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OAKLAND UNIFIED
SCHOOL DISTRICT

Community Schools, Thriving Students

Memo

To Board of Education

From Jacqueline Minor, General Counsel

Board Meeting Date February 26, 2014

Subject **APPROVAL OF THE MEMORANDUM OF UNDERSTANDING BETWEEN THE OAKLAND UNIFIED SCHOOL DISTRICT AND OPERATION HOPE**

Action Requested Approval of the Memorandum of Understanding Between the Oakland Unified School District and Operation HOPE.

Background
A one paragraph explanation of the the MOU.

Operation HOPE is a 501(c)3 non-profit organization. Operation HOPE's mission is to expand economic opportunity in underserved communities through economic education and empowerment.

Discussion
One paragraph summary of the MOU.

The Memorandum of Understanding will establish a relationship between the Oakland Unified School District and Operation HOPE for the latter to provide the basis of financial literacy in grades 4 thru 12 at District schools for the term July 1, 2013 to June 30, 2015 at no cost to the District.

Recommendation Approval of the Memorandum of Understanding Between the Oakland Unified School District and Operation HOPE.

Fiscal Impact N/A

Attachments

- Memorandum of Understanding



**MEMORANDUM OF AGREEMENT BETWEEN A NON-PROFIT ORGANIZATION
AND OAKLAND UNIFIED SCHOOL DISTRICT**

I. Parties

The purpose of this Memorandum of Understanding (“MOU”) is to establish a relationship between Oakland Unified School District (“OUSD”) and Operation HOPE of the Oakland Market. (“HOPE”).

WHEREAS, HOPE’s services or programs described in this MOU will be provided at no cost to OUSD, the students, and the parents; and

BOTH PARTIES HEREBY enter into this MOU to enable HOPE to provide said services/program on school(s), site(s) (“Schools”) selected in Section II of the MOU.

II. Program Sites

HOPE programs may be offered at all OUSD schools. Attached is a list of schools that have received HOPE programs and services in the past. (Reference Attachment A)

III. OPERATION HOPE Responsibilities/Scope of Services

A. Provide a description of the services that your program will be providing OUSD. Please be specific by answering all of the following questions

1. A brief description of the type of services your program generally provides.

Operation HOPE makes free enterprise work for all through financial dignity empowerment programs. Youth attending OUSD will receive our Banking On Our Future program, which provides 4th through 12th grade students with access to financial information and tools to allow them to achieve and sustain financial stability. Furthermore, selected middle and high schools will be eligible to participate in HOPE Business In A Box Academies powered by the Gallup HOPE Index. HOPE Business in a Box empowers youth with entrepreneurship education, an opportunity to work with a Business Role Model, and an opportunity to start a business with a grant for up to \$500. With extensive training, our dedicated HOPE Corps volunteer facilitators, many from the financial service industry, are responsible for delivering Banking on Our Future and HOPE Business in a Box. (Refer to Attachment B for list of HOPE programs)

2. The relevant experience of the Operation HOPE personnel that will be providing the services:



Throughout the 2013-14 school year, HOPE's main contacts for the OUSD are Market President, Mr. Tyrone Cosey and Youth Empowerment Program Manager, Mr. Gregory Collins. Mr. Cosey has served as HOPE's Market President for the Northwestern Region since 2010. In this role, he oversees and supervises all HOPE operations, which includes the HOPE Financial Dignity Center, youth and adult financial empowerment programs and personnel. Mr. Collins has been with HOPE since January of 2013. In his role as Youth Empowerment Program Manager for Oakland, the Bay Area and Northern California, Mr. Collins manages the recruitment of Oakland's elementary, middle, and high school educators and schools. In addition, he trains and manages the involvement of the HOPE Corps volunteers, while ensuring a positive and authentic experience for the HOPE volunteers, educators, and students.

Mr. Cosey and Mr. Collins are active in the Oakland community. Mr. Cosey has overseen the development of three key partnerships with the City of Oakland, including the Spark Point Center, (a founding partner); Oakland Community Land Trust financial education provider, and the Bank On Oakland program coordinating agency. And this past summer, Mr. Collins provided financial literacy presentations to the youth of Oakland that participated in the 6th Annual Attend & Achieve Back to School Rally at City Hall.

3. Please check all of the expectations or goals below that are in agreement with your program's services.

- Ensure a high quality instructional core
- Develop student's social health/skills
- Develop student's emotional health
- Develop student's physical health
- Develop student's cognitive and academic skills
- Create equitable opportunities for learning
- Ensure, maintain, or support high quality and effective instruction
- Prepare students for success in college and careers
- Help ensure, create, and/or sustain safe, healthy and supportive schools
- Create accountability for quality
- Help create full service community schools in OUSD
- Increase, raise graduation rates
- Other: Develop understanding of financial and business concepts.

B. Ensure that all Operation HOPE personnel, including volunteers, will comply with any policy and systems in place at OUSD and School(s). This includes, but is not limited to the following:

1. **Drug and Smoke Free**—No drugs, alcohol, and/or smoking are allowed at any time in any buildings and/or grounds on OUSD property. No



students, staff, visitors, Operation HOPE staff or Operation HOPE volunteers are to use drugs on these School(s).

2. **Anti-Discrimination**—It is the policy of OUSD that in connection with Operation HOPE’s services in this MOU there shall be no discrimination against any employee engaged in the work because of race, color, ancestry, national origin, religious creed, physical disability, medical condition, marital status, sexual orientation, gender, or age. Therefore, Operation HOPE agrees to comply with applicable Federal and California laws.
 3. **Conflict of Interest**—Operation HOPE shall abide by and be subject to all applicable OUSD policies, regulations, statutes or other laws regarding conflict of interest. Operation HOPE shall not hire any OUSD employee to perform the services in this MOU, and affirms that to the best of its knowledge no such conflict presently exists. Operation HOPE agrees to alert OUSD in writing if and when a potential conflict does arise.
 4. **Family Education Rights and Privacy Act**—Operation HOPE shall observe District policies and regulations, and state and federal laws, including the Family Education Rights and Privacy Act of 1974, commonly known as FERPA, related to the confidentiality of pupil and personnel records.
- C. **Required Documents**— Ensure that all Operation HOPE personnel who will be on OUSD premises have been: (a) fingerprinted; (b) submitted to a criminal background check via Livescan or a similar service as required by the Education Code, and (c) taken a tuberculosis test. Please see **Section IV** for the relevant documentation that is required.
- D. **Insurance**—Provide evidence of general liability insurance that names OUSD as an additional insured, for operation students, volunteers, and personnel at location where Operation HOPE provides programs/services with at least \$1M in coverage, and furnish certificate of said insurance to OUSD.
- OR**
1. **Waiver**—Operation HOPE is not required to maintain insurance under this agreement if the Risk Management Officer signs a waiver of insurance. You may contact the Risk Management Officer at 510.879.8588. Waiver of insurance does not release Operation HOPE from responsibility for any claim or demand.
- E. **Communication**—Communicate with School(s) and OUSD staff, both formally and informally, to ensure, to the best of the program’s ability, that Operation HOPE’s services are aligned with the School(s) and OUSD’s mission and



objectives and are adequately meeting student's needs. At the request of School(s) or OUSD staff, provide reasonable data and information to students participating in the Operation HOPE programs.

- F. **Confidentiality**—Operation HOPE shall maintain strict confidentiality of all information about individual students received under this MOU and will not disseminate such information without the express written consent of OUSD. Operation HOPE will comply with FERPA, and will be allowed to use the data received to solicit funding to continue to expand its services/program, so long as there is no information from which the identity of any student in Operation HOPE program as a participant could be made.

IV. Required Documents

Operation HOPE CANNOT commence the services agreed to in this MOU until it has submitted the following documents:

A. Operation HOPE Personnel:

- Completion of Pre-Consultant Screening Process—Attach a letter from Procurement showing completion of Pre-Consultant Screening for this current fiscal year. This process will include a check of all of the following:
 - Fingerprinting—Attach documentation
 - Criminal Background Check—Attach documentation
 - Tuberculosis Clearance—Documentation from health care provider showing negative TB status within the last four years.

B. Operation HOPE:

- X Insurance—see Section III (D) for specifications. Please attach documentation of either proof of insurance, or a waiver signed by the Risk Management Officer.

V. Responsibilities of Oakland Unified School District

- A. **Space**—Provide a suitable classroom or space at the participating School(s) with a teacher present, to be agreed upon by School(s) and Operation HOPE.
- B. **Janitorial Service**—Provide necessary services to maintain this space, including janitorial services, maintenance, utilities, and technology support.
- C. **Data**—Ensure that Operation HOPE has reasonable access to student assessment and evaluation data necessary to inform instruction and periodically review student progress and to provide the study.



1. Provide Operation HOPE with any other student information reasonably necessary to provide its services consistent with Operation HOPE program and to evaluate the impact of its program on students at School(s).

VI. Duration

This MOU is for the 2013 - 2015 school years.

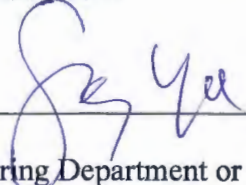
VII. Termination

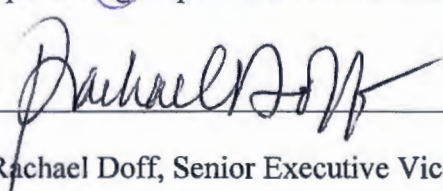
Either party may terminate this MOU at any time, without cause, with 30 day written notice to the other party. This agreement may be amended by mutual consent of the parties. All amendments must be in writing and signed by both parties.

VIII. Hold Harmless/Indemnity

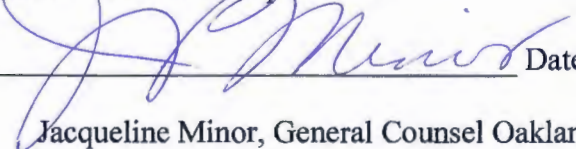
Each party to this MOU agrees to indemnify and hold harmless the other for and from any claims, causes of action, or any other proceeding of any type or kind that is made against the other where such claim, cause of action or other proceeding arises from the conduct, act, omission, or commission by the other party.

IN WITNESS THEREOF, the parties to this agreement have duly executed it on the day, month and year set forth below.

By:  Dated: 2/6/14 (MM/DD/YYYY)
Sponsoring Department or Site Principal

By:  Dated: 02/06/14 (02/06/2014)
Rachael Doff, Senior Executive Vice President, CAO - Operation HOPE Inc.

Approved as to form and procedure

By:  Dated: 2/7/14 (MM/DD/YYYY)
Jacqueline Minor, General Counsel Oakland Unified School District



A handwritten signature in black ink, appearing to be "A. ...".

2/27/14

President, Board of Education
Oakland Unified School District

A handwritten signature in blue ink, appearing to be "S. O. ...".

2/27/14

Superintendent and Secretary Board of Education
Oakland Unified School District



Attachment A
As of November, 17 2013

School	Region	Executive Officer	Students scheduled for 2013 -2014	Students educated 2012 - 2013	Students educated 2011- 2012	Students educated 2010 - 2011
Alliance Academy	3	Kimi Kean	x	X	140	109
Bret Harte Middle School	2	Janette Hernandez	x	X	X	274
Brookfield Elementary	3	Kimi Kean	x	50	X	56
Carl B. Munck	3	Kimi Kean	x	140	X	X
Castlemont Leadership Prep and EOSA	HS 1	Kevin Taylor	x	39	X	264
Claremont Middle School	1	Sondra Aguilera	x	X	X	36
Cleveland Elementary School	1	Sondra Aguilera	x	X	30	X
College Prep and Architecture	HS 1	Kevin Taylor	x	68	75	115
Community United Elementary School	3	Kimi Kean	x	96	X	X
East Oakland School of the Arts	HS 2	Kevin Taylor	x	X	X	70
Edna Brewer Middle School	2	Janette Hernandez	x	X	X	952
Emerson Elementary	1	Sondra Aguilera	x	X	X	110
Franklin Elementary School	2	Janette Hernandez	x	99	140	279
Fremont High School	HS 1	Kevin Taylor	x	210	X	15
Fruitvale Elementary School	2	Janette Hernandez	x	235	185	231
Horace Mann	2	Janette Hernandez	x	148	75	75
Joaquin Miller Elementary School	1	Sondra Aguilera	x	259	120	142
Lincoln Elementary	1	Sondra Aguilera	x	81	X	X
Mandela High School	HS 1	Kevin Taylor	x	X	70	40
Media Academy	HS 1	Kevin Taylor	x	X	X	73
Melrose Leadership Academy	2	Janette Hernandez	x	X	X	210
Oakland High	HS 1	Kevin Taylor	x	573	X	X
Oakland Tech	HS 1	Kevin Taylor	x	608	X	X
Ralph J Bunche High School	HS 1	Kevin Taylor	x	X	X	35
Redwood Heights	2	Janette Hernandez	x	X	100	102
Roosevelt Middle School	2	Janette Hernandez	x	X	240	286
Skyline High School	HS 1	Kevin Taylor	x	490	X	X
Street Academy	HS 1	Kevin Taylor	110	X	X	X
Thornhill Elementary	1	Sondra Aguilera	x	134	X	X
West Lake Middle School	1	Sondra Aguilera	630	791	X	X
Total Number of OUSD students			740	4021	1175	3474

Regions	Total Schools	BOOF Schools	Percentage of total schools
Sondra Aguilera	25	4	25%
Janette Hernandez	25	3	19%
Kimi Kean	26	3	19%
Kevin Taylor	22	7	44%

Total students educated in 2013 - 2014	740
Total students educated in 2012 - 2013	3448
Total students educated in 2011 - 2012	1175
Total students educated in 2010 - 2011	3474
Total students educated since partnersh	8837



Attachment B

1. Banking on Our Future (*grades 4th – 12th*) - Youth are taught the basics of checking and savings accounts, and the importance that credit and investment can have in their daily lives in a program that meets National Council of Teachers of Mathematics standards. The Banking on Our Future curriculum is an effective means of engaging youth in understanding the importance of saving and planning, and has a direct impact on students' commitment to their future while helping reinforce concepts that may be on state examinations.

The program consists of five modules:

1. A Course in Dignity - empowers youth to understand the importance of bringing dignity to their lives and those of others
2. Basics of Budgeting - introduces youth to the benefits of banks and budgeting
3. Get Smart About Banking - teaches children how to write checks and discusses overdraft fees and debit cards
4. Fundamentals of Credit- teaches about credit cards and loans
5. Introduction to Saving and Investing - discusses tools for building wealth.

Banking on Our Future Commitment – One 45-60 minute lesson per week for five weeks OR one full day.

2. HOPE Business in a Box–, Powered by the Gallup – HOPE Index (*grades 6th – 12th*), HBIAB is a national initiative developed by Operation HOPE to harness the economic energy of youth. The goal of the initiative is reconnecting the power of education to the power of aspiration, spurring local job creation, spiking local GDP growth, and therein insuring the future prosperity of our students and nation.

HBIAB Program Components:

Phase I

Gallup-HOPE Youth Economic Energy Index

September 1 to November 1

- A. Register your school at: www.gallupstudentpoll.com by. Operation HOPE will guide you through this process.
- B. Students complete index online in October. Each school chooses the one or two days students can complete survey in school computer labs. Survey takes 10 minutes per student to complete.
- C. Results from Index will be available for each school by December 1, 2013.



Phase II

Banking on Our Future (BOOF) Financial Dignity Program

Timeline customized to each school (5 class periods)

- A. Students complete BOOF Pre Test to measure baseline financial literacy knowledge.
- B. Students participate in five learning modules: Financial Dignity, Budgeting, Checking and Savings, Power of Credit, and Investments. The award-winning BOOF program aligns with the Common Core State Standards for Mathematics in 50 states and Social Science and Financial Literacy in 13 states.
- C. Students complete BOOF Post Test to measure knowledge gain and behavioral change.

Phase III

HOPE Business In A Box (HBIAB) Entrepreneurship Program

Timeline customized to each school (4 class periods)

- A. Students participate in four modules: Basics of Business, Developing Your Business Idea, Developing a Financial Plan for your Business, Communication and Public Speaking Skills.
- B. Students complete HBIAB Entrepreneurship Post Assessment to measure knowledge gain.

Phase IV

Classroom and School-Wide Pitch Events

(90 – 120 Minutes)

- A. Students participate in a classroom event where they pitch their business idea to their teachers, fellow classmates, and community business members that serve as judges and select winners. (estimated 45-60 minutes)
- B. The winners of the classroom pitch events then participate in a school-wide pitch event against other classroom winners in front of their teachers, fellow students, and community business members that serve as judges and select winners. (estimated 90 minutes)

Phase V

Business Role Model Empowerment Program

(10 Hours Outside the Classroom)

- A. Business pitch winners are connected to business role models in their community for business development and coaching.
- B. Students meet with their business role model 10 times (timeline is customized to each student).

Phase VI:

Presentation of Business Plans for Business Start-Up Grant

(30 Minutes Outside the Classroom)

Students present their business plan to Operation HOPE staff to qualify for a business start-up grant for up to \$500.