

File ID Number	23-1577
Introduction Date	8/9/23
Enactment Number	23-1361
Enactment Date	8/9/2023 CJH
By	



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

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

August 9, 2023

To: Board of Education

From: Kyla Johnson-Trammell, Superintendent
Sondra Aguilera, Chief Academic Officer
Aryn Bowman, Principal, Life Academy

Subject: Grant Agreement - The Helzel Family Foundation Fund at The East Bay Community Foundation - Life Academy

ACTION REQUESTED:

Approval by the Board of Education of a Grant Agreement, Grant #20232626, by and between The Helzel Family Foundation Fund at The East Bay Community Foundation, Oakland, CA, and the District, on behalf of Life Academy, with the latter accepting \$100,000.00, for High School Literacy Instruction at Life Academy, for the period of July 1, 2023 through June 30, 2024.

BACKGROUND:

Grant agreement for OUSD schools for the 2023-2024 fiscal year was submitted for funding as indicated in the chart below. The Grant Face Sheet and grant application packets are attached.

File ID #	Backup Document Included	Type	Recipient	Grant's Purpose	Time Period	Funding Source	Grant Amount
23-1577	Yes	Grant	Oakland Unified School District, Life Academy of Health and Bioscience	To support the Middle & High School literacy programs.	7/1/2023 - 6/30/2024	The Helzel Family Foundation Fund at The East Bay Community Foundation	\$100,000.00

DISCUSSION:

The District created a Grant Face sheet process to:

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

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

FISCAL IMPACT:

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

- Grants valued at: \$100,000.00

RECOMMENDATION:

Approval by the Board of Education of a Grant Agreement for Life Academy for fiscal year 2023-2024, pursuant to the terms and conditions thereof, for the grant year, if any.

ATTACHMENTS:

Grant Face Sheet
Grant Agreement

OUSD Grants Management Face Sheet

Title of Grant: Helzel Family Foundation Fund	Funding Cycle Dates: 07-31-2023 to 05-24-2024
Grant's Fiscal Agent: <small>(contact's name, address, phone number, email address)</small> East Bay Community Foundation 200 Frank H. Ogawa Plaza, Oakland, CA 94612 (510) 836-3223 ntrosas@eastbaycf.org	Grant Amount for Full Funding Cycle: 100,000.00
Funding Agency: Helzel Family Foundation Fund	Grant Focus: Literacy
List all School(s) or Department(s) to be Served: Life Academy of Health & Bioscience	

Information Needed	School or Department Response
How will this grant contribute to sustained student achievement or academic standards?	Increasing the number of teachers we can hire who focus specifically on reading growth and literacy development.
How will this grant be evaluated for impact upon student achievement? <small>(Customized data design and technical support are provided at 1% of the grant award or at a negotiated fee for a community-based fiscal agent who is not including OUSD's indirect rate of 4.22% in the budget. The 1% or negotiated data fee will be charged according to an Agreement for Grant Administration Related Services payment schedule. This fee should be included in the grant's budget for evaluation.)</small>	Student reading assessment data.

Does the grant require any resources from the school(s) or district? If so, describe.	N/A
Are services being supported by an OUSD funded grant or by a contractor paid through an OUSD contract or MOU? (If yes, include the district's indirect rate of 4.22% for all OUSD site services in the grant's budget for administrative support, evaluation data, or indirect services.)	
Will the proposed program take students out of the classroom for any portion of the school day? (OUSD reserves the right to limit service access to students during the school day to ensure academic attendance continuity.)	No
Who is the contact managing and assuring grant compliance? (Include contact's name, address, phone number, email address.)	Name/Title: Aryn Bowman, Principal Life Academy Site: 335 Address: 2101 35 th Avenue Oakland, CA 94601 Phone: 510-879-1335 Email: Aryn.Bowman@ousd.org

Applicant Obtained Approval Signatures:

Entity	Name/s	Signature/s	Date
Principal/Administrator	Aryn Bowman	<i>Aryn Bowman</i>	6/16/23
Chief Academic Officer	Sondra Aguilera	<i>Sondra Aguilera</i>	6/16/2023

Grant Office Obtained Approval Signatures:

Entity	Name/s	Signature/s	Date
Senior Business Officer	Lisa Grant-Dawson		
Superintendent	Kyla Johnson-Trammell	<i>Kyla Johnson-Trammell</i>	8/10/2023



The Helzel Family Foundation Fund at The East Bay Community Foundation

June 08, 2023

Sondra Aguilera
Chief Academic Officer
Life Academy of Health and Bioscience, FS: OUSD
1000 Broadway, Suite 300
Oakland, CA 94607

RE: Grant #20232626

Dear Sondra:

I am pleased to notify you that the Helzel Family Foundation Fund of the East Bay Community Foundation has awarded a grant to Life Academy of Health and Bioscience, FS: OUSD for \$100,000.00. This grant is for \$100,000 to support Middle & High School literacy programs (FBO: Life Academy of Health and Bioscience). The payment will be processed after receipt of the signed Grant Agreement (enclosed). Payment will be made by mailed check or ACH transfer.

The enclosed Grant Agreement forms the contract between Life Academy of Health and Bioscience, FS: OUSD and the East Bay Community Foundation. Please read it carefully as it outlines the conditions of the grant as well as the payment and reporting schedule. *Kindly acknowledge receipt and acceptance of the terms thereof by signing this agreement via DocuSign.* A fully signed copy will be provided. If the signed Agreement is not returned within 30 days, this award may be voided. Also included are the Report Guidelines. *Please keep these guidelines in your files to assist you with preparing a final report as indicated.*

The weekly deadline to complete the DocuSign is Monday at 5:00pm PT for a Friday payment. The grant number for this grant is **#20232626**. Please refer to it in your correspondence with us.

Please recognize this grant in your media (social, web and print) as the Helzel Family Foundation Fund at the East Bay Community Foundation.

Sincerely,

A handwritten signature in blue ink, appearing to read "Laura Choe".

Laura Choe
Director of Grants Management & Scholarships

Enclosure: Grant Agreement, Report Guidelines

**Helzel Family Foundation Fund Grant Agreement
Grant #20232626**



*The Helzel Family Foundation Fund
at The East Bay Community Foundation*

**DONOR ADVISED GRANT PROGRAM
GRANT AGREEMENT**

Between the Helzel Family Foundation Fund at the East Bay Community Foundation (the "Foundation") and:

Grantee: Life Academy of Health and Bioscience, FS: OUSD
Address: 1000 Broadway, Suite 300
Oakland, CA 94607
Contact Person: Sondra Aguilera
Foundation Contact: grantsmanagement@eastbaycf.org
Grant Number: #20232626

Purpose and Conditions of the Grant

This grant from the Helzel Family Foundation Fund at the East Bay Community Foundation is made to Life Academy of Health and Bioscience, FS: OUSD for the purpose and with the conditions outlined below (the "Grant").

- 1. Grant Purpose:** \$100,000 to support Middle & High School literacy programs (FBO: Life Academy of Health and Bioscience)
- 2. Grant Period:** 7/1/2023 - 6/30/2024
- 3. Grant Amount:** \$100,000.00
- 4. Payment Schedule:** One-time payment will be processed after receipt of the signed Grant Agreement.
- 5. Reporting Schedule:** Final report should be provided at the end of the Grant period, but no later than: 4/1/2024
- 6. Special Conditions:** Grant Classification (re: Financial Accounting Standard Board's SFAS 116-117):
 - I. Unconditional II. Unrestricted
 - Conditional Restricted

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

**Helzel Family Foundation Fund Grant Agreement
Grant #20232626**



Because this Grant is from a donor advised fund, we must remind you that the Grant must be used exclusively for charitable purposes, and that this Grant may not result in a more than incidental benefit to the donor, donor-appointed advisor, or related parties or businesses.

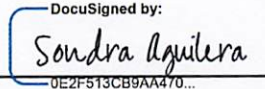
By accepting this Grant, your organization also certifies to the East Bay Community Foundation that this Grant will not be used by you to satisfy the payment of any pledge or other personal financial obligation on behalf of the donors of the Helzel Family Foundation Fund.

By signing this Agreement, your organization agrees to the following: i) that you will not use the funds for lobbying or political activities; ii) that you will return any funds not used for the designated purposes; and iii) that you will maintain the Grant funds in a separate fund so that charitable funds are segregated from non-charitable funds.

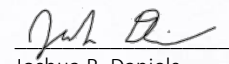
By signing this agreement the Grantee signatory acknowledges that he/she has read and understood the Agreement and that the Grantee accepts its terms and conditions.

Grantee:

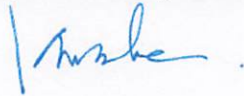
By: Authorized Officer of Grantee

Name: Sondra Aguilera Signature: 

Date 6/12/2023

Approve As To Form:

Joshua R. Daniels
Chief Governance Officer

East Bay Community Foundation:



By: Laura Choe, Director of Grants Management & Scholarships 06/08/23
DATE

PLEASE RETURN GRANT AGREEMENT via DOCUSIGN

**Helzel Family Foundation Fund Grant Agreement
Grant #20232626**



The Helzel Family Foundation Fund at the East Bay Community Foundation

REPORT GUIDELINES

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

Grant #: 20232626 **Amount:** \$100,000.00
Agency Name: Life Academy of Health and Bioscience, FS: OUSD
Grant Contact: Sondra Aguilera
Purpose of Grant: \$100,000 to support Middle & High School literacy programs
(FBO: Life Academy of Health and Bioscience)
Grant Period: 7/1/2023 - 6/30/2024
Final Report Due: 4/1/2024
Foundation Contact: grantsmanagement@eastbaycf.org

This report helps us understand the impact of our grants and your goals for the coming period. Please submit a brief narrative report (2-3 pages) addressing the following:

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

If you have any questions concerning these guidelines, please contact the Foundation Contact person indicated above.

*** Please submit this report electronically to grantsmanagement@eastbaycf.org.**