational in serving OUSD students?
- Please review the CDE's quality standards which are accessible on the [CDE Website](#). These standards identify organization, staff and programmatic touchpoints used by CDE to guide program quality. Please identify and discuss your agency's strengths and key areas for improvement in providing quality youth development programming.
- How does your organization ensure that all of your expanded learning staff have baseline knowledge and understanding of youth development best practices? What tools and training does your organization utilize to build the capacity of your staff and programs to create responsive high quality youth development practices?
- What types of data does your organization use to evaluate program quality? How has your organization used this information to inform program quality growth? Please share what indicators demonstrate that your organization is making the desired impact.

## APPENDIX III. Instructions for RFP Application Submission:

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

### Required Supporting Documentation Instructions:

All proposals will need to be in a Hardcopy Proposal and USB - Electronic RFP version. Any files missing could result in a disProposal 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
- Profit and loss statement and/or copy of 2020 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 (indicate specific names next to titles of staff whenever possible)
- Copy of organization's 501(c)(3) letter
- Bank statements to show proof of operating cash reserves (reference application question 2 in appendix II for details)
- Job description for site coordinator and program instructor
- 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 2021-2022 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 (outlined in Section 13)
- Copy of certificate of current insurance

# 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 ASESP and 21<sup>st</sup> 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 MOU SAMPLE CONTRACT

The contract template that is currently being used by lead agencies can be accessed by clicking the following link. However, please be aware that we are in the process of revising the contract template in 2 main respects: (1) the revised 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 (2) that master contract will last for 3 years (but note that agencies and sites will continue be matched in 1-year relationships, as they are currently). The other terms will be substantially similar to those in the current contract template.

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

*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 Community Schools 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 April 17, 2022 (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, whether by administrative process, judicial process, or any other legal process or proceeding.

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 Executive Director of Community Schools Student Services, whose decision will be final. Appellant should submit the appeal and any supporting documents should be sent electronically by email to:

***Andrea Bustamante***  
*Executive Director Community Schools & Student Services*  
*andrea.bustamante@ousd.org*

Appellants will receive written notice of the outcome of their appeal April 24, 2022. In the event that an applicant’s appeal is successful, the agency will be treated as all other prequalified agencies.

## 2022 OUSD Request for Proposals Application

ASES, 21st CCLC, ELO-P, and ASSETS After-School Programs

Cover Sheet Template:

|                         |                             |                           |                               |
|-------------------------|-----------------------------|---------------------------|-------------------------------|
|                         |                             |                           |                               |
| Organization Name       | Envisioneers Inc            |                           |                               |
| Primary Contact Person: | Maria Sparagna Drake        | Secondary Contact Person: | Allison Knight                |
| Email:                  | maria.d@theenvisioneers.org | Email:                    | allison.k@theenvisioneers.org |
| Telephone #:            | 415-680-5473                | Telephone #:              |                               |

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

|  |    |         |
|--|----|---------|
| 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?<br><br>If so, please identify the years and durations served. | √  | Yes     |
|  |    | No      |
|  | 14 | # Years |
| Do you currently serve in the Lead Agency role for any other school districts besides OUSD?  | √  | Yes     |
|  |    | No      |
| <b>If yes</b> , please list all school districts you have served.  |    |         |
| Alum Rock Union, Redwood City, West Contra Costa   |    |         |
| How many school sites does your organization have the capacity to serve as a lead agency?  | 1  | # Sites |
| In the box below, please briefly explain your rationale for this number of sites?  |    |         |
| We are concerned with the number of staff we would be able to hire in the upcoming year so we are having to take growth slowly.    |    |         |



On behalf of Envisioneers Inc (Agency), I, Maria Sparagna Drake (name)  
CEO (Position), declare under penalty of perjury under the laws  
of the State of California that the foregoing is true and correct.

Signature: *Maria Sparagna Drake* Date : 3/18/2022

**ORGANIZATIONAL CAPACITY**

Envisioneers' learner-centric approach to middle school intervention and enrichment is uniquely positioned to engage in partnership with the OUSD Expanded Learning Office. Envisioneers is a spin-off of Citizen Schools, a national organization with 26 years of experience in the expanded learning sector. Envisioneers received corporate identity status in December 2020 and IRS Determination (501c3 nonprofit status) in October of 2021. In the Fall of 2021, we launched as Envisioneers, an independent subsidiary of Citizen Schools with intent to expand and service underserved school districts throughout the Bay Area.

The mission of Envisioneers is to combat systemic inequity in education by fostering and cultivating the academic and social-emotional skills of our scholars while exposing them to project-based learning and community-based career mentors. Our vision is that all students will realize their opportunities, have the skills to envision their passion, and the freedom to achieve their dreams. By focusing on the critical inflection point of middle school, we help to close a gap between efforts focused on school readiness for younger children and programs aimed at drop-out prevention or college access for high school students.

Citizen Schools underwent a rigorous 5-year external evaluation of the ELT model which determined the most pronounced student impacts are in the critical area of social-emotional learning; participants are significantly more likely to report that the program helps their self-esteem and pro-social behaviors. They are also more likely to participate in activities that help them learn about college and careers. The academic impact is also clear - Citizen Schools alumni are 2x more likely to graduate from high school, and are 2x more likely to graduate from a four-year college or university than low-income students nationally. As Envisioneers, we are building upon this foundation to increase students' access and connections, closing the opportunity and achievement gaps to address the systemic inequities in education.

The legacy leadership and staff of Envisioneers have been working collaboratively with schools in the Bay Area for nearly 20 years. Our desire to iterate programming based on the proximate needs of our communities was one of the driving forces for establishing Envisioneers. In our inaugural year (SY21-22), we

have increased our impact by 50%. Our Oakland footprint now includes 4 middle school sites, serving approximately 600 students in the expanded learning hours and another 350 in the school day through our “push-in” component.

As Envisioneers, we continue to offer Citizen Schools’ ELT model; however, we are now able to design program elements to best fit the needs of the students, families, schools, and communities we serve. We will maintain our focus on our four pillars of academic rigor, social emotional support, 21st Century skill building, and career pathways in order to help close the academic and opportunity gaps created by the systemic racism and inequity built into the system of education in America.

Envisioneers exclusively partners with public high-need schools and communities, seeking to work with schools that serve low-income populations, have large BIPOC populations, demonstrate low baseline academic performance, and lack existing high-quality afterschool and mentoring programs. The leadership and staff of Envisioneers have been working collaboratively with under resourced schools in the Bay Area as Citizen Schools since 2002 and have partnered with low-income middle schools to bring experiential learning opportunities to over 12,600 total students, 2,700 of those students being from Oakland.

Cultural competency is a core component of our staff training and development models. Direct service staff undergo a rigorous summer training rooted in trauma-informed practices through a lens of equity and cultural humility, focusing on implicit bias and racial equity. In monthly professional development sessions, staff learn and practice skills to foster resilience for students and staff through building connection, coping skills, and competence, while focusing on individual and community wellness. All program staff receive site-specific training emergency protocols. Healing-centered practices are used to resolve conflicts in alignment with site-based practices.

Envisioneers’ ELT model is predicated on the belief that partnership is central to success and deep partnerships are developed and maintained with the administration, community partners, and families of each school site. Prior to entering into partnership with new school districts and sites, a preliminary meeting to

share goals and expectations is necessary. An Envisioneers' Master Educational School Partnership Agreement (MESPA) is signed with the site principal once the partnership is accepted by the district and verbally agreed upon by all parties. The MESPA clearly lays out the goals of both parties and the collaborative goals that each party will support and how. In ideal situations, we also create a small committee of 6-8 individuals on each site composed of families, students, administrators, teachers, PTO/A, and our staff. The role of this committee is to work together to make the transition for all school parties seamless and successful from the very beginning.

Envisioneers' staff are recruited specifically for their interest in youth development and urban education. All staff participate in culturally-responsive, trauma-informed training to better understand, disrupt, and act upon oppressive systems. As an organization that is striving to bring equal opportunities to our youth, it is vital that our youth see themselves in those future opportunities. We work to create a diverse workforce on our campuses (90% of our Oakland staff identify as people of color) as well as recruit community-based volunteers. Over the many years of hiring for the ELT program we have found that along with background working with youth and a preferable background in child development, it is most important to have staff that demonstrate the cultural competencies, social skills, and mindset necessary to work with middle school youth in urban environments. We work to hire not only staff from the local community but we also look for staff who may have attended the specific schools with whom we partner.

### ***FISCAL MANAGEMENT AND RESOURCE DEVELOPMENT***

As Citizen Schools California and now Envisioneers Inc, we have had a long and proven track record of securing match and supplemental funding to ensure its programs operate uninterruptedly in the event of a delay in disbursement of funds from federal and state-level grants. With the relationships built by our legacy leaders of the past 9 years, we believe we will continue to receive financial support from our diverse array of sources in both the public and private sectors including corporations, foundations, public funds, and individuals. We are fully committed to securing sufficient funding to serve as a lead agency as described in this application, including allocating portions of unrestricted grants. We have secured funding from supporters

including: Sergey Brin Family Foundation, Lucile Packard Foundation, Koshland Foundation, Sandia Laboratories, and Western Digital. Furthermore, now, as a Bay Area-centric organization, Envisioneers will be able to better develop a local fundraising pipeline.

For the 2021-22 school year, Envisioneers will operate with an organizational budget of \$2.7m. Envisioneers program costs include personnel and non-personnel expenses explained below. As we move into the ELOP funding, we fully expect to also have a fee for service, based on a sliding scale. In certain schools, this is already a well established practice. We have developed our budget with their guidance. We will have multiple ways to invoice and collect fees making it easy for our families.

*Personnel Costs:*

Program Director - Gene'a Mitchell will serve as Program Director for sites in OUSD and will be the primary point of contact. As the direct supervisor of Campus Directors (CD), she maintains a regular collaboration schedule with the school site administration to provide leadership-level oversight over the partnership. She meets weekly with CDs to ensure quality programming and to support their partnerships with the school site administrators.

Campus Directors (Site Coordinator) - Full-time site coordinators, oversee school partnerships, program implementation, and staff management. Our Campus Directors are part of each school's leadership committee - holistically assessing the needs of individual students and the school community at large. CDs oversee stakeholder measurement and evaluation at their campus including school continuous improvement plans, and weekly audits.

Teaching Fellows ( Full-Time Instructional Staff) - Teaching Fellows (TF) maintain safety protocols and maintain the ASES required 1:20 ratio. TFs lead students through all program elements (academic support, apprenticeships, and explorations), build relationships with students and families, and coordinate with school faculty and staff. Each TF has a partnership role that supports program and school priorities, such as overseeing

data entry and use for the campus, recruiting and managing volunteers, developing academic support lessons, or providing classroom support for the district teachers.

Teaching Associates (Part-Time Instructional Staff) - Instructors who work only in the afternoon hours. TAs may lead their own class or support volunteers in apprenticeships. TAs are responsible for maintaining program safety and maintaining the 1:20 student ratio.

#### *Non-personnel Costs*

Program Supplies and Materials - General office supplies such as pens, markers, stationary, as well as program-specific supplies such as solar car kits, art supplies, and sporting equipment. Travel - While most apprenticeships take place primarily at school sites, some include travel to other locations to visit professional workplaces or learn about their apprenticeship topic.

Incentives - Rewarding our scholars for work well done is important in building self esteem and confidence. We have created an incentive system based on our organizational values of equity, confidence , curiosity, perseverance, teamwork, joy, and service. When our scholars show by their actions one of our values, they get the corresponding value star. These are additive and rewarded at the end of each week with small incentive prizes

Technology - Licenses for virtual apprenticeships (i.e. coding), zoom accounts, and computers for classwork and apprenticeship programs that require additional access like 3D printing.

Professional Development - Teaching staff undergo rigorous and ongoing training rooted in trauma-informed practices through a lens of equity and cultural humility, focusing on addressing implicit bias and racial equity while focusing on community wellness.

Administrative - Costs associated with human resource and accounting staff, portions of Regional Staff salaries,

#### **AGENCY INFRASTRUCTURE**

Envisioneers' organizational infrastructure aligns with the responsibilities of a Lead Agency in OUSD, which are covered by at least one position with an additional layer of internal checks-and-balances.

| RESPONSIBILITY  | Envisioneers Staff  | ACTIONS   |
|---|---|---|
| Hiring, supervision, training, support of program staff and leaders | -Regional Leadership<br>-Program Director                     | Highly systematized process for recruitment and hiring led by Regional leadership. Detailed scope-and-sequence for ongoing training, coaching, and PD for all staff.                          |
| Compliance with OUSD and CA DoE requirements                        | -Program Director<br>-Regional Leadership                     | Regional leadership builds compliance systems for CA DoE requirements into all operational procedures.  |
| Fund Management   | -Program Director<br>Regional Leadership                      | Program Director oversees CDs' management on site-based budgets, which are also monitored weekly by Regional leadership. Regional leadership manages fund development, grants, and invoicing. |
| Program planning in collaboration with school leadership            | -Campus Director<br>-Program Director<br>-Regional Leadership | The model is integrated and in full alignment with the school's goals and priorities.   |
| Partnership w/ OUSD   | -Program Director<br>-Regional Leadership                     | Regional positions are dedicated to ensuring effective district partnerships.   |

- **Student Ratio of 1:20 or better** –Our ELT model yields 5-6 staff members serving 120 students at each school site. Each campus has a Campus Director who oversees the school partnership and the Teaching Fellows/Associates who are Line/Program staff, providing direct service to youth.

- **Staff meet OUSD Instructional Aide positions** - Program staff members are emerging educators who participate in a highly selective two-year AmeriCorps Teaching Fellowship. All staff meet the minimum standard of 48 credits required for educational aides. Staff and Volunteers are focused on creating a positive learning environment grounded in student voice.

- **Full-Time School Site Coordinator** - Each campus site has (1) full-time Campus Director who oversees the entire campus program and is stationed at each school site during the day and throughout program hours. Paperwork is audited on a weekly basis.

- **85% attendance documented by** daily sign in and out by students - At each program site we record and compile daily attendance and retention information. Our enrollment packets are augmented with OUSD's forms and we keep internal attendance and in OUSD systems. Our organizational goal is 90% school attendance.

- **Professional record keeping and reproduction upon request for district audits** - Envisioneers' Regional Leadership staff have developed official organizational policies inclusive of reporting, accounting, and record keeping procedures. These policies are designed to help Envisioneers achieve its mission by ensuring that we; allocate resources in a manner consistent with our mission, objectives and values, demonstrate to and document for our key stakeholders (students, families, partners and funders) that we are using our resources appropriately and judiciously, and meet fiduciary responsibilities as outlined by the 501(c)(3) standards outlined set by the government and enforced by our auditors.

***YOUTH DEVELOPMENT EXPERTISE, PROGRAM QUALITY ASSESSMENT PROCESS, AND SCHOOL DISTRICT ALIGNMENT***

Envisioneers' comprehensive model of academic support, college and career readiness preparation, and 21st-century skill development through mentor-led apprenticeships is designed to support the many facets of youth development with a well-rounded approach. All program staff receive site-specific training emergency protocols. Restorative justice practices are used to resolve conflicts in alignment with site-based practices. Students work with their team leaders to establish rules and consequences of violating rules. Students tend to develop close relationships with our program staff and often lay claim to the Envisioneers offices as a safe space throughout the school day. Youth participate as integral parts of collectives (classes, apprenticeship teams, field trip groups), to which they develop an intense sense of loyalty and belonging. Our model creates differentiated spaces for sustained effort, growth, and grit, and accomplishments, both in traditional learning outcomes and in non-cognitive skills like perseverance and problem-solving. Twice a year,

youth celebrate their success with their families and school community through formal celebrations called a WOW!. We take specific care to recruit and hire program staff representatives of the school community so youth can find a personal role model – be it because they share an ethnic heritage, can communicate in their home language, or relate to a staff’s educational journey.

Envisioneers has a commitment to Diversity Equity and Inclusion and we believe that diversity is vital to our success given that difference, in all its forms (such as ethnicity, gender, income, physical ability, race, religion, sexual orientation, work style, and experience), mirrors the diversity of the students and communities we serve and leads to more informed decision making. We intentionally recruit staff, volunteers, and partners for their reliability and credibility to youth and, often, partners from the community form the deepest connections with students. Envisioneers’ model is a collaborative, student-centered, results-driven model that is meeting California’s Quality Standards for Expanded Learning by:

**1. Safe and supportive environment** -All program staff receive site-specific training emergency protocols. Healing-centered practices are used to resolve conflicts in alignment with site-based practices. Students work with their team leaders to establish rules and consequences of violating rules

**2. Active and engaged learning** - Our model creates differentiated spaces for sustained effort, growth, grit, and accomplishments, both in traditional learning outcomes and non-cognitive skills like perseverance and problem-solving. Twice a year, youth celebrate their success with their families and school community through formal community celebrations.

**3. Skill building** - We expose students to hands-on learning, diverse careers, academic skill-building, high school and college readiness to develop essential academic, 21st-century, and social-emotional learning skills.

**4. Youth voice and leadership** - Students elect their apprenticeships and build leadership skills during their projects. During the program, staff seek viewpoints and input from students on

activities and norms.

**5. Healthy choices and behaviors** - Envisionneers staff work in a collaborative environment with school-based staff and parents. A 'value star' system is used to reward positive behaviors and values. Students engage in daily physical activity.

**6. Diversity, access and equity** - Envisionneers has a commitment to DEI and actively recruits staff and volunteers from the communities we serve. Staff participate in ongoing cultural responsiveness training and continually work to holistically serve students. . Similarly, we intentionally seek volunteers and partners for their reliability and credibility to youth.

**7. Quality staff** - Staff are hired based on their experience and commitment to serving middle school students. Staff are paid a competitive salary.

**8. Clear vision, mission and purpose** - Campus Directors oversee the measurement and evaluation at their campus including school continuous improvement, and weekly audits to make data-driven decisions.

**9. Collaborative partnerships** - Envisionneers staff collaborate with teachers and school leaders throughout the year to build a common vision, coordinate operations, align staff development, and share data about student progress to target instruction. We collaborate with private and non-profit organizations to recruit volunteers, offer experiential learning opportunities, and infuse curriculum.

**10. Continuous quality improvement** - All staff members are provided continuous training and coaching to ensure high program quality and to foster transferable professional skills for emerging youth development workers.

**11. Program management** -The program has a clear organizational/reporting structure, which allows staff to focus on the needs of students. Each year, Envisionneers creates parent handbooks that describe program policies and procedures.

**12. Sustainability** - Resource development and financial management is the responsibility of

Regional Leadership. Envisioneers maintains a diverse portfolio of funding sources.

Our professional development scope and sequence includes youth development best practices early and often for all staff. During our Summer Institute, new staff are introduced to the basic tenets of youth development (mandated reporting, restorative justice principles, and student-centered classroom procedures). Throughout the year campus-based and regional trainings expand youth development knowledge with topics ranging from inclusive practices for high-need students and cultural competency. In addition, program leaders and program staff participate in third-party professional development opportunities on youth development topics. The theory of change for the program anticipates that the core activities of Envisioneers' program, result in direct outputs of student enrollment and attendance; increased time for academics; and increased exposure to real-world applications of academic skills. Envisioneers will implement a robust monitoring and evaluation infrastructure reflecting our commitment to achieving a significant, measurable, and long-term impact on students' skills, attitudes, and beliefs. Our Core Program Profile captures key implementation best practices, dosage, and short-term student outcomes. Data collected through program observations, surveys, data sharing agreements with our school partners, and performance assessments that evaluate students' mastery of 21st century skills are stored in a secure, online database that supports flexible, on-demand reporting. Staff at each site and on our Regional Leadership team analyze data and partner with external evaluation organizations to inform program improvement and establish impact. Envisioneers will use evaluation results to assess the consistency of program implementation, inform program improvement, improve partnership selection, guide monitoring discussions with partners, and ultimately demonstrate impact to stakeholders. This level of adoption ensures everyone at the organization holds responsibility for outcomes and is invested in using performance data to improve performance and achieve outcome targets through our cumulative work and service to communities



Sobrato Center for NonProfits  
330 Twin Dolphin drive, suite 115  
Redwood City, Ca 94065

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Date: March 22, 2022

Oakland Unified School District  
1000 Broadway, Suite 300  
Oakland, CA 94607

To Whom It May Concern,

I, Maria Sparagne Drake, as the founding CEO of Envisioneers Inc, state that our organization, Envisioneers Inc, is both willing and able to perform the commitment contained in the RFP application #21-115 Expanded Lead Agency. Having partnered with OUSD Expanded Learning Program leaders over the past many years, we are not only excited for this opportunity to increase our partnerships, but more importantly, to share our program with more middle school scholars who are in need of greater equity.

Having a deliberate and singular focus on middle school expanded learning programming for the past 25 years has allowed us to lean into the academic as well as social skill building that is needed for these sometimes difficult years for scholars in middle school. Our signature 10 week, community mentor lead, hands-on apprenticeships foster creativity and curiosity to our scholars while giving them a glimpse of the many career pathways that are available to them for their futures. Your zip code should not determine your possibilities and what you don't see you can't be. We aspire to change these facts.

Sincerely,

*Maria Sparagna Drake*

Maria Sparagna Drake, MT, MNA  
Envisioneers, Founding CEO

# 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 ASESP and 21<sup>st</sup> 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 MOU SAMPLE CONTRACT

The contract template that is currently being used by lead agencies can be accessed by clicking the following link. However, please be aware that we are in the process of revising the contract template in 2 main respects: (1) the revised 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 (2) that master contract will last for 3 years (but note that agencies and sites will continue be matched in 1-year relationships, as they are currently). The other terms will be substantially similar to those in the current contract template.

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

*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.*



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**Signature**

---

, Maria Sparagna Drake, CEO

**Name and Title of Signatory**

3/30/2022

---

**Date**

---

ENVISIONEERS INC

**Name of Organization**



## Program Elements

- **Push-In Support**

Team Leaders provide 1:1 or small group tutoring, during the regular school-day, to address scholars' academic skill gaps and help them progress toward grade-level expectations.

- **AIM: Aspire, Invest, and Make the Grade.**

Focused time that results in quality, on-time assignment completion and targeted learning outcomes.

- **Skills Lab**

Scholars will receive targeted support and enrichment to help scholars excel in the foundational skills and knowledge in ELA, math, history, and science.

- **Apprenticeships**

Engaging, hands-on learning experiences targeted to develop scholars' 21st Century Skills facilitated by an Envisioneers Mentor (EM) volunteer from various professions and our Teaching Leaders.

- **Enrichment and Choice Time**

Targeted activities that allow scholars to cultivate and grow skills by interacting in different social settings.

- **Social-Emotional Learning**

Regularly scheduled activities through which scholars “understand and manage emotions, set and achieve positive goals, feel and show empathy for others, establish and maintain positive relationships, and make responsible decisions.”

(<https://casel.org/what-is-sel/>)

- **Supper**

Scholars are served a supper snack every day in the cafeteria.

- **Family Engagement**

- Bi-weekly phone calls home to report student progress.
  - We are happy to announce we are using ParentSquare to communicate with parents this year. Please download the app for easier communication.
- Quarterly Newsletter
- Regular events to help families connect to schools.

- **WOW!**

Twice a year we put on a showcase where families and other community members can come to see all the hard work scholars have put into their Apprenticeships over the semester, while enjoying food, entertainment, raffles.

- **Fun**

We also have lots of FUN at Envisioneers! Scholars will participate in sports, physical challenges, arts and crafts, design challenges, team building and monthly rallies throughout the year.

### Example Weekly Program Schedule

| Monday  | Tuesday   | Wednesday   | Thursday  | Friday  |
|---|---|---|---|---|
| <b>Tier One and Prep</b><br>9:00 - 3:30 PM            | <b>Tier One and Prep</b><br>9:00 - 2:15 PM            |   | <b>Tier One and Prep</b><br>9:00 - 3:30 PM            | <b>PD And Prep</b><br>9:00 - 3:30 PM                  |
| <b>Supper</b><br>3:30 - 4:00                          | <b>Physical Ed</b><br>2:15 - 3:15                     | <b>Physical Ed</b><br>2:15 - 3:15                     | <b>Supper</b><br>3:30 - 4:00                          | <b>Supper</b><br>3:30 - 4:00                          |
| <b>AIM</b><br>4:00 - 5:00                             | <b>Brain Break</b><br>3:15 - 3:30                     | <b>Brain Break</b><br>3:15 - 3:30                     | <b>AIM</b><br>4:00 - 5:00                             | <b>AIM</b><br>4:00 - 5:00                             |
|   | <b>Supper</b><br>3:30 - 4:00                          | <b>Supper</b><br>3:30 - 4:00                          |   |   |
| <b>Brain Break</b><br>5:00 - 5:15                     | <b>Enrichment</b><br>4:00 - 5:00                      | <b>Enrichment</b><br>4:00 - 5:00                      | <b>Brain Break</b><br>5:00 - 5:15                     | <b>Brain Break</b><br>5:00 - 5:15                     |
| <b>Enrichment</b><br>5:15 - 5:45                      |   |   | <b>AIM</b><br>5:00 - 6:15                             | <b>AIM</b><br>5:00 - 6:15                             |
| <b>Clean Up, Circle, and Dismissal</b><br>5:45 - 6:00 |

## Program Expectations for All Scholars

1. **Regularly attend Envisioneers program activities.**
  - Attendance is expected from **Monday - Thursday**. If something comes up, please contact your Campus Director or your child's homeroom teacher to notify them.
  - Please note that stepping off campus grounds during program time will result in an automatic 1-day suspension from Envisioneers.
  - If a student is enrolled in Envisioneers, he/she/they may not be on the school campus if they are not signed into the program.
2. Come to program prepared to **positively participate** in activities, engage in apprenticeships, and complete homework assignments.
3. **Listen to and follow directions from program staff** and **respect fellow classmates**.
4. Abide by the rules of Westlake Middle School.

## Consequences if Expectations are not Met

1. Parent Notification and/or Conference
2. Parent Notification and/or Conference + 1-day suspension from program
3. Parent Notification and/or Conference + 5-day suspension from program
4. Dismissal from the Envisioneers Program\*

\*Scholars dismissed from the program will be allowed to re-apply for a place in program starting the next school year.

## Dismissal

Please note that **our program runs until 6:00 P.M.** Any time after 6:15 PM is considered late. We will stay with your child until they are picked up, but we request that you plan accordingly so that you can pick them up **on time**.



**Envisioneers OUSD ELOP Budget Based 180 Students**

|                             |                     | <b>OUSD / ELOP<br/>Allocation</b> | <b>Envisioneers<br/>Match</b> |
|-----------------------------|---------------------|-----------------------------------|-------------------------------|
| <b>REVENUE</b>              |                     |                                   |                               |
| <b>Public Funding</b>       |                     |                                   |                               |
| OUSD ELOP 100ND             | \$115,911.25        |                                   |                               |
| <b>Private</b>              |                     |                                   |                               |
| Koshland Foundation         | \$35,000.00         |                                   |                               |
| Star One Credit Union       | \$7,500.00          |                                   |                               |
| Dome Construction           | \$5,000.00          |                                   |                               |
| Sandia Laboratories         | \$20,000.00         |                                   |                               |
| Individual Contributions    | \$25,000.00         |                                   |                               |
|                             |                     |                                   |                               |
| <b>Fee for Service*</b>     | \$95,550.00         |                                   |                               |
|                             |                     |                                   |                               |
| <b>TOTAL REVENUE</b>        | <b>\$303,961.25</b> |                                   |                               |
| <b>EXPENSES</b>             |                     |                                   |                               |
| <b>Personnel</b>            |                     |                                   |                               |
| (9) Site Associates \$19/HR | \$146,300.00        | \$82,000.00                       | \$64,300.00                   |
| (1) Site Coordinator        | \$62,000.00         | \$15,000.00                       | \$47,000.00                   |
| Managing Director (10%)     | \$8,500.00          |                                   | \$8,500.00                    |
| Fringe & Benefits           | \$54,200.00         | \$10,000.00                       | \$44,200.00                   |
| <b>TOTAL PERSONNEL</b>      | <b>\$271,000.00</b> | <b>\$107,000.00</b>               | <b>\$164,000.00</b>           |
| <b>Non-Personnel</b>        |                     |                                   |                               |
| Office Supplies             | \$1,400.00          | \$500.00                          | \$900.00                      |
| Professional Development    | \$1,800.00          | \$500.00                          | \$1,300.00                    |
| Apprenticeship Materials**  | \$5,400.00          | \$3,311.25                        | \$2,088.75                    |
| Field Trips***              | \$1,600.00          | \$800.00                          | \$800.00                      |
| Incentives****              | \$2,970.00          | \$800.00                          | \$2,170.00                    |
| <b>TOTAL NON-PERSONNEL</b>  | <b>\$13,170.00</b>  | <b>\$5,911.25</b>                 | <b>\$7,258.75</b>             |
| <b>Administrative Fee</b>   | <b>\$11,366.00</b>  | <b>\$3,000.00</b>                 | <b>\$8,366.00</b>             |
|                             |                     |                                   |                               |
| <b>TOTAL EXPENSES</b>       | <b>\$295,536.00</b> | <b>\$115,911.25</b>               | <b>\$179,624.75</b>           |

\*Fee for service based upon school history; 80 scholars \$10.50/day/student (non-duplicate only) at 65%

\*\*180 students \$30 each per year

\*\*\* Off-site explorations including college visits and career exploration

\*\*\*\* .50 per student per week



**FINANCIAL STATEMENTS  
JUNE 30, 2021 AND 2020**

**CITIZEN SCHOOLS, INC.**

Contents  
June 30, 2021 and 2020

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50 Washington Street  
Westborough, MA 01581  
508.366.9100  
aafcpcpa.com

## Independent Auditor's Report

To the Board of Directors of  
Citizen Schools, Inc.:

### **Report on the Financial Statements**

We have audited the accompanying financial statements of Citizen Schools, Inc. (a Massachusetts corporation, not for profit), which comprise the statements of financial position as of June 30, 2021 and 2020, and the related statements of activities and changes in net assets, cash flows and functional expenses for the years then ended, and the related notes to the financial statements.

### ***Management's Responsibility for the Financial Statements***

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes 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.

### ***Auditor's Responsibility***

Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audits to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements 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 the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

### ***Opinion***

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Citizen Schools, Inc. as of June 30, 2021 and 2020, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

*AAFCPAs, Inc.*

Westborough, Massachusetts  
December 7, 2021

**CITIZEN SCHOOLS, INC.**

## Statements of Financial Position

June 30, 2021 and 2020

| <b>Assets</b>  | <b>2021</b>         | <b>2020</b>         |
|--|---------------------|---------------------|
| Current Assets:  |                     |                     |
| Cash   | \$ 1,857,452        | \$ 1,333,355        |
| Current portion of pledges receivable                      | 1,981,984           | 1,487,790           |
| Public sector receivable, net                              | 1,240,209           | 295,933             |
| Prepaid expenses and other                                 | 72,057              | 51,309              |
| Total current assets                                       | 5,151,702           | 3,168,387           |
| Restricted Cash  | 30,210              | 30,210              |
| Pledges Receivable, net of current portion<br>and discount | -                   | 806,215             |
| Property and Equipment, net                                | 39,408              | 48,411              |
| Total assets   | <u>\$ 5,221,320</u> | <u>\$ 4,053,223</u> |
| <b>Liabilities and Net Assets</b>                          |                     |                     |
| Current Liabilities:                                       |                     |                     |
| Current portion of notes payable                           | \$ 11,088           | \$ 10,472           |
| Accounts payable and accrued expenses                      | 285,907             | 516,915             |
| Conditional advance  | -                   | 314,551             |
| Total current liabilities                                  | 296,995             | 841,938             |
| Long-Term Liabilities:                                     |                     |                     |
| Notes payable, net of current portion                      | 150,768             | 11,856              |
| Total liabilities  | <u>447,763</u>      | <u>853,794</u>      |
| Net Assets:  |                     |                     |
| Without donor restrictions:                                |                     |                     |
| Operating  | 3,087,552           | 897,935             |
| Property and equipment                                     | 27,552              | 26,083              |
| Total without donor restrictions                           | 3,115,104           | 924,018             |
| With donor restrictions                                    | 1,658,453           | 2,275,411           |
| Total net assets   | <u>4,773,557</u>    | <u>3,199,429</u>    |
| Total liabilities and net assets                           | <u>\$ 5,221,320</u> | <u>\$ 4,053,223</u> |

The accompanying notes are an integral part of these statements.

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**CITIZEN SCHOOLS, INC.**

Statements of Cash Flows  
For the Years Ended June 30, 2021 and 2020

|   | <u>2021</u>         | <u>2020</u>         |
|---|---------------------|---------------------|
| <b>Cash Flows from Operating Activities:</b>  |                     |                     |
| Changes in net assets   | \$ 1,574,128        | \$ 20,800           |
| Adjustments to reconcile changes in net assets to net cash provided by operating activities:            |                     |                     |
| Depreciation  | 36,912              | 85,139              |
| Bad debt expense  | 15,000              | -                   |
| Change in pledges receivable discount   | (18,785)            | (24,218)            |
| Changes in operating assets and liabilities:  |                     |                     |
| Pledges receivable  | 330,806             | 677,884             |
| Public sector receivable  | (959,276)           | 679,053             |
| Prepaid expenses and other  | (20,748)            | (21,704)            |
| Accounts payable and accrued expenses   | (231,008)           | (626,542)           |
| Conditional advance   | (314,551)           | 314,551             |
| Net cash provided by operating activities   | <u>412,478</u>      | <u>1,104,963</u>    |
| <b>Cash Flows from Investing Activities:</b>  |                     |                     |
| Acquisition of property and equipment   | <u>(27,909)</u>     | <u>-</u>            |
| <b>Cash Flows from Financing Activities:</b>  |                     |                     |
| Proceeds from debt issuance   | 150,000             | -                   |
| Payments on note payable  | <u>(10,472)</u>     | <u>(9,088)</u>      |
| Net cash provided by (used in) financing activities   | <u>139,528</u>      | <u>(9,088)</u>      |
| <b>Net Change in Cash and Restricted Cash</b>   | 524,097             | 1,095,875           |
| <b>Cash and Restricted Cash:</b>  |                     |                     |
| Beginning of year   | <u>1,363,565</u>    | <u>267,690</u>      |
| End of year   | <u>\$ 1,887,662</u> | <u>\$ 1,363,565</u> |
| <b>Reconciliation of Cash and Restricted Cash Reported Within the Statements of Financial Position:</b> |                     |                     |
| Cash  | \$ 1,857,452        | \$ 1,333,355        |
| Restricted cash   | <u>30,210</u>       | <u>30,210</u>       |
| Total cash and restricted cash  | <u>\$ 1,887,662</u> | <u>\$ 1,363,565</u> |
| <b>Supplemental Disclosure of Cash Flow Information:</b>  |                     |                     |
| Cash paid for interest  | <u>\$ 1,007</u>     | <u>\$ 1,435</u>     |
| <b>Supplemental Disclosure of Non-Cash Transactions:</b>  |                     |                     |
| Acquisition of property and equipment financed through note payable                                     | <u>\$ -</u>         | <u>\$ 31,416</u>    |

The accompanying notes are an integral part of these statements.

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**CITIZEN SCHOOLS, INC.**

Statement of Functional Expenses  
For the Year Ended June 30, 2020

|                                       | Program Services       |            |                  | Support Services       |             |                            | Total        |
|---------------------------------------|------------------------|------------|------------------|------------------------|-------------|----------------------------|--------------|
|                                       | Expanded Learning Time | Catalyst   | Makers + Mentors | Total Program Services | Development | General and Administrative |              |
| <b>Personnel and Related:</b>         |                        |            |                  |                        |             |                            |              |
| Salaries                              | \$ 1,687,751           | \$ 575,293 | \$ 1,123,624     | \$ 3,386,668           | \$ 494,859  | \$ 605,306                 | \$ 4,486,833 |
| Fringe benefits                       | 396,656                | 75,406     | 147,279          | 619,341                | 64,864      | 79,340                     | 763,545      |
| Payroll taxes                         | 233,370                | 44,176     | 86,281           | 363,827                | 37,999      | 46,480                     | 448,306      |
| Total personnel and related           | 2,317,777              | 694,875    | 1,357,184        | 4,369,836              | 597,722     | 731,126                    | 5,698,684    |
| <b>Other:</b>                         |                        |            |                  |                        |             |                            |              |
| In-kind goods and services            | -                      | 41,285     | 58,715           | 100,000                | -           | 191,816                    | 291,816      |
| Professional fees and services        | 75,052                 | 63,878     | 257,307          | 396,237                | 103,647     | 181,973                    | 681,857      |
| Equipment and software                | 52,141                 | 9,864      | 24,180           | 86,185                 | 20,000      | 10,379                     | 116,564      |
| Occupancy                             | 72,734                 | 14,399     | 28,123           | 115,256                | 12,386      | 15,150                     | 142,792      |
| Other                                 | 47,329                 | 8,959      | 17,498           | 73,786                 | 7,706       | 9,426                      | 90,918       |
| Insurance                             | 38,454                 | 7,279      | 14,217           | 59,950                 | 6,261       | 7,659                      | 73,870       |
| Direct campus expenses                | 19,162                 | 17,218     | 1,384            | 37,764                 | 2,647       | 1,092                      | 41,503       |
| Depreciation                          | 44,320                 | 8,390      | 16,386           | 69,096                 | 7,217       | 8,826                      | 85,139       |
| Promotional materials and advertising | 1,361                  | 50,000     | 2,286            | 53,647                 | 22,708      | 12,247                     | 88,602       |
| Office                                | 10,799                 | 2,174      | 20,162           | 33,135                 | 2,975       | 2,269                      | 38,379       |
| Meetings and trainings                | 6,376                  | 474        | 5,758            | 12,608                 | 6,564       | 16,436                     | 35,608       |
| Travel                                | 1,648                  | 2,826      | 20,981           | 25,455                 | 3,263       | 22,702                     | 51,420       |
| Entrance and membership fees          | 1,750                  | 64         | -                | 1,814                  | 684         | -                          | 2,498        |
| Communications                        | 20,116                 | 3,808      | 7,437            | 31,361                 | 3,276       | 4,007                      | 38,644       |
| Transportation                        | 66,686                 | -          | -                | 66,686                 | -           | -                          | 66,686       |
| Total other                           | 457,928                | 230,618    | 474,434          | 1,162,980              | 199,334     | 483,982                    | 1,846,296    |
| Total expenses                        | \$ 2,775,705           | \$ 925,493 | \$ 1,831,618     | \$ 5,532,816           | \$ 797,056  | \$ 1,215,108               | \$ 7,544,980 |

The accompanying notes are an integral part of these statements.

## CITIZEN SCHOOLS, INC.

Notes to Financial Statements  
June 30, 2021 and 2020

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### 1. OPERATIONS AND NONPROFIT STATUS

#### Operations

Citizen Schools, Inc. (the Agency) is a Massachusetts nonprofit corporation founded in 1995 to help all students thrive through hands-on learning and career mentors. The Agency's vision is for all students to have experiences and career mentors that ignite curiosity, build confidence and help them develop into the next generation of leaders. The Agency accomplishes this through a combination of three program models: Expanded Learning Time, Catalyst and Makers + Mentors Network (formerly US2020).

In fiscal year 2021, the Agency operated Expanded Learning Time (ELT) programs at ten sites, enrolling approximately 1,500 students from schools in underserved communities across two states, and engaged approximately 240 "Citizen Teacher" volunteers. The Agency operated Catalyst, a Professional Development program to build teacher capacity, in thirty-four schools, supporting nearly 1,600 students and engaging an additional fifty volunteers. Catalyst's implementation was interrupted during the pandemic, which would have engaged double the number of teachers and class sections. The Agency also supported a network of regional coalitions, delivered through the Makers + Mentors Network, creating STEM-based hands-on learning for students in twenty-one cities, ultimately impacting over 200,000 students and over 20,000 volunteers. Student enrollment numbers in fiscal year 2021 were impacted by the COVID-19 pandemic and school enrollment in general.

In fiscal year 2020, the Agency operated Expanded Learning Time (ELT) programs at twelve sites, enrolling approximately 2,496 students from schools in underserved communities across three states, and engaged approximately 320 "Citizen Teacher" volunteers. The Agency operated Catalyst, a Professional Development program to build teacher capacity, in twenty-five classrooms, supporting nearly 1,200 students and engaging an additional fifty volunteers. Catalyst's implementation was interrupted during the pandemic, which would have engaged double the number of teachers and class sections. The Agency also supported a network of regional coalitions, delivered through the Makers + Mentors Network, creating STEM-based hands-on learning for students in twenty-one cities, ultimately impacting over 200,000 students and over 20,000 volunteers.

Students are enrolled for the entire school year and participate in an integrated program of skill-building, leadership, and teamwork. The Agency works with students intensively and consistently to build students' academic skills and expand their opportunities.

Specifically, the Agency:

- Provides deeper student learning and engagement through hands-on "Apprenticeships" and Catalyst "Projects"
- Teaches collaborative problem solving and Social Emotional Learning
- Provides Professional Development for teachers to build their capacity for experiential learning
- Encourages students to develop solutions to real world challenges in their community
- Engages a diverse range of volunteer mentors, who model career pathways
- Raises students' awareness and aspirations for colleges and post-secondary education
- Develops an interest in STEM career pathways
- Creates networks for students, while building Social Emotional Skills
- Advances maker-centered learning and STEM mentorship
- Builds capacity for Community Based Organizations
- Instills and celebrates the values of confidence, curiosity, DEI (diversity, equity, inclusion), teamwork, and perseverance

## CITIZEN SCHOOLS, INC.

Notes to Financial Statements  
June 30, 2021 and 2020

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### 1. OPERATIONS AND NONPROFIT STATUS (Continued)

#### Operations (Continued)

In fiscal year 2021, the Agency operated programs in the following states and cities:

- Massachusetts - three programs located in Somerville
- California - seven programs located in East Palo Alto, Oakland, and San Jose

The Agency's programs consist of the following:

**ELT (Expanded Learning Time)** - ELT expenditures include all costs incurred to operate the Agency's ELT campuses, which includes salaries/wages, stipends, benefits and fringe costs for front-line managers and staff (Campus Directors, Teaching Fellows, Teaching Associates) and all other expenses (e.g., supplies, transportation) related to the program incurred at the campus level.

ELT programs are run with the support of regional offices and personnel. This support includes recruitment, onboarding and ongoing support for campus staff and citizen teacher volunteers, local relationship and key stakeholder management, regional best practice sharing, regionally based staff training, and direct management and professional development of campus directors. It also includes management of the Teaching Fellow program, a two-year leadership development program for aspiring young educators that can include earning a Master of Education degree.

**Catalyst Program** - Catalyst Program includes all staff salary and benefits and all other expenses to develop and implement professional development and training to build experiential learning capacity for teachers, while recruiting, training and matching career mentors. It also includes program design, partner and school engagement, volunteer recruitment, teacher training, and stakeholder engagement.

**Makers + Mentors Network/MMN** - The Agency is dedicated to mobilizing public and community support for high-quality hands-on project-based learning and maker-centered learning. Makers + Mentors Network leads this work by organizing Support for STEM programming and initiatives, new site cultivation, and the development of an AmeriCorps service experience called the Maker Fellowship, designed to engage under-resourced communities in STEM learning in partnership with local community colleges, colleges and universities. Costs include staff salaries and benefits and direct expenses related to convening and mobilizing a national coalition of local organizations.

During fiscal year 2021, the Agency made the decision to discontinue operating the Expanded Learning Time program in California effective July 1, 2021. As a result, the operations for this segment of the Expanded Learning Time program are presented as net income from discontinued operations in the accompanying statements of activities and changes in net assets for the years ended June 30, 2021, and 2020. Also see Note 14.

#### Nonprofit Status

The Agency is exempt from Federal income taxes as an organization (not a private foundation) formed for charitable purposes under Section 501(c)(3) of the Internal Revenue Code (IRC). The Agency is also exempt from state income taxes. Donors may deduct contributions made to the Agency within IRC requirements.

## CITIZEN SCHOOLS, INC.

Notes to Financial Statements  
June 30, 2021 and 2020

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### 2. SIGNIFICANT ACCOUNTING POLICIES

The Agency prepares its financial statements in accordance with generally accepted accounting standards and principles (U.S. GAAP) established by the Financial Accounting Standards Board (FASB). References to U.S. GAAP in these notes are to the FASB Accounting Standards Codification (ASC).

#### Estimates

The preparation of financial statements in accordance with U.S. GAAP requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the reported period. Actual results could differ from those estimates.

#### Revenue Recognition

The Agency's primary sources of revenue are from various Federal, state and local agencies. Amounts received under contracts with various Federal, state and local agencies, and grants and contributions have been recorded in accordance with ASC Subtopic 958-605, *Revenue Recognition*. These contracts are considered non-reciprocal transactions because the general public receives the benefit as a result of the assets transferred.

In accordance with ASC Subtopic 958-605, the Agency must determine whether a contribution (or a promise) is conditional or unconditional for transactions deemed to be a contribution. A contribution is considered to be a conditional contribution if an agreement includes a barrier that must be overcome and either a right of return of assets or a right of release of a promise to transfer assets exists. Indicators of a barrier include a measurable performance-related barrier or other measurable barriers, a stipulation that limits discretion by the recipient on the conduct of an activity, and stipulations that are related to the purpose of the agreement. This standard prescribes that the Agency should not consider probability of compliance with the barrier when determining if such awards are conditional and should be reported as refundable advance liabilities until such conditions are met (see Note 9).

Contracts with Federal, state and local agencies are recorded as public sector support revenue as services are provided and costs are incurred. Contracts consist of government and state unit-rate and cost reimbursable contract revenue. The unit-rate contract revenue is recognized based on hours of service. Cost reimbursable contract revenue is recognized to the extent of expenditures incurred.

Grants and contributions with donor restrictions are recorded as revenues and net assets with donor restrictions when unconditionally received or pledged. The Agency reports gifts of cash and other assets as net assets with donor restrictions if they are received with donor stipulations that limit the use of the donated assets. Transfers are made to net assets without donor restrictions as costs are incurred or time restrictions or program restrictions have lapsed. Donor restricted grants and contributions received and satisfied in the same period are included in net assets without donor restrictions.

The Agency has cost reimbursable contracts from governmental agencies. Reimbursements totaled approximately \$915,000 and \$1,137,000 for the years ended June 30, 2021 and 2020, respectively. Payments to the Agency are subject to audit by the appropriate government agency. In the opinion of management, the results of such audits, if any, will not have a material effect on the financial position of the Agency as of June 30, 2021 and 2020, or on its results of operations for the years then ended.

## CITIZEN SCHOOLS, INC.

Notes to Financial Statements  
June 30, 2021 and 2020

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### 2. SIGNIFICANT ACCOUNTING POLICIES (Continued)

#### Donated Goods and Services

The Agency receives services of volunteers and donated classroom space in various aspects of its programs. The value of these services and this space is not reflected in the accompanying financial statements since the value of these donations is not readily ascertainable.

The Agency receives donated goods and services (see Note 12) in support of various aspects of its programs, which are reflected as revenue and expense in the accompanying financial statements based upon the estimated value assigned to them by the donors.

#### Allowance for Doubtful Accounts

An allowance for doubtful accounts is calculated based on management's best estimate of the amount of uncollectible pledges and public sector receivables. The estimate of uncollectible receivables is based on past collection experience together with a review of the current status of existing receivables. There was an allowance of \$15,000 as June 30, 2021, on the public sector receivable. There was no allowance deemed necessary as of June 30, 2020.

#### Expense Allocation

Expenses related directly to a program or function are distributed to that program or function, while other expenses are allocated based upon records that accurately reflect the work performed and are supported by a system of internal control which provides reasonable assurance that the charges are accurate, allowable, and properly allocated.

Certain categories of expenses are attributable to more than one program or supporting function and are allocated on a reasonable basis that is consistently applied. The expenses that are allocated are personnel and related, which are allocated on the basis of estimates of time and effort; occupancy, which is allocated on a square footage basis; and office expenses, which are allocated based on usage studies conducted annually.

#### Advertising

The Agency expenses advertising costs as they are incurred. Total advertising expenses were \$29,603 and \$88,602 for the years ended June 30, 2021 and 2020, respectively.

#### Property and Equipment and Depreciation

Purchased property and equipment with a cost of \$5,000 or more are recorded at cost. Donated property and equipment are recorded at fair value at the time of donation. Renewals and betterments are capitalized as an addition to the related asset accounts, while repairs and maintenance are expensed as incurred. Depreciation is computed using the straight-line method over estimated useful lives of three to ten years.

**CITIZEN SCHOOLS, INC.**

Notes to Financial Statements  
 June 30, 2021 and 2020

**2. SIGNIFICANT ACCOUNTING POLICIES (Continued)**

**Net Assets**

*Net Assets Without Donor Restrictions*

Net assets without donor restrictions are those net resources that bear no external restrictions and are generally available for use by the Agency. The Agency has grouped its net assets without donor restrictions into the following categories:

- Operating** - represent resources available to carry on the operations of the Agency.
- Property and Equipment** - reflect net book value of the Agency’s property and equipment, net of related debt.

*Net Assets with Donor Restrictions*

The Agency receives contributions and grants that are restricted by donors for specific purposes or for future periods. These contributions are recorded as net assets with donor restrictions until they are released from restriction in accordance with donor designations.

Included in net assets with donor restrictions are pledges that are restricted to the time period in which they are payable to the Agency. These amounts are recorded at the present value of their estimated future cash flows (see Note 8).

Net assets with donor restrictions are restricted at June 30, 2021 and 2020, for the following:

|         | <u>2021</u>         | <u>2020</u>         |
|---------|---------------------|---------------------|
| Time    | \$ 1,408,453        | \$ 2,275,411        |
| Purpose | <u>250,000</u>      | <u>-</u>            |
|         | <u>\$ 1,658,453</u> | <u>\$ 2,275,411</u> |

Net assets were released from donor restrictions by occurrence of the passage of time as \$1,510,411 and \$1,550,782 at June 30, 2021 and 2020, respectively.

**Fair Value Measurements**

The Agency follows the accounting and disclosure standards pertaining to ASC Topic, *Fair Value Measurements*, for qualifying assets and liabilities. Fair value is defined as the price that the Agency would receive upon selling an asset or pay to settle a liability in an orderly transaction between market participants.

The Agency uses a framework for measuring fair value that includes a hierarchy that categorizes and prioritizes the sources used to measure and disclose fair value. This hierarchy is broken down into three levels based on inputs that market participants would use in valuing the financial instruments based on market data obtained from sources independent of the Agency. Inputs refer broadly to the assumptions that market participants would use in pricing the financial instrument, including assumptions about risk. Inputs may be observable or unobservable. Observable inputs are inputs that reflect the assumptions market participants would use in pricing the financial instrument developed based on market data obtained from sources independent of the reporting entity. Unobservable inputs are inputs that reflect the reporting entity’s own assumptions about the assumptions market participants would use in pricing the asset developed based on the best information available.

**CITIZEN SCHOOLS, INC.**

Notes to Financial Statements  
June 30, 2021 and 2020

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**2. SIGNIFICANT ACCOUNTING POLICIES (Continued)**

**Fair Value Measurements (Continued)**

The three-tier hierarchy of inputs is summarized in the three broad levels as follows:

- Level 1 - Inputs that reflect unadjusted quoted prices in active markets for identical assets at the measurement date.
- Level 2 - Inputs other than quoted prices that are observable for the asset either directly or indirectly, including inputs in markets that are not considered to be active.
- Level 3 - Inputs that are unobservable and which require significant judgment or estimation.

An asset or liability's level within the framework is based upon the lowest level of any input that is significant to the fair value measurement.

*Restricted Cash*

Restricted cash in the accompanying statements of financial position consists of a security deposit required for use of the corporate credit card. This security deposit is held in a savings account that is valued using Level 1 inputs.

*All Other Assets and Liabilities*

The carrying values of all other qualifying assets and liabilities do not differ materially from their estimated fair values and are considered Level 1 in the fair value hierarchy.

**Accounting for Uncertainty in Income Taxes**

The Agency accounts for uncertainty in income taxes in accordance with ASC Topic, *Income Taxes*. This standard clarifies the accounting for uncertainty in tax positions and prescribes a recognition threshold and measurement attribute for the financial statements regarding a tax position taken or expected to be taken in a tax return. The Agency has determined that there are no uncertain tax positions which qualify for either recognition or disclosure in the accompanying financial statements at June 30, 2021 and 2020. The Agency's informational returns are subject to examination by Federal and state jurisdictions.

**Subsequent Events**

Subsequent events have been evaluated through December 7, 2021, which is the date the financial statements were available to be issued. There were no events that met the criteria for recognition or disclosure in the financial statements.

**CITIZEN SCHOOLS, INC.**

Notes to Financial Statements  
June 30, 2021 and 2020

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**3. LIQUIDITY**

The Agency's financial assets available within one year from the statements of financial position date for general operating expenses are as follows at June 30:

|   | <u>2021</u>         | <u>2020</u>         |
|---|---------------------|---------------------|
| Cash  | \$ 1,857,452        | \$ 1,333,355        |
| Pledges receivable                                | 1,981,984           | 1,487,790           |
| Public sector receivable                          | <u>1,240,209</u>    | <u>295,933</u>      |
|   | 5,079,645           | 3,117,078           |
| Less - net assets subject to purpose restrictions | <u>250,000</u>      | <u>-</u>            |
| Total financial assets                            | <u>\$ 4,829,645</u> | <u>\$ 3,117,078</u> |

The Agency is substantially supported by restricted contributions. Because a donor's restriction requires resources to be used in a particular manner or in a future period, the Agency must maintain sufficient resources to meet those responsibilities to its donors. Thus, financial assets may not be available for general expenditure within one year. As part of the Agency's liquidity management, the Agency has a policy to structure its financial assets to be available as its general expenditures, liabilities, and other obligations come due.

**4. LEASE AGREEMENTS**

The Agency leases space for its headquarters and its program sites under multiple operating leases. For one of the lease agreements, the landlord has agreed to waive all but \$1 of the monthly base rent that would otherwise be due under this lease so long as the tenant is a nonprofit entity (see Note 12). The program site leases expire at various times through July 2022. Certain leases require the Agency to maintain insurance coverage. Monthly payments under the leases are subject to fluctuation based on use of conference rooms on the premises. Gross rent expense under the facility leases was approximately \$69,000 and \$116,000 for the years ended June 30, 2021 and 2020, respectively.

Future minimum cash lease payments under these agreements are as follows:

| <u>Year Ending<br/>June 30</u> | <u>Rent</u> |
|--------------------------------|-------------|
| 2022                           | \$ 64,875   |
| 2023                           | \$ 1        |

The Agency had two sublease agreements for a portion of the headquarters' space and a program site. Revenue under the sublease agreement was approximately \$22,000 for the year ended June 30, 2020, and has been netted against rent expense in the accompanying statements of functional expenses. The sublease agreements were terminated during fiscal year 2020 and as such, there was no sublease revenue during fiscal year 2021.

**CITIZEN SCHOOLS, INC.**

Notes to Financial Statements  
June 30, 2021 and 2020

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**5. NOTES PAYABLE**

In July 2019, the Agency entered into a loan agreement for \$31,416 with a lender to finance software. The note bears interest at a rate of 5.73% per annum and is payable in thirty-six equal installments. This note is secured by the software asset. The note matures on July 13, 2022.

In July 2020, the Agency applied for, and was awarded, an Economic Injury Disaster Loan (EIDL) of \$150,000 from the Small Business Administration (SBA) under the Coronavirus Aid, Relief and Economic Security Act (CARES Act). The loan bears interest at 2.75% and requires monthly payments of principal and interest of \$641 beginning in July 2022 through June 2050 (maturity). The loan is secured by all business assets.

Future minimum principal payments on these notes over the next five years are as follows:

|      |           |
|------|-----------|
| 2022 | \$ 11,088 |
| 2023 | \$ 4,144  |
| 2024 | \$ 3,470  |
| 2025 | \$ 3,567  |
| 2026 | \$ 3,666  |

There was no interest accrued on the notes payable as of June 30, 2021, as it would be immaterial to the overall financial statements.

**6. RETIREMENT PLAN**

The Agency sponsors a defined contribution retirement plan under IRC Section 403(b) covering all eligible employees. Employees become eligible to participate after completing one year of service and attaining the age of twenty-one. The Agency matches employee contributions up to 3% per year, based on tenure. For the years ended June 30, 2021 and 2020, the Agency contributed \$60,997 and \$64,749, respectively, which are included in fringe benefits in the accompanying statements of functional expenses.

**7. CONCENTRATIONS OF RISK**

The Agency maintains its cash balances in a bank in Massachusetts, which is insured within the limits of the Federal Deposit Insurance Corporation (FDIC). At certain times during the year, cash balances may exceed the insured amounts. The Agency has not experienced any losses in such accounts. The Agency believes it is not exposed to any significant credit risk on cash.

Approximately 65% and 64% of net pledges and public sector accounts receivable were due from four and three organizations as of June 30, 2021 and 2020, respectively.

**CITIZEN SCHOOLS, INC.**

Notes to Financial Statements  
June 30, 2021 and 2020

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**8. PLEDGES RECEIVABLE**

As of June 30, 2021 and 2020, the Agency has unconditional pledges for current and future operations. As of June 30, 2021 and 2020, these pledges are due as follows:

|                          | <u>2021</u>      | <u>2020</u>       |
|--------------------------|------------------|-------------------|
| Due within one year      | \$ 1,981,984     | \$ 1,487,790      |
| Due in two to four years | -                | 825,000           |
|                          | <u>1,981,984</u> | <u>2,312,790</u>  |
| Less - discount          | -                | 18,785            |
|                          | <u>1,981,984</u> | <u>2,294,005</u>  |
| Less - current portion   | <u>1,981,984</u> | <u>1,487,790</u>  |
|                          | <u>\$ -</u>      | <u>\$ 806,215</u> |

Pledges receivable at June 30, 2020, due in greater than one year have been discounted to present value using various discount rates ranging from 0.45% to 2.33%. All pledges receivable are due in fiscal year 2022; accordingly, no discount is needed at June 30, 2021.

The Agency had \$370,963 and \$292,526 of pledges receivable, which were recorded as net assets without donor restrictions at June 30, 2021 and 2020, respectively. These amounts were released from restrictions during fiscal years 2021 and 2020 based on the donors' intent. All remaining pledges receivable are included within net assets with donor restrictions (see Note 2).

**9. CONDITIONAL ADVANCE**

The Agency applied for, and was awarded, a loan of \$1,229,161 from the Paycheck Protection Program (PPP) established by the CARES Act through a bank. The funds were used to pay certain payroll costs, including benefits, as well as rent and utilities during a covered period as defined in the CARES Act. Effective May 4, 2021, the Agency received a full forgiveness for this loan from the SBA.

On July 20, 2021, the Agency applied for, and received, a second PPP loan for \$1,001,011. The second draw has the same loan terms as the first draw of the PPP loan. The funds will be used to pay certain payroll costs, including benefits, during the covered period as defined in the CARES Act. A portion of these funds may be forgiven, as defined in the agreement, at the end of the covered period and the remainder of the funds will be due over a five-year period with interest at 1%. Any repayment will be deferred for a period of ten months from the end of the covered period, when the note, plus interest, will be due in equal monthly payments through the maturity date as defined by the bank. The forgiveness calculations are subject to review and approval by the lending bank and the SBA. In the opinion of management, the results of such reviews will not have a material effect on the financial position of the Agency as of June 30, 2021, or 2020, and on the changes in its net assets for the years then ended.

The Agency believes there is not more than a remote chance these loans will not be forgiven and, therefore, is accounting for them as conditional grants under ASC Subtopic 958-605. It is determined that this grant is conditional upon certain performance requirements and the incurrence of eligible expenses. Amounts received are recognized as revenue when the Agency has incurred expenditures in compliance with the loan application and CARES Act requirements.

**CITIZEN SCHOOLS, INC.**

Notes to Financial Statements  
June 30, 2021 and 2020

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**9. CONDITIONAL ADVANCE (Continued)**

As of June 30, 2021, the Agency recognized \$1,315,562, which represents all of the second PPP loan and the balance of the first PPP loan. As of June 30, 2020, the Agency recognized \$914,610 of the first PPP Loan.

As of December 7, 2021, the Agency has not yet applied for forgiveness on the second PPP loan.

**10. THE EMPLOYEE RETENTION TAX CREDIT**

The Employee Retention Tax Credit (ERTC) was first established by the CARES Act and was extended and expanded by the Consolidated Appropriations Act (CAA) and American Rescue Plan (ARP). ERTC provides a refundable tax credit against certain employment taxes equal to 50% of the first \$10,000 in qualified wages paid to each employee between March 12, 2020, and December 31, 2020 (2020 ERTC), and 70% of the first \$10,000, per quarter, in qualified wages paid to each employee between January 1, 2021 and December 31, 2021 (2021 ERTC). To be eligible, the Agency must meet certain conditions as described in applicable laws and regulations.

The Agency has determined that it qualifies for 2021 ERTC and therefore is accounting for it as conditional grants under ASC Subtopic 958-605. These grants are conditional upon certain performance requirements and the incurrence of eligible expenses. In the opinion of management, these conditions were met as of June 30, 2021, and therefore, the entire refund of \$680,257 that the Agency expects to receive is included in the public sector receivable in the accompanying 2021 statement of financial position.

Subsequent to June 30, 2021, the Agency filed amended 2021 Federal employment tax returns in order to claim the ERTC. Eligibility for the credit and the credit calculations are subject to review and approval by the Federal government. In the opinion of management, the results of such reviews and audit will not have a material effect on the financial position of the Agency as of June 30, 2021, and on the changes in its net assets for the year then ended.

**11. PROPERTY AND EQUIPMENT**

Property and equipment consist of the following as of June 30:

|                                   | <u>2021</u>      | <u>2020</u>      |
|-----------------------------------|------------------|------------------|
| Furniture, fixtures and equipment | \$ 2,876,286     | \$ 2,848,377     |
| Less - accumulated depreciation   | <u>2,836,878</u> | <u>2,799,966</u> |
|                                   | <u>\$ 39,408</u> | <u>\$ 48,411</u> |

**12. DONATED GOODS AND SERVICES**

The value of donated goods and services is as follows for the years ended June 30:

|                      | <u>2021</u>       | <u>2020</u>       |
|----------------------|-------------------|-------------------|
| Program consulting   | \$ 378,000        | \$ 58,715         |
| Legal consulting     | 194,321           | 113,060           |
| Rent and maintenance | 183,029           | 78,756            |
| Computers            | <u>47,037</u>     | <u>41,285</u>     |
|                      | <u>\$ 802,387</u> | <u>\$ 291,816</u> |

**CITIZEN SCHOOLS, INC.**

Notes to Financial Statements  
June 30, 2021 and 2020

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**13. CONDITIONAL GRANTS**

As of June 30, 2021, the Agency has received contract and conditional commitments with a government agency and a private donor through fiscal year 2022. These commitments are considered conditional under ASC Topic 958, as the Agency must incur qualified costs and provide specific services to meet performance requirements prior to recognizing revenue. Total contracts committed but not recognized as of June 30, 2021, summarized by the Agency, are as follows:

|  |                   |
|--|-------------------|
| Private Foundation (time restricted)           | \$ 325,097        |
| Department of Defense STEM (cost reimbursable) | <u>22,185</u>     |
| Total  | <u>\$ 347,282</u> |

**14. DISCONTINUED OPERATIONS**

The revenue and expenses related to the discontinued operations (see Note 1) for the years ended June 30 are as follows:

|                                     | <u>2021</u>       | <u>2020</u>       |
|-------------------------------------|-------------------|-------------------|
| Operating support and revenue       | \$ 1,745,920      | \$ 2,064,487      |
| Operating expenses                  | <u>1,465,323</u>  | <u>1,423,206</u>  |
| Income from discontinued operations | <u>\$ 280,597</u> | <u>\$ 641,281</u> |

**15. CONTINGENCIES**

During fiscal year 2020 and continuing through fiscal year 2021, COVID-19 was recognized as a global pandemic. Federal, state and local governments in the United States have imposed restrictions on travel and business operations. While the business disruption is currently expected to be temporary, there is considerable uncertainty around the duration and the impact it will have on the Agency's operations and financial position. The financial impact to the Agency, if any, cannot be reasonably estimated at this time.

The Agency is engaged in legal cases that have arisen in the normal course of its operations. The Agency believes that the outcome of these cases will not have a material adverse effect on the financial position of the Agency.

**16. RECLASSIFICATION**

Certain amounts in the fiscal year 2020 financial statements have been reclassified to conform with the fiscal year 2021 presentation.

**Return of Organization Exempt From Income Tax**  
Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

▶ Do not enter social security numbers on this form as it may be made public.  
▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

**A** For the 2019 calendar year, or tax year beginning **JUL 1, 2019** and ending **JUN 30, 2020**

|  |  |   |
|--|--|---|
| <b>B</b> Check if applicable:<br><br><input type="checkbox"/> Address change<br><input type="checkbox"/> Name change<br><input type="checkbox"/> Initial return<br><input type="checkbox"/> Final return/terminated<br><input type="checkbox"/> Amended return<br><input type="checkbox"/> Application pending | <b>C</b> Name of organization<br><b>CITIZEN SCHOOLS, INC.</b><br>Doing business as<br>Number and street (or P.O. box if mail is not delivered to street address) Room/suite<br><b>1 BEACON STREET 1500</b><br>City or town, state or province, country, and ZIP or foreign postal code<br><b>BOSTON, MA 02108</b><br><b>F</b> Name and address of principal officer: <b>EMILY MCCANN</b><br><b>1 BEACON STREET, NO. 1500, BOSTON, MA 02108</b> | <b>D</b> Employer identification number<br><b>04-3259160</b><br><b>E</b> Telephone number<br><b>617-695-2300</b><br><b>G</b> Gross receipts \$ <b>8,697,170.</b><br><b>H(a)</b> Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No<br><b>H(b)</b> Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No<br>If "No," attach a list. (see instructions)<br><b>H(c)</b> Group exemption number ▶ |
| <b>I</b> 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   |  |   |
| <b>J</b> Website: ▶ <b>WWW.CITIZENSCHOOLS.ORG</b>  |  |   |
| <b>K</b> Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶  |  | <b>L</b> Year of formation: <b>1995</b> <b>M</b> State of legal domicile: <b>MA</b>   |

**Part I Summary**

|                                    |  |  |
|------------------------------------|--|--|
| <b>Activities &amp; Governance</b> | <b>1</b> Briefly describe the organization's mission or most significant activities: <b>CITIZEN SCHOOLS, INC. (CSI) HELPS ALL STUDENTS TO THRIVE IN SCHOOL AND BEYOND THROUGH HANDS-ON</b><br><b>2</b> Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.<br><b>3</b> Number of voting members of the governing body (Part VI, line 1a) ..... <b>3</b> <b>19</b><br><b>4</b> Number of independent voting members of the governing body (Part VI, line 1b) ..... <b>4</b> <b>18</b><br><b>5</b> Total number of individuals employed in calendar year 2019 (Part V, line 2a) ..... <b>5</b> <b>234</b><br><b>6</b> Total number of volunteers (estimate if necessary) ..... <b>6</b> <b>411</b><br><b>7a</b> Total unrelated business revenue from Part VIII, column (C), line 12 ..... <b>7a</b> <b>0.</b><br><b>7b</b> Net unrelated business taxable income from Form 990-T, line 39 ..... <b>7b</b> <b>0.</b> |  |
| <b>Revenue</b>                     | <b>8</b> Contributions and grants (Part VIII, line 1h) ..... <b>10,271,933.</b> <b>Prior Year</b> <b>8,666,680.</b> <b>Current Year</b><br><b>9</b> Program service revenue (Part VIII, line 2g) ..... <b>0.</b> <b>0.</b><br><b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d) ..... <b>0.</b> <b>0.</b><br><b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) ..... <b>2,110.</b> <b>19,704.</b><br><b>12</b> Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) ..... <b>10,274,043.</b> <b>8,686,384.</b>  |  |
| <b>Expenses</b>                    | <b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3) ..... <b>0.</b> <b>0.</b><br><b>14</b> Benefits paid to or for members (Part IX, column (A), line 4) ..... <b>0.</b> <b>0.</b><br><b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) ..... <b>8,629,081.</b> <b>7,051,773.</b><br><b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e) ..... <b>0.</b> <b>0.</b><br><b>b</b> Total fundraising expenses (Part IX, column (D), line 25) ▶ <b>786,270.</b><br><b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) ..... <b>2,897,695.</b> <b>1,613,811.</b><br><b>18</b> Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) ..... <b>11,526,776.</b> <b>8,665,584.</b><br><b>19</b> Revenue less expenses. Subtract line 18 from line 12 ..... <b>-1,252,733.</b> <b>20,800.</b>   |  |
| <b>Net Assets or Fund Balances</b> | <b>20</b> Total assets (Part X, line 16) ..... <b>4,322,086.</b> <b>Beginning of Current Year</b> <b>4,053,223.</b> <b>End of Year</b><br><b>21</b> Total liabilities (Part X, line 26) ..... <b>1,143,457.</b> <b>853,794.</b><br><b>22</b> Net assets or fund balances. Subtract line 21 from line 20 ..... <b>3,178,629.</b> <b>3,199,429.</b>  |  |

**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.

|                               |  |  |                                |   |
|-------------------------------|--|--|--------------------------------|---|
| <b>Sign Here</b>              | Signature of officer<br><b>EMILY MCCANN, CHIEF EXECUTIVE OFFICER</b><br>Type or print name and title | Date<br>_____                                    |                                |   |
| <b>Paid Preparer Use Only</b> | Print/Type preparer's name<br><b>JOHN BUCKLEY, CPA</b>   | Preparer's signature<br><b>JOHN BUCKLEY, CPA</b> | Date<br><b>01/20/21</b>        | Check <input type="checkbox"/> if self-employed<br>PTIN<br><b>P00830631</b> |
|                               | Firm's name ▶ <b>AAFPCAS, INC.</b>   |  | Firm's EIN ▶ <b>04-2571780</b> |   |
|                               | Firm's address ▶ <b>50 WASHINGTON STREET WESTBOROUGH, MA 01581</b>                                   |  | Phone no. <b>508-366-9100</b>  |   |

May the IRS discuss this return with the preparer shown above? (see instructions)  Yes  No

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III [X]

1 Briefly describe the organization's mission: IN FISCAL YEAR 2020, CITIZEN SCHOOLS SERVED 2,496 STUDENTS FROM LOW INCOME COMMUNITIES 12 SCHOOL SITES IN SCHOOL DISTRICTS ACROSS THREE STATES. STUDENTS ARE ENROLLED FOR THE ENTIRE SCHOOL YEAR AND PARTICIPATE IN AN INTEGRATED PROGRAM OF ACADEMIC SUPPORT, HANDS-ON

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 [X] 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 [X] 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 \$ 4,198,911. including grants of \$ ) (Revenue \$ ) STATE SERVICES/ELT - SERVICES PROVIDED AT THE STATE AND NATIONAL LEVEL TO SUPPORT THE DELIVERY OF CITIZEN SCHOOLS' EXTENDED LEARNING TIME (ELT) PROGRAM AT CAMPUSES ACROSS THE COUNTRY. INCLUDES RECRUITMENT, TRAINING, RETENTION AND SUPPORT OF STAFF, SERVICE MEMBERS AND VOLUNTEERS; CURRICULUM DEVELOPMENT; DATABASE AND EVALUATION MANAGEMENT; MANAGEMENT OF LOCAL DISTRICT AND SCHOOL PARTNERSHIPS, FUNDERS AND OTHER KEY STAKEHOLDERS, REGIONAL BEST PRACTICE SHARING, AND DIRECT MANAGEMENT AND PROFESSIONAL DEVELOPMENT OF CAMPUS DIRECTORS.

4b (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ ) CAMPUS OPERATIONS/ELT - CAMPUS OPERATIONS INCLUDES ALL COSTS INCURRED TO OPERATE CAMPUSES, WHICH INCLUDES THE SALARY AND BENEFITS OF STAFF MEMBERS (CAMPUS DIRECTORS, PART-TIME TEACHING ASSOCIATES), THE STIPEND AND BENEFITS FOR AMERICORPS SERVICE MEMBERS (TEACHING FELLOWS) AND ALL OTHER EXPENSES (E.G. SUPPLIES, TRANSPORTATION) RELATED TO PROGRAM EXPENDITURES INCURRED AT THE CAMPUS LEVEL.

4c (Code: ) (Expenses \$ 1,772,903. including grants of \$ ) (Revenue \$ ) FIELD DEVELOPMENT AND MAKERS + MENTORS NETWORK - CSI IS DEDICATED TO MOBILIZING PUBLIC AND COMMUNITY SUPPORT FOR HIGH-QUALITY AFTER-SCHOOL PROGRAMS THROUGH RESEARCH, EVALUATION, INNOVATION, ADVOCACY AND THE LEADERSHIP OF THE MAKERS + MENTORS (FORMERLY US2020) NETWORK. THE AGENCY ADVOCATES FOR THE CONTINUATION AND EXPANSION OF SPECIFIC PUBLIC FUNDING AND PUBLIC POLICY INITIATIVES THAT SUPPORT 21ST CENTURY SKILL DEVELOPMENT, MENTORSHIP, AMERICORPS NATIONAL SERVICE, AND OUT OF SCHOOL TIME. CSI ALSO FOCUSES ITS EFFORTS ON INNOVATION, INCLUDING THE MAKERS + MENTORS NETWORK, WHICH SUPPORTS 20 COMMUNITY COALITIONS THAT OFFER HIGH QUALITY PROJECT BASED STEM LEARNING WITH EXPERTS TO OVER 200,000 STUDENTS. CSI ALSO ENGAGES IN EVALUATION WITH THIRD PARTY INSTITUTIONS TO PROVE THE EFFICACY OF ITS PROGRAM. FINALLY, THE AGENCY OFFERS AN

4d Other program services (Describe on Schedule O.) (Expenses \$ 884,208. including grants of \$ ) (Revenue \$ )

4e Total program service expenses 6,856,022.

**Part IV Checklist of Required Schedules**

|   | Yes          | No |
|---|--------------|----|
| <b>1</b> Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)?<br><i>If "Yes," complete Schedule A</i> .....  | <b>1</b> X   |    |
| <b>2</b> Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> ? .....   | <b>2</b> X   |    |
| <b>3</b> Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i> .....  | <b>3</b>     | X  |
| <b>4 Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II</i> .....  | <b>4</b> X   |    |
| <b>5</b> 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? <i>If "Yes," complete Schedule C, Part III</i> .....   | <b>5</b>     | X  |
| <b>6</b> 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? <i>If "Yes," complete Schedule D, Part I</i> .....  | <b>6</b>     | X  |
| <b>7</b> Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i> .....  | <b>7</b>     | X  |
| <b>8</b> Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i> .....   | <b>8</b>     | X  |
| <b>9</b> 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? <i>If "Yes," complete Schedule D, Part IV</i> .....            | <b>9</b>     | X  |
| <b>10</b> Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi endowments? <i>If "Yes," complete Schedule D, Part V</i> .....   | <b>10</b>    | X  |
| <b>11</b> 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.   |              |    |
| <b>a</b> Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI</i> .....   | <b>11a</b> X |    |
| <b>b</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? <i>If "Yes," complete Schedule D, Part VII</i> .....  | <b>11b</b>   | X  |
| <b>c</b> 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? <i>If "Yes," complete Schedule D, Part VIII</i> .....  | <b>11c</b>   | X  |
| <b>d</b> 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? <i>If "Yes," complete Schedule D, Part IX</i> .....   | <b>11d</b>   | X  |
| <b>e</b> Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i> .....   | <b>11e</b> X |    |
| <b>f</b> 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)? <i>If "Yes," complete Schedule D, Part X</i> .....  | <b>11f</b> X |    |
| <b>12a</b> Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i> .....  | <b>12a</b> X |    |
| <b>b</b> Was the organization included in consolidated, independent audited financial statements for the tax year?<br><i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i> .....  | <b>12b</b>   | X  |
| <b>13</b> Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i> .....  | <b>13</b>    | X  |
| <b>14a</b> Did the organization maintain an office, employees, or agents outside of the United States? .....  | <b>14a</b>   | X  |
| <b>b</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? <i>If "Yes," complete Schedule F, Parts I and IV</i> ..... | <b>14b</b>   | X  |
| <b>15</b> 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? <i>If "Yes," complete Schedule F, Parts II and IV</i> .....   | <b>15</b>    | X  |
| <b>16</b> 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? <i>If "Yes," complete Schedule F, Parts III and IV</i> .....   | <b>16</b>    | X  |
| <b>17</b> 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? <i>If "Yes," complete Schedule G, Part I</i> .....   | <b>17</b>    | X  |
| <b>18</b> Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i> .....   | <b>18</b> X  |    |
| <b>19</b> Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i> .....   | <b>19</b>    | X  |
| <b>20a</b> Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i> .....   | <b>20a</b>   | X  |
| <b>b</b> If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return? .....   | <b>20b</b>   |    |
| <b>21</b> 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? <i>If "Yes," complete Schedule I, Parts I and II</i> .....  | <b>21</b>    | X  |

Part IV Checklist of Required Schedules (continued)

Table with 3 columns: Question ID, Question Text, and Yes/No columns. Rows include questions 22 through 38 regarding grants, compensation, bond issues, and organizational transactions.

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response or note to any line in this Part V [ ]

Table with 3 columns: Question ID, Question Text, and Yes/No columns. Rows include questions 1a, 1b, and 1c regarding Form 1096, Forms W-2G, and backup withholding rules.

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

Table with columns for question number, question text, and Yes/No response boxes. Includes questions 2a through 16 regarding employee counts, tax filings, foreign accounts, and charitable contributions.

**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

**Section A. Governing Body and Management**

|           |  | Yes | No |
|-----------|--|-----|----|
| <b>1a</b> | Enter the number of voting members of the governing body at the end of the tax year<br>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>1a</b> 19   |     |    |
| <b>b</b>  | Enter the number of voting members included on line 1a, above, who are independent   |     |    |
|           | <b>1b</b> 18   |     |    |
| <b>2</b>  | 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?  |     | X  |
| <b>3</b>  | 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?  |     | X  |
| <b>4</b>  | Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?   |     | X  |
| <b>5</b>  | Did the organization become aware during the year of a significant diversion of the organization's assets?   |     | X  |
| <b>6</b>  | Did the organization have members or stockholders?   |     | X  |
| <b>7a</b> | 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?   |     | X  |
| <b>b</b>  | Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?  |     | X  |
| <b>8</b>  | Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:  |     |    |
| <b>a</b>  | The governing body?  | X   |    |
| <b>b</b>  | Each committee with authority to act on behalf of the governing body?  |     | X  |
| <b>9</b>  | 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   |     | X  |

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

|            |  | Yes | No |
|------------|--|-----|----|
| <b>10a</b> | Did the organization have local chapters, branches, or affiliates?   | X   |    |
| <b>b</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?   | X   |    |
| <b>11a</b> | Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?  | X   |    |
| <b>b</b>   | Describe in Schedule O the process, if any, used by the organization to review this Form 990.  |     |    |
| <b>12a</b> | Did the organization have a written conflict of interest policy? If "No," go to line 13  | X   |    |
| <b>b</b>   | Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?  | X   |    |
| <b>c</b>   | Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done   | X   |    |
| <b>13</b>  | Did the organization have a written whistleblower policy?  | X   |    |
| <b>14</b>  | Did the organization have a written document retention and destruction policy?   | X   |    |
| <b>15</b>  | 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?   |     |    |
| <b>a</b>   | The organization's CEO, Executive Director, or top management official   | X   |    |
| <b>b</b>   | Other officers or key employees of the organization  | X   |    |
|            | If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).  |     |    |
| <b>16a</b> | Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?  |     | X  |
| <b>b</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? |     |    |

**Section C. Disclosure**

- 17** List the states with which a copy of this Form 990 is required to be filed **MA, NC, NY, 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)
- 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.
- 20** State the name, address, and telephone number of the person who possesses the organization's books and records **ELISHA MUSKAT - 617-695-2300**  
**1 BEACON STREET, NO. 1500, BOSTON, MA 02108**

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

Check 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 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 and/or Box 7 of Form 1099-MISC) 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 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)<br>Name and title   | (B)<br>Average hours per week (list any hours for related organizations below line) | (C)<br>Position (do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W-2/1099-MISC) | (E)<br>Reportable compensation from related organizations (W-2/1099-MISC) | (F)<br>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) EMILY MCCANN<br>CEO & BOARD MEMBER                        | 40.00   | X   |                       | X       |              |                              |        | 218,388.   | 0.  | 49,338.   |
| (2) KYLE CONLEY<br>CHIEF IMPACT OFFICER                       | 40.00   |   |                       | X       |              |                              |        | 117,388.   | 0.  | 43,334.   |
| (3) ELISHA MUSKAT<br>VP, FINANCE & OPERATIONS                 | 40.00   |   |                       | X       |              |                              |        | 99,070.  | 0.  | 41,838.   |
| (4) VANESSA BISHOP<br>EXECUTIVE DIRECTOR, ELT MA              | 40.00   |   |                       |         |              | X                            |        | 111,161.   | 0.  | 28,025.   |
| (5) MARIA DRAKE<br>EXECUTIVE DIRECTOR, ELT                    | 40.00   |   |                       |         |              | X                            |        | 121,658.   | 0.  | 12,443.   |
| (6) AIMEE SARGENT<br>VP, EXTERNAL ENGAGEMENT                  | 40.00   |   |                       |         |              | X                            |        | 125,690.   | 0.  | 4,543.  |
| (7) PRISCILLA COHEN<br>MANAGING DIRECTOR, EXTERNAL ENGAGEMENT | 40.00   |   |                       |         |              | X                            |        | 120,745.   | 0.  | 4,366.  |
| (8) MIKE KEATING<br>CHAIR                                     | 1.00  | X   |                       | X       |              |                              |        | 0.   | 0.  | 0.  |
| (9) ROSEMARY REILLY<br>CLERK (NON-VOTING)                     | 1.00  | X   |                       | X       |              |                              |        | 0.   | 0.  | 0.  |
| (10) SETH KALVERT<br>BOARD MEMBER                             | 1.00  | X   |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (11) KATE O'LEARY<br>BOARD MEMBER                             | 1.00  | X   |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (12) SUSAN SIEBERT<br>BOARD MEMBER                            | 1.00  | X   |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (13) KRISTIN HENDLER<br>BOARD MEMBER                          | 1.00  | X   |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (14) MARITERE MIX<br>BOARD MEMBER                             | 1.00  | X   |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (15) TODD ECKLER<br>BOARD MEMBER                              | 1.00  | X   |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (16) VINCENT LETTERI<br>BOARD MEMBER                          | 1.00  | X   |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (17) ERIC SCHWARZ<br>BOARD MEMBER                             | 1.00  | X   |                       |         |              |                              |        | 0.   | 0.  | 0.  |

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

| (A)<br>Name and title  | (B)<br>Average hours per week (list any hours for related organizations below line) | (C)<br>Position (do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W-2/1099-MISC) | (E)<br>Reportable compensation from related organizations (W-2/1099-MISC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|--|---|---|-----------------------|---------|--------------|------------------------------|--------|--|---|---|
|  |   | Individual trustee or director  | Institutional trustee | Officer | Key employee | Highest compensated employee | Former |  |   |   |
| (18) LYNN WIATROWSKI<br>BOARD MEMBER                           | 1.00  | X   |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (19) ELIAS MIRANDA<br>BOARD MEMBER                             | 1.00  | X   |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (20) BOB FRANCE<br>BOARD MEMBER                                | 1.00  | X   |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (21) WESLEY FORD<br>BOARD MEMBER                               | 1.00  | X   |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (22) BING HOWELL<br>BOARD MEMBER                               | 1.00  | X   |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (23) TONY BARNES<br>BOARD MEMBER                               | 1.00  | X   |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (24) GERRY MCGRAW<br>BOARD MEMBER                              | 1.00  | X   |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (25) KRISTY CUNNINGHAM<br>BOARD MEMBER (AS OF 10/2019)         | 1.00  | X   |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (26) DANIELLE WANG<br>BOARD MEMBER (AS OF 10/2019)             | 1.00  | X   |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| <b>1b Subtotal</b>   |   |   |                       |         |              |                              |        | 914,100.   | 0.  | 183,887.  |
| <b>c Total from continuation sheets to Part VII, Section A</b> |   |   |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| <b>d Total (add lines 1b and 1c)</b>                           |   |   |                       |         |              |                              |        | 914,100.   | 0.  | 183,887.  |

**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 **6**

|  | Yes | No |
|--|-----|----|
| <b>3</b> Did the organization list any <b>former</b> officer, director, trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>  |     | X  |
| <b>4</b> 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? <i>If "Yes," complete Schedule J for such individual</i> | X   |    |
| <b>5</b> Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i>                       |     | X  |

**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)<br>Name and business address                                      | (B)<br>Description of services | (C)<br>Compensation |
|---|--------------------------------|---------------------|
| POSITIVELY PARTNERS, 1875 CONNECTICUT AVENUE NW, WASHINGTON, DC 20009 | EMPLOYMENT CONSULTING          | 210,464.            |
| INSOURCE SERVICES<br>148 LINDEN STREET, WELLESLEY, MA 02482           | ACCOUNTING SERVICES            | 102,036.            |
|   |                                |                     |
|   |                                |                     |

**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 **2**

SEE PART VII, SECTION A CONTINUATION SHEETS



**Part VIII Statement of Revenue**

Check if Schedule O contains a response or note to any line in this Part VIII

|  |   |                      | (A)                  | (B)                                | (C)                        | (D)  |  |
|--|---|----------------------|----------------------|------------------------------------|----------------------------|--|--|
|  |   |                      | Total revenue        | Related or exempt function revenue | Unrelated business revenue | Revenue excluded from tax under sections 512 - 514 |  |
| <b>Contributions, Gifts, Grants and Other Similar Amounts</b>  | <b>1 a</b> Federated campaigns .....  | <b>1a</b>            |                      |                                    |                            |  |  |
|  | <b>b</b> Membership dues .....  | <b>1b</b>            |                      |                                    |                            |  |  |
|  | <b>c</b> Fundraising events .....   | <b>1c</b>            | 325,333.             |                                    |                            |  |  |
|  | <b>d</b> Related organizations .....  | <b>1d</b>            |                      |                                    |                            |  |  |
|  | <b>e</b> Government grants (contributions) .....  | <b>1e</b>            | 3,874,460.           |                                    |                            |  |  |
|  | <b>f</b> All other contributions, gifts, grants, and similar amounts not included above ... | <b>1f</b>            | 4,466,887.           |                                    |                            |  |  |
|  | <b>g</b> Noncash contributions included in lines 1a-1f .....                                | <b>1g</b>            | \$                   |                                    |                            |  |  |
|  | <b>h Total.</b> Add lines 1a-1f .....   |                      |                      | 8,666,680.                         |                            |  |  |
|  | <b>Program Service Revenue</b>  | <b>2 a</b> _____     | <b>Business Code</b> |                                    |                            |  |  |
| <b>b</b> _____   |   |                      |                      |                                    |                            |  |  |
| <b>c</b> _____   |   |                      |                      |                                    |                            |  |  |
| <b>d</b> _____   |   |                      |                      |                                    |                            |  |  |
| <b>e</b> _____   |   |                      |                      |                                    |                            |  |  |
| <b>f</b> All other program service revenue .....   |   |                      |                      |                                    |                            |  |  |
| <b>g Total.</b> Add lines 2a-2f .....  |   |                      |                      |                                    |                            |  |  |
| <b>Other Revenue</b>   | <b>3</b> Investment income (including dividends, interest, and other similar amounts) ..... |                      |                      |                                    |                            |  |  |
|  | <b>4</b> Income from investment of tax-exempt bond proceeds .....                           |                      |                      |                                    |                            |  |  |
|  | <b>5</b> Royalties .....  |                      |                      |                                    |                            |  |  |
|  | <b>6 a</b> Gross rents .....  | <b>6a</b>            | (i) Real             |                                    |                            |  |  |
|  |   |                      | (ii) Personal        |                                    |                            |  |  |
|  |   |                      |                      |                                    |                            |  |  |
|  | <b>b</b> Less: rental expenses ...  | <b>6b</b>            |                      |                                    |                            |  |  |
|  | <b>c</b> Rental income or (loss)  | <b>6c</b>            |                      |                                    |                            |  |  |
|  | <b>d</b> Net rental income or (loss) .....  |                      |                      |                                    |                            |  |  |
|  | <b>7 a</b> Gross amount from sales of assets other than inventory .....                     | <b>7a</b>            | (i) Securities       |                                    |                            |  |  |
|  |   |                      | (ii) Other           |                                    |                            |  |  |
|  |   |                      |                      |                                    |                            |  |  |
|  | <b>b</b> Less: cost or other basis and sales expenses .....                                 | <b>7b</b>            |                      |                                    |                            |  |  |
|  | <b>c</b> Gain or (loss) .....   | <b>7c</b>            |                      |                                    |                            |  |  |
|  | <b>d</b> Net gain or (loss) .....   |                      |                      |                                    |                            |  |  |
| <b>8 a</b> Gross income from fundraising events (not including \$ 325,333. of contributions reported on line 1c). See Part IV, line 18 ..... | <b>8a</b>   |                      | 30,490.              |                                    |                            |  |  |
|  |   |                      |                      |                                    |                            |  |  |
| <b>b</b> Less: direct expenses .....   | <b>8b</b>   |                      | 10,786.              |                                    |                            |  |  |
| <b>c</b> Net income or (loss) from fundraising events .....  |   |                      | 19,704.              |                                    | 19,704.                    |  |  |
| <b>9 a</b> Gross income from gaming activities. See Part IV, line 19 .....   | <b>9a</b>   |                      |                      |                                    |                            |  |  |
|  |   |                      |                      |                                    |                            |  |  |
| <b>b</b> Less: direct expenses .....   | <b>9b</b>   |                      |                      |                                    |                            |  |  |
| <b>c</b> Net income or (loss) from gaming activities .....   |   |                      |                      |                                    |                            |  |  |
| <b>10 a</b> Gross sales of inventory, less returns and allowances .....  | <b>10a</b>  |                      |                      |                                    |                            |  |  |
|  |   |                      |                      |                                    |                            |  |  |
| <b>b</b> Less: cost of goods sold .....  | <b>10b</b>  |                      |                      |                                    |                            |  |  |
| <b>c</b> Net income or (loss) from sales of inventory .....  |   |                      |                      |                                    |                            |  |  |
| <b>Miscellaneous Revenue</b>   | <b>11 a</b> _____   | <b>Business Code</b> |                      |                                    |                            |  |  |
|  | <b>b</b> _____  |                      |                      |                                    |                            |  |  |
|  | <b>c</b> _____  |                      |                      |                                    |                            |  |  |
|  | <b>d</b> All other revenue .....  |                      |                      |                                    |                            |  |  |
|  | <b>e Total.</b> Add lines 11a-11d .....   |                      |                      |                                    |                            |  |  |
| <b>12 Total revenue.</b> See instructions .....  |   |                      | 8,686,384.           | 0.                                 | 0.                         | 19,704.  |  |

**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

| <i>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</i>  | (A)<br>Total expenses | (B)<br>Program service expenses | (C)<br>Management and general expenses | (D)<br>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   | 732,764.              | 537,637.                        | 41,246.                                | 153,881.                    |
| 6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)   |                       |                                 |  |                             |
| 7 Other salaries and wages   | 5,239,853.            | 4,295,775.                      | 571,074.                               | 373,004.                    |
| 8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)   | 57,365.               | 46,788.                         | 5,975.                                 | 4,602.                      |
| 9 Other employee benefits  | 573,485.              | 478,898.                        | 66,351.                                | 28,236.                     |
| 10 Payroll taxes   | 448,306.              | 363,827.                        | 46,480.                                | 37,999.                     |
| 11 Fees for services (nonemployees):   |                       |                                 |  |                             |
| a Management   |                       |                                 |  |                             |
| b Legal  | 11,886.               |                                 | 11,886.                                |                             |
| c Accounting   | 161,240.              |                                 | 161,240.                               |                             |
| d Lobbying   | 60,000.               | 60,000.                         |  |                             |
| 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 Sch O.)  | 510,728.              | 398,234.                        | 8,847.                                 | 103,647.                    |
| 12 Advertising and promotion   | 85,522.               | 53,647.                         | 12,247.                                | 19,628.                     |
| 13 Office expenses   | 39,497.               | 34,253.                         | 2,269.                                 | 2,975.                      |
| 14 Information technology  | 116,564.              | 86,185.                         | 10,379.                                | 20,000.                     |
| 15 Royalties   |                       |                                 |  |                             |
| 16 Occupancy   | 146,124.              | 118,588.                        | 15,150.                                | 12,386.                     |
| 17 Travel  | 53,212.               | 27,247.                         | 22,702.                                | 3,263.                      |
| 18 Payments of travel or entertainment expenses for any federal, state, or local public officials  |                       |                                 |  |                             |
| 19 Conferences, conventions, and meetings  |                       |                                 |  |                             |
| 20 Interest  |                       |                                 |  |                             |
| 21 Payments to affiliates  |                       |                                 |  |                             |
| 22 Depreciation, depletion, and amortization   | 85,139.               | 69,096.                         | 8,826.                                 | 7,217.                      |
| 23 Insurance   | 73,870.               | 59,950.                         | 7,659.                                 | 6,261.                      |
| 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 MISCELLANEOUS  | 83,212.               | 73,786.                         | 9,426.                                 |                             |
| b TRANSPORTATION   | 66,686.               | 66,686.                         |  |                             |
| c DIRECT CAMPUS EXPENSES   | 41,503.               | 37,764.                         | 1,092.                                 | 2,647.                      |
| d COMMUNICATIONS   | 38,644.               | 31,361.                         | 4,007.                                 | 3,276.                      |
| e All other expenses   | 39,984.               | 16,300.                         | 16,436.                                | 7,248.                      |
| 25 Total functional expenses. Add lines 1 through 24e  | 8,665,584.            | 6,856,022.                      | 1,023,292.                             | 786,270.                    |
| 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  if following SOP 98-2 (ASC 958-720)

**Part X Balance Sheet**

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

|   |  | (A)                   |            | (B)                |
|---|--|-----------------------|------------|--------------------|
|   |  | Beginning of year     |            | End of year        |
| Assets  | <b>1</b> Cash - non-interest-bearing .....   | 237,691.              | <b>1</b>   | 1,333,355.         |
|   | <b>2</b> Savings and temporary cash investments .....  | 29,999.               | <b>2</b>   | 30,210.            |
|   | <b>3</b> Pledges and grants receivable, net .....  | 2,947,671.            | <b>3</b>   | 2,294,005.         |
|   | <b>4</b> Accounts receivable, net .....  | 974,986.              | <b>4</b>   | 295,933.           |
|   | <b>5</b> 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 ..... |                       | <b>5</b>   |                    |
|   | <b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B) .....   |                       | <b>6</b>   |                    |
|   | <b>7</b> Notes and loans receivable, net .....   |                       | <b>7</b>   |                    |
|   | <b>8</b> Inventories for sale or use .....   |                       | <b>8</b>   |                    |
|   | <b>9</b> Prepaid expenses and deferred charges .....   | 29,605.               | <b>9</b>   | 51,309.            |
|   | <b>10a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D .....   | <b>10a</b> 2,848,377. |            |                    |
|   | <b>b</b> Less: accumulated depreciation .....  | <b>10b</b> 2,799,966. | 102,134.   | <b>10c</b> 48,411. |
|   | <b>11</b> Investments - publicly traded securities .....   |                       | <b>11</b>  |                    |
|   | <b>12</b> Investments - other securities. See Part IV, line 11 .....   |                       | <b>12</b>  |                    |
|   | <b>13</b> Investments - program-related. See Part IV, line 11 .....  |                       | <b>13</b>  |                    |
|   | <b>14</b> Intangible assets .....  |                       | <b>14</b>  |                    |
|   | <b>15</b> Other assets. See Part IV, line 11 .....   |                       | <b>15</b>  |                    |
| <b>16 Total assets.</b> Add lines 1 through 15 (must equal line 33) ..... | 4,322,086.   | <b>16</b>             | 4,053,223. |                    |
| Liabilities   | <b>17</b> Accounts payable and accrued expenses .....  | 1,143,457.            | <b>17</b>  | 516,915.           |
|   | <b>18</b> Grants payable .....   |                       | <b>18</b>  |                    |
|   | <b>19</b> Deferred revenue .....   |                       | <b>19</b>  |                    |
|   | <b>20</b> Tax-exempt bond liabilities .....  |                       | <b>20</b>  |                    |
|   | <b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D .....  |                       | <b>21</b>  |                    |
|   | <b>22</b> 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 .....     |                       | <b>22</b>  |                    |
|   | <b>23</b> Secured mortgages and notes payable to unrelated third parties .....   |                       | <b>23</b>  | 22,328.            |
|   | <b>24</b> Unsecured notes and loans payable to unrelated third parties .....   |                       | <b>24</b>  |                    |
|   | <b>25</b> 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 .....  | 0.                    | <b>25</b>  | 314,551.           |
|   | <b>26 Total liabilities.</b> Add lines 17 through 25 .....   | 1,143,457.            | <b>26</b>  | 853,794.           |
| Net Assets or Fund Balances   | <b>Organizations that follow FASB ASC 958, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 27, 28, 32, and 33.</b>  |                       |            |                    |
|   | <b>27</b> Net assets without donor restrictions .....  | 371,632.              | <b>27</b>  | 924,018.           |
|   | <b>28</b> Net assets with donor restrictions .....   | 2,806,997.            | <b>28</b>  | 2,275,411.         |
|   | <b>Organizations that do not follow FASB ASC 958, check here</b> <input type="checkbox"/> <b>and complete lines 29 through 33.</b>   |                       |            |                    |
|   | <b>29</b> Capital stock or trust principal, or current funds .....   |                       | <b>29</b>  |                    |
|   | <b>30</b> Paid-in or capital surplus, or land, building, or equipment fund .....   |                       | <b>30</b>  |                    |
|   | <b>31</b> Retained earnings, endowment, accumulated income, or other funds .....   |                       | <b>31</b>  |                    |
|   | <b>32</b> Total net assets or fund balances .....  | 3,178,629.            | <b>32</b>  | 3,199,429.         |
| <b>33</b> Total liabilities and net assets/fund balances .....            | 4,322,086.   | <b>33</b>             | 4,053,223. |                    |

**Part XI Reconciliation of Net Assets**

Check if Schedule O contains a response or note to any line in this Part XI

|           |  |           |            |
|-----------|--|-----------|------------|
| <b>1</b>  | Total revenue (must equal Part VIII, column (A), line 12)  | <b>1</b>  | 8,686,384. |
| <b>2</b>  | Total expenses (must equal Part IX, column (A), line 25)   | <b>2</b>  | 8,665,584. |
| <b>3</b>  | Revenue less expenses. Subtract line 2 from line 1   | <b>3</b>  | 20,800.    |
| <b>4</b>  | Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))                      | <b>4</b>  | 3,178,629. |
| <b>5</b>  | Net unrealized gains (losses) on investments   | <b>5</b>  |            |
| <b>6</b>  | Donated services and use of facilities   | <b>6</b>  |            |
| <b>7</b>  | Investment expenses  | <b>7</b>  |            |
| <b>8</b>  | Prior period adjustments   | <b>8</b>  |            |
| <b>9</b>  | Other changes in net assets or fund balances (explain on Schedule O)   | <b>9</b>  | 0.         |
| <b>10</b> | Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B)) | <b>10</b> | 3,199,429. |

**Part XII Financial Statements and Reporting**

Check if Schedule O contains a response or note to any line in this Part XII

|           |   | Yes | No |
|-----------|---|-----|----|
| <b>1</b>  | Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____<br>If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.   |     |    |
| <b>2a</b> | Were the organization's financial statements compiled or reviewed by an independent accountant? _____<br>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:<br><input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis |     | X  |
| <b>b</b>  | Were the organization's financial statements audited by an independent accountant? _____<br>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:<br><input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis                | X   |    |
| <b>c</b>  | 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? _____<br>If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.   | X   |    |
| <b>3a</b> | As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133? _____  | X   |    |
| <b>b</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 _____  | X   |    |



**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) 2015    | (b) 2016    | (c) 2017    | (d) 2018    | (e) 2019   | (f) Total   |
|--|-------------|-------------|-------------|-------------|------------|-------------|
| <b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....  | 20,866,361. | 18,439,403. | 14,302,927. | 10,271,933. | 8,666,680. | 72,547,304. |
| <b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....   |             |             |             |             |            |             |
| <b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge .....   |             |             |             |             |            |             |
| <b>4 Total.</b> Add lines 1 through 3 .....  | 20,866,361. | 18,439,403. | 14,302,927. | 10,271,933. | 8,666,680. | 72,547,304. |
| <b>5</b> 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) ..... |             |             |             |             |            | 194,748.    |
| <b>6 Public support.</b> Subtract line 5 from line 4.  |             |             |             |             |            | 72,352,556. |

**Section B. Total Support**

| Calendar year (or fiscal year beginning in) ▶  | (a) 2015    | (b) 2016    | (c) 2017    | (d) 2018    | (e) 2019   | (f) Total                |
|--|-------------|-------------|-------------|-------------|------------|--------------------------|
| <b>7</b> Amounts from line 4 .....   | 20,866,361. | 18,439,403. | 14,302,927. | 10,271,933. | 8,666,680. | 72,547,304.              |
| <b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources .....   | 4,482.      | 332.        | 84.         |             |            | 4,898.                   |
| <b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on .....  |             |             |             |             |            |                          |
| <b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) .....  |             |             |             |             |            |                          |
| <b>11 Total support.</b> Add lines 7 through 10  |             |             |             |             |            | 72,552,202.              |
| <b>12</b> Gross receipts from related activities, etc. (see instructions) .....  |             |             |             |             | 12         |                          |
| <b>13 First five years.</b> 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 <b>stop here</b> ..... |             |             |             |             |            | <input type="checkbox"/> |

**Section C. Computation of Public Support Percentage**

|   |           |                                     |
|---|-----------|-------------------------------------|
| <b>14</b> Public support percentage for 2019 (line 6, column (f) divided by line 11, column (f)) .....  | <b>14</b> | 99.72 %                             |
| <b>15</b> Public support percentage from 2018 Schedule A, Part II, line 14 .....  | <b>15</b> | 99.68 %                             |
| <b>16a 33 1/3% support test - 2019.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization .....  |           | <input checked="" type="checkbox"/> |
| <b>b 33 1/3% support test - 2018.</b> 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 <b>stop here.</b> The organization qualifies as a publicly supported organization .....   |           | <input type="checkbox"/>            |
| <b>17a 10% -facts-and-circumstances test - 2019.</b> 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 <b>stop here.</b> 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>b 10% -facts-and-circumstances test - 2018.</b> 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 <b>stop here.</b> 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>18 Private foundation.</b> 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) 2015 | (b) 2016 | (c) 2017 | (d) 2018 | (e) 2019 | (f) Total |
|---|----------|----------|----------|----------|----------|-----------|
| <b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....   |          |          |          |          |          |           |
| <b>2</b> 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 ..... |          |          |          |          |          |           |
| <b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513 .....   |          |          |          |          |          |           |
| <b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....  |          |          |          |          |          |           |
| <b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge .....  |          |          |          |          |          |           |
| <b>6 Total.</b> Add lines 1 through 5 .....   |          |          |          |          |          |           |
| <b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons .....  |          |          |          |          |          |           |
| <b>b</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 .....           |          |          |          |          |          |           |
| <b>c</b> Add lines 7a and 7b .....  |          |          |          |          |          |           |
| <b>8 Public support.</b> (Subtract line 7c from line 6.)  |          |          |          |          |          |           |

**Section B. Total Support**

| Calendar year (or fiscal year beginning in) ►  | (a) 2015 | (b) 2016 | (c) 2017 | (d) 2018 | (e) 2019 | (f) Total |
|--|----------|----------|----------|----------|----------|-----------|
| <b>9</b> Amounts from line 6 .....   |          |          |          |          |          |           |
| <b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources ..... |          |          |          |          |          |           |
| <b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 .....                           |          |          |          |          |          |           |
| <b>c</b> Add lines 10a and 10b .....   |          |          |          |          |          |           |
| <b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on .....      |          |          |          |          |          |           |
| <b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) .....                                  |          |          |          |          |          |           |
| <b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.)   |          |          |          |          |          |           |

**14 First five 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**

|   |           |   |
|---|-----------|---|
| <b>15</b> Public support percentage for 2019 (line 8, column (f), divided by line 13, column (f)) ..... | <b>15</b> | % |
| <b>16</b> Public support percentage from 2018 Schedule A, Part III, line 15 .....                       | <b>16</b> | % |

**Section D. Computation of Investment Income Percentage**

|  |           |   |
|--|-----------|---|
| <b>17</b> Investment income percentage for 2019 (line 10c, column (f), divided by line 13, column (f)) ..... | <b>17</b> | % |
| <b>18</b> Investment income percentage from 2018 Schedule A, Part III, line 17 .....                         | <b>18</b> | % |

**19a 33 1/3% support tests - 2019.** 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 - 2018.** 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 in line 12 on Part I. If you checked 12a of Part I, complete Sections A and B. If you checked 12b of Part I, complete Sections A and C. If you checked 12c of Part I, complete Sections A, D, and E. If you checked 12d of Part I, complete Sections A and D, and complete Part V.)

**Section A. All Supporting Organizations**

|  | Yes | No |
|--|-----|----|
| <b>1</b> Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>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.</i>  |     |    |
| <b>2</b> Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>   |     |    |
| <b>3a</b> Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer (b) and (c) below.</i>   |     |    |
| <b>b</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)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>   |     |    |
| <b>c</b> Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>  |     |    |
| <b>4a</b> Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked 12a or 12b in Part I, answer (b) and (c) below.</i>  |     |    |
| <b>b</b> Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>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.</i>  |     |    |
| <b>c</b> 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)? <i>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.</i>   |     |    |
| <b>5a</b> Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer (b) and (c) 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).</i> |     |    |
| <b>b Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document?   |     |    |
| <b>c Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?  |     |    |
| <b>6</b> 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? <i>If "Yes," provide detail in Part VI.</i>  |     |    |
| <b>7</b> 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? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>  |     |    |
| <b>8</b> Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>  |     |    |
| <b>9a</b> 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))? <i>If "Yes," provide detail in Part VI.</i>  |     |    |
| <b>b</b> Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>  |     |    |
| <b>c</b> Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>   |     |    |
| <b>10a</b> 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)? <i>If "Yes," answer 10b below.</i>   |     |    |
| <b>b</b> Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>   |     |    |

**Part IV Supporting Organizations** (continued)

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

**Section B. Type I Supporting Organizations**

|   | Yes | No |
|---|-----|----|
| <b>1</b> Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? If "No," describe in <b>Part VI</b> 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 directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year. |     |    |
| <b>2</b> 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 <b>Part VI</b> how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.   |     |    |

**Section C. Type II Supporting Organizations**

|  | Yes | No |
|--|-----|----|
| <b>1</b> 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 <b>Part VI</b> how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s). |     |    |

**Section D. All Type III Supporting Organizations**

|   | Yes | No |
|---|-----|----|
| <b>1</b> 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? |     |    |
| <b>2</b> 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 <b>Part VI</b> how the organization maintained a close and continuous working relationship with the supported organization(s).   |     |    |
| <b>3</b> By reason of the relationship described in (2), 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 <b>Part VI</b> the role the organization's supported organizations played in this regard.  |     |    |

**Section E. Type III Functionally Integrated Supporting Organizations**

|   |  |     |    |
|---|--|-----|----|
| <b>1</b> Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).  |  |     |    |
| <b>a</b> <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.  |  |     |    |
| <b>b</b> <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.   |  |     |    |
| <b>c</b> <input type="checkbox"/> The organization supported a governmental entity. Describe in <b>Part VI</b> how you supported a government entity (see instructions).  |  |     |    |
| <b>2</b> Activities Test. Answer (a) and (b) below.   |  | Yes | No |
| <b>a</b> 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 <b>Part VI</b> 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. |  |     |    |
| <b>b</b> Did the activities described in (a) 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 <b>Part VI</b> the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.  |  |     |    |
| <b>3</b> Parent of Supported Organizations. Answer (a) and (b) below.   |  |     |    |
| <b>a</b> 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? Provide details in <b>Part VI</b> .   |  |     |    |
| <b>b</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 <b>Part VI</b> the role played by the organization in this regard.   |  |     |    |

**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.

| <b>Section A - Adjusted Net Income</b> |  | (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                                      | <b>Adjusted Net Income</b> (subtract lines 5, 6, and 7 from line 4)  | 8              |                             |

| <b>Section B - Minimum Asset Amount</b> |   | (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                                       | <b>Total</b> (add lines 1a, 1b, and 1c)   | 1d             |                             |
| e                                       | <b>Discount</b> claimed for blockage or other factors (explain in detail in <b>Part VI</b> ):                                   |                |                             |
| 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 1-1/2% 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 .035.  | 6              |                             |
| 7                                       | Recoveries of prior-year distributions  | 7              |                             |
| 8                                       | <b>Minimum Asset Amount</b> (add line 7 to line 6)  | 8              |                             |

| <b>Section C - Distributable Amount</b> |   |   | Current Year |
|---|---|---|--------------|
| 1                                       | Adjusted net income for prior year (from Section A, line 8, Column A)   | 1 |              |
| 2                                       | Enter 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                                       | <b>Distributable Amount.</b> 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). |   |              |

Schedule A (Form 990 or 990-EZ) 2019

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

| <b>Section D - Distributions</b>  | <b>Current Year</b> |
|---|---------------------|
| <b>1</b> Amounts paid to supported organizations to accomplish exempt purposes  |                     |
| <b>2</b> Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity              |                     |
| <b>3</b> Administrative expenses paid to accomplish exempt purposes of supported organizations  |                     |
| <b>4</b> Amounts paid to acquire exempt-use assets  |                     |
| <b>5</b> Qualified set-aside amounts (prior IRS approval required)  |                     |
| <b>6</b> Other distributions (describe in <b>Part VI</b> ). See instructions.   |                     |
| <b>7 Total annual distributions.</b> Add lines 1 through 6.   |                     |
| <b>8</b> Distributions to attentive supported organizations to which the organization is responsive (provide details in <b>Part VI</b> ). See instructions. |                     |
| <b>9</b> Distributable amount for 2019 from Section C, line 6   |                     |
| <b>10</b> Line 8 amount divided by line 9 amount  |                     |

| <b>Section E - Distribution Allocations</b> (see instructions)   | <b>(i)<br/>Excess Distributions</b> | <b>(ii)<br/>Underdistributions<br/>Pre-2019</b> | <b>(iii)<br/>Distributable<br/>Amount for 2019</b> |
|--|-------------------------------------|---|--|
| <b>1</b> Distributable amount for 2019 from Section C, line 6  |                                     |   |  |
| <b>2</b> Underdistributions, if any, for years prior to 2019 (reasonable cause required- explain in <b>Part VI</b> ). See instructions.  |                                     |   |  |
| <b>3</b> Excess distributions carryover, if any, to 2019   |                                     |   |  |
| <b>a</b> From 2014   |                                     |   |  |
| <b>b</b> From 2015   |                                     |   |  |
| <b>c</b> From 2016   |                                     |   |  |
| <b>d</b> From 2017   |                                     |   |  |
| <b>e</b> From 2018   |                                     |   |  |
| <b>f Total</b> of lines 3a through e   |                                     |   |  |
| <b>g</b> Applied to underdistributions of prior years  |                                     |   |  |
| <b>h</b> Applied to 2019 distributable amount  |                                     |   |  |
| <b>i</b> Carryover from 2014 not applied (see instructions)  |                                     |   |  |
| <b>j</b> Remainder. Subtract lines 3g, 3h, and 3i from 3f.   |                                     |   |  |
| <b>4</b> Distributions for 2019 from Section D, line 7: \$   |                                     |   |  |
| <b>a</b> Applied to underdistributions of prior years  |                                     |   |  |
| <b>b</b> Applied to 2019 distributable amount  |                                     |   |  |
| <b>c</b> Remainder. Subtract lines 4a and 4b from 4.   |                                     |   |  |
| <b>5</b> Remaining underdistributions for years prior to 2019, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in <b>Part VI</b> . See instructions. |                                     |   |  |
| <b>6</b> Remaining underdistributions for 2019. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in <b>Part VI</b> . See instructions.                        |                                     |   |  |
| <b>7 Excess distributions carryover to 2020.</b> Add lines 3j and 4c.  |                                     |   |  |
| <b>8</b> Breakdown of line 7:  |                                     |   |  |
| <b>a</b> Excess from 2015  |                                     |   |  |
| <b>b</b> Excess from 2016  |                                     |   |  |
| <b>c</b> Excess from 2017  |                                     |   |  |
| <b>d</b> Excess from 2018  |                                     |   |  |
| <b>e</b> Excess from 2019  |                                     |   |  |

**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.)

COPY

**SCHEDULE C**  
**(Form 990 or 990-EZ)**

**Political Campaign and Lobbying Activities**

OMB No. 1545-0047

**2019**

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

For Organizations Exempt From Income Tax Under section 501(c) and section 527  
 ▶ **Complete if the organization is described below. ▶ Attach to Form 990 or Form 990-EZ.**  
 ▶ **Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.**

**If the organization answered "Yes," on Form 990, Part IV, line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then**

- Section 501(c)(3) organizations: Complete Parts I-A and B. Do not complete Part I-C.
- Section 501(c) (other than section 501(c)(3)) organizations: Complete Parts I-A and C below. Do not complete Part I-B.
- Section 527 organizations: Complete Part I-A only.

**If the organization answered "Yes," on Form 990, Part IV, line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then**

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)): Complete Part II-A. Do not complete Part II-B.
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)): Complete Part II-B. Do not complete Part II-A.

**If the organization answered "Yes," on Form 990, Part IV, line 5 (Proxy Tax) (see separate instructions) or Form 990-EZ, Part V, line 35c (Proxy Tax) (see separate instructions), then**

- Section 501(c)(4), (5), or (6) organizations: Complete Part III.

|  |   |
|--|---|
| Name of organization<br><b>CITIZEN SCHOOLS, INC.</b> | Employer identification number<br><b>04-3259160</b> |
|--|---|

**Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization.**

- 1 Provide a description of the organization's direct and indirect political campaign activities in Part IV.
- 2 Political campaign activity expenditures ..... ▶ \$ \_\_\_\_\_
- 3 Volunteer hours for political campaign activities ..... \_\_\_\_\_

**Part I-B Complete if the organization is exempt under section 501(c)(3).**

- 1 Enter the amount of any excise tax incurred by the organization under section 4955 ..... ▶ \$ \_\_\_\_\_
- 2 Enter the amount of any excise tax incurred by organization managers under section 4955 ..... ▶ \$ \_\_\_\_\_
- 3 If the organization incurred a section 4955 tax, did it file Form 4720 for this year? .....  Yes  No
- 4a Was a correction made? .....  Yes  No
- b If "Yes," describe in Part IV.

**Part I-C Complete if the organization is exempt under section 501(c), except section 501(c)(3).**

- 1 Enter the amount directly expended by the filing organization for section 527 exempt function activities ..... ▶ \$ \_\_\_\_\_
- 2 Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities ..... ▶ \$ \_\_\_\_\_
- 3 Total exempt function expenditures. Add lines 1 and 2. Enter here and on Form 1120-POL, line 17b ..... ▶ \$ \_\_\_\_\_
- 4 Did the filing organization file **Form 1120-POL** for this year? .....  Yes  No
- 5 Enter the names, addresses and employer identification number (EIN) of all section 527 political organizations to which the filing organization made payments. For each organization listed, enter the amount paid from the filing organization's funds. Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC). If additional space is needed, provide information in Part IV.

| (a) Name | (b) Address | (c) EIN | (d) Amount paid from filing organization's funds. If none, enter -0-. | (e) Amount of political contributions received and promptly and directly delivered to a separate political organization. If none, enter -0-. |
|----------|-------------|---------|---|--|
|          |             |         |   |  |
|          |             |         |   |  |
|          |             |         |   |  |
|          |             |         |   |  |
|          |             |         |   |  |
|          |             |         |   |  |
|          |             |         |   |  |
|          |             |         |   |  |
|          |             |         |   |  |
|          |             |         |   |  |

**Part II-A Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).**

- A** Check  if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures).
- B** Check  if the filing organization checked box A and "limited control" provisions apply.

| <b>Limits on Lobbying Expenditures</b><br>(The term "expenditures" means amounts paid or incurred.)   |  | (a) Filing organization's totals                | (b) Affiliated group totals                              |                    |                               |   |  |   |  |  |   |                   |              |  |  |
|---|--|---|--|--------------------|-------------------------------|---|--|---|--|--|---|-------------------|--------------|--|--|
| <b>1a</b> Total lobbying expenditures to influence public opinion (grassroots lobbying)   |  |   |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| <b>b</b> Total lobbying expenditures to influence a legislative body (direct lobbying)  |  | 60,000.   |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| <b>c</b> Total lobbying expenditures (add lines 1a and 1b)  |  | 60,000.   |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| <b>d</b> Other exempt purpose expenditures  |  | 8,605,584.                                      |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| <b>e</b> Total exempt purpose expenditures (add lines 1c and 1d)  |  | 8,665,584.                                      |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| <b>f</b> Lobbying nontaxable amount. Enter the amount from the following table in both columns.   |  | 583,279.  |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">If the amount on line 1e, column (a) or (b) is:</th> <th style="text-align: left;">The lobbying nontaxable amount is:</th> </tr> </thead> <tbody> <tr> <td>Not over \$500,000</td> <td>20% of the amount on line 1e.</td> </tr> <tr> <td>Over \$500,000 but not over \$1,000,000</td> <td>\$100,000 plus 15% of the excess over \$500,000.</td> </tr> <tr> <td>Over \$1,000,000 but not over \$1,500,000</td> <td>\$175,000 plus 10% of the excess over \$1,000,000.</td> </tr> <tr> <td>Over \$1,500,000 but not over \$17,000,000</td> <td>\$225,000 plus 5% of the excess over \$1,500,000.</td> </tr> <tr> <td>Over \$17,000,000</td> <td>\$1,000,000.</td> </tr> </tbody> </table> |  | If the amount on line 1e, column (a) or (b) is: | The lobbying nontaxable amount is:                       | Not over \$500,000 | 20% of the amount on line 1e. | Over \$500,000 but not over \$1,000,000 | \$100,000 plus 15% of the excess over \$500,000. | Over \$1,000,000 but not over \$1,500,000 | \$175,000 plus 10% of the excess over \$1,000,000. | Over \$1,500,000 but not over \$17,000,000 | \$225,000 plus 5% of the excess over \$1,500,000. | Over \$17,000,000 | \$1,000,000. |  |  |
| If the amount on line 1e, column (a) or (b) is:   | The lobbying nontaxable amount is:                 |   |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| Not over \$500,000  | 20% of the amount on line 1e.                      |   |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| Over \$500,000 but not over \$1,000,000   | \$100,000 plus 15% of the excess over \$500,000.   |   |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| Over \$1,000,000 but not over \$1,500,000   | \$175,000 plus 10% of the excess over \$1,000,000. |   |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| Over \$1,500,000 but not over \$17,000,000  | \$225,000 plus 5% of the excess over \$1,500,000.  |   |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| Over \$17,000,000   | \$1,000,000.                                       |   |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| <b>g</b> Grassroots nontaxable amount (enter 25% of line 1f)  |  | 145,820.  |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| <b>h</b> Subtract line 1g from line 1a. If zero or less, enter -0-  |  | 0.  |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| <b>i</b> Subtract line 1f from line 1c. If zero or less, enter -0-  |  | 0.  |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| <b>j</b> If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year?  |  |   | <input type="checkbox"/> Yes <input type="checkbox"/> No |                    |                               |   |  |   |  |  |   |                   |              |  |  |

**4-Year Averaging Period Under Section 501(h)**  
(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the separate instructions for lines 2a through 2f.)

| <b>Lobbying Expenditures During 4-Year Averaging Period</b>         |            |            |          |          |            |
|---|------------|------------|----------|----------|------------|
| Calendar year<br>(or fiscal year beginning in)                      | (a) 2016   | (b) 2017   | (c) 2018 | (d) 2019 | (e) Total  |
| <b>2a</b> Lobbying nontaxable amount                                | 1,000,000. | 1,000,000. | 726,899. | 583,279. | 3,310,178. |
| <b>b</b> Lobbying ceiling amount<br>(150% of line 2a, column(e))    |            |            |          |          | 4,965,267. |
| <b>c</b> Total lobbying expenditures                                | 64,592.    | 52,905.    | 60,000.  | 60,000.  | 237,497.   |
| <b>d</b> Grassroots nontaxable amount                               | 250,000.   | 250,000.   | 181,725. | 145,820. | 827,545.   |
| <b>e</b> Grassroots ceiling amount<br>(150% of line 2d, column (e)) |            |            |          |          | 1,241,318. |
| <b>f</b> Grassroots lobbying expenditures                           | 136.       |            |          |          | 136.       |

**Part II-B Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).**

|   | (a) |    | (b)    |
|---|-----|----|--------|
|   | Yes | No | Amount |
| <i>For each "Yes" response on lines 1a through 1i below, provide in Part IV a detailed description of the lobbying activity.</i>  |     |    |        |
| <b>1</b> During the year, did the filing organization attempt to influence foreign, national, state, or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of: |     |    |        |
| <b>a</b> Volunteers? .....  |     |    |        |
| <b>b</b> Paid staff or management (include compensation in expenses reported on lines 1c through 1i)? ..  |     |    |        |
| <b>c</b> Media advertisements? .....  |     |    |        |
| <b>d</b> Mailings to members, legislators, or the public? .....   |     |    |        |
| <b>e</b> Publications, or published or broadcast statements? .....  |     |    |        |
| <b>f</b> Grants to other organizations for lobbying purposes? .....   |     |    |        |
| <b>g</b> Direct contact with legislators, their staffs, government officials, or a legislative body? .....  |     |    |        |
| <b>h</b> Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means? .....  |     |    |        |
| <b>i</b> Other activities? .....  |     |    |        |
| <b>j</b> Total. Add lines 1c through 1i .....   |     |    |        |
| <b>2a</b> Did the activities in line 1 cause the organization to be not described in section 501(c)(3)? .....   |     |    |        |
| <b>b</b> If "Yes," enter the amount of any tax incurred under section 4912 .....  |     |    |        |
| <b>c</b> If "Yes," enter the amount of any tax incurred by organization managers under section 4912 .....   |     |    |        |
| <b>d</b> If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year? .....   |     |    |        |

**Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).**

|  | Yes | No |
|--|-----|----|
| <b>1</b> Were substantially all (90% or more) dues received nondeductible by members? .....  | 1   |    |
| <b>2</b> Did the organization make only in-house lobbying expenditures of \$2,000 or less? .....                                   | 2   |    |
| <b>3</b> Did the organization agree to carry over lobbying and political campaign activity expenditures from the prior year? ..... | 3   |    |

**Part III-B Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) and if either (a) BOTH Part III-A, lines 1 and 2, are answered "No" OR (b) Part III-A, line 3, is answered "Yes."**

|   |    |  |
|---|----|--|
| <b>1</b> Dues, assessments and similar amounts from members .....   | 1  |  |
| <b>2</b> Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid).   |    |  |
| <b>a</b> Current year .....   | 2a |  |
| <b>b</b> Carryover from last year .....   | 2b |  |
| <b>c</b> Total .....  | 2c |  |
| <b>3</b> Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues .....  | 3  |  |
| <b>4</b> If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditure next year? ..... | 4  |  |
| <b>5</b> Taxable amount of lobbying and political expenditures (see instructions) .....   | 5  |  |

**Part IV Supplemental Information**

Provide the descriptions required for Part I-A, line 1; Part I-B, line 4; Part I-C, line 5; Part II-A (affiliated group list); Part II-A, lines 1 and 2 (see instructions); and Part II-B, line 1. Also, complete this part for any additional information.

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SCHEDULE D (Form 990)

Department of the Treasury Internal Revenue Service

Supplemental Financial Statements

Complete 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

2019

Open to Public Inspection

Name of the organization: CITIZEN SCHOOLS, INC. Employer identification number: 04-3259160

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.

Table with 3 columns: Question, (a) Donor advised funds, (b) Funds and other accounts. Rows include total number at end of year, aggregate value of contributions, grants, and end of year, and two yes/no questions about donor property and grant fund usage.

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

Form with multiple questions (1-9) regarding conservation easements, including checkboxes for various purposes, a table for 'Held at the End of the Tax Year' (2a-2d), and yes/no questions about monitoring policies and requirements.

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.

Form with questions (1a, 1b, 2) regarding reporting requirements for art and historical treasures, including revenue and asset amounts.

**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
  - b  Scholarly research
  - c  Preservation for future generations
  - d  Loan or exchange program
  - e  Other \_\_\_\_\_
- 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.

- 1a 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             | 1c     |
| d Additions during the year     | 1d     |
| e Distributions during the year | 1e     |
| f Ending balance                | 1f     |
- 2a 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 |
|--|------------------|----------------|--------------------|----------------------|---------------------|
| 1a 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%.
- 3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:
- |  | Yes    | No |
|--|--------|----|
| (i) Unrelated organizations  | 3a(i)  |    |
| (ii) Related organizations   | 3a(ii) |    |
| b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? | 3b     |    |
- 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 |
|--|--------------------------------------|---------------------------------|------------------------------|----------------|
| 1a Land  |                                      |                                 |                              |                |
| b Buildings  |                                      |                                 |                              |                |
| c Leasehold improvements   |                                      |                                 |                              |                |
| d Equipment  |                                      | 2,848,377.                      | 2,799,966.                   | 48,411.        |
| e Other  |                                      |                                 |                              |                |
| <b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.) |                                      |                                 |                              | <b>48,411.</b> |

**Part VII Investments - Other Securities.**

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)   |                |   |
| <b>Total.</b> (Col. (b) must equal Form 990, Part X, col. (B) line 12.) ▶ |                |   |

**Part VIII Investments - Program Related.**

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)   |                |   |
| <b>Total.</b> (Col. (b) must equal Form 990, Part X, col. (B) line 13.) ▶ |                |   |

**Part IX Other Assets.**

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)   |                |
| <b>Total.</b> (Column (b) must equal Form 990, Part X, col. (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) <b>CONDITIONAL ADVANCE</b>  | <b>314,551.</b> |
| (3)   |                 |
| (4)   |                 |
| (5)   |                 |
| (6)   |                 |
| (7)   |                 |
| (8)   |                 |
| (9)   |                 |
| <b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶ | <b>314,551.</b> |

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        | 8,988,986. |
| 2 | Amounts included on line 1 but not on Form 990, Part VIII, line 12:             |    |          |            |
| a | Net unrealized gains (losses) on investments                                    | 2a |          |            |
| b | Donated services and use of facilities  | 2b | 291,816. |            |
| c | Recoveries of prior year grants   | 2c |          |            |
| d | Other (Describe in Part XIII.)  | 2d | 10,786.  |            |
| e | Add lines 2a through 2d   | 2e |          | 302,602.   |
| 3 | Subtract line 2e from line 1  |    | 3        | 8,686,384. |
| 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                | 4a |          |            |
| b | Other (Describe in Part XIII.)  | 4b |          |            |
| c | Add lines 4a and 4b   | 4c |          | 0.         |
| 5 | Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.) |    | 5        | 8,686,384. |

**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        | 8,968,186. |
| 2 | Amounts included on line 1 but not on Form 990, Part IX, line 25:                |    |          |            |
| a | Donated services and use of facilities   | 2a | 291,816. |            |
| b | Prior year adjustments   | 2b |          |            |
| c | Other losses   | 2c |          |            |
| d | Other (Describe in Part XIII.)   | 2d | 10,786.  |            |
| e | Add lines 2a through 2d  | 2e |          | 302,602.   |
| 3 | Subtract line 2e from line 1   |    | 3        | 8,665,584. |
| 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                 | 4a |          |            |
| b | Other (Describe in Part XIII.)   | 4b |          |            |
| c | Add lines 4a and 4b  | 4c |          | 0.         |
| 5 | Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.) |    | 5        | 8,665,584. |

**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.

**PART X, LINE 2:**

CSI ACCOUNTS FOR UNCERTAINTY IN INCOME TAXES IN ACCORDANCE WITH ASC TOPIC, INCOME TAXES. THIS STANDARD CLARIFIES THE ACCOUNTING FOR UNCERTAINTY IN TAX POSITIONS AND PRESCRIBES A RECOGNITION THRESHOLD AND MEASUREMENT ATTRIBUTE FOR THE FINANCIAL STATEMENTS REGARDING A TAX POSITION TAKEN OR EXPECTED TO BE TAKEN IN A TAX RETURN. CSI HAS DETERMINED THAT THERE ARE NO UNCERTAIN TAX POSITIONS WHICH QUALIFY FOR EITHER RECOGNITION OR DISCLOSURE IN THE FINANCIAL STATEMENTS AT JUNE 30, 2020. CSI'S INFORMATION RETURNS ARE SUBJECT TO EXAMINATION BY THE FEDERAL AND STATE JURISDICTIONS.

**PART XI, LINE 2D - OTHER ADJUSTMENTS:**

DIRECT SPECIAL EVENT EXPENSES NETTED AGAINST REVENUE ON 990 10,786.

**Part XIII** Supplemental Information *(continued)*

PART XII, LINE 2D - OTHER ADJUSTMENTS:

DIRECT SPECIAL EVENT EXPENSES NETTED AGAINST REVENUE ON 990 10,786.

COPY



**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<br>(add col. (a) through<br>col. (c)) |          |
|-----------------|--|---|------------------------------|---------------------|--|----------|
|                 |  | CA BENEFIT<br>ED<br>(event type)                            | MA GET CYCED<br>(event type) | 1<br>(total number) |  |          |
| Revenue         | 1  | Gross receipts  | 172,875.                     | 39,219.             | 143,729.   | 355,823. |
|                 | 2  | Less: Contributions   | 142,875.                     | 38,729.             | 143,729.   | 325,333. |
|                 | 3  | Gross income (line 1 minus line 2)                          | 30,000.                      | 490.                |  | 30,490.  |
| Direct Expenses | 4  | Cash prizes   |                              |                     |  |          |
|                 | 5  | Noncash prizes  |                              |                     |  |          |
|                 | 6  | Rent/facility costs   |                              | 916.                | 2,000.   | 2,916.   |
|                 | 7  | Food and beverages  |                              |                     |  |          |
|                 | 8  | Entertainment   |                              |                     | 7,870.   | 7,870.   |
|                 | 9  | Other direct expenses                                       |                              |                     |  |          |
|                 | 10   | Direct expense summary. Add lines 4 through 9 in column (d) |                              |                     |  |          |
| 11              | Net income summary. Subtract line 10 from line 3, column (d) |   |                              |                     |  | 19,704.  |

**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<br>bingo/progressive bingo                    | (c) Other gaming  | (d) Total gaming (add<br>col. (a) through col. (c)) |  |
|-----------------|--|---|---|---|---|--|
|                 |  |   |   |   |   |  |
| Revenue         | 1  | Gross revenue   |   |   |   |  |
|                 | 2  | Cash prizes   |   |   |   |  |
| Direct Expenses | 3  | Noncash prizes  |   |   |   |  |
|                 | 4  | Rent/facility costs   |   |   |   |  |
|                 | 5  | Other direct expenses   |   |   |   |  |
| 6               | Volunteer labor  | <input type="checkbox"/> Yes _____ %<br><input type="checkbox"/> No | <input type="checkbox"/> Yes _____ %<br><input type="checkbox"/> No | <input type="checkbox"/> Yes _____ %<br><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: \_\_\_\_\_

10a Were any of the organization's gaming licenses revoked, suspended, or terminated during the tax year?  Yes  No  
 b If "Yes," explain: \_\_\_\_\_





**SCHEDULE J  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Compensation Information**

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees  
 ▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 23.  
 ▶ Attach to Form 990.  
 ▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2019**

Open to Public Inspection

Name of the organization **CITIZEN SCHOOLS, INC.** Employer identification number **04-3259160**

**Part I Questions Regarding Compensation**

**1a** Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.

- |  |  |
|--|--|
| <input type="checkbox"/> First-class or charter travel             | <input type="checkbox"/> Housing allowance or residence for personal use   |
| <input type="checkbox"/> Travel for companions                     | <input type="checkbox"/> Payments for business use of personal residence   |
| <input type="checkbox"/> Tax indemnification and gross-up payments | <input type="checkbox"/> Health or social club dues or initiation fees     |
| <input type="checkbox"/> Discretionary spending account            | <input type="checkbox"/> Personal services (such as maid, chauffeur, chef) |

**b** If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain ..... **1b**

**2** Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a? ..... **2**

**3** Indicate which, if any, of the following the organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.

- |   |   |
|---|---|
| <input checked="" type="checkbox"/> Compensation committee          | <input checked="" type="checkbox"/> Written employment contract                     |
| <input type="checkbox"/> Independent compensation consultant        | <input checked="" type="checkbox"/> Compensation survey or study                    |
| <input checked="" type="checkbox"/> Form 990 of other organizations | <input checked="" type="checkbox"/> Approval by the board or compensation committee |

**4** During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:

- a** Receive a severance payment or change-of-control payment? ..... **4a**
- b** Participate in, or receive payment from, a supplemental nonqualified retirement plan? ..... **4b**
- c** Participate in, or receive payment from, an equity-based compensation arrangement? ..... **4c**
- If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

**Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.**

**5** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:

- a** The organization? ..... **5a**
- b** Any related organization? ..... **5b**
- If "Yes" on line 5a or 5b, describe in Part III.

**6** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:

- a** The organization? ..... **6a**
- b** Any related organization? ..... **6b**
- If "Yes" on line 6a or 6b, describe in Part III.

**7** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described on lines 5 and 6? If "Yes," describe in Part III ..... **7**

**8** Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III ..... **8**

**9** If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)? ..... **9**

|           | Yes | No |
|-----------|-----|----|
| <b>1b</b> |     |    |
| <b>2</b>  |     |    |
| <b>4a</b> |     | X  |
| <b>4b</b> |     | X  |
| <b>4c</b> |     | X  |
| <b>5a</b> |     | X  |
| <b>5b</b> |     | X  |
| <b>6a</b> |     | X  |
| <b>6b</b> |     | X  |
| <b>7</b>  |     | X  |
| <b>8</b>  |     | X  |
| <b>9</b>  |     |    |

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

Schedule J (Form 990) 2019

**Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that aren't listed on Form 990, Part VII.

**Note:** The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

| (A) Name and Title                      |      | (B) Breakdown of W-2 and/or 1099-MISC compensation |                                     |                                     | (C) Retirement and other deferred compensation | (D) Nontaxable benefits | (E) Total of columns (B)(i)-(D) | (F) Compensation in column (B) reported as deferred on prior Form 990 |
|---|------|--|-------------------------------------|-------------------------------------|--|-------------------------|---------------------------------|---|
|   |      | (i) Base compensation                              | (ii) Bonus & incentive compensation | (iii) Other reportable compensation |  |                         |                                 |   |
| (1) EMILY MCCANN<br>CEO & BOARD MEMBER  | (i)  | 218,388.   | 0.                                  | 0.                                  | 7,500.   | 41,838.                 | 267,726.                        | 0.  |
|   | (ii) | 0.   | 0.                                  | 0.                                  | 0.   | 0.                      | 0.                              | 0.  |
| (2) KYLE CONLEY<br>CHIEF IMPACT OFFICER | (i)  | 117,388.   | 0.                                  | 0.                                  | 0.   | 43,334.                 | 160,722.                        | 0.  |
|   | (ii) | 0.   | 0.                                  | 0.                                  | 0.   | 0.                      | 0.                              | 0.  |
|   | (i)  |  |                                     |                                     |  |                         |                                 |   |
|   | (ii) |  |                                     |                                     |  |                         |                                 |   |
|   | (i)  |  |                                     |                                     |  |                         |                                 |   |
|   | (ii) |  |                                     |                                     |  |                         |                                 |   |
|   | (i)  |  |                                     |                                     |  |                         |                                 |   |
|   | (ii) |  |                                     |                                     |  |                         |                                 |   |
|   | (i)  |  |                                     |                                     |  |                         |                                 |   |
|   | (ii) |  |                                     |                                     |  |                         |                                 |   |
|   | (i)  |  |                                     |                                     |  |                         |                                 |   |
|   | (ii) |  |                                     |                                     |  |                         |                                 |   |
|   | (i)  |  |                                     |                                     |  |                         |                                 |   |
|   | (ii) |  |                                     |                                     |  |                         |                                 |   |
|   | (i)  |  |                                     |                                     |  |                         |                                 |   |
|   | (ii) |  |                                     |                                     |  |                         |                                 |   |
|   | (i)  |  |                                     |                                     |  |                         |                                 |   |
|   | (ii) |  |                                     |                                     |  |                         |                                 |   |
|   | (i)  |  |                                     |                                     |  |                         |                                 |   |
|   | (ii) |  |                                     |                                     |  |                         |                                 |   |



**SCHEDULE M  
(Form 990)**

**Noncash Contributions**

OMB No. 1545-0047

**2019**

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

- ▶ 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](http://www.irs.gov/Form990) for instructions and the latest information.

Name of the organization **CITIZEN SCHOOLS, INC.** Employer identification number **04-3259160**

**Part I Types of Property**

|  | (a)<br>Check if applicable | (b)<br>Number of contributions or items contributed | (c)<br>Noncash contribution amounts reported on Form 990, Part VIII, line 1g | (d)<br>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 ▶ ( CHROMEBOOKS )                                   | X                          | 90  | 32,310.  | PRICE PROVIDED BY DO                                      |
| 26 Other ▶ ( LAPTOPS )                                       | X                          | 25  | 8,975.   | PRICE PROVIDED BY DO                                      |
| 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 IV, Donee Acknowledgement **29**

|   | Yes | No |
|---|-----|----|
| 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 three years from the date of the initial contribution, and which isn't required to be used for exempt purposes for the entire holding period? |     | X  |
| 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?   |     | X  |
| 32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?  |     | X  |
| 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.   |     |    |



**SCHEDULE O**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**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 990-EZ.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2019**

Open to Public  
Inspection

Name of the organization

CITIZEN SCHOOLS, INC.

Employer identification number

04-3259160

FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

LEARNING AND CAREER MENTORS. CITIZEN SCHOOLS IS A NATIONAL NONPROFIT THAT WORKS IN SCHOOL, AFTER SCHOOL AND AT THE SYSTEMS-LEVEL TO PROVIDE HANDS-ON LEARNING AND MENTORS FROM COMPANIES AND COMMUNITY ORGANIZATIONS. OVER THE LAST 25 YEARS, CITIZEN SCHOOLS HAS HELPED 50,000 UNDERREPRESENTED STUDENTS BUILD CONFIDENCE, GAIN 21ST CENTURY SKILLS AND DEVELOP INTEREST IN CAREER PATHWAYS.

FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

LEARNING WITH EXPERTS (APPRENTICESHIPS), AND COMMUNITY EXPLORATIONS.

FORM 990, PART III, LINE 4C, PROGRAM SERVICE ACCOMPLISHMENTS:

INNOVATIVE TEACHING FELLOWSHIP, A TWO-YEAR LEADERSHIP DEVELOPMENT PROGRAM FOR ASPIRING YOUNG EDUCATORS THAT INCLUDES THE OPPORTUNITY TO EARN A MASTER'S DEGREE AND TEACHING CERTIFICATION, AND IS PILOTING A NEW TEACHER SUPPORT MODEL TO BRING APPRENTICESHIP-STYLE LEARNING INTO THE TRADITIONAL CLASSROOM.

FORM 990, PART III, LINE 4D, OTHER PROGRAM SERVICES:

NATIONAL SERVICES AND CATALYST - SERVICES PROVIDED BY CSI'S NATIONAL OFFICE TO SUPPORT STATE OFFICES AND CAMPUS OPERATIONS. SERVICES INCLUDE NATIONAL RECRUITMENT OF CAMPUS STAFF AND CITIZEN TEACHERS, MANAGEMENT OF NATIONAL RELATIONSHIPS AND KEY STAKEHOLDERS, NATIONWIDE BEST PRACTICE SHARING, NATIONALLY-BASED STAFF TRAINING, PROGRAM RESEARCH AND EVALUATION, AND CURRICULUM, INSTRUCTION AND TRAINING SUPPORT. NATIONAL SERVICES ALSO INCLUDE THE DEVELOPMENT, LAUNCH AND IMPLEMENTATION OF THE

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule O (Form 990 or 990-EZ) (2019)

Name of the organization

CITIZEN SCHOOLS, INC.

Employer identification number

04-3259160

CATAYST PROGRAM, SUPPORTING TEACHERS TO DELIVER HANDS-ON PROJECT BASED  
LEARNING DURING SCIENCE CLASSES ACROSS THE COUNTRY.

EXPENSES \$ 884,208. INCLUDING GRANTS OF \$ 0. REVENUE \$ 0.

FORM 990, PART VI, SECTION A, LINE 8B:

CSI'S EXECUTIVE COMMITTEE MEETINGS ARE INFORMATIONAL AND MINUTES ARE NOT  
MAINTAINED. ANY ISSUES ARE BROUGHT UP AT THE BOARD MEETINGS AND DOCUMENTED  
IN BOARD MEETING MINUTES.

FORM 990, PART VI, SECTION B, LINE 11B:

THE CFO AND PRESIDENT REVIEW THE FORM 990 AND PRESENT TO THE BOARD AND THE  
CEO FOR APPROVAL.

FORM 990, PART VI, SECTION B, LINE 12C:

BOARD MEMBERS AND OFFICERS ARE REQUIRED TO COMPLETE AND SIGN A CONFLICT OF  
INTEREST DISCLOSURE FORM ANNUALLY. EACH DIRECTOR, PRINCIPAL OFFICER AND  
MEMBER OF A COMMITTEE WITH GOVERNING BOARD DELEGATED POWERS IS REQUIRED TO  
REVIEW AND SIGN THE CONFLICT OF INTEREST POLICY EACH YEAR. BY SIGNING, THE  
SIGNER AGREES TO ADHERE TO THE POLICY WHICH INCLUDES AVOIDING CONFLICTS OF  
INTERESTS AND IMMEDIATE DISCLOSURE SHOULD ONE ARISE. ON-GOING ADHERENCE TO  
THE POLICY IS SUPPORTED BY THE FOLLOWING:

1. COMPENSATION: VOTING MEMBERS OF THE BOARD ARE NOT COMPENSATED BY CITIZEN  
SCHOOLS.

2. CONTRACTS AND PROCUREMENT: OUR PROCUREMENT PROCEDURES SUPPORT COMPLIANCE  
WITH OUR CONFLICT OF INTEREST POLICY (I.E. SOLICITATION OF MULTIPLE VENDORS,  
ANNUAL ZERO-BASED REQUIRING LINE ITEM JUSTIFICATION AND APPROVED  
SIGNATORIES ON ALL CHECK REQUESTS AND CHECKS FOR PURCHASES OVER \$5,000).

|   |  |
|---|--|
| Name of the organization<br>CITIZEN SCHOOLS, INC. | Employer identification number<br>04-3259160 |
|---|--|

FORM 990, PART VI, SECTION B, LINE 15:

THE CEO'S COMPENSATION IS DETERMINED BASED UPON THE BOARD'S REVIEW OF EXTERNAL COMPARATIVE DATA OF SIMILAR ORGANIZATIONS. THE COMPENSATION IS THEN APPROVED BY THE BOARD.

FOR ALL STAFF, CITIZEN SCHOOLS HAS CREATED A SALARY STRUCTURE (A RANGE OF SALARIES THAT ARE DEEMED APPROPRIATE AND FAIR FOR CURRENT POSITIONS) ON WHICH BENCHMARKING IS DONE YEARLY AND UPDATES ARE MADE AS APPROPRIATE. PAY FOR THE CHIEF EXECUTIVE OFFICER IS DETERMINED BY THE BOARD OF DIRECTORS, WORKING WITH THE CHIEF TALENT OFFICER TO DETERMINE APPROPRIATE BENCHMARKS. ANY PAY INCREASES OTHER THAN THE STANDARD MERIT BASED ADJUSTMENT MUST BE APPROVED BY THE BOARD OF DIRECTORS. ANY PAY INCREASE FOR OTHER STAFF OUTSIDE OF MERIT BASED INCREASE OR CHANGE OF POSITION MUST BE REVIEWED AND APPROVED BY THE COMPENSATION COMMITTEE WHICH MUST INCLUDE AT LEAST THE DIRECTOR OF HUMAN RESOURCES AND THE CEO.

FORM 990, PART VI, SECTION C, LINE 19:

CITIZEN SCHOOLS MAKES ITS GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY, AND FINANCIAL STATEMENTS AVAILABLE TO THE PUBLIC UPON REQUEST.

FORM 990, PART XII, LINE 2C:

THIS PROCESS HAS NOT CHANGED SINCE THE PRIOR YEAR.

# Application for Automatic Extension of Time To File an Exempt Organization Return

Department of the Treasury  
Internal Revenue Service

▶ **File a separate application for each return.**  
▶ **Go to [www.irs.gov/Form8868](http://www.irs.gov/Form8868) for the latest information.**

**Electronic filing (e-file).** You can electronically file Form 8868 to request a 6-month automatic extension of time to file any of the forms listed below with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, for which an extension request must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit [www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits](http://www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits).

**Automatic 6-Month Extension of Time.** Only submit original (no copies needed).

All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

|  |   |   |
|--|---|---|
| <b>Type or print</b>   | Name of exempt organization or other filer, see instructions.<br><b>CITIZEN SCHOOLS, INC.</b>                       | Taxpayer identification number (TIN)<br><b>04-3259160</b> |
| File by the due date for filing your return. See instructions. | Number, street, and room or suite no. If a P.O. box, see instructions.<br><b>1 BEACON STREET, NO. 1500</b>          |   |
|  | City, town or post office, state, and ZIP code. For a foreign address, see instructions.<br><b>BOSTON, MA 02108</b> |   |

Enter the Return Code for the return that this application is for (file a separate application for each return) 0 | 1

| Application Is For                       | Return Code | Application Is For                | Return Code |
|--|-------------|-----------------------------------|-------------|
| Form 990 or Form 990-EZ                  | 01          | Form 990-T (corporation)          | 07          |
| Form 990-BL                              | 02          | Form 1041-A                       | 08          |
| Form 4720 (individual)                   | 03          | Form 4720 (other than individual) | 09          |
| Form 990-PF                              | 04          | Form 5227                         | 10          |
| Form 990-T (sec. 401(a) or 408(a) trust) | 05          | Form 6069                         | 11          |
| Form 990-T (trust other than above)      | 06          | Form 8870                         | 12          |

**ELISHA MUSKAT**

- The books are in the care of ▶ **1 BEACON STREET, NO. 1500 - BOSTON, MA 02108**  
Telephone No. ▶ **617-695-2300** Fax No. ▶ \_\_\_\_\_
- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_. If this is for the whole group, check this box . If it is for part of the group, check this box  and attach a list with the names and TINs of all members the extension is for.

**1** I request an automatic 6-month extension of time until **MAY 17, 2021**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:  
 ▶  calendar year \_\_\_\_\_ or  
 ▶  tax year beginning **JUL 1, 2019**, and ending **JUN 30, 2020**.

**2** If the tax year entered in line 1 is for less than 12 months, check reason:  Initial return  Final return  
 Change in accounting period

|   |           |    |    |
|---|-----------|----|----|
| <b>3a</b> If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.                                   | <b>3a</b> | \$ | 0. |
| <b>b</b> If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit. | <b>3b</b> | \$ | 0. |
| <b>c Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.              | <b>3c</b> | \$ | 0. |

**Caution:** If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

# FY22 Envisioneers Program Impact Metrics Report: Q1



In partnership with

**Instructions:** Please fill in the "Value" column for each metric. If the data isn't available, write a note about why.

**Data Deadline:** 10/4

| IMPLEMENTATION   |                                       |
|--|---------------------------------------|
| Metric   | Value                                 |
| # students enrolled in program                         | 420                                   |
| # students served through push-in ONLY                 | 391                                   |
| Student attendance (daily/weekly)                      | <a href="#">Link spreadsheet here</a> |
| # apprenticeships                                      | 53                                    |
| % apprenticeships in STEAM                             | 41(24)                                |
| # students assigned to each apprenticeship             | <a href="#">Refer to Campus Tabs</a>  |
| # volunteers supporting apprenticeships                | 21                                    |
| # total hours served by vols supporting a'ships        | 30hrs / 630hrs                        |
| # volunteers supporting one-time activities            | 2                                     |
| # AmeriCorps member training hours                     |                                       |
| % TFs showing improvement in 7+ IR competencies at EOY |                                       |
| Student demographics                                   |                                       |
| <i>Gender:</i>   |                                       |
| % Male   | 60                                    |
| % Female   | 38                                    |
| % Non-binary   | 0.002                                 |
| % Prefer to self-describe                              |                                       |
| <i>Race/Ethnicity:</i>                                 |                                       |
| % American Indian or Alaska Native                     |                                       |
| % Asian  | 8                                     |
| % Black or African American                            | 35                                    |
| % Hispanic/Latino                                      | 45                                    |
| % Native Hawaiian or other Pacific Islander            | 8                                     |
| % White  | 5                                     |
| % Other  | 2                                     |
| Volunteer demographics                                 |                                       |
| <i>Gender:</i>   |                                       |
| % Male   | 40%                                   |
| % Female   | 59%                                   |

| IMPACT   |                                       |
|--|---------------------------------------|
| Metric   | Value                                 |
| Students   |                                       |
| Aggregate % of students demonstrating SEL skills [1] | 64%                                   |
| % change in pre/post SEL scores per each student [2] | <a href="#">Link spreadsheet here</a> |
| % students reporting sense of belonging              | 62%                                   |
| % students reporting high quality relationships      | 67%                                   |
| % students expressing intention to attend college    | 76%                                   |
| % students expressing interest in STEM careers       | 54%                                   |
| Volunteers   |                                       |
| Volunteer NPS  |                                       |
| % of volunteers who would volunteer again            |                                       |
| Constituents   |                                       |
| School Partner NPS                                   |                                       |
| Family NPS   |                                       |

# FY22 Envisioneers Program Impact Metrics Report: Q1



In partnership with CITIZEN SCHOOLS

**Instructions:** Please fill in the "Value" column for each metric. If the data isn't available, write a note about why.

**Data Deadline:** 10/4

| IMPLEMENTATION                              |       |
|---|-------|
| Metric                                      | Value |
| % Non-binary                                | 1%    |
| % Prefer to self-describe                   |       |
| <i>Race/Ethnicity:</i>                      |       |
| % American Indian or Alaska Native          |       |
| % Asian                                     | 32%   |
| % Black or African American                 | 8%    |
| % Hispanic/Latino                           | 12%   |
| % Native Hawaiian or other Pacific Islander | 4%    |
| % White                                     | 28%   |
| % Other                                     | 8%    |

| IMPACT |       |
|--------|-------|
| Metric | Value |

[1] self-efficacy, self-management, social awareness

[2] Please link a spreadsheet here of all students and their pre/post SEL skill scores as well as the % change.

# FY22 Envisioneers Program Impact Metrics Report: Q2



In partnership with

**Instructions:** Please fill in the "Value" column for each metric. If the data isn't available, write a note about why.

**Data Deadline:** 11/16

| IMPLEMENTATION  |                                       |
|---|---------------------------------------|
| Metric  | Value                                 |
| # students enrolled in program                              | 499                                   |
| # students served through push-in ONLY (UNDULICATED)        | 391                                   |
| Student attendance (daily/weekly)                           | <a href="#">Link spreadsheet here</a> |
| # apprenticeships   | 53                                    |
| % apprenticeships in STEM                                   | 41(24)                                |
| # students assigned to each apprenticeship                  | <a href="#">Refer to Campus Tabs</a>  |
| # volunteers supporting apprenticeships                     | 21                                    |
| # total hours served by vols supporting a'ships             | 30hrs / 630hrs                        |
| # volunteers supporting one-time activities                 | 2                                     |
| # total hours served by vols supporting one-time activities | 0                                     |
| # AmeriCorps member training hours                          |                                       |
| % TFs showing improvement in 7+ IR competencies at EOY      |                                       |
| Student demographics  |                                       |
| <i>Gender:</i>  |                                       |
| % Male  | 60                                    |
| % Female  | 38                                    |
| % Non-binary  | 0.002                                 |
| % Prefer to self-describe                                   |                                       |
| <i>Race/Ethnicity:</i>                                      |                                       |
| % American Indian or Alaska Native                          | 8                                     |
| % Asian   | 35                                    |
| % Black or African American                                 | 45                                    |
| % Hispanic/Latino   | 8                                     |
| % Native Hawaiian or other Pacific Islander                 | 5                                     |
| % White   | 2                                     |
| % Other   |                                       |
| Volunteer demographics                                      |                                       |
| <i>Gender:</i>  |                                       |
| % Male  | 40%                                   |

| IMPACT   |                                       |
|--|---------------------------------------|
| Metric   | Value                                 |
| Students   |                                       |
| Aggregate % of students demonstrating SEL skills [1] | 64%                                   |
| % change in pre/post SEL scores per each student [2] | <a href="#">Link spreadsheet here</a> |
| % students reporting sense of belonging              | 62%                                   |
| % students reporting high quality relationships      | 67%                                   |
| % students expressing intention to attend college    | 76%                                   |
| % students expressing interest in STEM careers       | 54%                                   |
| Volunteers   |                                       |
| Volunteer NPS  | 50                                    |
| % of volunteers who would volunteer again            | 57.7                                  |
| Constituents   |                                       |
| School Partner NPS                                   | 23                                    |
| Family NPS   |                                       |

## FY22 Envisioneers Program Impact Metrics Report: Q2



In partnership with CITIZEN SCHOOLS

**Instructions:** Please fill in the "Value" column for each metric. If the data isn't available, write a note about why.

**Data Deadline:** 11/16

| IMPLEMENTATION                              |       |
|---|-------|
| Metric                                      | Value |
| % Female                                    | 59%   |
| % Non-binary                                | 1%    |
| % Prefer to self-describe                   |       |
| <i>Race/Ethnicity:</i>                      |       |
| % American Indian or Alaska Native          |       |
| % Asian                                     | 32%   |
| % Black or African American                 | 8%    |
| % Hispanic/Latino                           | 12%   |
| % Native Hawaiian or other Pacific Islander | 4%    |
| % White                                     | 28%   |
| % Other                                     | 8%    |

| IMPACT |       |
|--------|-------|
| Metric | Value |

[1] self-efficacy, self-management, social awareness

[2] Please link a spreadsheet here of all students and their pre/post SEL skill scores as well as the % change.

# FY22 Envisioneers Program Impact Metrics Report: Q3



In partnership with

**Instructions:** Please fill in the "Value" column for each metric. If the data isn't available, write a note about why.

**Data Deadline:** 1/24

| IMPLEMENTATION  |                                       |
|---|---------------------------------------|
| Metric  | Value                                 |
| # students enrolled in program                              | 550                                   |
| # students served through push-in ONLY                      | 553                                   |
| Student attendance (daily/weekly)                           | <a href="#">Link spreadsheet here</a> |
| # apprenticeships   | 53 (projected)                        |
| % apprenticeships in STEM                                   | 51                                    |
| # students assigned to each apprenticeship                  | <a href="#">Refer to Campus Tabs</a>  |
| # volunteers supporting apprenticeships                     | 23                                    |
| # total hours served by vols supporting a'ships             |                                       |
| # volunteers supporting one-time activities                 |                                       |
| # total hours served by vols supporting one-time activities |                                       |
| # AmeriCorps member training hours                          |                                       |
| % TFs showing improvement in 7+ IR competencies at EOY      |                                       |
| Student demographics  |                                       |
| <i>Gender:</i>  |                                       |
| % Male  | 59                                    |
| % Female  | 39                                    |
| % Non-binary  | 0.002                                 |
| % Prefer to self-describe                                   |                                       |
| <i>Race/Ethnicity:</i>                                      |                                       |
| % American Indian or Alaska Native                          | 8                                     |
| % Asian   | 34                                    |
| % Black or African American                                 | 46                                    |
| % Hispanic/Latino   | 8                                     |
| % Native Hawaiian or other Pacific Islander                 | 5                                     |
| % White   | 2                                     |
| % Other   |                                       |
| Volunteer demographics                                      |                                       |
| <i>Gender:</i>  |                                       |
| % Male  | 31%                                   |
| % Female  | 63%                                   |

| IMPACT   |                                       |
|--|---------------------------------------|
| Metric   | Value                                 |
| Students   |                                       |
| Aggregate % of students demonstrating SEL skills [1] | 74                                    |
| % change in pre/post SEL scores per each student [2] | <a href="#">Link spreadsheet here</a> |
| % students reporting sense of belonging              | 62                                    |
| % students reporting high quality relationships      | 66                                    |
| % students expressing intention to attend college    | 72                                    |
| % students expressing interest in STEM careers       | 48.2                                  |
| Volunteers   |                                       |
| Volunteer NPS  | 50                                    |
| % of volunteers who would volunteer again            | 57.7                                  |
| Constituents   |                                       |
| School Partner NPS                                   | 23                                    |
| Family NPS   |                                       |

# FY22 Envisioneers Program Impact Metrics Report: Q3



In partnership with CITIZEN SCHOOLS

**Instructions:** Please fill in the "Value" column for each metric. If the data isn't available, write a note about why.

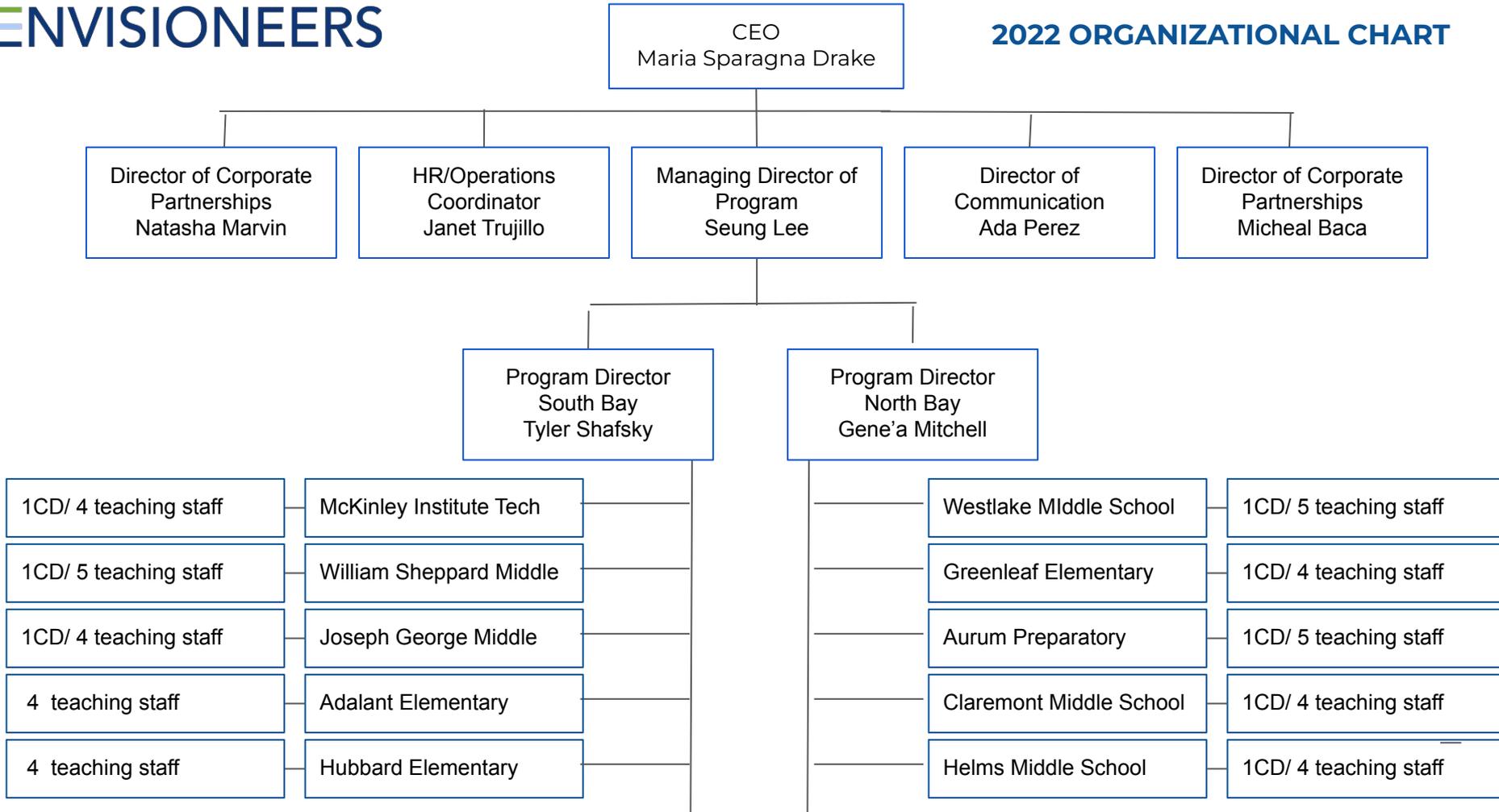
**Data Deadline:** 1/24

| IMPLEMENTATION                              |       |
|---|-------|
| Metric                                      | Value |
| % Non-binary                                |       |
| % Prefer to self-describe                   |       |
| <i>Race/Ethnicity:</i>                      |       |
| % American Indian or Alaska Native          | 0%    |
| % Asian                                     | 25%   |
| % Black or African American                 | 0%    |
| % Hispanic/Latino                           | 44%   |
| % Native Hawaiian or other Pacific Islander | 0%    |
| % White                                     | 13%   |
| % Other                                     | 13%   |

| IMPACT |       |
|--------|-------|
| Metric | Value |

[1] self-efficacy, self-management, social awareness

[2] Please link a spreadsheet here of all students and their pre/post SEL skill scores as well as the % change.





Department of the Treasury  
Internal Revenue Service  
Tax Exempt and Government Entities  
P.O. Box 2508  
Cincinnati, OH 45201

ENVISIONEERS INC  
330 TWIN DOLPHIN DRIVE SUITE 115  
REDWOOD CITY, CA 94065

Date:  
10/04/2021  
Employer ID number:  
86-2828543  
Person to contact:  
Name: Senayon Avungbeto  
ID number: 17241  
Telephone: 877-829-5500  
Accounting period ending:  
June 30  
Public charity status:  
170(b)(1)(A)(vi)  
Form 990 / 990-EZ / 990-N required:  
Yes  
Effective date of exemption:  
December 30, 2020  
Contribution deductibility:  
Yes  
Addendum applies:  
No  
DLN:  
26053505004491

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to [www.irs.gov/charities](http://www.irs.gov/charities). Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

We sent a copy of this letter to your representative as indicated in your power of attorney.

Sincerely,

*Stephen A. Martin*

Stephen A. Martin  
Director, Exempt Organizations  
Rulings and Agreements

## Balance Summary for 02/01/2022 - 02/28/2022

Account Sort: Account Name

02/01/2022

|                       | Opening Ledger      | Closing Ledger     | Opening Available   | Closing Available  | Average Closing Available MTD | 1 - Day Float | 2 or More Days Float | Total Float   |
|-----------------------|---------------------|--------------------|---------------------|--------------------|-------------------------------|---------------|----------------------|---------------|
| ABA321081669          |                     |                    |                     |                    |                               |               |                      |               |
| ENVISIONEERS INC 8547 |                     |                    |                     |                    |                               |               |                      |               |
| <u>80009718547</u>    | \$116,002.72        | \$58,669.87        | \$116,002.72        | \$58,669.87        | \$58,669.87                   | \$0.00        | \$0.00               | \$0.00        |
| <b>Totals</b>         | <b>\$116,002.72</b> | <b>\$58,669.87</b> | <b>\$116,002.72</b> | <b>\$58,669.87</b> | <b>\$58,669.87</b>            | <b>\$0.00</b> | <b>\$0.00</b>        | <b>\$0.00</b> |

02/02/2022

|                       | Opening Ledger     | Closing Ledger     | Opening Available  | Closing Available  | Average Closing Available MTD | 1 - Day Float | 2 or More Days Float | Total Float   |
|-----------------------|--------------------|--------------------|--------------------|--------------------|-------------------------------|---------------|----------------------|---------------|
| ABA321081669          |                    |                    |                    |                    |                               |               |                      |               |
| ENVISIONEERS INC 8547 |                    |                    |                    |                    |                               |               |                      |               |
| <u>80009718547</u>    | \$58,669.87        | \$58,649.87        | \$58,669.87        | \$58,649.87        | \$58,659.87                   | \$0.00        | \$0.00               | \$0.00        |
| <b>Totals</b>         | <b>\$58,669.87</b> | <b>\$58,649.87</b> | <b>\$58,669.87</b> | <b>\$58,649.87</b> | <b>\$58,659.87</b>            | <b>\$0.00</b> | <b>\$0.00</b>        | <b>\$0.00</b> |

02/03/2022

|                       | Opening Ledger     | Closing Ledger      | Opening Available  | Closing Available   | Average Closing Available MTD | 1 - Day Float | 2 or More Days Float | Total Float   |
|-----------------------|--------------------|---------------------|--------------------|---------------------|-------------------------------|---------------|----------------------|---------------|
| ABA321081669          |                    |                     |                    |                     |                               |               |                      |               |
| ENVISIONEERS INC 8547 |                    |                     |                    |                     |                               |               |                      |               |
| <u>80009718547</u>    | \$58,649.87        | \$226,649.87        | \$58,649.87        | \$226,649.87        | \$114,656.54                  | \$0.00        | \$0.00               | \$0.00        |
| <b>Totals</b>         | <b>\$58,649.87</b> | <b>\$226,649.87</b> | <b>\$58,649.87</b> | <b>\$226,649.87</b> | <b>\$114,656.54</b>           | <b>\$0.00</b> | <b>\$0.00</b>        | <b>\$0.00</b> |

02/04/2022

|                       | Opening Ledger      | Closing Ledger      | Opening Available   | Closing Available   | Average Closing Available MTD | 1 - Day Float | 2 or More Days Float | Total Float   |
|-----------------------|---------------------|---------------------|---------------------|---------------------|-------------------------------|---------------|----------------------|---------------|
| ABA321081669          |                     |                     |                     |                     |                               |               |                      |               |
| ENVISIONEERS INC 8547 |                     |                     |                     |                     |                               |               |                      |               |
| <u>80009718547</u>    | \$226,649.87        | \$226,416.66        | \$226,649.87        | \$226,416.66        | \$0.00                        | \$0.00        | \$0.00               | \$0.00        |
| <b>Totals</b>         | <b>\$226,649.87</b> | <b>\$226,416.66</b> | <b>\$226,649.87</b> | <b>\$226,416.66</b> | <b>\$0.00</b>                 | <b>\$0.00</b> | <b>\$0.00</b>        | <b>\$0.00</b> |

02/07/2022

|                       | Opening Ledger      | Closing Ledger      | Opening Available   | Closing Available   | Average Closing Available MTD | 1 - Day Float | 2 or More Days Float | Total Float   |
|-----------------------|---------------------|---------------------|---------------------|---------------------|-------------------------------|---------------|----------------------|---------------|
| ABA321081669          |                     |                     |                     |                     |                               |               |                      |               |
| ENVISIONEERS INC 8547 |                     |                     |                     |                     |                               |               |                      |               |
| <u>80009718547</u>    | \$226,416.66        | \$225,418.35        | \$226,416.66        | \$225,372.35        | \$32,196.05                   | \$0.00        | \$0.00               | \$0.00        |
| <b>Totals</b>         | <b>\$226,416.66</b> | <b>\$225,418.35</b> | <b>\$226,416.66</b> | <b>\$225,372.35</b> | <b>\$32,196.05</b>            | <b>\$0.00</b> | <b>\$0.00</b>        | <b>\$0.00</b> |

02/08/2022

|  | Opening Ledger | Closing Ledger | Opening Available | Closing Available | Average Closing Available MTD | 1 - Day Float | 2 or More Days Float | Total Float |
|--|----------------|----------------|-------------------|-------------------|-------------------------------|---------------|----------------------|-------------|
|--|----------------|----------------|-------------------|-------------------|-------------------------------|---------------|----------------------|-------------|

|                       | Ledger              | Ledger              | Available           | Available           | Available MTD      | Float         | Float             |                   |
|-----------------------|---------------------|---------------------|---------------------|---------------------|--------------------|---------------|-------------------|-------------------|
| ABA321081669          |                     |                     |                     |                     |                    |               |                   |                   |
| ENVISIONEERS INC 8547 |                     |                     |                     |                     |                    |               |                   |                   |
| <u>80009718547</u>    | \$225,418.35        | \$226,881.30        | \$225,372.35        | \$226,835.30        | \$28,354.41        | \$0.00        | \$3,250.00        | \$3,250.00        |
| <b>Totals</b>         | <b>\$225,418.35</b> | <b>\$226,881.30</b> | <b>\$225,372.35</b> | <b>\$226,835.30</b> | <b>\$28,354.41</b> | <b>\$0.00</b> | <b>\$3,250.00</b> | <b>\$3,250.00</b> |

02/09/2022

|                       | Opening Ledger      | Closing Ledger      | Opening Available   | Closing Available   | Average Closing Available MTD | 1 - Day Float | 2 or More Days Float | Total Float       |
|-----------------------|---------------------|---------------------|---------------------|---------------------|-------------------------------|---------------|----------------------|-------------------|
| ABA321081669          |                     |                     |                     |                     |                               |               |                      |                   |
| ENVISIONEERS INC 8547 |                     |                     |                     |                     |                               |               |                      |                   |
| <u>80009718547</u>    | \$226,881.30        | \$226,881.30        | \$226,835.30        | \$226,881.30        | \$25,209.03                   | \$0.00        | \$0.00               | \$6,500.00        |
| <b>Totals</b>         | <b>\$226,881.30</b> | <b>\$226,881.30</b> | <b>\$226,835.30</b> | <b>\$226,881.30</b> | <b>\$25,209.03</b>            | <b>\$0.00</b> | <b>\$0.00</b>        | <b>\$6,500.00</b> |

02/10/2022

|                       | Opening Ledger      | Closing Ledger      | Opening Available   | Closing Available   | Average Closing Available MTD | 1 - Day Float | 2 or More Days Float | Total Float       |
|-----------------------|---------------------|---------------------|---------------------|---------------------|-------------------------------|---------------|----------------------|-------------------|
| ABA321081669          |                     |                     |                     |                     |                               |               |                      |                   |
| ENVISIONEERS INC 8547 |                     |                     |                     |                     |                               |               |                      |                   |
| <u>80009718547</u>    | \$226,881.30        | \$226,835.30        | \$226,881.30        | \$226,835.30        | \$22,683.53                   | \$0.00        | \$0.00               | \$6,500.00        |
| <b>Totals</b>         | <b>\$226,881.30</b> | <b>\$226,835.30</b> | <b>\$226,881.30</b> | <b>\$226,835.30</b> | <b>\$22,683.53</b>            | <b>\$0.00</b> | <b>\$0.00</b>        | <b>\$6,500.00</b> |

02/11/2022

|                       | Opening Ledger      | Closing Ledger      | Opening Available   | Closing Available   | Average Closing Available MTD | 1 - Day Float | 2 or More Days Float | Total Float       |
|-----------------------|---------------------|---------------------|---------------------|---------------------|-------------------------------|---------------|----------------------|-------------------|
| ABA321081669          |                     |                     |                     |                     |                               |               |                      |                   |
| ENVISIONEERS INC 8547 |                     |                     |                     |                     |                               |               |                      |                   |
| <u>80009718547</u>    | \$226,835.30        | \$226,291.66        | \$226,835.30        | \$226,291.66        | \$20,571.97                   | \$0.00        | \$0.00               | \$6,500.00        |
| <b>Totals</b>         | <b>\$226,835.30</b> | <b>\$226,291.66</b> | <b>\$226,835.30</b> | <b>\$226,291.66</b> | <b>\$20,571.97</b>            | <b>\$0.00</b> | <b>\$0.00</b>        | <b>\$6,500.00</b> |

02/12/2022

|                       | Opening Ledger      | Closing Ledger      | Opening Available   | Closing Available   | Average Closing Available MTD | 1 - Day Float | 2 or More Days Float | Total Float       |
|-----------------------|---------------------|---------------------|---------------------|---------------------|-------------------------------|---------------|----------------------|-------------------|
| ABA321081669          |                     |                     |                     |                     |                               |               |                      |                   |
| ENVISIONEERS INC 8547 |                     |                     |                     |                     |                               |               |                      |                   |
| <u>80009718547</u>    | \$226,291.66        | \$226,291.66        | \$226,291.66        | \$226,291.66        | \$18,857.64                   | \$0.00        | \$0.00               | \$6,500.00        |
| <b>Totals</b>         | <b>\$226,291.66</b> | <b>\$226,291.66</b> | <b>\$226,291.66</b> | <b>\$226,291.66</b> | <b>\$18,857.64</b>            | <b>\$0.00</b> | <b>\$0.00</b>        | <b>\$6,500.00</b> |

02/14/2022

|                       | Opening Ledger      | Closing Ledger      | Opening Available   | Closing Available   | Average Closing Available MTD | 1 - Day Float | 2 or More Days Float | Total Float       |
|-----------------------|---------------------|---------------------|---------------------|---------------------|-------------------------------|---------------|----------------------|-------------------|
| ABA321081669          |                     |                     |                     |                     |                               |               |                      |                   |
| ENVISIONEERS INC 8547 |                     |                     |                     |                     |                               |               |                      |                   |
| <u>80009718547</u>    | \$226,291.66        | \$226,240.67        | \$226,291.66        | \$225,038.15        | \$16,074.15                   | \$0.00        | \$0.00               | \$6,500.00        |
| <b>Totals</b>         | <b>\$226,291.66</b> | <b>\$226,240.67</b> | <b>\$226,291.66</b> | <b>\$225,038.15</b> | <b>\$16,074.15</b>            | <b>\$0.00</b> | <b>\$0.00</b>        | <b>\$6,500.00</b> |

02/15/2022

|                       | Opening Ledger      | Closing Ledger      | Opening Available   | Closing Available   | Average Closing Available MTD | 1 - Day Float | 2 or More Days Float | Total Float       |
|-----------------------|---------------------|---------------------|---------------------|---------------------|-------------------------------|---------------|----------------------|-------------------|
| ABA321081669          |                     |                     |                     |                     |                               |               |                      |                   |
| ENVISIONEERS INC 8547 |                     |                     |                     |                     |                               |               |                      |                   |
| <u>80009718547</u>    | \$226,240.67        | \$169,551.75        | \$225,038.15        | \$169,551.75        | \$11,303.45                   | \$0.00        | \$0.00               | \$6,500.00        |
| <b>Totals</b>         | <b>\$226,240.67</b> | <b>\$169,551.75</b> | <b>\$225,038.15</b> | <b>\$169,551.75</b> | <b>\$11,303.45</b>            | <b>\$0.00</b> | <b>\$0.00</b>        | <b>\$6,500.00</b> |

02/16/2022

|                       | Opening Ledger      | Closing Ledger      | Opening Available   | Closing Available   | Average Closing Available MTD | 1 - Day Float | 2 or More Days Float | Total Float       |
|-----------------------|---------------------|---------------------|---------------------|---------------------|-------------------------------|---------------|----------------------|-------------------|
| ABA321081669          |                     |                     |                     |                     |                               |               |                      |                   |
| ENVISIONEERS INC 8547 |                     |                     |                     |                     |                               |               |                      |                   |
| <u>80009718547</u>    | \$169,551.75        | \$165,467.44        | \$169,551.75        | \$165,467.44        | \$10,341.72                   | \$0.00        | \$0.00               | \$6,500.00        |
| <b>Totals</b>         | <b>\$169,551.75</b> | <b>\$165,467.44</b> | <b>\$169,551.75</b> | <b>\$165,467.44</b> | <b>\$10,341.72</b>            | <b>\$0.00</b> | <b>\$0.00</b>        | <b>\$6,500.00</b> |

02/17/2022

|                       | Opening Ledger      | Closing Ledger      | Opening Available   | Closing Available   | Average Closing Available MTD | 1 - Day Float | 2 or More Days Float | Total Float       |
|-----------------------|---------------------|---------------------|---------------------|---------------------|-------------------------------|---------------|----------------------|-------------------|
| ABA321081669          |                     |                     |                     |                     |                               |               |                      |                   |
| ENVISIONEERS INC 8547 |                     |                     |                     |                     |                               |               |                      |                   |
| <u>80009718547</u>    | \$165,467.44        | \$165,124.75        | \$165,467.44        | \$164,438.69        | \$9,672.86                    | \$0.00        | \$0.00               | \$6,500.00        |
| <b>Totals</b>         | <b>\$165,467.44</b> | <b>\$165,124.75</b> | <b>\$165,467.44</b> | <b>\$164,438.69</b> | <b>\$9,672.86</b>             | <b>\$0.00</b> | <b>\$0.00</b>        | <b>\$6,500.00</b> |

02/18/2022

|                       | Opening Ledger      | Closing Ledger      | Opening Available   | Closing Available   | Average Closing Available MTD | 1 - Day Float | 2 or More Days Float | Total Float       |
|-----------------------|---------------------|---------------------|---------------------|---------------------|-------------------------------|---------------|----------------------|-------------------|
| ABA321081669          |                     |                     |                     |                     |                               |               |                      |                   |
| ENVISIONEERS INC 8547 |                     |                     |                     |                     |                               |               |                      |                   |
| <u>80009718547</u>    | \$165,124.75        | \$164,469.00        | \$164,438.69        | \$164,330.69        | \$9,129.48                    | \$0.00        | \$0.00               | \$6,500.00        |
| <b>Totals</b>         | <b>\$165,124.75</b> | <b>\$164,469.00</b> | <b>\$164,438.69</b> | <b>\$164,330.69</b> | <b>\$9,129.48</b>             | <b>\$0.00</b> | <b>\$0.00</b>        | <b>\$6,500.00</b> |

02/19/2022

|                       | Opening Ledger      | Closing Ledger      | Opening Available   | Closing Available   | Average Closing Available MTD | 1 - Day Float | 2 or More Days Float | Total Float       |
|-----------------------|---------------------|---------------------|---------------------|---------------------|-------------------------------|---------------|----------------------|-------------------|
| ABA321081669          |                     |                     |                     |                     |                               |               |                      |                   |
| ENVISIONEERS INC 8547 |                     |                     |                     |                     |                               |               |                      |                   |
| <u>80009718547</u>    | \$164,469.00        | \$164,469.00        | \$164,330.69        | \$164,367.99        | \$8,650.95                    | \$0.00        | \$0.00               | \$6,500.00        |
| <b>Totals</b>         | <b>\$164,469.00</b> | <b>\$164,469.00</b> | <b>\$164,330.69</b> | <b>\$164,367.99</b> | <b>\$8,650.95</b>             | <b>\$0.00</b> | <b>\$0.00</b>        | <b>\$6,500.00</b> |

02/22/2022

|                       | Opening Ledger | Closing Ledger | Opening Available | Closing Available | Average Closing Available MTD | 1 - Day Float | 2 or More Days Float | Total Float |
|-----------------------|----------------|----------------|-------------------|-------------------|-------------------------------|---------------|----------------------|-------------|
| ABA321081669          |                |                |                   |                   |                               |               |                      |             |
| ENVISIONEERS INC 8547 |                |                |                   |                   |                               |               |                      |             |
| <u>80009718547</u>    |                |                |                   |                   |                               |               |                      |             |
| <b>Totals</b>         |                |                |                   |                   |                               |               |                      |             |

|                    |                     |                     |                     |                     |                   |               |               |                   |
|--------------------|---------------------|---------------------|---------------------|---------------------|-------------------|---------------|---------------|-------------------|
| <u>80009718547</u> | \$164,469.00        | \$164,989.14        | \$164,367.99        | \$164,989.14        | \$7,499.51        | \$0.00        | \$0.00        | \$6,500.00        |
| <b>Totals</b>      | <b>\$164,469.00</b> | <b>\$164,989.14</b> | <b>\$164,367.99</b> | <b>\$164,989.14</b> | <b>\$7,499.51</b> | <b>\$0.00</b> | <b>\$0.00</b> | <b>\$6,500.00</b> |

## 02/23/2022

|                       | Opening Ledger      | Closing Ledger      | Opening Available   | Closing Available   | Average Closing Available MTD | 1 - Day Float | 2 or More Days Float | Total Float       |
|-----------------------|---------------------|---------------------|---------------------|---------------------|-------------------------------|---------------|----------------------|-------------------|
| ABA321081669          |                     |                     |                     |                     |                               |               |                      |                   |
| ENVISIONEERS INC 8547 |                     |                     |                     |                     |                               |               |                      |                   |
| <u>80009718547</u>    | \$164,989.14        | \$164,479.50        | \$164,989.14        | \$164,479.50        | \$7,151.28                    | \$0.00        | \$0.00               | \$6,500.00        |
| <b>Totals</b>         | <b>\$164,989.14</b> | <b>\$164,479.50</b> | <b>\$164,989.14</b> | <b>\$164,479.50</b> | <b>\$7,151.28</b>             | <b>\$0.00</b> | <b>\$0.00</b>        | <b>\$6,500.00</b> |

## 02/24/2022

|                       | Opening Ledger      | Closing Ledger      | Opening Available   | Closing Available   | Average Closing Available MTD | 1 - Day Float | 2 or More Days Float | Total Float       |
|-----------------------|---------------------|---------------------|---------------------|---------------------|-------------------------------|---------------|----------------------|-------------------|
| ABA321081669          |                     |                     |                     |                     |                               |               |                      |                   |
| ENVISIONEERS INC 8547 |                     |                     |                     |                     |                               |               |                      |                   |
| <u>80009718547</u>    | \$164,479.50        | \$163,841.79        | \$164,479.50        | \$163,841.79        | \$6,826.74                    | \$0.00        | \$0.00               | \$6,500.00        |
| <b>Totals</b>         | <b>\$164,479.50</b> | <b>\$163,841.79</b> | <b>\$164,479.50</b> | <b>\$163,841.79</b> | <b>\$6,826.74</b>             | <b>\$0.00</b> | <b>\$0.00</b>        | <b>\$6,500.00</b> |

## 02/25/2022

|                       | Opening Ledger      | Closing Ledger      | Opening Available   | Closing Available   | Average Closing Available MTD | 1 - Day Float | 2 or More Days Float | Total Float       |
|-----------------------|---------------------|---------------------|---------------------|---------------------|-------------------------------|---------------|----------------------|-------------------|
| ABA321081669          |                     |                     |                     |                     |                               |               |                      |                   |
| ENVISIONEERS INC 8547 |                     |                     |                     |                     |                               |               |                      |                   |
| <u>80009718547</u>    | \$163,841.79        | \$163,841.79        | \$163,841.79        | \$163,841.79        | \$6,553.67                    | \$0.00        | \$0.00               | \$6,500.00        |
| <b>Totals</b>         | <b>\$163,841.79</b> | <b>\$163,841.79</b> | <b>\$163,841.79</b> | <b>\$163,841.79</b> | <b>\$6,553.67</b>             | <b>\$0.00</b> | <b>\$0.00</b>        | <b>\$6,500.00</b> |

## 02/26/2022

|                       | Opening Ledger      | Closing Ledger      | Opening Available   | Closing Available   | Average Closing Available MTD | 1 - Day Float | 2 or More Days Float | Total Float       |
|-----------------------|---------------------|---------------------|---------------------|---------------------|-------------------------------|---------------|----------------------|-------------------|
| ABA321081669          |                     |                     |                     |                     |                               |               |                      |                   |
| ENVISIONEERS INC 8547 |                     |                     |                     |                     |                               |               |                      |                   |
| <u>80009718547</u>    | \$163,841.79        | \$163,841.79        | \$163,841.79        | \$163,841.79        | \$6,301.61                    | \$0.00        | \$0.00               | \$6,500.00        |
| <b>Totals</b>         | <b>\$163,841.79</b> | <b>\$163,841.79</b> | <b>\$163,841.79</b> | <b>\$163,841.79</b> | <b>\$6,301.61</b>             | <b>\$0.00</b> | <b>\$0.00</b>        | <b>\$6,500.00</b> |

## 02/28/2022

|                       | Opening Ledger      | Closing Ledger      | Opening Available   | Closing Available   | Average Closing Available MTD | 1 - Day Float | 2 or More Days Float | Total Float       |
|-----------------------|---------------------|---------------------|---------------------|---------------------|-------------------------------|---------------|----------------------|-------------------|
| ABA321081669          |                     |                     |                     |                     |                               |               |                      |                   |
| ENVISIONEERS INC 8547 |                     |                     |                     |                     |                               |               |                      |                   |
| <u>80009718547</u>    | \$163,841.79        | \$157,223.18        | \$163,841.79        | \$157,223.18        | \$5,615.11                    | \$0.00        | \$0.00               | \$6,500.00        |
| <b>Totals</b>         | <b>\$163,841.79</b> | <b>\$157,223.18</b> | <b>\$163,841.79</b> | <b>\$157,223.18</b> | <b>\$5,615.11</b>             | <b>\$0.00</b> | <b>\$0.00</b>        | <b>\$6,500.00</b> |

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## Campus Director

Reports to Director of Programs Full Time/Exempt

### Who We Are

The leadership and staff of Envisioneers have been working collaboratively with schools in the San Francisco Bay Area as Citizen Schools for 20 years. Middle school students benefit from mentorship and hands-on learning experiences that spark curiosity and illuminate the world of opportunity available through education. Our proven Extended Learning Time (ELT) and Apprenticeship program models connect students with a second shift of educators that includes Teaching Associate Leads, AmeriCorps service members and volunteer Career Mentors from community organizations, local businesses and major corporations like Cisco and Western Digital.

**Join us as we launch Envisioneers** and help accelerate student outcomes in social emotional learning, academic growth, and equity in education. You can learn more about our mission, history and results on our website.

### What We Offer

- An established program model with immediate and long-term impact on the lives of middle school students, existing relationships in four Bay Area School districts, and a reputation for high quality engagement with student scholars, classroom teachers and volunteers.
- Frequent collaboration with passionate, curious, driven leaders focused on student impact.
- Regular participation and active engagement in leadership training through meetings with job-alike colleagues and supervisors in the Envisioneers network.
- A welcoming atmosphere for individuals interested in growing their own skills in leadership, supervision, instruction and program quality.
- Competitive salary and full benefits: health care, 401(K), Flexible PTO and a month-long sabbatical awarded after five years of employment.
- Annual professional development stipend after eight months of employment.

### The Opportunity

Envisioneers seeks a talented, enthusiastic, and diverse cohort of educators to lead ELT and Apprenticeship programs at public and charter schools sites in San Pablo, Oakland, Redwood City and/or San Jose. A successful Campus Director will see students measurably increase their SEL skills in self-efficacy and self-confidence while also achieving significant gains in math, reading, and writing.

With a strong organizational mission and vision to bring more justice, equity, diversity and inclusion into our organization, you will:

- **Lead**
  - Inspire others by modeling outstanding performance, unrelenting optimism, and a dedicated focus on Envisioneers' core values.
  - Express confidence in self and others, as well as a strong belief in the Envisioneers program as a vehicle for student success.
  - Maintain a keen focus on goals and the vision for sustained success.
- **Supervise**
  - Supervise a team of AmeriCorps Teaching Fellows, Teaching Associate Leads, Community Volunteers, and Career Mentors with curiosity, empathy, and confidence and always ask for clarity and understanding.
  - Ensure that all elements of the Envisioneers' program are delivered as designed.
  - Support teaching leads so that all scholars are benefiting from social emotional and academic support.
- **Elevate**
  - Raise all stakeholders' voices ensuring all are heard, especially the voices of our students, families and partners.
- **Deliver**
  - Fulfill all aspects of the Envisioneers program, mission and vision: to bring equity to education and the social emotional skills of self awareness, self confidence and belonging: " I am; I can; I belong."
- **Communicate**
  - Message Envisioneers' Theory of Impact clearly and consistently to all constituencies as one of the organization's lead influencers and brand ambassadors.
- **Collaborate**
  - Work effectively with regional team members, volunteers, educators, school staff, funders and sponsors.

## **Drive our Theory of Impact** ***The Responsibilities***

- **Campus Culture**
  - Promote a safe and nurturing environment for all staff and students.
  - Develop and support a strong, positive campus culture for both the

Envisioneers team and the community-at-large utilizing an asset-based, inclusive approach.

- Work to ensure all team leads feel heard, supported and appreciated with the goal of 100% annual retention
- **Program Quality**
  - Collaborate with school administration and campus team to plan and implement programming that adheres to Envisioneers' Theory of Impact
  - Support SEL activities to create meaningful academic, behavioral and career growth for all scholars.
  - Utilize campus data and survey analysis to assess and redesign as needed and to fulfill the following grant requirements:
    - *ASES attendance requirements of 85% attendance rate for student scholars*
    - *80% of Volunteers report experience met or exceeded expectations with a Net Promoter Score (NPS) of 9 or above*
    - *80% of Envisioneers scholars reach grade level proficiency*
    - *80% of school partners rate our partnership with NPS of 9 or above*
    - *75% of scholars show an increase in self regulation*
- **Performance Management**
  - Conduct weekly one-on-one coaching meetings and quarterly performance conversations for all direct reports, emphasize strengths and areas for growth.
  - Regularly update staff and coach on any performance challenges and implement performance improvement plans when necessary.
  - Set meaningful individual and team SMART goals and create concrete plans to attain them.
  - Serve as supervisor, coach, and mentor for a team of AmeriCorps service members, teaching associate leads, and others, supporting their growth as educators and professionals.
    - Develop and lead training that meets individual needs and team goals.
    - Serve as instructional leader delivering well designed Friday professional development workshops.
    - Co-lead monthly regional professional development sessions.
    - Conduct consistent classroom and/or online observations providing constructive feedback to staff and volunteers, modeling high quality teaching that conforms to a culturally responsive and healing centered teaching approach.
- **Operations Management**
  - Hold responsibility for campus budget, program schedule, all survey distribution and completion, and support on student data collection.

- Ensure safety of all program participants and compliance with all Envisioneers policies, state and local standards, and grant mandates.
- Ensure Americorps compliance on attendance, fundraising, branding, etc.
- **Stakeholder Engagement**
  - Build and support collaborative relationships with all of our stakeholders - families, the community partners and volunteers, students, regional team, campus admin and staff.
  - Design to develop meaningful roles and leadership opportunities for students.
  - Establish effective, measurable family engagement and communication strategies that support the development of meaningful relationships, including conducting quarterly family nights, and ensuring staff make weekly calls to families.
  - Cultivate community, philanthropic, volunteer and local partnerships through site visits and events that increase participation and financial support.
  - Act as Envisioneers Site Coordinator to the district
    - Attend all mandatory Site Coordinator meetings
    - Oversee state and district attendance reporting
    - Support Envisioneers' Continuous Quality Improvement (CQI) Plans
- **Hiring**
  - Participate in annual and ongoing talent recruitment and selection for campus staff and service members. Give clear and accurate feedback on candidates aligned with Envisioneers' hiring practices.
  - Ensure effective new hire orientation including introduction to school staff, regional staff, families and various stakeholders.

## Requirements and Qualifications

The ideal candidate will have:

- **Educational Leadership:** a track record of driving student academic and social emotional learning (SEL) outcomes and at least one year of experience providing coaching and/or mentorship to new teachers. Experience with middle school students is preferred.
- **Inspiration:** demonstrated success in moving a team to achieving goals through culturally-responsive teaching and student support.
- **Achievement:** a goal-oriented focus with personal ownership of results and experience overcoming barriers to achieving ambitious outcomes.
- **Community:** appreciation for the importance of diversity, equity, and inclusion as a core driver of all decisions and a belief that education is vital and requires community-wide support.

- **Team Building:** a proven record establishing and maintaining strong relationships with staff and external partners, and an ability to create buy-in from multiple stakeholders.
- **Solution-Oriented:** a leader ready to work with their team with an attitude of joy and a passion for the work. A mindset of positivity and grit.
- **Experience**
  - Bachelor's degree required; Master's degree in a relevant subject preferred.
  - Two years of experience leading a K-12 classroom or similar experience working with middle schoolers preferred
  - Four years of professional, post-undergraduate experience preferred.
  - At least one year of experience managing or leading a group of adults towards measurable outcomes.
  - Some experience managing a small to moderate budget
  - Spanish language skills are highly preferred.

## Compensation

Salary will be competitive with similar roles at non-profit organizations of comparable size and includes a robust benefits package. We offer medical and dental insurance, flexible PTO, a 401(k) plan, professional development stipend, and more.

*Envisioneers is an equal opportunity employer and enthusiastically encourages qualified individuals of all backgrounds to apply for employment. Envisioneers does not discriminate on the basis of race, ethnicity, gender identity, sexual orientation, religion, national origin, disability, or military veteran status.*

## To Apply

Email [mariadrake@citizenschools.org](mailto:mariadrake@citizenschools.org) with **Campus Director** in the subject line. Include your cover letter and resume in the body of your email. Attachments will NOT be opened. No calls please.

**EQUAL OPPORTUNITY STATEMENT:** *Envisioneers is an equal opportunity employer and does not discriminate on the basis of sex, race, color, religion, sexual orientation, national origin, cultural heritage, ancestry, political belief, age, marital status, pregnancy, physical or mental disability or veteran status. Envisioneers is compliant with the American with Disabilities Act and we are committed to making special accommodations for your interview or work as a member of our team. If specific accommodations are needed, please notify csandoval and we will work to accommodate your needs.*

## Teaching Associate Lead

Reports to Campus Director      Part Time/Hourly

### Who We Are

The mission of Envisioneers is to combat systemic inequity in education by fostering and cultivating the academic and social emotional skills of our scholars while exposing them to project-based learning and industry mentors. Envisioneers works collaboratively with schools in four California districts, connecting students with a second shift of educators: AmeriCorps service members, Teaching Associate Leads, and over 5,000 volunteer Career Teachers from community organizations, local businesses and major corporations like Cisco and Western Digital. Students benefit from mentorship and hands-on learning experiences that spark curiosity and illuminate the world of opportunity available through education.

### What We Offer

- A proven program model with immediate and long-term impact on the lives of middle school students.
- A welcoming atmosphere for individuals seeking to grow their instructional skills and interest in a career in teaching or non-profits.
- Opportunities to form relationships with passionate, smart, Envisioneers colleagues focused on student impact.
- Regular meetings with your Campus Director to receive coaching feedback on goals and performance and monthly professional development in supporting student outcomes.

### The Opportunity:

Envisioneers seeks a talented, enthusiastic, and diverse cohort of educators to serve as part-time Teaching Associate Leads (TALs) in San Jose, Oakland, Redwood City, and Contra Costa for the 2021-2022 academic year. As a Teaching Associate you will work approximately 15-25 hours per week. Schedules vary by campus, but all TALs work Monday through Friday for three to five hours between the hours of 12:00 and 6:00 p.m, with additional hours possible for morning push in and professional development sessions.

TALs are vital members of the Envisioneers program who provide the following direct services to students: teach after school classes, co-lead apprenticeships, design and teach student electives, and, in some cases, provide push-in or instructional aide services to teachers during the regular day school program (first shift). The TAL role affords all of the opportunities of the Teaching Fellowship (TF) role, but allows for a shorter, more personalized schedule, with some free time during the day to pursue other opportunities and interests.

## **Responsibilities:**

- Work with your campus team to create academic and elective activities, including homework support, that promote academic growth and social emotional learning
- Work with Envisioneers Mentors, career-based volunteers to create apprenticeships that allow students to grow in their social emotional learning and explore career fields
- Work with your campus team to create a culturally responsive environment that focuses on diversity, equity and inclusion.
- Inspire students to set and achieve ambitious academic and personal goals
- Partner with families, colleagues, and school staff to support student growth and hold students to consistently high expectations
- Participate in Envisioneers' system of student incentives, recognition, and student behavior expectations
- Create culturally-responsive opportunities for students that strengthen the connection between academic success, college, and career.
- Collect and track student data in order to make decisions for individual students and the program
- Create and reinforce a culture of achievement and the idea that hard work + opportunity = success
- Build and leverage relationships with students, families, volunteers, peers, and the school community

## **Requirements:**

- Knowledge of and commitment to the Envisioneers' mission
- Academic skills – proficiency in middle school math and English
- Coachable attitude, able to receive and implement constructive feedback
- Commitment to diversity, equity and inclusion with Envisioneers team members and all stakeholders
- Experience working with middle school youth preferred
- Ability to build relationships and influence students, colleagues, and community members
- Strong oral and written communication skills
- Strong detail orientation, time management, and organization skills
- 2 years of college – 48 units OR a High School Diploma/GED AND pass district Instructional Aide Exam (75% is passing grade)
- Spanish language skills a plus

## Qualifications we are seeking:

- **Organization:** Uses a consistent practice to manage materials, information, and commitments in order to successfully meet expectations in a fast-paced work environment.
- **Excellent Communicator:** Demonstrates active, intentional, and ongoing engagement with a diverse range of individuals and groups. Routinely makes room for multiple perspectives
- **Achievement:** Goal-oriented mindset takes personal ownership for results and has a track record of overcoming barriers to achieve ambitious outcomes.
- **Commitment to Service:** Mobilizer who believes education is a vital project that requires community-wide support.
- **Passion for Educational Equity:** Willing to remain curious and open to all students' and team needs supporting them where they are.

## Compensation

Salary is hourly at 17.50 per hour, slightly higher than those competitive with similar roles at non-profit organizations of comparable size.

*Envisioneers is an equal opportunity employer and enthusiastically encourages qualified individuals of all backgrounds to apply for employment. Envisioneers does not discriminate on the basis of race, ethnicity, gender identity, sexual orientation, religion, national origin, disability, or military veteran status.*

## To Apply

Email [envisioneers2021@gmail.com](mailto:envisioneers2021@gmail.com) with **Teaching Associate Lead** in the subject line. Include your cover letter and resume in the body of your email. Attachments will NOT be opened. No calls please.



## **AmeriCorps: National Teaching Fellowship (Class of '22)**

Help all students thrive in school and beyond through hands-on learning and career mentors. Join the National Teaching Fellowship in California.

Citizen Schools is partnering with Envisioneers to deliver programming for the 2021-2022 school year. The mission of Envisioneers is to combat systemic inequity in education by fostering and cultivating the academic and social emotional skills of our scholars while exposing them to project-based learning and industry mentors.

As an AmeriCorps National Teaching Fellow at Citizen Schools, you'll change the lives of middle school students. You'll serve as a member of a diverse team of caring adults dedicated to transforming the school day for middle school students in low-income communities. We do this by adding three hours to the end of the school day, during which students receive additional academic support in math or language arts, complete homework in structured sessions, and participate in hands-on apprenticeships taught by volunteer professionals from the community.

As a AmeriCorps National Teaching Fellow, you will be performing an extraordinary act of citizenship, helping the nation to address one of its greatest challenges, educating our youth in ways that promote self-belief, college readiness, and the skills needed to achieve their dreams. It is an opportunity that leads to a better future for students, yet it also holds rich benefits for those willing to dedicate two years of their life to national service through AmeriCorps. That's why we call the opportunity: Teach, Serve, Grow.

All National Teaching Fellow positions begin in August 2021 with Summer Institute, an intensive training program during which you will learn the skills needed to successfully serve in low-income schools and deliver high-quality academic enrichment to students.

We have 4 locations in Northern California: San Jose (Alum Rock School District), Oakland (Oakland Unified School District), Redwood City (Redwood City School District, and West Contra Costa (West Contra Costa Unified School District).

## **ESSENTIAL DUTIES & SERVICE MEMBER FUNCTIONS**

During your two years as an AmeriCorps National Teaching Fellow you will:

**SERVE:** The ability to connect with students day-to-day and help them through the difficult years of middle school is a profound opportunity for many individuals who join the Fellowship. Fellows are eager to impact the academics of students directly, but also have the opportunity to influence student growth through the lens of a mentor and coach.

- Act as a liaison and advocate for students in the school community
- Communicate regularly with families to discuss student progress and program updates
- Partner with volunteers from businesses, nonprofits, universities, and other local organizations, to create relevant, real-world learning experiences for students
- Identify assets that already exist in the communities we serve, and support with making direct connections to our students and families
- Create and reinforce a culture of achievement
- Build lasting relationships with students, families, and volunteers that increase the school's impact in the community
- Create opportunities for students that strengthen the connection between academic success, college, and career

**TEACH:** Driving academic outcomes is a core component of our mission. On many campuses, our Fellows push in or pull out small groups of students to aid instruction that is occurring during the first shift. (occasionally Fellows may deliver new content in select regions only and may vary by campus). Teaching Fellows have an important role to play in the extension of learned content or “reteaching”/ reinforcing what was previously delivered by a member of the first shift.

- Deliver hands-on, engaging lessons in Math and/or English Language Arts and provide structured homework/project support
- Partner with first shift teachers and families to support student academic and personal growth
- Inspire students to set and achieve ambitious goals, and hold students to consistently high expectations
- Monitor and use student learning data to inform instructional/ program decisions
- Prepare students for college by cementing college-to-career-connections
- Motivate students to attain the knowledge, skills, and beliefs to achieve personal goals
- Explicitly communicate the idea that hard work + opportunity = success

- Steward good classroom practice, including the creation of a safe learning environment

**GROW:** Training and support are critical components of the Teaching Fellowship experience and contribute greatly to our Teaching Fellows' overall successes, both in their direct service, and their personal/professional development. We are committed to providing ongoing coaching opportunities throughout their two years of service that will lead to student impact, as well as career advancement.

- Be challenged by diverse professional experiences at school, in the regional office, and with partner organizations
- Impact program results through direct responsibility for school/ region-wide projects
- Plan, execute, and participate in a variety of school and regional events
- Network with senior professionals in diverse disciplines including: technology, law, finance, and higher education
- Collect, analyze, and use data to inform decision-making
- Operate in an entrepreneurial environment with access to campus, regional, and national leadership
- Give and receive feedback, strengthening personal and professional skills
- Grow cultural competencies through the opportunity to work as part of a diverse professional and school community
- Receive career pathway development training and opportunities in your second year of service, such as resume coaching, job identification that aligns with your interests, as well as interviewing coaching techniques

Service for Teaching Fellows will begin with summer training in August, an intensive learning program designed to provide you with the skills needed to successfully serve students from underserved communities.

## **DECIDING TO SERVE**

It takes a special person to work in education reform and to meet the challenges of today's schools. Before applying, please consider the following qualifications, skills, and experiences that we have found lead to success as a Teaching Fellow. No one candidate will meet every criteria; however, it is a good exercise to review the list in advance of submitting your application to ensure you believe you have "what it takes" to support middle school students to help them thrive in school and beyond.

- Knowledge of and commitment to the Citizen Schools' mission to serve students in low-income communities
- Experience working or volunteering with students
- Passion for changing the lives of middle school students
- Desire to work with students and families in low-income communities

- Strong academic skills in Math and English
- Ability to coach and mentor others
- Ability to solicit and receive adjusting feedback
- Commitment to teamwork and collaboration with colleagues from diverse backgrounds
- Ability to build relationships and influence students, colleagues, and community members
- Outstanding communication skills, strong detail orientation, time management, and organization skills
- Demonstrated leadership ability
- Demonstration of Citizen Schools' values: Confidence, Curiosity, Diversity, Equity, and Inclusion, Perseverance, Teamwork

PLEASE NOTE: You must meet these educational requirements in order to apply to be a Teaching Fellow.

- Credit Hours: Successful completion of at least 60 credit hours or equivalent at an accredited post-secondary institution (community college, college, or university). Credit hours are calculated based on the standard 1 credit hour per hour spent in class each week during a semester.
- GPA: Achievement of a cumulative GPA of 2.5 or higher.

If you are interested in serving and do not meet the education requirement, please take a look at our [school support positions](#). Please note that the position locations may vary.

## **COMPENSATION & BENEFITS**

National Teaching Fellows receive an annual living stipend of \$23,550, paid out in bi-weekly installments of \$905.77. Please note that the annual living wage is subject to tax.

In addition to this stipend, Teaching Fellows are eligible to receive these benefits while they are serving or upon successful completion of at least 1700 hours of service each year.

- Segal Education Award of \$6,195 for each completed year of service (there are [hundreds of schools](#) that match the Education Award, \$6,000+)
- Forbearance of Student loans for qualified loans during your two years of service
- Medical, dental, and vision insurance is provided to you free of charge for the duration of your service
- Childcare benefits to assist with the costs of childcare during your 2 years of service
- National Network of AmeriCorps Members and alumni who are available to support you during your 2 years of service and afterward

- Ongoing Professional Development and other learning opportunities throughout 2-year service commitment

\*For a more comprehensive view of each of the above benefits, please follow this [link](#).

## **APPLICATION PROCESS**

The admissions process is rigorous, so interested candidates are encouraged to apply early. You can learn more by visiting our website at

[www.citizenschools.org/national-teaching-fellowship](http://www.citizenschools.org/national-teaching-fellowship).

## **PHYSICAL, ENVIRONMENTAL, AND HEALTH & SAFETY REQUIREMENTS**

Serving as an AmeriCorps National Teaching Fellow with Citizen Schools requires members to be able to meet essential requirements in the following categories:

- Physical Requirements: Frequent movement and physical abilities to perform writing, communication and visual responsibilities are key in this service role.
- Health and Safety: Ability to maintain safety and respond to safety situations that commonly occur at schools.
- Environmental Conditions: Placement in urban school settings comes with exposure to many factors.
- Technology/Equipment Use: There are baseline technology requirements in this position that require the ability to use and leverage a computer and other technology aids in schools.

To learn more about specifics within these areas, please [click here](#) or contact a member of the Talent Team for more information.

## **KEEPING SCHOOLS SAFE**

Qualified candidates are required to successfully complete local and AmeriCorps-directed criminal history and sexual offender checks. The requirements for clearance differ by region and school district based on applicable law and what are the defined allowable convictions locally.

You can learn more about AmeriCorps required checks by clicking [here](#). Please note allowable offenses are dictated by the local municipality and can change at the discretion of local districts.

## **EQUAL OPPORTUNITY STATEMENT:**

Citizen Schools is an equal opportunity employer and does not discriminate on the basis of sex, race, color, religion, sexual orientation, gender identity, national origin, cultural heritage, ancestry, political belief, age, marital status, pregnancy, physical or mental disability or veteran status. Citizen Schools is compliant with the American with Disabilities Act and we are committed to making special accommodations for your interview or work as a member of our team.

If specific accommodations are needed during your interview, and/or you have longer-term accommodation needs in order to fulfill the essential functions of this service opportunity, please contact a member of the Citizen Schools talent team and we will work to accommodate your needs.

**IRS** DEPARTMENT OF THE TREASURY  
INTERNAL REVENUE SERVICE  
PHILADELPHIA PA 19255-0023

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ENVISIONEERS INC  
330 TWIN DOLPHIN DR STE 115  
REDWOOD CITY CA 94065

Date of this notice: 03-29-2021

Employer Identification Number:  
86-2828543

Form: SS-4

Number of this notice: CP 575 A

For assistance you may call us at  
1-800-829-4933

IF YOU WRITE, ATTACH THE  
STUB OF THIS NOTICE.

**WE ASSIGNED YOU AN EMPLOYER IDENTIFICATION NUMBER**

Thank you for applying for an Employer Identification Number (EIN). We assigned you EIN 86-2828543. This EIN will identify you, your business accounts, tax returns, and documents, even if you have no employees. Please keep this notice in your permanent records.

When filing tax documents, payments, and related correspondence, it is very important that you use your EIN and complete name and address exactly as shown above. Any variation may cause a delay in processing, result in incorrect information in your account, or even cause you to be assigned more than one EIN. If the information is not correct as shown above, please make the correction using the attached tear-off stub and return it to us.

Based on the information received from you or your representative, you must file the following form(s) by the date(s) shown.

Form 941  
Form 940

10/31/2021  
01/31/2022

If you have questions about the form(s) or the due dates(s) shown, you can call us at the phone number or write to us at the address shown at the top of this notice. If you need help in determining your annual accounting period (tax year), see Publication 538, Accounting Periods and Methods.

We assigned you a tax classification based on information obtained from you or your representative. It is not a legal determination of your tax classification and is not binding on the IRS. If you want a legal determination of your tax classification, you may request a private letter ruling from the IRS under the guidelines in Revenue Procedure 2004-1, 2004-1 I.R.B. 1 (or superseding Revenue Procedure for the year at issue). Note: Certain tax classification elections can be requested by filing Form 8832, Entity Classification Election. See Form 8832 and its instructions for additional information.



## Secretary of State Certificate of Status

I, SHIRLEY N. WEBER, Ph.D., Secretary of State of the State of California, hereby certify:

**Entity Name:** ENVISIONEERS INC.  
**File Number:** C4678018  
**Registration Date:** 12/30/2020  
**Entity Type:** DOMESTIC NONPROFIT CORPORATION  
**Jurisdiction:** CALIFORNIA  
**Status:** ACTIVE (GOOD STANDING)

As of April 27, 2021 (Certification Date), the entity is authorized to exercise all of its powers, rights and privileges in California.

This certificate relates to the status of the entity on the Secretary of State's records as of the Certification Date and does not reflect documents that are pending review or other events that may affect status.

No information is available from this office regarding the financial condition, status of licenses, if any, business activities or practices of the entity.



**IN WITNESS WHEREOF**, I execute this certificate and affix the Great Seal of the State of California this day of April 28, 2021.

A handwritten signature in black ink, appearing to read "S. N. Weber".

**SHIRLEY N. WEBER, Ph.D.**  
**Secretary of State**

**Certificate Verification Number:** REME2DY

To verify the issuance of this Certificate, use the Certificate Verification Number above with the Secretary of State Certification Verification Search available at [bebizfile.sos.ca.gov/certification/index](http://bebizfile.sos.ca.gov/certification/index).



FY22 Envisioneers Board of Directors  
Member List



| Name                   | Title/Organization  |  |
|------------------------|---|--|
| Bob France<br>Term 1   | Micron<br>VPCustomer Engineering<br>Executive committee - Chair                 | france.bob@gmail.com   |
| Wesley Ford<br>Term1   | Argo AI, Engineering Vice President<br>AdHoc benefited                          | twsford@gmail.com  |
| Itzik Gilboa<br>Term 1 | Western Digital, Senior Director Strategic Accounts<br>ProgramChair             | Itzik.Gilboa@sandisk.com   |
| Tracy Meng<br>Term 2   | Checkout.com<br>VP Global Partnerships,   | tmeng21@gmail.com  |
| Karin Meyer<br>Term 2  | Advisor / Technology &<br>Management Consultant<br>Strategy/mentorship chair    | karin@karinmeyer.org   |
| Annie Khalid<br>Term 2 | <i>Director, Legal &amp; Compliance</i><br>Caffeine Inc.,<br>Strategy Committee | anniekhald@gmail.com   |
| Kelly Stuart<br>TErm 3 | CEO, Collaborative Classroom<br>Strategy Chair                                  | kstuart@collaborative classroom.org  |
| Pauline Vogl<br>Term 3 | Manager of Environmental Sustainability<br>Cisco Systems<br>Program Committee   | pavogl@cisco.com   |
| Bret Wallace<br>Term 3 | Senior Associate at Surveyor Capital<br>Development/Finance Chair               | bret.j.wallace@gmail.com   |
| Jaime Zepeda<br>Term3  | HIVE DIVERSITY<br>SVP of Customer and People Success                            | <a href="mailto:jazepeda@linkedin.com">jazepeda@linkedin.com</a><br>jryz83@gmail.cim |

# Envisioneers Board Meeting Minutes December 17, 2021

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## **In attendance:**

Board: Maria Drake, Bob France, Kelly Stuart, Wesley Ford, Pauline Vogl, Brett Wallace, Jaime Zepeda, Annie Khalid, Itzik Gilboa

Staff : Kristin Thomas, Seung Lee, Joseph George team, Renee Lemieux

Guest: Oscar Cruz, New CEO Citizen Schools (through 12:30)

Excused: Karin Meyer, Tracy Meng

**Minutes**: Karin

**Meeting came to order**: 12:02 PM PST

**Meeting came to a close**: 01:43 PST

## Motions & Votes

- Consent Calendar
- Minutes from October meeting: unanimously approved.

## Notables and To Dos: (actions/follow-ups in red)

- Sustainability: Still struggling with clean numbers out of the financials, but no concerns about budget. **Now is the time to be pulling on our networks to bring in funding. Talk to Maria if you need help or want to get her in front of others.**
- Fundraising Ideas: **Take a look at slide 10 and let us know how you can participate in any of these ideas. Fill in the name and month on these or other ideas.**
- Program Committee: examined structure and charter. Would like to recruit committee members and volunteers who better reflect the communities we serve. Looking for a passion for DEI as well as education experts. **If you have someone in mind, please connect with Itzik. Can be someone from outside the board.**
- Program continues to wrestle with nation-wide staffing shortage and social and technical issues with remote learning. These issues are reflected in our SEL results as well as volunteer return sign-up.
- Kristin and Renee will be moving on to new opportunities. We wish them all the best and thank them for being our heroes! Stay in touch - you will always be part of the family.
- Governance Committee: new charter and priorities. **Please review these in the deck as we weren't able to cover them. Feedback to Karin. Ask: please complete [this board survey](#) as part of our baseline board skills assessment.** This will help us prioritize skills for recruiting.
- **Next Meeting: March 4, 2022**

Resource links:

- [Meeting Deck](#)
- [Recorded Meeting](#)

**OUR MISSION:** Our Mission is to combat systemic inequity in education by fostering and cultivating the academic and social emotional skills of our scholars while exposing them to project-based learning and community mentors.

**OUR VISION:** Our vision is for all scholars to realize the opportunities that are available and have the skills to create their vision and engineer their dreams

## 1. Introductions

- Joseph George Middle School (Vay??, CD)
  - Teaching fellows: Adrian Perez, Juan Gao??, Jiohan? Moreno Rodriguez
  - Good energy on camaraderie of the team and opportunity to be in the classroom serving this community and helping to combat educational inequity.
  - Thank you Joseph George Team!
- Oscar Cruz, new CEO of Citizen Schools
  - Motivation: Attracted by CS's mission and hands-on learning approach. Oscar's parents didn't finish high school, but his family instilled a love for learning in him. He was previously COO for United Way. Wants to help change how learning works in schools, especially in the COVID era. He also loves the entrepreneurial nature of the moment for CS in that so much is changing and there is real opportunity to evolve into something different but equally impactful.
  - Personal: Based out of Los Angeles, 8 year old son. Roots in the Bay Area.
  - Is very aware of the importance of the fiscal arrangement Envisioneers has with CS. Committed to supporting the relationship.
  - What do you see as the new vision for CS in 5 years' time? Capacity builders: we can be partners to both non-profits and school districts on how to do teaching and learning differently. Systems change: we need to identify and try to break systems barriers. These don't necessarily imply growth - it could mean more depth.
- Pauline Vogl: new board member, Sr. Manager of Environmental Sustainability, Cisco
  - Started 2012 with CS; recruited 400 Citizen Teachers over that period. Brought Cisco in as full partner, including hosting virtual benefitEd.
  - Motivated by the impact that volunteers bring to the scholars' lives.

## 2. National Board Report-out:

[Wesley]

- First half of meeting dedicated to fiscal audit. Audit was clean on the core financials. Bottom line take-away: end of year surplus \$280K, healthy operating reserve of about 3 months. For 2022: overall budget is \$8M including Envisioneers, \$6M without.
- Short updates on diversity initiatives and on Envisioneers.
- Introduction to Oscar.
- Both Wesley and Bob have extended their tenures on the national board. Both Bob and Wesley will stay

on through at least the summer, but will focus their fundraising and personal donations on Envisioneers.

- Maria emphasized that we need representation on the CS board through the end of our fiscal contract in order to retain visibility and a voice around our California volunteer situation. (Americorps contract.)

### 3. CEO Report:

[Maria]

- Kristin and Renee will be leaving the organization. We thank them for their years of service. Your efforts and advocacy have been a real inspiration. We all wish you all the best in your next endeavors!

### 4. Sustainability:

[Brett]

- Same slide as previous two meetings - no quantitative updates. *We still have issues accessing our financials.* Getting close to the point where we have the Quickbooks system configured to produce reliable output.
- *Budget is still fine.* Public \$\$'s will probably come in slightly over the most conservative scenario. Foundation and individual development is the side that creates most anxiety.
- *This is the time to be calling on our networks to donate in an end of year push.* Use your relationships to help get yourself or Maria in front of people to get ahead of the fundraising. If you need help, just ask Maria.
- Expenses will be tight. We don't expect any of the national allocations to come in at all.

### 5. Fundraising:

[Maria]

- Maria: we raised \$30K this week. End of year is the time for fund development.
- Slide 9 in the deck shows current fundraising activities, along with a set of ideas (slide 10) we threw out at last meeting. Action: Take a look at slide 10 and see how you can participate in any of these ideas

### 6. Program Committee

[Itzik, Renee, Seung]

- Recent McKinsey report states that the gap between students in majority black schools is now three months wider than it was before the pandemic.
- Itzik and Pauline shared examples of the kinds of scholar hardship they have seen in the past months.
- Focus: don't want to think about program just as apprenticeship but also improving the connection we have as a community and how we approach DEI. Desire to improve the diversity of the volunteers we put in front of the scholars - people who come from similar communities and backgrounds. Would like to see someone with a DEI passion join the committee. Suggestion from Maria: consider the chambers.
- Given how long COVID has been going on, we need to get better at making the curriculum more "out of the box" to reduce the learning curve of volunteers, or even remove the requirement for the volunteer.
- Hybrid apprenticeship model has been a mixed bag. Tech for remote volunteers still has problems.
- Need to focus on TL led apprenticeships for Spring 2022, which requires culling and pruning our offering.
- Want to continue to monitor and improve metrics for tracking our programs.
- Cadence is two meetings/semester. Next meeting in January.
- Metrics (Renee): Surveys are out 23/51 back so far. Feedback was extremely positive (see slide 14 for specifics.) Goal is to maintain this level of satisfaction into the next semester, but need to improve the % of people open to volunteering again. This could be just a reflection of the period we are in, as volunteers are still remote even with the students back in the classroom.
- Renee suggests that getting volunteers on campus occasionally would help the sense of presence and relevance. Pauline: first class would help establish a relationship with the kids before starting teaching.
- Seung: #scholars enrolled is low and we are not meeting our ADA requirement. Staffing situation aggravates that. 65% capacity at the state level. In order to meet the 20:1 ratio, we can only serve 65 scholars at a time. Maria is working to see if we can waive that requirement next year.

- Push-in numbers are lower due to the hybrid model and that we have fewer TF's than normal.
- Pre\_SEL surveys are about 8% lower than usual. Likely due to the lack of connection screen-based learning imposed on the programs.
- Net Promoter rates also reflect staffing issues.

**7. Governance**

**[Kelly]**

- <Did not have time to get to this topic – see take-aways for summary>

# Envisioneers Board Meeting Minutes October 22, 2021

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## **In attendance:**

Board: Maria Drake, Jaime Zepeda, Kelly Stuart, Bob France, Bret Wallace, Wesley Ford, Itzik Gilboa, Karin Meyer

Staff Renee Lemieux, Katie Rutledge and team, Sydney Flanagan, Kristin Thomas, Gene'a Mitchell, Allison Knight, Tyler Shafsky, Kristin Thomas, Elisha Muskat (relevant agenda only)

Excused:, Annie Khalid, Tracy Meng

**Minutes:** Karin & Maria

**Meeting came to order:** 12:05 PM PST

**Meeting came to a close:** 01:45 PST

## Motions & Votes

- Consent Calendar
- Minutes from August meeting: unanimously approved.
- Nominate Pauline Vogl to board: unanimously approved

## Notables and To Dos: (actions/follow-ups in red)

- Our 501(3)c has been approved, retroactively through December 2020
- Oscar Cruz will be the new CEO of Citizen Schools, starting November 1st. Confidential for now.
- We have a 90 minute (Nov 19, 12-1:30) brainstorming session with HBS alums to discuss our marketing / communications strategy as a new organization. **We are looking for additional board members to make this session as valuable as possible. Let Maria know if you can attend.**
- Governance: we have identified 4 committees and would like each board member to volunteer for one committee. **Please add your name to the slide in the board deck slide describing each committee. Here is a link to the [PPT](#)**
- Communication: We are assembling a pitch deck to help communicate the value proposition of Envisioneers: **Send Maria anything you have used in the past in describing what we do to your networks. Or add your 30sec, 3 minute to [this document](#)**
- Sustainability: Operating reserve campaign should start now so we can have multi-year conversations with funders and schools. To the extent possible, please accelerate your donations to ensure we have good cash flow from day one. Mechanisms for accepting donations directly to Envisioneers are being put in place. **If you have mechanics issues in your donations – make sure Envisioneers is part of your matching gift platform or let us know so we can help set it up.** Benevity is already set up.
- We need to ramp up our Fund Development Plan participation. How can you help? **Make introductions to major Corporate or foundations or individuals:** Maria is available for one-off presentations for pitches for volunteers or funding.
- We need to start building the list of people to invite for the Salesforce event in February. Guest list will include current major donors + board + potential major donors. (\$10K-\$50K range) **Looking for names**

of people who support education equity to include in the list.

- Brainstorm on creative approaches to enhance our sustainability approaches: What are some creative ideas for sustainability? Put any thoughts you have in the slide in the board deck and it will be taken to the finance committee.
- Send any comments on the status slides in the appendix directly to staff for clarification/reaction.

Resource links:

- [Meeting Deck](#)
- Recorded Meeting (To be Added)

**OUR MISSION:** Our Mission is to combat systemic inequity in education by fostering and cultivating the academic and social emotional skills of our scholars while exposing them to project-based learning and community mentors.

**OUR VISION:** Our vision is for all scholars to realize the opportunities that are available and have the skills to create their vision and engineer their dreams

## 1. Introductions

Helms Team (Katie Rutledge, CD)

- Katie Rutledge introduced the team at Helms: Lindsay, Bellamar, and Angelica
- No 6th graders at Helms – 7th and 8th grade only
- First weeks observations:
  - Kids have lost practice at being social but have gained technical skills. Kids are happy to be in person. More technology being used in the classroom, which makes some things easier.
  - Teachers aren't necessarily well-equipped to deal with some of the behavioral issues that they are seeing in the schools. Envisioneers staff cooperating to try to re-envision the classroom.

## 2. Fiscal Sponsorship Structure Discussion:

[Elisha]

- Oscar Cruz will be the new CEO of Citizen Schools, starting November 1st. Confidential for now.
- 5013(c) is retroactive through last December
- Not that much changes with fiscal sponsorship. We are now in the "interim period" of the contract.
- Agreement continues through the end of the fiscal year. Nothing HAS to be transferred over – gives us leeway to operate in whatever way makes the most sense for us.
- Expectation is that final version of the contract will be signed in the next week, as certain items were still pending.
- Elisha will continue to be liaison to us as Oscar comes on board. She is available to consult once it is time to do our audit to ensure consistency between the two sets of books.

### 3. National Board Report-out:

[Wesley]

- This was a board retreat more than a regular board meeting. Final approval of Oscar Cruz for national org. Positive impressions all around. Brings a compelling background to the job.
- New committee assignments, new board member, financial review.
- Review of the organization's Theory of Change.
- Working sessions on DEI in Citizen Schools and in broader communities. Considered focus, good dialogue and approach.
- Wesley and Bob will look at bringing some of the DEI material to create a similar exercise for Envisioneers. Wesley provided the following links as a preview (note that we may not have access to all of these.)
  - [https://koyapartners.com/wp-content/uploads/2018/12/KOYA\\_GovernanceGap\\_FINAL.pdf](https://koyapartners.com/wp-content/uploads/2018/12/KOYA_GovernanceGap_FINAL.pdf)
  - [https://drive.google.com/file/d/18NZQMblZyhRTQRaCFNUtjUQz9A\\_2DHE/view](https://drive.google.com/file/d/18NZQMblZyhRTQRaCFNUtjUQz9A_2DHE/view)
  - [https://drive.google.com/file/d/1iV\\_LZNuxVWBI689-VFXbLEeUDSWI6SSk/view](https://drive.google.com/file/d/1iV_LZNuxVWBI689-VFXbLEeUDSWI6SSk/view)
  - <https://www.youtube.com/watch?v=GnKGa38OZ10&t=317s>

### 4. CEO Report:

[Maria]

- Mission/Vision will change to use "scholars" in all instances.
- HBS session focused on marketing and messaging on November 19th – join if you can!

### 5. Governance

[Bob]

- Board Committee Structure presented (in deck): 4 committees are Governance, Executive, Finance and Program
- We are building a 30/3/30 pitch pack to help board members communicate the value proposition of the organization.
  - Brett: don't focus on new org, make sure that audience understands that we have been doing the work for a long time. The difference from CS in that we are a *local* Bay Area organization and that is important to funders.
  - **Action:** what is your elevator pitch? Everyone send your elevator pitch to Maria for consideration in the new content.
- Discussion on proposed committee structure:
  - Maria: Finance committee will need to also encompass a year-long fundraising plan, looking not just at current numbers, but also at a financial plan to create future financial stability.
  - Maria: Outside of the Executive committee, committee members can include outsiders, so feel free to invite people in your networks to advise on aspects of these.
  - Kristin: Governance: should include representation from our communities
  - Itzik: Program: Hybrid model is a key focus for this semester. How to ensure we run a high quality program.
  - Maria: already doing the impact management at staff level based on what we have collected over the years.
  - Maria: Staff will have representation at each committee meeting for taking minutes, inform on operations, committees are not operational, they are there to guide and inform.

### 6. Sustainability:

[Brett]

- Deck contains the same slide as last time for annual projections.
- Public dollars are coming through as expected.
- Good news: in light of 501 (3)c coming through, we can expect to get much of the \$150K budgeted to cover national administrative costs back.

- Bad news: mechanisms for getting funding to flow through from CS to us is klunky. Getting better, but not as fast as we would like. We will try to funnel new \$\$s directly to Envisioneers from now to make this better.
- Take-away: Operating reserve campaign should start now so we can have multi-year conversations with funders and schools. One time, separate from your annual gift so that we can be more strategic in our thinking.
- Action: if you have mechanics issues in your donations – make sure Envisioneers is part of your matching gift platform. Benevity is already set up.

## 7. Fundraising:

[Maria]

- Request for Fund Development Plan participation. How can you help? Introductions to major Corporate or foundations or individuals: Maria is available for one-off presentations for pitches for volunteers or funding.
- Specific ask: list of people to invite for the Salesforce event in February. Guest list will include current major donors + board + potential major donors. (\$10K-\$50K range) Looking for people who support education equity.
- Kristin is taking a class at Berkeley on Volunteerism and Corporate Giving:
  - Fundraising through an Equity Lens. Working on a project to better understand where our corporate partners are and how they view us. Should improve our ability to approach them and communicate in a more effective manner.
- Action: What are some creative ideas for sustainability? Put in the slide and it will be taken to the finance committee. Can bring that up in committee meetings.
- Brett: we need to get the donation plumbing set up so we can accept the donations in cash and in stock as soon as possible.
- If you use something other than Benevity for Matching Gifts, let us know so we make sure to include it.
- Nov 17th is the goal for the big email blast announcing Envisioneers
- Working on getting Envisioneers into Smile, Charity Navigator, DAF's, etc so that we can get our donations processed ASAP.

# Envisioneers Board Meeting Minutes August 27, 2021

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## **In attendance:**

Board: Maria Drake, Bob France, Itzik Gilboa, Wesley Ford, Jaime Zepeda

Staff Maria Drake, Allison Knight, Seung Lee, Sydney Flanagan, Tyler Shafsky, Gene'a Mitchell, Kristin Thomas, Elisha Muskat (first agenda item only)

Excused:, Karin Meyer, Alena Taylor, Kelly Stuart, Tracy Meng

**Minutes:** Karin (from Recording)

**Meeting came to order:** 12:05 PM PST

**Meeting came to a close:** 01:40 PST

## Motions & Votes

- Consent Calendar: None – First board Meeting.

## Notables and To Dos: [\(actions/follow-ups in red\)](#)

- Fiscal Sponsorship Agreement is almost complete (1-2 weeks away from signature) – there is full alignment on goals. Remaining issues are around how to deal with existing vs new contracts. **Look for final document from Maria in the coming days.**
- Mission/Vision/Values: Review and become grounded in and be able to represent and support. Agreement to emphasize the use of the term “scholar” over “student.” **Send in comments over the next two weeks.**
- Sustainability: FY22 budget forecast of ~\$2.7M is very conservative. Desire is to end the year with a surplus in order to demonstrate fiscal responsibility in our first year
- Board Involvement: critical that we all support our priorities for the year: Governance, Development and Programs. Everyone should focus on Development in whatever way they can in order to successfully launch Envisioneers. **Get your board contracts and contributions for the year, if possible, (preferred in Q1 for fiscal reasons) to Maria in the next couple of weeks.**
- Impact: All campuses are still understaffed going into the year. Program enthusiasm is there and we have waitlists in place as we continue to ramp up staffing. Hybrid model this year. Volunteers virtual, scholars and TL's in classroom.

## Resource links:

- [Meeting Deck](#)
- [Recorded Meeting](#)

**OUR MISSION:** Our Mission is to combat systemic inequity in education by fostering and cultivating the academic and social emotional skills of our scholars while exposing them to project-based learning and community mentors.

**OUR VISION:** Our vision is for all scholars to realize the opportunities that are available and have the skills to create their vision and engineer their dreams

1. **Fiscal Sponsorship Structure Discussion:**

[Elisha]

- All expenses for Envisioneers are fully on CS books. Envisioneers represents about \$2.5M-\$3M of \$6.1M CS budget. Hence oversight is especially important to CS.
- Allows Envisioneers to operate as a 501(3)c before obtaining official status.
- Operational and compliance operating mechanisms have been put in place between Maria and Elisa or other CS representatives.
- Agreement is almost final.
- Monthly fund transfer allows for cash flow stability.
- Operating from a symmetric perspective of trust and good will.
- Once we get 501(3)c designation, each of the school districts will have to agree to transfer their contracts to us. Will also need all private funders to transfer their grants. CS will still need to report on their financials as “discontinued operations.” If all of that can occur, we can try to wrap up the contract mid-year. Alternative is to have agreement in place to cover any remaining contracts over the course of the year. No final decision at this point. Agreement says the contract is in place through the end of the year. We are attempting to differentiate between existing and new agreements.

2. **Mission/Vision/Values:**

[Maria]

- Took in input from board members and staff and feels really good about the result and that it represents our work.
- Bob: represents a lot of different stakeholders. Joy and service represent the engagement with students. Recommends consistency between the terms ‘scholar’ and ‘student.’
- Kristin: Has gotten good positive feedback on these during her Lunch and Learns. She uses ‘scholar’ exclusively.
- Gene’a/Seung: Scholar represents a life-long learner in everything they do. Important to shift the mindset. Student is defined as learning within the school construct. This year has shown that students have to learn outside that structure.
- Itzik: should Mission be “by” instead of “while” exposing....Bob: “while” doesn’t limit us to only combating inequity through project-based learning. Gene’a: Push in supports that comment.

3. **Sustainability:**

[Brett]

- Taking an extremely conservative approach to the budget for our first year to ensure we have a net

surplus and bank operating reserve. Surplus is critical for our operations and fiscal reputation going forward.

- Expense visibility is trickier since we are starting to carry our expenses for the first time and starting a lot of new contracts.
- Looking good for a break-even year.
- Three levers could make the year look better, as broken out in the slide scenarios. These could leave us in the more ideal spot of ending the year with a surplus of up to \$300K. Levers:
- Funding from public dollars is set to increase from \$8.88 to \$10.18/student. which hasn't been included yet, uptake of \$170K.
- 10% increase in projected fundraising
- current allocation of \$150K to cover staffing at CS in support of Envisioneers. If less support is required, we may be able to take back about \$50K of this.

#### 4. **National Board Report-out:**

**[Wesley]**

- Transition period for National. Not a lot of discussion on Envisioneers – appears to be sincere support from the board to allow Envisioneers to be a successful independent org, a shift from previous meetings.
- Search for new CEO: external search group, 200 applicants. Focus on minority candidates.
- Discussion of DEI within Citizen Schools.
- Bob has stepped down from the National governance committee.

#### 5. **Fundraising: [Maria]**

- Important for board to help build financial stability
- Calendar reflects fundraising events for the year
- Q1 is low for public / private so consider moving personal gifts upfront. Who can you invite to the January 22nd Salesforce event, which is new for us?
- Consider in your board contracts how you can participate in Governance, Program or Development committees.
- Bob: we all need to up our involvement in Development in support of the new organization.

#### 6. **Impact: [Tyler/Gene'a/Kristin/Sydney]**

- Not fully staffed yet. Not unusual for this time of year. Interest and enrollment in our programs is there, but the TA's and TF's are hard to come by.
- Protocols and logistics of program are still being ironed out as we re-enter schools, but there is a sense of joy in the scholars as they re-engage socially. It may take another 6 weeks to get our programs operating smoothly and at capacity.
- We have capped our numbers for now, and have waitlists on all of our campuses. Demand is there and enthusiastic.
- Hybrid model this year. Volunteers virtual, scholars and TL's in class room.
- Scorecards will remain the same this year, but we will be doing the work to gather the data.
- 40 volunteers recruited! Apprenticeships start on Oct 4th.
- HR Pipeline is active. Very competitive environment at the moment.



Sobrato Center for NonProfits  
330 Twin Dolphin drive, suite 115  
Redwood City, Ca 94065

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Date: March 22, 2022

Oakland Unified School District  
1000 Broadway, Suite 300  
Oakland, CA 94607

To Whom It May Concern,

I, Maria Sparagne Drake, as the founding CEO of Envisioneers Inc, state that our organization, Envisioneers Inc, is both willing and able to perform the commitment contained in the RFP application #21-115 Expanded Lead Agency. Having partnered with OUSD Expanded Learning Program leaders over the past many years, we are not only excited for this opportunity to increase our partnerships, but more importantly, to share our program with more middle school scholars who are in need of greater equity.

Having a deliberate and singular focus on middle school expanded learning programming for the past 25 years has allowed us to lean into the academic as well as social skill building that is needed for these sometimes difficult years for scholars in middle school. Our signature 10 week, community mentor lead, hands-on apprenticeships foster creativity and curiosity to our scholars while giving them a glimpse of the many career pathways that are available to them for their futures. Your zip code should not determine your possibilities and what you don't see you can't be. We aspire to change these facts.

Sincerely,

*Maria Sparagna Drake*

Maria Sparagna Drake, MT, MNA  
Envisioneers, Founding CEO

Envisioneers was incorporated in 2021. Envisioneers previously operated as Citizen Schools California, a part of Citizen Schools Inc. Envisioneers has not completed a 990 yet, but the document below reflects Citizen Schools Inc's most current 990. We fully intend to file a 990 at the close fo the fiscal year and are willing to connect you with out CPA.



50 Washington Street  
Westborough, MA 01581  
508.366.9100  
aafcpa.com

February 16, 2022

Dear Maria

Thank you for asking AAFCPAs to quote on your June 30, 2022 audit. After reviewing the documents that you sent over, we were able to project out a fee based on our knowledge of the nonprofit industry and our experience auditing similar organizations.

Our fee is as follows:

|  |          |
|--|----------|
| Audit of the financial statements of Envisioneers for the period from inception through June 30, 2022          | \$22,000 |
| If needed, testing and related reporting in accordance with Government auditing standards and Uniform Guidance | 3,500    |
| Preparation of IRS Form 990 and California state filing  | 2,900    |

As we discussed, the audit in accordance with Uniform Guidance would only be needed if you expend more than \$750,000 of Federal funding.

We are excited about the opportunity to work with you. We know that you will benefit from our years of experience working with nonprofit organizations. If you have any questions, please do not hesitate to call.

Very truly yours,

By:   
John R. Buckley, C.P.A., Vice President

**AAFCPAs, Inc.**  
**Certified Public Accountants**



February 21, 2022

To the OUSD Expanded Learning Time Office,

I am pleased to be submitting a letter of support for the incredible Envisioneers staff and recommend them for funding for the 2022-2025 RFP.

Women's Audio Mission has worked with the Envisioneers for 4+ years to bring Girls on the Mic, our digital music/media arts production training and mentoring program, to underserved Oakland girls and gender-diverse youth. In all the years of partnering together, we have seen our students get support both in and out of the classroom with creative skills and socio-emotional learning. Their work with us and school sites to provide hands-on learning activities with a focus on career pathways, 21st century skill building, and social skills is one of their many attributes and benefits they bring to our partnership and youth participants.

The Envisioneers are critical to helping our staff provide engaging lessons and coordinate with schools to recruit and retain Oakland girls and gender-diverse students. We work closely together to find the best academic and media arts solutions that help to close the opportunity gap so many of our students face.

Please feel free to reach out to me if you need any further information.

Respectfully submitted,

*Joyous Bey*

Joyous Bey

Girls on the Mic/Youth Program Manager and Instructor

[jbey@womensaudiomission.org](mailto:jbey@womensaudiomission.org)

(800) 926-1338 ext 706



**Ms. Taylor  
Principal**

# **Westlake Middle School**

**2629 Harrison Street  
Oakland, CA 94612**

**Telephone: (510) 879-2213**

**Fax: (510) 627-9213**

**Dr. Manning  
Assistant Principal**



**Mr. Omolade  
Community Program Manager**

March 28, 2022

As Principal of Westlake Middle School I am writing in support of Envisioneers' OUSD Expanded Learning model and partnership. The staff of Envisioneers Inc have been in partnership with our school serving as the lead agency for our Expanded learning program for the past 3 years, 2 of them as the Citizen Schools AfterSchool Program and this last year as Envisioneers.

In years of partnership, we have seen our scholars get support both in and out of the classroom. The Program serves our teaching staff with in school support and then transitions into the expanded learning time of the day to offer continued academic support as well as social emotional support. Their ability to bring hands-on learning activities with a focus on career pathways, 21st century skill building and social skills is one of their many attributes and benefits to our partnership and scholars. Envisioneers over these past few years, even maintained their push to provide these hands-on activities virtually.

Envisioneers provide the staff, volunteers, materials and curriculum for their activities. They utilize a small amount of space within our facility for their staff and meetings. We work closely together to find the best academic support solutions that are spread across the entire day.

I encourage you to support their work in Oakland. Please feel free to reach out to me at [maya.taylor@ousd.org](mailto:maya.taylor@ousd.org) or (510) 879-2213 if you need any further information.

In Community,

*Maya Taylor*

Maya Taylor  
Principal



Lead Agency: Middle School (including K-8)

### **Track Record & Capacity**

Documentation Enclosed: A 5-year Evaluation of Citizen Schools' model, examining program implementation and impact.

Envisioneers is a 501(c)(3) organization and has adequate fiscal reserves to cover at least 2 months of general operating expenses. Envisioneers is a spin-off of our National organization, Citizen Schools. We received our corporate identity in December of 2020 and our IRS Determination for nonprofit status in October of 2021. In the Fall of 2021, we launched as Envisioneers, an independent subsidiary of Citizen Schools. Envisioneers' mission is to combat systemic inequity in education by fostering and cultivating the academic and social emotional skills of our scholars while exposing them to project-based learning and community-based career mentors.

The legacy leadership and staff of Envisioneers have been working collaboratively with schools in the San Francisco Bay Area for nearly 20 years and have partnered with low-income middle schools to bring experiential learning opportunities to over 12,600 total students, 2,700 of those students being from Oakland.

As Envisioneers, we will continue to offer Citizen Schools' Expanded Learning Time model however, we will be able to iterate program elements to best fit the needs of the students, families, and schools we serve. Citizen Schools' ELT model has a track record of impact validated by a five-year study of students performance compared to matched peers. We will maintain our focus on our four pillars of academic rigor, social emotional support, 21st century skill building, and career pathways in order to help close the academic and opportunity gaps created by the systemic racism and inequity built into the system of education in America.

## **Compliance**

Fiscal management and administrative responsibilities are centralized in Envisioneers' Operations Department. The department is overseen by Chief Executive Officer, Maria Drake. Key responsibilities of the of Operations include: processing payroll for all employees and consultants, paying vendors, processing expense reimbursements, billing for funds from all grants and funding sources, producing monthly and quarterly financial reports in addition to annual statements; working with regional budget managers to create annual budgets; reporting financial information to investors, staff, students, families, and volunteers; and conducting an audit process to ensure compliance and financial soundness. Envisioneers has a contract with a Certified Public Accounting firm to conduct annual financial statements.

## **Hiring, Retention, and Professional Development**

Documentation Enclosed: [An overview of Envisioneers' Professional Development Scope and Sequence.](#)

Because the program occurs primarily through our staff, recruitment, hiring, preparation and support of staff directly affect how the program operates. Envisioneers recruits staff specifically for their interest in youth development and urban education. We also intentionally recruit staff and volunteers who possess highly effective mindsets. Working with middle school scholars in underserved communities requires a certain amount of perseverance and a ton of empathy. We therefore, as often as possible, try to hire from the community in which our schools reside. We often employ staff who have attended the same school they serve as a means to give back.

Cultural competency is a core component of our staff training and development models.. Direct service staff undergo a rigorous summer training rooted in trauma-informed practices through a lens of equity and cultural humility, focusing on implicit bias and racial equity. Monthly professional development sessions are led by the Director of Program and outside professionals - staff learn and practice skills to foster resilience for students and staff through building connection, coping skills, and competence, while focusing on individual and

community wellness. All program staff receive site-specific training emergency protocols. Healing-centered practices are used to resolve conflicts in alignment with site-based practices.

Envisioneers employs a highly systematized process for recruitment and a detailed scope-and-sequence for ongoing training, coaching and professional development for all staff.

### **Cultural Competency & Family Engagement**

Envisioneers exclusively partners with public high-need schools and communities, seeking to work with schools that serve low-income populations, have large BIPOC populations, demonstrate low baseline academic performance, and lack existing high-quality afterschool and mentoring programs. By focusing on the critical inflection point of middle school, we help to close a gap between efforts focused on school readiness for younger children and programs aimed at drop-out prevention or college access for high school students.

Envisioneers has a commitment to Diversity Equity and Inclusion and we believe that diversity is vital to our success given that difference, in all its forms (such as ethnicity, gender, income, physical ability, race, religion, sexual orientation, work style, and experience), mirrors the diversity of the students and communities we serve and leads to more informed decision making. We intentionally recruit staff, volunteers, and partners for their reliability and credibility to youth and, often, partners from the community form the deepest connections with students.

Envisioneers staff develop strong connections to student families. They conduct bi-weekly phone calls home and engage in frequent conversations at pickup. Families are invited to celebrate their students at annual family nights and bi-annual WOW! Events.

## **Collaboration with School Site Leadership**

Documentation Enclosed: School Partnership Agreement completed at the onset of partnership.

The development of deep and meaningful partnerships with school leaders, faculty, and staff are integral to the successful implementation of Envisioneers' program. These partnerships are grounded in a shared vision for high quality community schools and extend from overall goals and priorities to operations, instruction, data sharing, and joint professional development. Joint program planning begins at least 6 months before the program begins serving students and collaboration continues iteratively throughout the school year with the help of ongoing data-collection, data analysis, and quality-assurance loops. Envisioneers' full time staff, who work in the school all day, consult regularly with teachers and other school personnel and often attend grade and content area meetings to ensure academic alignment between the "first and second shifts." This coordination also extends to a school's support staff; counselors, social workers, etc. As a result, when a situation arises and a student needs more support, the Envisioneers team will usually problem-solve in collaboration with the counselor and social worker to provide wrap-around support for the student and his or her family across the two domains of the school day. At the end of each semester, school administrators and site coordinators are surveyed about the health of the partnership and at the end of each school year Envisioneers staff, led by the Campus Director, work closely with the school and school community leadership to ensure the continued alignment with the schools' initiatives for the following year.



# Evaluation of Citizen Schools' Expanded Learning Time Model: Executive Summary



March 9, 2016

*Prepared for:*

**Citizen Schools**

308 Congress St., 5th Floor  
Boston, MA 02210



*Submitted by:*

*Alyssa Rulf Fountain*

*Beth Gamse*

*Melissa Velez*

*Matthew Hillard*

*Porsha Cropper*

**Abt Associates**

55 Wheeler Street  
Cambridge, MA 02138



## Executive Summary

### Introduction and Background

Academic achievement in the nation's lowest performing schools is troubling. Despite improvements in students' overall academic achievement over the past few decades, proficiency gaps in reading and mathematics still persist across income, racial, and ethnic groups (National Center for Education Statistics, 2013). One promising strategy for reducing the achievement gaps is the use of a longer school day, often called Expanded Learning Time (ELT); evidence suggests that students' increased access—through ELT programming—to enrichment activities can have positive effects on their academic motivation and social-emotional skill development.

The number of schools across the country implementing ELT continues to grow; by 2013–14, the most recent school year for which data are available, over 2,000 schools were using ELT strategies (National Center for Time and Learning (NCTL)). Nearly half of these schools were charter schools, and the remaining schools include many low-performing regular district schools that adopted ELT strategies in response to federal requirements for the School Improvement Grant (SIG) program. A recent GAO report indicates that approximately 1,800 SIG-funded schools, and 69 schools funded under the 21<sup>st</sup> Century Community Learning Program are implementing some form of ELT strategies.<sup>1</sup> Current guidance under the SIG program defines increased learning time as “increasing the length of the school day, week, or year to significantly increase the total number of school hours” for instruction in core academic subjects and other subjects, enrichment activities, and teacher collaboration, planning, and professional development (U.S. Department of Education, 2012a, p. 23).

The definition of ELT may seem straightforward, yet its implementation varies considerably in practice. ELT can occur via additional days in the school year, more hours in a school day, or summer programming above and beyond the regular year or day. ELT participation is sometimes mandatory for designated students, grades, or schools, and is sometimes optional. ELT programming is offered by local schools/districts, community-based organizations or non-profit groups, and is delivered by teachers, tutors, community volunteers, or other adults. Further, schools implementing ELT may rely upon the same *structure* (i.e., all after-school or summer or longer day programming), yet may vary substantially in the content of ELT, how additional time is distributed across subjects or extracurricular activities, and in who provides instruction.

Regardless of structure or content, using additional time effectively requires attending to multiple factors or strategies that all affect program implementation. Both the Afterschool Alliance (2012) and NCTL (2012) have articulated some guiding principles as essential for high-quality ELT programming. These include strong school community partnerships; focused learning; family engagement; intentional programming; diverse, prepared staff; participation and access; safety, health, and wellness; and ongoing assessment and improvement.

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<sup>1</sup> See <http://www.gao.gov/products/GAO-16-141>

### Key Elements of Successful Expanded Learning Time Approaches

Key elements<sup>a</sup> of expanded learning time initiatives include:

- Increase time in schools for students
- Provide academic support, individualized learning support, and enrichment activities to prepare students for college and career success
- Ensure opportunities for teacher collaboration and professional development to improve the quality of instruction
- Build strong school leadership and support of ELT
- Promote data-driven and evidence-based support to improve student performance
- Cultivate dedicated partnerships with external organizations
- Build a culture of high expectations and accountability

<sup>a</sup> See After School Alliance (January 2012), *Principles of Effective Expanded Learning Programs: A Vision Built on the Afterschool Approach*. Washington, DC: Author. Retrieved from [http://www.afterschoolalliance.org/Principles%20of%20Expanded%20Learning%20Programs\\_Jan\\_2012\(2\).pdf](http://www.afterschoolalliance.org/Principles%20of%20Expanded%20Learning%20Programs_Jan_2012(2).pdf); see also Claire Kaplan & Roy Chan (2011), *Time Well Spent: Eight Powerful Practices of Successful Expanded-Time Schools*, National Center for Time and Learning. Retrieved from <http://timeandlearning.org/sites/default/files/resources/timewellspent.pdf>

Since 1995, Citizen Schools has developed and implemented its own ELT model. Citizen Schools partners with middle schools serving predominantly low income (90% nationally) racial or ethnic minority (94% nationally), and academically struggling students. The Citizen Schools model relies upon an additional shift of educators and community volunteers to engage middle school students in hands-on apprenticeships, while simultaneously providing individualized supports to ensure academic and future success. Initially, Citizen Schools offered optional out-of-school time (OST) programming to middle school students in Boston, MA; it expanded to other districts in 2002, and further expanded to serve entire grade levels in an ELT framework in 2006. By 2010, Citizen Schools had shifted its focus from opt-in OST to mandatory full-grade ELT programming, and it began its national ELT initiative in 2010. Over the past six years, Citizen Schools ELT programming has expanded to schools in seven states, including California, Illinois, Massachusetts, New Jersey, New Mexico, New York, and Texas.

Abt Associates has been working as an evaluation partner with Citizen Schools since 2010, to learn how schools are implementing and integrating the Citizen Schools ELT model, and whether participation in ELT affects students' shorter-term behavioral and aspirational outcomes as well as students' academic performance. The evaluation was designed to examine implementation and impact from the beginning of Citizen Schools' national ELT expansion in fall 2010. This final report summarizes what the evaluation has learned about ELT implementation and outcomes over five consecutive school years, from 2010–11 through 2014–15.

## Background and Findings from Prior Research

The research foundation for identifying the most effective strategies for implementing ELT has not kept pace with the steady expansion of ELT across the country. While there have been numerous studies, relatively few have been both rigorous and multi-faceted enough to assess the diversity of targeted outcomes and the heterogeneity of implementation. On the surface, for example, a study of a summer learning program and a study of ELT may each examine the impact of additional time, yet a summer-based program intervention is quite distinct from an expansion of instructional time during the regular school day. While some research does suggest positive findings about OST or summer

programming, those findings may not be applicable to an integrated ELT program model (McCombs et al., 2011; Redd et al., 2012). Studies that assess whether students attending charter schools (in which longer school days are required) outperform peers in regular district schools have found positive impacts on academic outcomes (Angrist et al., 2010; Tuttle et al., 2013; Tuttle et al., 2015). One of the strongest studies is a large-scale random assignment investigation of the Knowledge is Power Program (KIPP), a multi-faceted school improvement effort with many simultaneously implemented strategies, including ELT; this study found convincing positive effects on academic outcomes, yet cannot disentangle the effects of a longer school day from other key program elements (the seven principles that govern KIPP schools focus on academics, learning, and leadership<sup>2</sup>).

Several recent meta-analyses have examined studies of different strategies for increasing learning time, prioritizing studies based on stronger research designs, and the findings are mixed. For example, some research suggests that expanded learning time improves non-academic student outcomes (e.g., students' attendance, study skills, behavior, social skills, and motivation to learn); however, the evidence is based primarily on non-experimental research, including studies that used simple pre- and post-program comparisons of ELT participants and other quasi-experimental designs to identify correlations between ELT participation and youth outcomes (Zief et al., 2006; Redd et al., 2012). Kidron and Lindsay (2014) synthesized 30 studies, some of which were experimental and some quasi-experimental, and found that OST programs (before- and after-school and weekend programs) had a small, positive, and statistically significant effect on students' academic motivation. Another meta-analysis of the effects of afterschool programs on socio-emotional skill development found some positive and statistically significant effects on socio-emotional skill development, behavior management, school bonding, and positive self-perceptions (Durlak et al., 2010), but because the interventions could occur within and outside the regular school day, the effects of ELT cannot be examined separately from other school improvement strategies.

Overall, the evidence suggests three key findings on the implementation of ELT. First, ELT models vary in focus, structure, and content across school environments (Rocha, 2007). Second, time alone is not sufficient to improve student performance; quality academic learning time matters. Third, schools with successful expanded learning time programs share common features, including bold, visionary leadership; strong community support and partners; ongoing assessment and improvement; engaged students; high attendance and participation; and a culture of high expectation.

Given the large variability in ELT types and elements, in mandatory or voluntary ELT participation, and the concomitant implementation of other school-wide improvement initiatives, it can be difficult to pinpoint the source of any positive effects on students, both academically and non-academically. Further, the observed impacts largely reflect the benefits of instructional time within programs or interventions that are quite distinct from the Citizen Schools ELT model. Describing specific elements of the Citizen Schools' ELT model can help situate findings about both the implementation and impact of Citizen Schools ELT, relative to other research about ELT. The report turns next to a discussion of the Citizen Schools ELT program.

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<sup>2</sup> See [www.kipp.org/our-approach](http://www.kipp.org/our-approach) for more detail about key KIPP approaches.

## The Citizen Schools ELT Program Model

The Citizen Schools Expanded Learning Time model is defined by three separate components: Apprenticeships, Academic Support, and Explore, which are built into a lengthened school day. The Apprenticeships are the cornerstone of the Citizen Schools ELT program model; they connect students to adult volunteers who teach a skill or content area about which they are passionate. The adult volunteers, called Citizen Teachers, teach about such varied topics as robotics, mock trials, poetry, dance, and numerous other areas. Students learn about possible apprenticeship topics early each semester via an Apprenticeship Fair; they rank their top choices after hearing Citizen Teachers present short pitches. Citizen Schools staff then assign students to apprenticeships based on a combination of student preference and availability. Students take four apprenticeships each year, two each semester. Each apprenticeship consists of 10 90-minute sessions per semester that culminates in a showcase called the WOW! during which students “teach back” to friends, family, and community members what they learned.

Apprenticeships are complemented by two distinct types of academic support. Structured homework time is generally offered for an hour each program day; it includes one-on-one goal setting and tutoring, and is known as AIM, or “aspire, invest, and make the grade.” Academic League includes targeted academic support in either math or English/Language Arts (at each school’s discretion); it is offered twice a week for between 30 and 90 minutes.

The third program component, called Explore, provides additional enrichment activities through team-building exercises. The Explore block generally reflects each participating school’s priorities and circumstances, while establishing connections between students’ middle school experiences, knowledge/guidance about college and careers (earlier, this component was known as C3—College to Career Connections), and how students can develop a pathway to future goals. Citizen Schools ELT also includes an eighth grade-specific program element, the Eighth Grade Academy (8GA), a capstone program that supports students as they navigate from middle to high school.

The chief mechanism by which program components are delivered is through an embedded “second shift” of educators, funded by AmeriCorps, hired to support the schools’ extended day, either as Teaching Fellows (TFs) or Teaching Associates (TAs). Teaching Fellows generally work full-time and are expected to serve for two years. The requirements have become more explicit over time: TFs are required to have had prior experience working with children, have earned some college credit, and to be U.S. citizens. Teaching Associates, half-time Citizen Schools employees, generally provide Citizen Schools

### Illustrative Weekly Schedule for Students

- **Monday:** 60 minutes of homework support, followed by 90-minute Academic League lesson on fractions
- **Tuesday:** 60 minutes of homework support, followed by 90-minute *Robotics* Apprenticeship taught by Citizen Teachers from Google
- **Wednesday:** 60 minutes of homework support, followed by 30 minutes of refresh/review on fractions, then 60 minutes of team-building exercises
- **Thursday:** 60 minutes of homework support, followed by 90-minute *Mock Trials* Apprenticeship taught by Citizen Teachers from local law firm
- **Friday:** No Citizen Schools programming typically offered

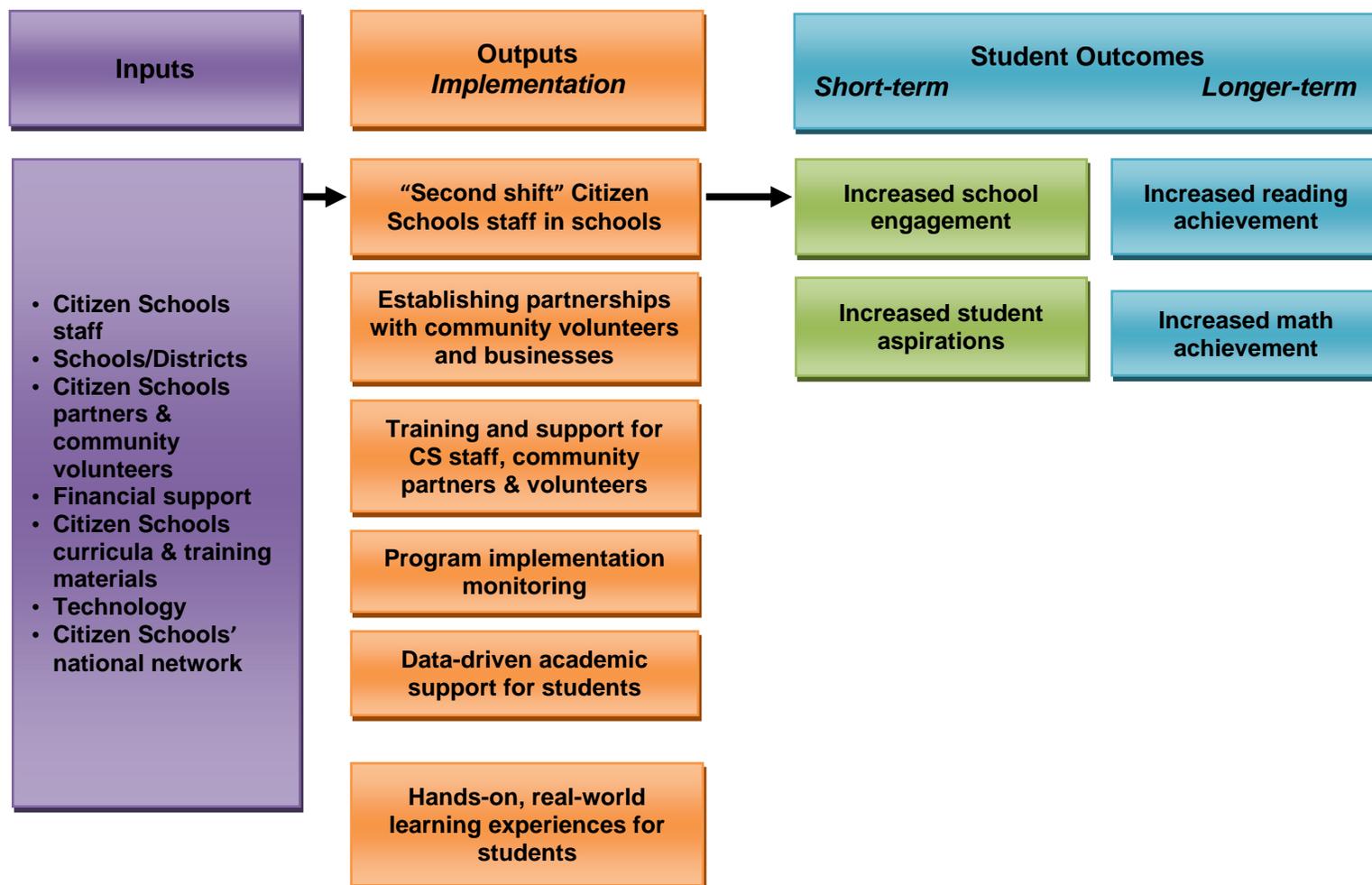
programming to students during the extended portion of the day, while TFs spend their mornings engaged in varied activities (e.g., providing support for the school, preparing for the afternoon programming). ELT programming generally begins around 3:00 PM, and concludes by 6:00 pm.

Although partner schools do not necessarily adhere to the same universal schedule network-wide, schools typically schedule activities across all three program components each week.

Through its systematic and loosely structured model, Citizen Schools provides consistency to students and their staff, and takes the burden of additional teaching away from first shift educators in their partner schools. Citizen Schools' ELT model also establishes clear expectations against which it can be evaluated. And, as noted above, the Citizen Schools ELT model is both similar to and different from other programs that include additional instructional time.

The evaluation of the Citizen Schools ELT Model incorporates the program elements described above into a logic model (Exhibit 1). The model illustrates the inputs, outputs, and expected outcomes, moving from left to right. The inputs represent the elements that, in combination, comprise the Citizen Schools ELT model, including the school/district, the Citizen Schools staff, partners and community volunteers, materials (e.g., curricula), supports, and technology. The outputs (e.g., activities/personnel represented in the model) include a second shift of ELT staff, establishing partnerships with community members and organizations, training, supporting, and monitoring Citizen Schools staff, and providing hands-on experiences for students. The underlying hypothesis is that if the model is implemented with fidelity, student engagement in school and student aspirations would increase (short-term outcomes), and correspondingly, student English/Language Arts (ELA) and math achievement, as measured by state standardized test scores, would then increase (longer-term outcomes).

Exhibit 1: Citizen Schools ELT Logic Model



## Study Design and Research Questions

The Citizen Schools ELT Evaluation examined how Citizen Schools ELT programming is being implemented across sites nationally, and assesses whether there are impacts of Citizen Schools ELT participation on engagement, aspirational, and academic outcomes.

### Key Study Design Features

- **Multi-site, multi-year study:** staggered cohorts of schools (2010-11 through 2014-15)
  - 35 schools in four cohorts have implemented Citizen Schools ELT for one or more years
  - The cumulative achievement results include up to 27 schools (Cohorts 1, 2, 3, and 4)
- **Implementation and outcome components**
  - Implementation focuses on Citizen Schools ELT programming
  - Non-academic outcome component focuses on student engagement and aspirational outcomes
  - Academic component uses quasi-experimental design to assess whether Citizen Schools has an impact on student achievement

This final report summary focuses on implementation and student outcomes from 2010-11 through the 2014-15 school years (achievement data are available only through the 2013-14 year). The implementation component of the study incorporates surveys, interviews, and site visits to assess how schools integrate Citizen Schools ELT into their school days, organizationally and instructionally. The data on implementation purposefully draw from multiple sources over different points in time to (1) ensure representation from the various stakeholders engaged in Citizen Schools ELT and (2) attempt to corroborate perspectives across stakeholder groups. Survey analyses assess the student engagement and aspirational outcomes from teacher, Citizen School staff, and student perspectives. Comparative analyses assess differences in these outcomes between Citizen Schools teachers and students and matched comparison individuals. The study also uses these data sources to assess the level of implementation more systematically in an implementation index.

The impact component of the study uses a comparative interrupted time series quasi-experimental (QED) research design; the design heeds the What Works Clearinghouse (WWC) guidance, and its sampling and analytic approaches are intended to meet WWC standards with reservations, which is the highest possible rating for a QED. The comparative interrupted time series is one of the strongest alternatives to a random control trial (RCT) to assess whether there are systematic differences in academic achievement for students in Citizen Schools ELT schools, compared to the same outcomes for their counterparts attending similar schools without Citizen Schools ELT. The study design relies upon carefully matching up to four local comparison schools to each Citizen Schools ELT campus, based on demographic and achievement profiles, to assess differences in academic achievement. Survey analyses are based on results from two of the four comparison schools for each Citizen Schools campus.<sup>3</sup>

The table below illustrates the study's data collection schedule.

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<sup>3</sup> If a Citizen Schools ELT campus exits the study, so too do its matched comparison school counterparts.

**Exhibit 2. Data Collection Schedule**

| Data Collection Activity               | Study Year<br>School Year |              |              |              |              |
|--|---------------------------|--------------|--------------|--------------|--------------|
|  | 1<br>2010–11              | 2<br>2011–12 | 3<br>2012–13 | 4<br>2013–14 | 5<br>2014–15 |
| Site visit (CS ELT only)               | ✓                         | ✓            | ✓            |              |              |
| Principal Telephone Interview (CS ELT) |                           | ✓            | ✓            | ✓            | ✓            |
| Principal Telephone Interview (MC)     |                           | ✓            | ✓            | ✓            |              |
| Campus Director Telephone Interview    |                           | ✓            | ✓            | ✓            | ✓            |
| Survey                                 |                           |              |              |              |              |
| *Student (CS ELT & MC)                 |                           | ✓            | ✓            |              |              |
| **Teacher (CS ELT & MC)                |                           | ✓            | ✓            | ✓            |              |
| CS staff (CS ELT only)                 |                           | ✓            | ✓            | ✓            |              |
| Extant (test score) data               | ✓                         | ✓            | ✓            | ✓            |              |

\*Student surveys were not collected in years 4 and 5.

\*\*Teacher surveys were administered in Citizen Schools ELT schools (not comparison schools) in year 4; no surveys were administered in year 5.

In 2014–15, interviews were conducted with a subset of Citizen Schools campus administrators and campus directors, focusing specifically on schools designated as high implementers in the 2013–14 school year.

The study's guiding research questions include one question about implementation, one about shorter-term non-academic outcomes, and one about longer-term academic outcomes:

- How successfully are schools implementing and integrating expanded learning opportunities into their school days?
- What are the differences between Citizen Schools ELT and MC schools on student engagement and aspirations?
- What are the differences between Citizen Schools ELT and MC schools on student achievement (e.g., on English/Language Arts (ELA) and math achievement test scores)?

## Key Findings

The study has found consistent patterns in survey, interview, and achievement findings. Implementation of the Citizen Schools ELT model takes time to establish and operate adequately, yet it also continues to vary substantially across Citizen Schools ELT schools, even as participating schools have demonstrably implemented several core principles of Citizen Schools ELT. Findings about short-term non-academic outcomes indicate some positive findings as well as some negative perceptions.

The data on student achievement in ELA and math indicated no statistically significant impacts of Citizen Schools ELT, on average. Exploratory subgroup analyses suggest a significant positive impact of Citizen Schools ELT on math achievement in the first year of implementation and a marginally significant positive effect of Citizen Schools ELT on 7<sup>th</sup> grade math achievement. In the context of other research about the impact of ELT on student achievement outcomes, these findings are not surprising. Few studies have found consistent positive outcomes, and the most positive

findings to date, from the most recent KIPP study (Tuttle et al., 2015) reflect implementation of a highly structured program model that emphasizes academic achievement rather than the considerably more flexible Citizen Schools ELT model that emphasizes varied learning opportunities designed to increase student engagement and aspirations.

Below, we summarize key findings about implementation and the implementation index, about student non-academic outcomes, and about impacts on student achievement.

### **Key Findings about Implementation**

Over the course of several years, common patterns in implementation have become more evident. Attention to planning, along with clear and early communication with both school and district partners about roles and responsibilities helped set the stage for smoother program launch and implementation. Once program operations began in earnest, schools faced a number of common challenges, including changes in district or school leadership, and therefore changes in priorities, as well as maintaining program consistency given high staff turnover among the Teaching Fellows.

Because Citizen Schools programming occurs primarily through its staff, recruitment, hiring, preparation and support of staff directly affect how the program operates and is perceived. Participating campuses experienced similar challenges over the study's duration, including training and experience, hiring practices, staff turnover, and staff diversity. Establishing strong working relationships early on was consistently described as essential, as was ensuring that staff had access to training that helped them understand local school needs. Citizen Schools Fellows' capacity to manage student behavior effectively and provide focused instruction was consistently reported as a challenge by Citizen School staff and campus administrators, and staff turnover was a challenge in about half the schools.

Integrating Citizen Schools staff into schools generally occurred through three mechanisms: 1) structured overlap and joint participation between the first and second shift staff; 2) alignment of content, pedagogy, and especially behavior management systems; and 3) establishing and maintaining relationships between stakeholder groups. Developing purposefully structured overlaps between first and second shifts generated benefits, goodwill, and enhanced integration efforts. In about half the schools, Citizen Schools staff had shared access to information about student performance, typically via schools' data systems or joint participation in meetings with first shift teachers. Integration also proceeded more smoothly when there were positive working relationships between Citizen Schools staff and first shift teachers.

Over the past several years, the Citizen Schools Program model has demonstrably changed in response to network schools' continued adaptations of core program elements and the national curricula. The Citizen Schools organization adjusted its approach to developing and using its national curricula to make it more responsive to schools' needs. Even as the national organization has become more flexible, network campuses continued to adapt core program elements to meet their own students' needs.

By the end of the 2014–15 school year, the Citizen Schools network included campuses in their second through fifth years of implementation. The network schools and the Citizen Schools organization have faced persistent questions about how to sustain school/district commitment and participation, particularly for schools relying upon time-limited federal funding. The two most

prevalent concerns include (1) financial sustainability, and (2) campus stability—and therefore programmatic sustainability—given frequent staff transitions.

### Implementing the Seven Key Elements of the Citizen Schools ELT Model across the Network and Over Time

Over the course of the Citizen Schools ELT evaluation, it has become and remains evident that implementation varies substantially across participating campuses. The Citizen Schools organization is keenly interested in understanding how the Citizen Schools ELT schools vary in their implementation of the model. The study team, working collaboratively with Citizen Schools, developed a summary metric, called the implementation index, to capture individual campus and network-wide progress on implementation of core Citizen Schools ELT program elements—the seven “non-negotiable” processes and activities that together, represent what successful implementation of the program would require. The implementation index draws from surveys administered in schools’ second and subsequent years of implementation as well as annual interviews. The index incorporates information from multiple school-based respondents, including principals, classroom teachers, Citizen Schools CDs and Citizen Schools Teaching Fellows.

The multi-dimensional index includes the following key elements of the Citizen Schools program model:

- 1) Planning;
- 2) Leadership;
- 3) Data collection;
- 4) Training and professional development;
- 5) Family/community engagement;
- 6) Alignment/coordination between partner school and CS; and
- 7) Perceptions of program quality.

Each school’s implementation (in a given year) is characterized as limited, moderate, or full (corresponding to ratings of 1, 2, or 3), for each of the seven core program constructs listed above. School ratings could vary between 7 (representing limited implementation of each construct) and 21 (full implementation across all seven constructs). The index provides information about progress, consistency, and variability—whether for individual campuses, for cohorts of schools that began implementation at specific times, or for the entire network, both at a given point in *time* (e.g., as of the 2012–13 academic year) as well as at a given point in *implementation* duration (e.g., as of the second year of program implementation).

Overall index scores remain clustered in the moderate range, with average scores hovering around 17 (out of 21) across multiple cohorts and up to four implementation years. There are few patterns evident in schools’ levels of implementation over time. While schools with lower index scores tended to exit the network over time, continuing schools’ implementation levels do not change substantially from one year to the next. The specific constructs schools were most consistently able to implement fully *across* implementation years include planning, leadership, perceived quality, and data collection. For example, 16 schools (of 19 for which index scores are available) in their second year, 9 (of 11) in their third year, and 3 (of 3) in their fourth year scored a “3” for the planning construct. Fewer schools implemented either the family and community engagement or alignment of partner school and Citizen Schools constructs fully, again, *across* implementation years.

## How Does Citizen Schools ELT Affect Student and Teacher Perceptions?

Survey findings help to describe teacher and student perceptions about the Citizen Schools ELT model, and provide some insight into whether and how the program is progressing toward the shorter-term outcomes depicted in the logic model. The results are consistent with implementation findings that some program elements are positively perceived (exposure to learning about colleges and careers), and that there are some ongoing puzzles and challenges (less positive perceptions of Citizen Schools staff).

Overall, significantly more students in Citizen Schools ELT campuses than the counterfactual reported positive behavioral engagement of peers, that the ELT program helped their self-esteem and pro-social behaviors, and that they participated in activities to help them learn about college and careers. At the same time, however, significantly more Citizen Schools students also reported concerns with Citizen Schools staff and the Citizen Schools ELT program than those comparison students who reported that they attended after-school programming.

Student and faculty staff perceptions differed on some dimensions. Specifically, significantly more Citizen Schools' ELT students indicated that they were positively engaged and had high aspirations, while more school teachers/Citizen Schools staff reported student engagement and student aspirations were a problem than occurred in schools without ELT.

## How Does Citizen Schools ELT Affect Student Achievement?

Following the recommendations of the U.S. Department of Education's What Works Clearinghouse (WWC) standards for rigorous designs, the student achievement analyses were divided into confirmatory (central hypotheses to the evaluation) and exploratory analyses (hypotheses that are important yet are not central and may not be well powered).<sup>4</sup> The data on student achievement in ELA and math indicated no statistically significant impacts of Citizen Schools ELT, on average. Exploratory subgroup analyses suggest a significant positive impact of Citizen Schools ELT on math achievement in the first year of implementation and a marginally significant positive effect of Citizen Schools ELT on 7<sup>th</sup> grade math achievement. In the context of other research about the impact of ELT on student achievement outcomes, these findings are not surprising. Few studies have found consistent positive outcomes, and the most positive findings to date, from the most recent KIPP study (Tuttle et al., 2015) reflect implementation of a highly structured program model that emphasizes academic achievement rather than the considerably more flexible Citizen Schools ELT model that emphasizes varied learning opportunities designed to increase student engagement and aspirations.

## Discussion

This final report provides a comprehensive overview of the Citizen Schools ELT model after five years of implementation. Over that time, the Citizen Schools ELT network has matured and expanded as new schools joined each year, and schools exited after one, two, three, or four years. The ELT program model has become more flexible as partner schools have refined and adapted the program model to meet their needs. Over the past five years, the study has examined both implementation and outcomes in detail.

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<sup>4</sup> [http://ies.ed.gov/ncee/wwc/pdf/reference\\_resources/wwc\\_procedures\\_v3\\_0\\_draft\\_standards\\_handbook.pdf](http://ies.ed.gov/ncee/wwc/pdf/reference_resources/wwc_procedures_v3_0_draft_standards_handbook.pdf)

The implementation-focused findings presented in this report center on implementation variability. Overall, the ELT schools are clearly committed to implementing Citizen Schools' ELT programming with fidelity, and at the same time, Citizen Schools has continued to recognize the need for flexibility with its campus partners. As a result, there is considerable variation across individual campuses in how the model is incorporated into their respective school contexts; indeed, that variability seems to be essential for the model to be adaptable across such diverse contexts. The implementation findings also highlight some of the challenges associated with launching a multi-faceted model in dynamic settings, coupled with built-in staffing changes.

The outcome-focused findings described in this report are mixed. The study finds both positive effects on student engagement and aspirations and negative perceptions about students' Citizen Schools ELT experiences. The confirmatory findings indicate no overall significant impact on student performance, as measured by standardized achievement test scores in ELA and math; exploratory findings indicated a significant positive impact of Citizen Schools ELT on math achievement in the first year of implementation and suggest a marginally significant positive effect of Citizen Schools ELT on 7<sup>th</sup> grade math achievement. Statically significant impacts on student achievement have proven persistently elusive and it is unclear whether this is a function of variability in implementation, model variation across campuses, statistical power, the fit between the intervention and the outcome measures, or some combination of the above.

Prior research on other interventions that include expanded learning time has yielded mixed evidence; few studies found positive achievement impacts, most studies found no achievement impacts, and some found negative effects. Perhaps unsurprisingly, interventions designed to improve academic achievement, such as KIPP, or Higher Achievement, were more likely to affect academic outcomes than were more holistic interventions designed to broaden students' enrichment, socio-emotional, or other non-academic experiences. One of the distinctive features of the Citizen Schools ELT model is its emphasis on non-academic learning opportunities that are hypothesized to be necessary precursors to improved achievement. Perhaps student engagement and aspirational short-term outcomes are more appropriate outcomes on which to focus, given Citizen Schools' emphasis on team-building and exposing students to novel, hands-on, real-world experiences through apprenticeships.

### Limitations

The study was designed to answer key questions about implementation and impact using the strongest possible approaches, yet the study's analytic approaches have some limitations. For example, data on implementation relied upon semi-structured interviews in which respondents could and did answer questions in varying detail, and, because campuses differed in the number (and availability) of stakeholders participating in interviews, the study was not necessarily able to interview staff members with comparable positions at each site. Additionally, interviews and surveys were completed after the ELT program had been introduced, and while student achievement data could be obtained retrospectively—dating back to before the program was implemented—data about school climate and short-term outcomes reflect experiences *after* schools had begun to implement Citizen Schools ELT, and may or may not reflect *changes* as a result of ELT.

Two other limitations are worth heeding: one, the study examines Citizen Schools' specific approach to ELT, and two, it uses a purposefully constructed sample of schools. The Citizen Schools ELT model is distinctive, and lessons derived from this study apply to this specific approach to ELT, and reflect the idiosyncrasies of the study sample. The study sample has experienced considerable

fluctuation over its duration, and while some attrition may occur because either schools or the Citizen Schools organization recognize the “fit” (or lack thereof) for the ELT model, the fluidity of the sample raises a concern about external validity and the sample’s representativeness. The study describes implementation progress and challenges for all 35 schools for at least one year of implementation—but the program is not currently designed as a one-year or even a two-year intervention. The cumulative results (both implementation and outcomes) are therefore based on a subset of schools and may not apply to all schools that had ever participated in the Citizen Schools network.

Finally, one other consideration is noteworthy. Performance on standardized achievement tests may not be the most sensitive measure of ELT’s potential impact on student learning. Perhaps achievement outcomes are too distal a measure for Citizen Schools’ ELT model, given its emphasis on such non-academic outcomes as student motivation, engagement, and aspiration, as well as on better understanding the high school application processes and what comes after secondary school (e.g., college and careers). Performance on core academic subject assessments is clearly important, but it may not be the right outcome for the ELT model.

## **Future Steps**

At the conclusion of this five-year evaluation, the Citizen Schools ELT initiative continues to anticipate its school partners’ needs, as new campuses join the network and some current school partners exit. The Citizen Schools’ ELT model has undergone some fundamental changes as well, responding to school partners and secular shifts in both academic and non-academic priorities. Citizen Schools’ programming will also likely adjust to changes in the education landscape resulting from the recently authorized Every Student Succeeds Act (ESSA), as the legislation simultaneously reduces federal reach into local education decisions and provides states and districts more control over teacher evaluation, standards, school turnarounds, and accountability. Given that Citizen Schools has focused chiefly on working with turnaround schools, the new legislation will undoubtedly influence not only how the organization engages new district and school partners, but also how it will adjust its programming and staffing. Hopefully the findings described in this report can provide useful information as the Citizen Schools organization plans for the future.

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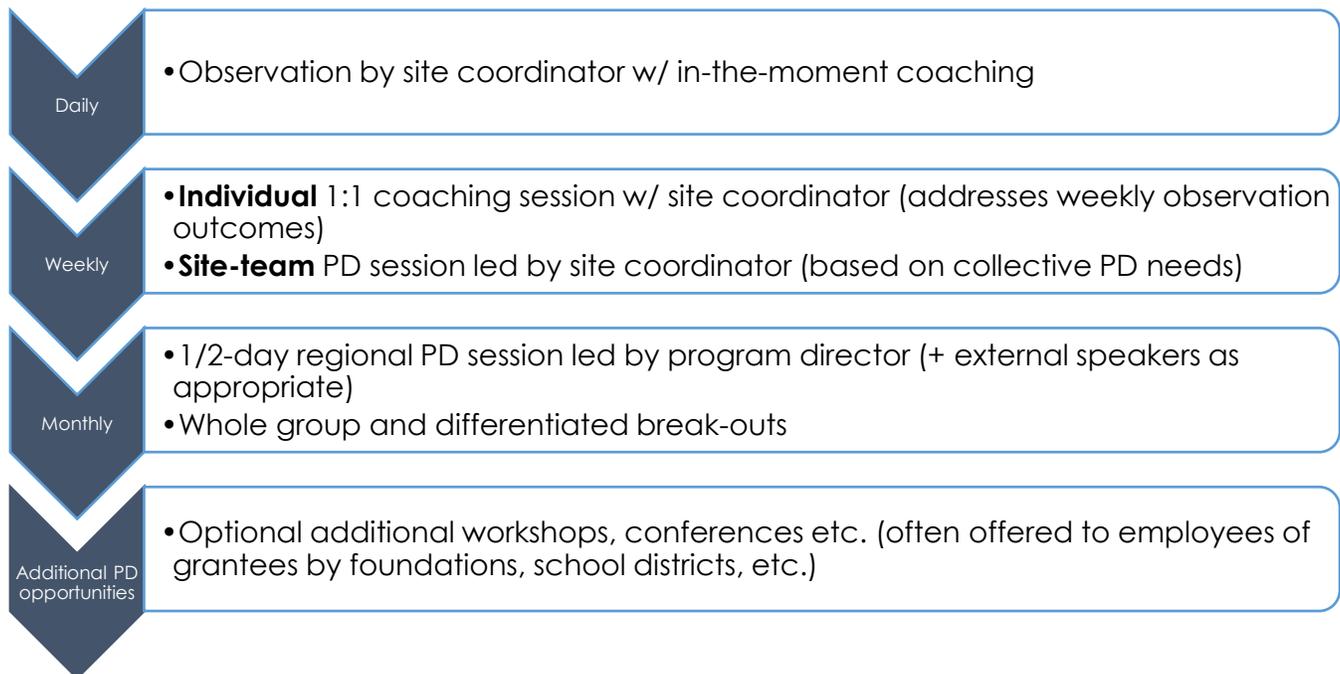
# CYCLE OF PROFESSIONAL DEVELOPMENT // TEACHING FELLOWS & CAMPUS DIRECTORS

## Teaching Fellows: Program Staff (serve a 2-year tenure with their Envisioneers site)

### Summer I (Pre-Service)

- 3-week summer training //centralized training at California HQ in Redwood City
  - 1-week training on Citizen Schools history, mission, culture, and norms
  - 1-week training on youth development and classroom management
  - 1-week campus-specific training at assigned campus—systems for campus culture, learning about the community, preparation for start of program

## Teaching Fellows throughout both years:



### Summer II (before 2<sup>nd</sup> year of Fellowship)

- Individualized 6-week Summer Projects based on professional trajectory, interest, and/or PD needs that emerged through Year 1
- 3-week summer training //centralized training at California HQ in Redwood City
  - 1-week advanced PD topics for TF2s
  - 1-week—leadership role in TF1s sessions and differentiated sessions on advanced TF2 topics (family engagement, content area instruction, complex YD topics, eg. trauma)
  - 1-week campus-specific PD at assigned campus—systems for campus culture, learning about the community, preparation for start of program

The document below represents the School Partnership Agreement between our legacy Organization Citizen Schools and Aurum Preparatory Academy. Since completion of the agreement, Citizen Schools California transitioned to Envisioneers, no services were interrupted. The partnership at Aurum is effective and we anticipate being a partner at Aurum for years to come.



## EXPANDED LEARNING TIME SCHOOL PARTNERSHIP AGREEMENT

This Expanded Learning Time School Partnership Agreement (the "ELT School Partnership Agreement"), effective as of 7/01/2021 (the "Program Effective Date"), is between Citizen Schools, Inc., a Massachusetts corporation with its principal place of business at One Beacon Street, Boston MA, 02108 ("Citizen Schools") and Aurum Preparatory Academy, having a principal place of business at 1034 66th Ave, Oakland, CA 94621 ("School"), is made part of and incorporated by reference into the Master Educational Program Services Agreement between Citizen Schools and School, dated 06/15/2021 (the "Master Agreement"). Each capitalized term used but not defined in this ELT School Partnership Agreement has the meaning given to it in the Master Agreement.

This ELT School Partnership Agreement outlines a collaboration between Aurum Preparatory Academy and Citizen Schools to implement an Expanded Learning Time ("ELT") Program. What follows is an outline of a commitment by Citizen Schools and School for effective collaboration in ELT Program delivery and implementation.

Program Term: The term of the ELT Program hereunder (the "Program Term") shall commence on the Program Effective Date and, unless earlier terminated in accordance with the Master Agreement or renewed by mutual written agreement of the parties, shall expire on 6/13/2022.

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- II. Overview of Citizen Schools Core Program Model Requirements and Priority Outcomes
- III. Leadership and Staffing (including AmeriCorps Requirements)
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- VI. Logistics and Operations
- VII. Miscellaneous
- VIII. payment schedules
- IX. Signatures

### I. Citizen Schools Program Guiding Principles

Strong and deep collaborations between Citizen Schools and School are critical to the successful implementation of an ELT Program. Additional time in the school day creates increased opportunities for schools to engage the broader community as partners in teaching and learning. *In a successful collaboration, parties collaborate to co-develop, co-manage, and co-sustain a collaboration that enhances the experiences of students, teachers, Citizen Schools' staff and volunteers, and families.*

Guiding principles that support the collaboration include:



- A. *Clearly communicated and shared, data-driven goals:* The collaboration supports clear data-driven educational goals and priorities established by both School and Citizen Schools.
- B. *Complementary & aligned content:* School and Citizen Schools plan together over the summer months and throughout the year to develop a scope and sequence of curriculum to be implemented by Citizen Schools which will complement the lessons and academic experiences of students during traditional classroom instruction. This is supported by mutual classroom observations, teacher support and, when appropriate, joint professional development.
- C. *Ongoing clear and consistent communication:* School and Citizen Schools work to ensure clear, consistent communication and data sharing between the parties on two levels: between the leadership of School and Citizen Schools and between teachers and staff who work directly with students.
- D. *Continuous improvement and sustainability:* The partnership is a multi-year endeavor with responsibilities for relationship-building, community engagement and ongoing communication, fundraising, and commitment to continuous improvement shared by both parties.
- E. *Collective Teacher Efficacy:* Citizen Schools teams firmly believe in their ability to positively affect students academically and behaviorally. We seek partnerships with school administrators and staff who feel strongly that their work can make a positive difference in students' lives.

## II. Overview of Citizen Schools Program Design

Though precise measures may vary by location, Citizen Schools prioritizes select student outcomes within the school year:

- student growth and proficiency on statewide and/or internal assessments - 80 % of our students have met their growth goals rate by EOY
- mastery of 21<sup>st</sup> Century Skills aligned to Citizen Schools' apprenticeships
- improvements in student engagement measures such as attendance

Citizen Schools, with assistance from Collaborator, may also want to track long-term outcomes after Program participation including:

- high school enrollment and graduation
- college enrollment, persistence and graduation

School will offer 3 hours of learning time in addition to its daily schedule for at least 5 days each week (except when school is not in session) and use that additional time to provide:

1. *Academic Support* (at least 240 minutes/week of the 900 minutes)



- a. Students build academic skill via extra practice in a single content focus area (math or literacy)
  - b. Students build growth mindset via Goals and Progress Conferences
  - c. Teaching fellows will push into the school day to support students as directed by School
2. *Apprenticeships* (two 90-minute sessions/week)
- a. Students take at least 4 apprenticeships a year with 21<sup>st</sup> century skills standards as focus
3. *Culture & Student Engagement* (bi-weekly goals & progress meetings, daily team meetings, weekly team/campus activities)
- a. Students participate in goal setting, culture building, and social-emotional learning
  - b. 8GA, our high school and college prep class for 8th graders, helps students become leaders in their school and community (campuses with 8th graders)
  - c. Citizen Schools' Team Leaders make family phone calls that build relationships to support students

### **III. Leadership and Staffing (including AmeriCorps Requirements)**

The School Executive Director and the Citizen Schools Campus Director will work at all times to support the successful implementation of the ELT Program located in School.

#### The Executive Director:

- serves as the *leader of the ELT initiative* and supports the implementation of the ELT Program, including cultivating the buy-in of school faculty, students and families.
- supports and upholds Citizen Schools' *attendance and enrollment policies*, including providing additional supervision support during transitions and facilitating family meetings if necessary.
- commits to *mentor the Citizen Schools Campus Director and meet with him/her* on at least a bi-weekly basis on topics such as instructional leadership, community building, school administration, personnel management, or others as agreed upon.
- commits to *include the Citizen Schools Campus Director in conversations pertinent to student progress and growth, and in Grade-Level team meetings and Professional Development sessions*
- (or designated school administrator) commits to *being present generally until 6:00pm and active in the school building during the Expanded Learning Time hours*, including supporting student behavioral challenges as needed.
- will notify Campus Director of any *procedures* relevant to the ELT Program (e.g., procedures around new school initiatives) through ensuring the Citizen Schools Campus Director receives school email and mail communication.



- will notify Citizen Schools of *changes in leadership* at the School thirty (30) days prior to the implementation of such changes or as soon as practicable and make sure new leaders (such as any new Executive Director, or other key school administrator) are available early in their tenure to participate in an orientation about the Program.

#### Additional School Staff Support:

In addition to the ongoing support and supervision of the Principal, at least 1 School English Language Arts ("ELA") and/or math and 1 Special Education teacher will be designated to participate in ELT Program elements and serve as liaisons and coaches to Citizen Schools staff on at least a monthly basis. To ensure quality, School is strongly encouraged to keep members of its administrative and/or student support team on site during ELT to support operations, including but not limited to office staff, nurse, guidance counselor, safety officer, and or behavioral support staff.

#### Citizen Schools Staffing:

As Citizen Schools is an AmeriCorps program, in addition to the existing Citizen Schools staff (i.e., the Campus Director, Part Time Teaching Associates, and AmeriCorps Teaching Fellows), additional AmeriCorps Teaching Fellows will serve on campus and in school-based morning roles that support the ELT Program goals. Specific roles and responsibilities for campus staff will be discussed and agreed-upon by the Principal and Citizen Schools Managing Director of Program and Campus Director.

Per requirements by the Corporation for National and Community Service for all AmeriCorps members, AmeriCorps Teaching Fellows may not participate in the following activities during the hours of service for School and Citizen Schools:

- Political Activities
  - Participating in efforts to influence legislation, including state or local ballot initiatives, or lobbying for your program
  - Engaging in partisan political activities, or other activities designed to influence the outcome of an election to any public office
  - Participating in or endorsing events or activities that are likely to include advocacy for or against political parties, political platforms, political candidates, proposed legislation or elected officials
  - Voter registration drives



- Organizing or participating in protests, boycotts or strikes
- Religious Affairs
  - Engaging in religious instruction or conducting worship services
  - Providing instruction in a program that includes mandatory religious instruction or worship
  - Constructing or operating facilities devoted to religious instruction or worship
  - Maintaining facilities primarily or inherently devoted to religion instruction or worship
  - Engaging in any form of religious proselytizing
- Union Activities:
  - Assisting, promoting, or deterring union organizing;
  - Impairing existing contracts for services or collective bargaining agreements;
- For-profit businesses
  - Providing a direct benefit to a for-profit entity
- Fundraising
  - AmeriCorps members cannot assist their organization with major fundraising efforts that raise resources toward the operating expense or endowment. However, AmeriCorps policy does permit limited activities related to fundraising to the extent that such activities:
    - Provide immediate and direct support to a specific and direct service activity
    - Fall within the programs approved direct service objectives
    - Are not the primary activity
    - Involve in-kind donations rather than cash donations
- Other prohibited activities
  - Providing abortion services or referrals
  - Other activities Citizen Schools determines will be prohibited upon notice to Citizen Schools
  - Administrative work, unless it benefits the members direct service

#### **IV. Alignment & Coordination**

To help ensure ongoing alignment and coordination, Citizen Schools and School will identify strategies for ensuring ongoing collaboration and alignment through:

- Joint participation in professional development sessions, as appropriate;
  - attend summer training as directed between July 26th - August 6th, 2021
  - attend training on No Nonsense Nurturer offered by School



- Joint participation in standing meetings including school department, grade level, orientation, student support, professional development, and instructional leadership and other whole-school team meetings to review and action plan around student data, and
- Joint classroom observations.
- Joint classroom management strategy - No Nonsense Nurturer
  - participate in Co-teacher model
  - hold bi weekly conversations with their lead teacher
  - align on culture

In addition, Citizen Schools' regional leadership, Campus Director and the School leadership will meet at least twice yearly to review end-of-semester data and create strategic plans to continue to improve performance.

#### **V. Measurement & Evaluation**

Citizen Schools collects, analyzes and uses information about student performance in Citizen Schools programming and during the school day. This information will help Citizen Schools make improvements to its Program to have an even greater impact on the students served in the future.

- work toward the School internal benchmark of 80% of all scholars passing classes
- 85% attendance is met in the ELT program
- 70% will increase their sense of belonging and positive mindset assessed through SEL surveys administered at the beginning and end of the school year

#### Access to Data and Obtaining Parental Consent:

- Citizen Schools and School will work together to ensure that Citizen Schools has access to the Learning Management Systems ("LMS") for student support (including PowerSchool and Google Classroom) during the ELT Program and for evaluation purposes, in accordance with federal, state, and other legal privacy guidelines.
- School will support Citizen Schools to obtain parental consent when needed for various field trips, sharing of academic results of evaluation, dismissal waiver for walking home, etc, through existing family engagement systems like newsletters, school-wide mailings, and orientation events.
- Citizen Schools will follow School policies to obtain parental consent to access participants' education records.



- Where such consent is granted, School will provide Citizen Schools with ongoing access to the school database or school records for the purpose of accessing such data, including students' enrollment information, and students' school administered interim assessments and state assessment results.

## **VI. Logistics & Operations**

Citizen Schools and School agree to work together to ensure the following is achieved at the School:

- Clear communication around expectations and ownership for training Citizen Schools staff around School, County, and state-required compliance requirements, including mandated reporting.
- Explicit training of School policies and procedures to Citizen Schools staff relevant to the implementation of programs in the expanded learning hours, such as policies/procedures around: student transitions, dismissal, field trips, and usage of School facilities, furniture and other School property.
- Access for Citizen Schools staff to student Individualized Education Program ("IEP") files, upon parental consent.
- Access for Citizen Schools Campus Leadership to the School's School Safety Plan documentation and collaboration in revising components or protocols to account for resources available during ELT Program hours. This may include participation of Citizen Schools staff in School building drills or additional drills being conducted during the second shift.
- The development of communication protocols, in collaboration with the School, for notification or alert of parents and/or guardians, Citizen Schools staff, School staff and School administration in the event of an emergency or hazard present in the building.
- With prior consent and approval of the School, the ability to use standard signage, as appropriate, containing Citizen Schools and AmeriCorps name and logo on School property including but not limited to at least one banner or sign.
- Open access and usage of School space including but not limited to use of the School computers and computer labs, as well as phones.
- The development of a method, in collaboration with the School, for communication between School staff and Citizen Schools staff regarding any incident which may affect students' behavior or needs during the school day.



- The development of a method, in collaboration with the School, to monitor and supervise students during transition times between school day and Citizen Schools programming and after the conclusion of school day.

**VII. Miscellaneous**

- School shall be responsible for the condition and operation of all facilities and equipment used, and for the actions of School staff, in the conduct of the ELT Program.
- Citizen Schools shall be responsible for the actions of Citizen Schools staff in the conduct of the ELT Program.

**VIII. Payment Schedule**

- Citizen Schools will invoice School on a monthly basis starting August 2021 through June 2022. For a total amount not to exceed \$154,000.00 annually with payment due according to the terms of the Master Agreement.

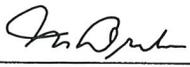
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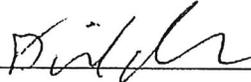


IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the day and year set forth above.

CITIZEN SCHOOLS, INC.

(Aurum Preparatory Academy)





By: Maria Drake

By: David Hardin

Title: Executive Director

Title: Executive Director

Date: 7/02/2021

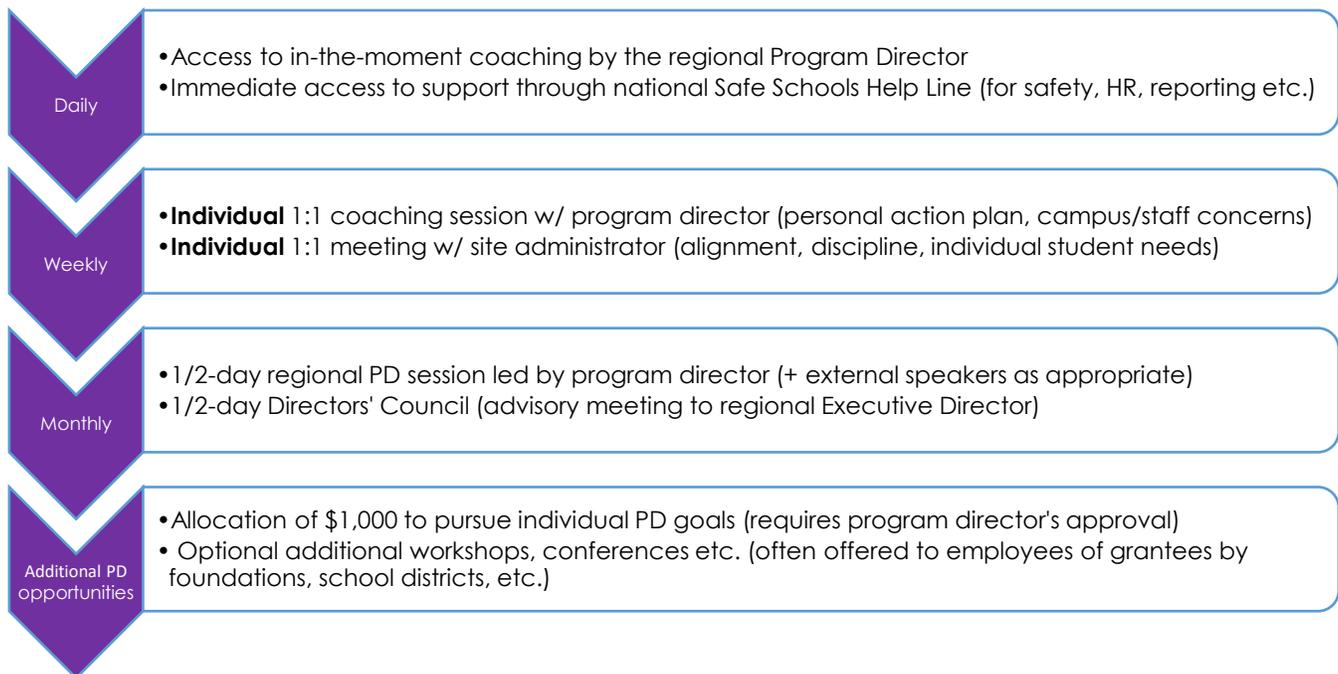
Date: 07/02/2021

## Campus Directors: Program Leaders (experienced educators with multi-year retention)

### Summer I (Pre-Service) for new program leaders

- 3-week summer training // centralized training at California HQ in Redwood City
  - 1-week training on Citizen Schools history, mission, culture, and norms
  - 1-week regional training in Redwood City (regional office)—leadership and coaching; budgeting; HR; site management
  - 1-week campus-specific PD at assigned campus—systems for campus culture, learning about the community, preparation for start of program

## All Campus Directors throughout their tenure (differentiated as appropriate by experience)



### Subsequent Summers

- 3-week summer training // centralized training at California HQ in Redwood City
  - 1-week advanced PD topics for returning site coordinators
  - 1-week regional training in Redwood City (regional office)—leadership role in TF sessions and differentiated sessions on advanced program leader topics
  - 1-week campus-specific PD at assigned campus—systems for campus culture, learning about the community, preparation for start of program



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
07/07/2021

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).

|  |              |  |  |        |                             |
|--|--------------|--|--|--------|-----------------------------|
| <b>PRODUCER</b><br>Digital Insurance LLC<br>formerly Huntleigh McGehee<br>8235 Forsyth Boulevard, #1200<br>Clayton, MO 63105 | 314-746-4700 |  | <b>CONTACT NAME:</b><br>PHONE (A/C, No, Ext): 314-746-4700 |        | FAX (A/C, No): 314-889-3700 |
|  |              |  | E-MAIL ADDRESS: john.girafalco@onedigital.com              |        |                             |
| INSURER(S) AFFORDING COVERAGE  |              |  |  | NAIC # |                             |
| INSURER A: Citizens Ins. Co. of America  |              |  |  | 31534  |                             |
| INSURER B: Hartford Accident & Indemnity   |              |  |  | 22357  |                             |
| INSURER C:   |              |  |  |        |                             |
| INSURER D:   |              |  |  |        |                             |
| INSURER E:   |              |  |  |        |                             |
| INSURER F:   |              |  |  |        |                             |

**INSURED**  
**ENVISIONEERS INC**  
 330 Twin Dolphin Dr  
 Redwood City, CA 94065

### COVERAGES

### CERTIFICATE NUMBER:

### 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.

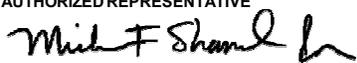
| INSR LTR | TYPE OF INSURANCE   | ADDL INSD | SUBR WVD | POLICY NUMBER                | POLICY EFF (MM/DD/YYYY)  | POLICY EXP (MM/DD/YYYY)  | LIMITS   |
|----------|---|-----------|----------|------------------------------|--------------------------|--------------------------|--|
| A        | <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY<br><input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR<br><br>GEN'L AGGREGATE LIMIT APPLIES PER:<br><input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC<br>OTHER: |           |          | RBKH67045100                 | 07/01/2021               | 07/01/2022               | EACH OCCURRENCE \$ 1,000,000<br>DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000<br>MED EXP (Any one person) \$ 10,000<br>PERSONAL & ADV INJURY \$ 1,000,000<br>GENERAL AGGREGATE \$ 3,000,000<br>PRODUCTS - COM/OP AGG \$ 3,000,000 |
| A        | <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY<br><input checked="" type="checkbox"/> HIRED AUTOS ONLY<br><input type="checkbox"/> SCHEDULED AUTOS<br><input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY  |           |          | RBKH67045100                 | 07/01/2021               | 07/01/2022               | COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000<br>BODILY INJURY (Per person) \$<br>BODILY INJURY (Per accident) \$<br>PROPERTY DAMAGE (Per accident) \$  |
| A        | <input checked="" type="checkbox"/> UMBRELLA LIAB<br><input type="checkbox"/> EXCESS LIAB<br><input checked="" type="checkbox"/> OCCUR<br><input type="checkbox"/> CLAIMS-MADE<br>DED <input checked="" type="checkbox"/> RETENTION \$ NIL  |           |          | UHKH67045100                 | 07/01/2021               | 07/01/2022               | EACH OCCURRENCE \$ 3,000,000<br>AGGREGATE \$ 3,000,000   |
| B        | <b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b><br>ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/><br>If yes, describe under DESCRIPTION OF OPERATIONS below  |           | X        | 84WECAL9JAX                  | 07/01/2021               | 07/01/2022               | <input checked="" type="checkbox"/> PER STATUTE<br><input type="checkbox"/> OTH-ER<br>E.L. EACH ACCIDENT \$ 1,000,000<br>E.L. DISEASE - EA EMPLOYEE \$ 1,000,000<br>E.L. DISEASE - POLICY LIMIT \$ 1,000,000                             |
| A        | <b>Professional Liab.</b><br><b>Abuse &amp; Molestion</b>   |           |          | RBKH67045100<br>RBKH67045100 | 07/01/2021<br>07/01/2021 | 07/01/2022<br>07/01/2022 | <b>Occur</b> \$ 1,000,000<br><b>Aggregate</b> \$ 3,000,000   |

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

Oakland Unified School District, its Councilmembers, Directors, Officers, Agents, Employees and Volunteers are included as Additional Insured with regard to the General Liability policy where required by written contract. A waiver Subrogation applies in regards to Workers Compensation coverage where required by written contract and permissible by law.

### CERTIFICATE HOLDER

### CANCELLATION

|  |   |
|--|---|
| <b>OAKCA-4</b><br><br>Oakland Unified School District<br>1000 Broadway, Suite 680<br>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.<br><br>AUTHORIZED REPRESENTATIVE<br> |
|--|---|

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

## COMMERCIAL GENERAL LIABILITY BROADENING ENDORSEMENT

This endorsement modifies insurance provided under the following:

### COMMERCIAL GENERAL LIABILITY COVERAGE PART

#### SUMMARY OF COVERAGES

|     |   |          |
|-----|---|----------|
| 1.  | Additional Insured by Contract, Agreement or Permit                                 | Included |
| 2.  | Additional Insured – Primary and Non-Contributory                                   | Included |
| 3.  | Blanket Waiver of Subrogation   | Included |
| 4.  | Bodily Injury Redefined   | Included |
| 5.  | Broad Form Property Damage – Borrowed Equipment, Customers Goods & Use of Elevators | Included |
| 6.  | Knowledge of Occurrence   | Included |
| 7.  | Liberalization Clause   | Included |
| 8.  | Medical Payments – Extended Reporting Period  | Included |
| 9.  | Newly Acquired or Formed Organizations - Covered until end of policy period         | Included |
| 10. | Non-owned Watercraft  | 51 ft.   |
| 11. | Supplementary Payments Increased Limits   |          |
|     | - Bail Bonds  | \$2,500  |
|     | - Loss of Earnings  | \$1000   |
| 12. | Unintentional Failure to Disclose Hazards   | Included |
| 13. | Unintentional Failure to Notify   | Included |

This endorsement amends coverages provided under the Commercial General Liability Coverage Part through new coverages, higher limits and broader coverage grants.

#### 1. Additional Insured by Contract, Agreement or Permit

The following is added to **SECTION II – WHO IS AN INSURED**:

##### Additional Insured by Contract, Agreement or Permit

- a. Any person or organization with whom you agreed in a written contract, written agreement or permit that such person or organization to add an additional insured on your policy is an additional insured 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, but only with respect to:

- (1) "Your work" for the additional insured(s) designated in the contract, agreement or permit;

- (2) Premises you own, rent, lease or occupy; or

- (3) Your maintenance, operation or use of equipment leased to you.

- b. The insurance afforded to such additional insured described above:

- (1) Only applies to the extent permitted by law; and

- (2) Will not be broader than the insurance which you are required by the contract, agreement or permit to provide for such additional insured.

- (3) Applies on a primary basis if that is required by the written contract, written agreement or permit.
  - (4) Will not be broader than coverage provided to any other insured.
  - (5) Does not apply if the "bodily injury", "property damage" or "personal and advertising injury" is otherwise excluded from coverage under this Coverage Part, including any endorsements thereto.
- c. This provision does not apply:
- (1) Unless the written contract or written agreement was executed or permit was issued prior to the "bodily injury", "property damage", or "personal injury and advertising injury".
  - (2) To any person or organization included as an insured by another endorsement issued by us and made part of this Coverage Part.
  - (3) To any lessor of equipment:
    - (a) After the equipment lease expires; or
    - (b) If the "bodily injury", "property damage", "personal and advertising injury" arises out of sole negligence of the lessor
  - (4) To any:
    - (a) Owners or other interests from. whom land has been leased which takes place after the lease for the land expires; or
    - (b) Managers or lessors of premises if:
      - (i) The occurrence takes place after you cease to be a tenant in that premises; or
      - (ii) The "bodily injury", "property damage", "personal injury" or "advertising injury" arises out of structural alterations, new construction or demolition operations performed by or on behalf of the manager or lessor.
  - (5) To "bodily injury", "property damage" or "personal and advertising injury" arising out of the rendering of or the failure to render any professional services.
- This exclusion applies even if the claims against any insured allege negligence or other wrongdoing in the supervision, hiring, employment, training or monitoring of others by that insured, if the "occurrence" which caused the "bodily injury" or "property damage" or the offense which caused the "personal and

advertising injury" involved the rendering of or failure to render any professional services by or for you.

- d. With respect to the insurance afforded to these additional insureds, the following is added to **SECTION III – LIMITS OF INSURANCE**:

The most we will pay on behalf of the additional insured for a covered claim is the lesser of the amount of insurance:

- 1. Required by the contract, agreement or permit described in Paragraph a.; or
- 2. Available under the applicable Limits of Insurance shown in the Declarations.

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

## 2. Additional Insured – Primary and Non-Contributory

The following is added to **SECTION IV – COMMERCIAL GENERAL LIABILITY CONDITIONS**, Paragraph 4. **Other insurance**:

### Additional Insured – Primary and Non-Contributory

If you agree in a written contract, written agreement or permit that the insurance provided to any person or organization included as an Additional Insured under **SECTION II – WHO IS AN INSURED**, is primary and non-contributory, the following applies:

If other valid and collectible insurance is available to the Additional Insured for a loss covered under Coverages **A** or **B** of this Coverage Part, our obligations are limited as follows:

#### a. Primary Insurance

This insurance is primary to other insurance that is available to the Additional Insured which covers the

Additional Insured as a Named Insured. We will not seek contribution from any other insurance available to the Additional Insured except:

- (1) For the sole negligence of the Additional Insured;
- (2) When the Additional Insured is an Additional Insured under another primary liability policy; or
- (3) when b. below applies.

If this insurance is primary, our obligations are not affected unless any of the other insurance is also primary. Then, we will share with all that other insurance by the method described in c. below.

**b. Excess Insurance**

(1) This insurance is excess over any of the other insurance, whether primary, excess, contingent or on any other basis:

- (a) That is Fire, Extended Coverage, Builder's Risk, Installation Risk or similar coverage for "your work";
- (b) That is Fire insurance for premises rented to the Additional Insured or temporarily occupied by the Additional Insured with permission of the owner;
- (c) That is insurance purchased by the Additional Insured to cover the Additional Insured's liability as a tenant for "property damage" to premises rented to the Additional Insured or temporarily occupied by the Additional with permission of the owner; or
- (d) If the loss arises out of the maintenance or use of aircraft, "autos" or watercraft to the extent not subject to Exclusion g. of **SECTION I – COVERAGE A – BODILY INJURY AND PROPERTY DAMAGE LIABILITY.**

(2) When this insurance is excess, we will have no duty under Coverages **A** or **B** to defend the insured against any "suit" if any other insurer has a duty to defend the insured against that "suit". If no other insurer defends, we will undertake to do so, but we will be entitled to the insured's rights against all those other insurers.

(3) When this insurance is excess over other Insurance, we will pay only our share of the amount of the loss, if any, that exceeds the sum of:

- (a) The total amount that all such other insurance would pay for the loss in the absence of this insurance; and
- (b) The total of all deductible and self insured amounts under all that other insurance.

We will share the remaining loss, if any, with any other insurance that is not described in this Excess Insurance provision and was not bought specifically to apply in excess of the Limits of Insurance shown in the Declarations of this Coverage Part.

**c. Method Of Sharing**

If all of the other insurance permits contribution by equal shares, we will follow this method also. Under this approach each

insurer contributes equal amounts until it has paid its applicable limit of insurance or none of the loss remains, whichever comes first. If any of the other insurance does not permit contribution by equal shares, we will contribute by limits. Under this method, each insurer's share is based on the ratio of its applicable limit of insurance to the total applicable limits of insurance of all insurers

**3. Blanket Waiver of Subrogation**

The following is added to **SECTION IV – COMMERCIAL GENERAL LIABILITY CONDITIONS, Paragraph 8. Transfer Of Rights Of Recovery Against Others To Us:**

We waive any right of recovery we may have against any person or organization with whom you have a written contract that requires such waiver because of payments we make for damage under this coverage form. The damage must arise out of your activities under a written contract with that person or organization. This waiver applies only to the extent that subrogation is waived under a written contract executed prior to the "occurrence" or offense giving rise to such payments.

**4. Bodily Injury Redefined**

**SECTION V – DEFINITIONS, Definition 3.** "bodily injury" is replaced by the following:

3. "Bodily injury" means bodily injury, sickness or disease sustained by a person including death resulting from any of these at any time. "Bodily injury" includes mental anguish or other mental injury resulting from "bodily injury".

**5. Broad Form Property Damage – Borrowed Equipment, Customers Goods, Use of Elevators**

a. **SECTION I – COVERAGES, COVERAGE A – BODILY INJURY AND PROPERTY DAMAGE LIABILITY, Paragraph 2. Exclusions** subparagraph j. is amended as follows:

Paragraph (4) does not apply to "property damage" to borrowed equipment while at a jobsite and not being used to perform operations.

Paragraphs (3), (4) and (6) do not apply to "property damage" to "customers goods" while on your premises nor do they apply to the use of elevators at premises you own, rent, lease or occupy.

b. The following is added to **SECTION V – DEFINITIONS:**

24. "Customers goods" means property of your customer on your premises for the purpose of being:

- a. worked on; or
- b. used in your manufacturing process.
- c. The insurance afforded under this provision is excess over any other valid and collectible property insurance (including deductible) available to the insured whether primary, excess, contingent

**6. Knowledge of Occurrence**

The following is added to **SECTION IV – COMMERCIAL GENERAL LIABILITY CONDITIONS**, Paragraph 2. **Duties in the Event of Occurrence, Offense, Claim or Suit:**

- e. Notice of an "occurrence", offense, claim or "suit" will be considered knowledge of the insured if reported to an individual named insured, partner, executive officer or an "employee" designated by you to give us such a notice.

**7. Liberalization Clause**

The following is added to **SECTION IV – COMMERCIAL GENERAL LIABILITY CONDITIONS:**

**Liberalization Clause**

If we adopt any revision that would broaden the coverage under this Coverage Form without additional premium, within 45 days prior to or during the policy period, the broadened coverage will immediately apply to this Coverage Part.

**8. Medical Payments – Extended Reporting Period**

- a. **SECTION I – COVERAGES, COVERAGE C – MEDICAL PAYMENTS**, Paragraph 1. **Insuring Agreement**, subparagraph a.(3)(b) is replaced by the following:
  - (b) The expenses are incurred and reported to us within three years of the date of the accident; and
- b. This coverage does not apply if **COVERAGE C – MEDICAL PAYMENTS** is excluded either by the provisions of the Coverage Part or by endorsement.

**9. Newly Acquired Or Formed Organizations**

**SECTION II – WHO IS AN INSURED**, Paragraph 3.a. is replaced by the following:

- a. Coverage under this provision is afforded until the end of the policy period.

**10. Non-Owned Watercraft**

**SECTION I – COVERAGES, COVERAGE A BODILY INJURY AND PROPERTY DAMAGE LIABILITY**, Paragraph 2. **Exclusions**, subparagraph g.(2) is replaced by the following:

**g. Aircraft, Auto Or Watercraft**

- (2) A watercraft you do not own that is:
  - (a) Less than 51 feet long; and
  - (b) Not being used to carry persons or property for a charge;

This provision applies to any person who, with your consent, either uses or is responsible for the use of a watercraft.

**11. Supplementary Payments Increased Limits**

**SECTION I – SUPPLEMENTARY PAYMENTS COVERAGES A AND B**, Paragraphs 1.b. and 1.d. are replaced by the following:

- 1.b. Up to \$2,500 for cost of bail bonds required because of accidents or traffic law violations arising out of the use of any vehicle to which the Bodily Injury Liability Coverage applies. We do not have to furnish these bonds.

- 1.d. All reasonable expenses incurred by the insured at our request to assist us in the investigation or defense of the claim or "suit", including actual loss of earnings up to \$1000 a day because of time off from work.

**12. Unintentional Failure to Disclose Hazards**

The following is added to **SECTION IV – COMMERCIAL GENERAL LIABILITY CONDITIONS**, Paragraph 6. **Representations:**

We will not disclaim coverage under this Coverage Part if you fail to disclose all hazards existing as of the inception date of the policy provided such failure is not intentional.

**13. Unintentional Failure to Notify**

The following is added to **SECTION IV – COMMERCIAL GENERAL LIABILITY CONDITIONS**, Paragraph 2. **Duties in the Event of Occurrence, Offense, Claim or Suit:**

Your rights afforded under this policy shall not be prejudiced if you fail to give us notice of an "occurrence", offense, claim or "suit", solely due to your reasonable and documented belief that the "bodily injury" or "property damage" is not covered under this policy.

ALL OTHER TERMS, CONDITIONS, AND EXCLUSIONS REMAIN UNCHANGED.