

File ID Number	21-2633
Introduction Date	3/23/22
Enactment Number	22-0503
Enactment Date	3-23-2022 CJH
By	



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

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

March 23, 2022

To: Board of Education

From: Kyla Johnson-Trammell, Superintendent
John Stagl, Principal, Laurel Elementary School

Subject: **Acceptance of Donations by the District**

ACTION REQUESTED:

Acceptance by the Board of Education of a donor-advised fund grant in the amount of \$227,000.00 from Fidelity Charitable, to support the academic and social emotional support at Laurel Elementary School, for the period October 15, 2021 through June 30, 2022, pursuant to the terms and conditions thereof, if any.

BACKGROUND:

The District received donations for the 2021-2022 school year as indicated in the chart below. The donation documentation is available on the Board's legislative web site.

File I.D #	Backup Document Included	Type	Recipient	Grant's Purpose	Time Period	Funding Source	Grant Amount
21-2633	Yes	Donation	Laurel Elementary School	Academic and social emotional support	October 15, 2021 through June 30, 2022	Taylor Charitable Foundation, via Fidelity Charitable	\$227,000.00

FISCAL IMPACT:

The total donation value will be provided to OUSD school from the funders.

- Grants valued at: \$227,000.00

RECOMMENDATION:

Acceptance of the donation by the District pursuant to the terms and conditions thereof, if any.

ATTACHMENTS:

OUSD Donation Form
Copy of Check #94351466

DONATION/GRANT FORM

Please complete the information requested on this form. **Attach your donation checks made payable to Oakland Unified School District with the name of the school referenced on the check's memo note.** For school sites receiving donations: deliver/mail check & form to the Office of your Network Superintendent/Chief/Deputy Chief for processing and board review/preparation. For central office departments receiving donations: deliver/mail check & form to your department Office Manager for processing and board review/preparation.

Questions? Contact Tien Truong at [510-879-5027](tel:510-879-5027) or by email at tien.truong@ousd.org for further information.

Site No.	School Name	Donation's Purpose	Start Date	End Date	Donor	Donation Value*	Check Date	Check No.	[FOR OFFICE USE ONLY] CR NO.
131	Laurel Elementary School	Academic and social emotion support	10/15/21	6/30/21	Taylor Charitable Foundation	\$227,000.00	10/7/21	11467806	

Your Print Name: John Stangl

Your Signature: John Stangl

Your Job Title: Principal

Signature Date: 10/20/21

Your Phone Number: 510-735-7710

Your Email: john.stangl@ousd.org

OUSD Authorized Employee Name (Board Policies, BP 3290,):
Kyla Johnson-Trammell, Superintendent

OUSD Authorized Employee Signature:

[FOR OFFICE USE ONLY] Escape account code(s):



P.O. Box 770001
Cincinnati, OH 45277-0053

BLMFRZBBBBRCR
JOHN STANGL
OAKLAND UNIFIED SCHOOL DISTRICT
LAUREL ELEMENTARY
3750 BROWN AVE
OAKLAND, CA 94619-1406

October 07, 2021

Dear Sir or Madam:

We are delighted to provide you with the attached check for **\$227,000.00**. This Fidelity Charitable Donor-Advised FundSM grant was made at the recommendation of the Taylor Charitable Foundation, a donor-advised fund. ¹

This grant is made by Fidelity Charitable. Fidelity Charitable's donor recommends the grant be used for the following purpose (which does not constitute a restriction): **Laurel Elementary School**. This grant is to be used exclusively for charitable purposes, and is not made for the purpose of influencing legislation. This grant is also subject to the "Grant Terms" on the next page. If you are unable or unwilling to meet these grant conditions, you must return these funds to Fidelity Charitable.

Should you choose to send a thank-you letter, the donor has requested it be sent to the following address. You should not, however, issue a tax acknowledgement to either the recommending donor(s) or to Fidelity Charitable.

Mrs. Karen Taylor, Taylor Charitable Foundation, Bret and Karen Taylor, P.O Box 0934, Lafayette, CA 94549-0934

¹ Fidelity Charitable is an independent public charity that sponsors a donor-advised fund program. In a donor-advised fund, Donors make irrevocable charitable contributions to Fidelity Charitable, and have the privilege of recommending grants to qualified public charities.

DCC _CEBLMFRZBBBBRCR_BBBBB 20211007 5700 P OP=DCCO

DCC _CEBLMFRZBBBBRCR_BBBBB 20211007 PLEASE FOLD AND DETACH AT PERFORATION BEFORE PRESENTING CHECK FOR PAYMENT

VERIFY THE AUTHENTICITY OF THIS MULTI-TONE SECURITY DOCUMENT

CHECK BACKGROUND AREA CHANGES COLOR GRADUALLY FROM TOP TO BOTTOM.



P.O. Box 770001
Cincinnati, OH 45277-0053
800-952-4438

PAYABLE AT: THE BANK OF NEW YORK MELLON
EVERETT, MA 02149
53-292/113

11467806

October 07, 2021

PAY TO THE ORDER OF
OAKLAND UNIFIED SCHOOL DISTRICT

\$227,000.00

*****Two Hundred Twenty Seven Thousand & 0/100 DOLLARS

VOID AFTER 60 DAYS

⑈ 11467806 ⑆ ⑆ 011302920 ⑆ ⑆ 004936 ⑆

Security Features included. Recycle on back.

94351466

Grant Terms: This grant is made subject to the following terms. By accepting this grant, you certify to Fidelity Charitable that (i) your organization is formed under the laws of the US and its territories and is a public charity described in Internal Revenue Code sec. 509(a)(1)-(3), or a private operating foundation described in IRC sec. 4942(j)(3); (ii) this grant will be used exclusively for your organization's exempt purposes; (iii) neither the recommending donor nor any other party will receive goods, services or impermissible benefits (e.g., tuition, memberships or dues with more than incidental benefits, admission to events or goods bought at auction) as a result of this grant; (iv) this grant does not satisfy any portion of a financial obligation (including an enforceable pledge) of any party; (v) this grant will not be used for political contributions or campaign activities; and (vi) your organization does not devote more than an insubstantial part of its activities to attempting to influence legislation by propaganda or otherwise (or has made an election under IRC sec. 501(h) and complies with the limitations thereunder).

If you have any questions regarding the grant, please contact a Fidelity Charitable representative at 800-952-4438.

We wish you continued success in pursuit of your charitable mission.

Sincerely,
Fidelity Charitable

Fidelity Charitable is the brand name for the Fidelity Investments® Charitable Gift Fund, an independent public charity with a donor-advised fund program. Various Fidelity companies provide services to Fidelity Charitable. Fidelity Charitable, Giving Account, and Fidelity are registered service marks, and the Fidelity Charitable logo is a service mark, of FMR LLC, used by Fidelity Charitable under license.

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