

**S. D. Bechtel, Jr. Foundation
Stephen Bechtel Fund**

Request for Proposals

Oakland School Health and Wellness Program

MISSION AND BACKGROUND

The S. D. Bechtel, Jr. Foundation and the Stephen Bechtel Fund (hereafter referred to as the Foundation) support well-managed non-profit organizations that provide quality programs and create significant sustained benefits in areas of special interest to the Founder and Directors. The Foundation has a strong commitment to supporting youth in developing the knowledge, values and skills needed to become compassionate and contributing citizens; and the Foundation believes that health promotion and disease prevention are keys to improving quality of life. In order to address the issues that arise from the intersection of these interest areas, the Foundation has developed a grantmaking program to address school-based health promotion.

PURPOSE

The Foundation is launching the Oakland School Health and Wellness Program in order to reduce obesity and chronic disease among high risk populations in Oakland. The Initiative builds on the infrastructure of school-based health centers (SBHCs) in Oakland Unified School District (OUSD). Through this Initiative the Foundation hopes to achieve the following outcomes:

- Strengthen nutrition, physical activity and wellness programs in five SBHCs and improve coordination with district programs and resources.
- Increase healthy eating and activity levels among students.
- Increase engagement of students in efforts to change policy and school/neighborhood environments to make them more conducive to healthy eating and physical activity.
- Develop model programs and lessons learned in implementing nutrition and fitness programs in SBHCs that can be applied in other locations.

SUPPORTING WELLNESS IN OUSD

A variety of health and wellness activities are currently operating in Oakland Unified School District including health education, school-based health center services, improvements to food services, physical education and after school activities with nutrition and physical activity components. While a wide range of activities are occurring at the district level, programming is not widespread through all of the OUSD schools.

The Foundation contracted with Samuels & Associates (S&A) to assess current nutrition, physical activity and wellness activities in the OUSD. In Spring 2009, S&A and the California School Health Center Association solicited comments from key stakeholders to assess current programming and future needs and priorities in OUSD schools related to healthy eating and opportunities for physical activity. The following section summarizes the key findings from the stakeholder interviews.

KEY FINDINGS FROM STAKEHOLDER INTERVIEWS

OUSD has taken preliminary steps to prioritize health and wellness through the development of a Wellness Policy, Wellness Committee and Wellness Coordinator position; however, the lack of individuals dedicated to health and wellness coordination at the school sites has prevented true district-wide implementation. A range of competing priorities currently prevent school staff from taking on this role including limitations in time and funding as well as pressures to focus on academic goals. School staff members, including teachers, have established relationships with students and have a commitment to their well-being. With additional incentives and adequate support, teachers may be ideal candidates to act as Wellness Champions at the school site.

Student leadership efforts around health and wellness activities are also in the early stages of development across the schools. Some schools have student leadership groups that occasionally address health and wellness issues and many schools have peer health education programs. A few schools have engaged students in assessing the school health environment, but there is no sustained effort by student leaders to improve the food and physical activity environment on their campuses.

School-based health centers in OUSD prioritize nutrition and physical activity for the populations of students that they serve. However, current programming efforts around nutrition and physical activity are limited due to restricted resources, such as time and funding. While only a few school-based health centers currently offer comprehensive nutrition and physical activity-specific programming and services, many school-based health centers have existing capacity to engage students in nutrition and physical activity by building on and/or adapting existing health promotion, youth development and social justice programs.

In addition to the need for greater coordination of wellness activities by a site-based coordinator and school-based health centers, many schools need improvements to the school facilities such as a greater variety of fresh, healthy food options in the school cafeteria or more equipment, better facilities and more teachers for physical education. A collaborative effort by student leaders, a site based wellness coordinator and school-based health center staff would provide the impetus for site-specific improvements to the school food and physical activity environment.

OUSD WELLNESS GRANT MAKING PRIORITIES

Grantmaking will focus on promoting nutrition and physical activity at school sites through careful integration of wellness activities with the work of SBHCs. Successful proposals must demonstrate a coordinated approach between the SBHC, the Wellness Champion, the school site administration, and other relevant community/county agencies. Proposals should include the components described below:

School Site Wellness Champion

- Identify a school site Wellness Champion to create a bridge between the school-based health center and youth and community engagement programs. This position (filled by a teacher, school-based health center staff member, or another staff member) would work to coordinate nutrition, physical activity and wellness activities at the school. Proposals must include a rationale for why the selected staff member was chosen as the Wellness Champion.
- Budgets must include a line item for a Wellness Champion stipend or salary. These funds should be sufficient to allow the Wellness Champion adequate time for their wellness work:

- Wellness champions will work with the OUSD Program Manager for Coordinated School Health on Wellness Policy implementation.
- Wellness Champions will participate in a Wellness Champion Academy that will meet 3-4 times per year for a one-day meeting. The academy will be designed to support school site Wellness Champions in their work, link them to school wellness experts and provide a forum for sharing ideas and resources.
- Possible activities for the Wellness Champion also include:
 - Forming and staffing a school level Wellness Committee tasked with developing and adopting school-specific wellness policies as well as assisting with monitoring and enforcing policies.
 - Integrating nutrition and physical activity into ongoing SBHC or after school programming.
 - Engaging students, staff and parents around wellness issues at the school site level, including: assessments of current programs, future needs, and nutrition and physical activity programming.
 - Involving community partners (e.g., families, faith-based organizations, YMCA, non-profits that work with nutrition and physical activity, local grocery stores) in nutrition and physical activity efforts and meetings.

Capacity-building in the School-Based Health Center

- Build the capacity of school-based health centers to deliver nutrition and physical activity programming and work to improve the school nutrition and physical activity environments.
- Initiate or strengthen collaboration with PE teachers, food service staff, health education teachers, after school staff, and Alameda County Nutrition Educators and Site Coordinators.
- Potential strategies include:
 - Professional development related to integrating nutrition and physical activity into other services offered by the school-based health center (e.g., health education, sensitive services, youth engagement, outreach)
 - Culturally competent outreach to families, school staff and community members including health promotion and food and physical activity workshops.

Youth Development and Leadership

- Institute youth development and leadership programs at school sites that:
 - Build on existing youth leadership/peer education programs run by school-based health centers to provide a strong focus on nutrition and physical activity environmental change.
 - Train youth to conduct assessments of the school and community food and beverage environments, physical activity facilities and opportunities, and neighborhood, park and joint use audits.
 - Train youth to use assessment data for youth-led advocacy and peer education to improve school and neighborhood environments.
 - Promote social justice groups and programs where youth can discuss and address issues such as food insecurity, “food deserts,” the built environment, and neighborhood safety as they pertain to nutrition and physical activity.

Data and Evaluation

- Report available data on school wellness indicators to the Foundation including, but not limited to: Fitnessgram, California Healthy Kids Survey, absenteeism, disciplinary actions, school meal participation.
- Report data to the Foundation on services provided by the SBHC including clinical services, health education, school-wide activities, and community assessment/advocacy.
- Participate in a benchmarking system developed by the Foundation to track changes in student behavior and health outcomes.

Optional

- Include up to \$5,000 (within the total allowed budget) for equipment to enhance school meals or strengthen Physical Education programs.

ELIGIBILITY

Eligibility is limited to work in the Oakland Unified School District. Applicants must either have a currently operating SBHC or an SBHC under development (funded by the Atlantic Philanthropies Elev8 program). SBHCs in middle and high schools are eligible.

Fiscal Agents: Fiscal agents for this proposal must be the agency managing the school-based health center and must be a non-profit with 501(c)3 status. Each proposal should describe activities for an individual campus; and fiscal agents are allowed to submit multiple applications.

FUNDING GUIDELINES

The Foundation will entertain proposals for budgets up to \$100,000 over a 24 month funding period and hopes to fund programs at five schools. The initial grant is a two year grant (with payments based on progress interviews every six months and a required written final report) with the possibility of a \$50,000 per year annual renewal for an additional three years based on achievement of outcomes.

The timeline for proposal submission and funding is as follows:

- ❖ Invited proposals due 9/30/09.
- ❖ Proposals will be funded upon review and Board approval by the end of October 2009.

APPLICATION GUIDELINES

Use these headings in the order presented below to structure your proposal. Please stay within the page limits for each section, using 1 inch margins, and 12 point font. Complete each section of the proposal narrative in a substantive and concrete manner. Answers to Sections A-C, in total, should not exceed 6 pages.

Alicia Rozum, the OUSD Program Manager for Coordinated School Health, is available for assistance with developing plans and strategies for this proposal. We encourage applicants to contact Alicia either by phone (510-879-2409) or email (alicia.rozum@ousd.k12.ca.us).

Proposal Narrative:

A. Background (1/2 page)

- Why is this project needed?
 - Wellness-related data describing the school (Examples: BMI, Fitnessgram, health problems, absenteeism, etc.)
- Whom will the project impact?
- What will the project attempt to do?

B. Organizational Capacity (1 pages)

- Describe your capacity to conduct the proposed project including competencies and skills related to this work. Be sure to include the competencies and skills of the Wellness Champion.
- Briefly describe your past and current relevant experience
- Describe the specific roles and responsibilities of any partner organization(s) or professionals, as well as anticipated structure of collaboration. Clearly identify the fiscal agent and their role in the project.

C. Project Design (4 1/2 pages)

- Describe the objectives the proposed project will achieve.
- Clearly describe the activities that will be conducted to achieve the objectives.
- Describe a plan for accessing and tracking wellness-related data, including but not limited to: Fitnessgram, absenteeism, disciplinary actions, school meal participation.
- Prepare a project timeline that includes proposed activities, participation in the required six month progress interview, and submission of a written final report (reporting requirements attached).

(end of 6 page limit)

D. Budget

- Prepare a line item budget specifying the requested amount and costs for the 24 month grant period. Budgets may include indirect or overhead costs, not to exceed 10%.
- Prepare a budget justification that describes the line items listed in the budget and identifies other sources of funding for this project.

E. Letters of Support

- Provide a letter of support from the School Principal, the fiscal agent organization, and other key partners as appropriate that describes their commitment to the program and to working collaboratively to achieve the program outcomes.

GRANT REVIEW PROCESS

Samuels & Associates, consultants to the Foundation, will work with the Foundation staff to review proposals. Proposals will be reviewed in accordance with the following criteria:

Quality of Proposal

- Followed all instructions in this RFP

- Demonstrates an understanding of school-based wellness promotion and appropriate and innovative intervention strategies
- Proposes constructive, innovative and feasible approaches
- Proposes an appropriate evaluation component that captures the experience and outcomes of the project
- Presents an achievable timeline and scope of work

Competency and Skills

- Demonstrates knowledge, skills and experience to promote healthy eating and physical activity for children
- Presents knowledgeable and culturally competent project staff

Budget

- Presents an appropriate and reasonable budget

HOW TO APPLY

- Please e-mail your completed application to:
margyris@sdbjrfoundation.org
Electronically submitted documents must be in: Word, Excel or pdf formats.
- Or –
- Mail your completed application to:
Marcia Argyris
Program Officer
S.D. Bechtel, Jr. Foundation
P.O. Box 193809
San Francisco, CA 94119-3809
- Faxed documents will not be accepted.
- The Foundation will acknowledge receipt of all proposals, and will notify you if any additional information is required.
- For questions on the RFP or proposal content, please contact Lisa Craypo at Samuels & Associates, (510) 271-6799 or lisa@samuelsandassociates.com.

Your proposal should be clear and succinct, and must contain the following information and documentation in the order outlined below (use a bullet point format where applicable).

1. **Cover Letter** – Signed by President or Executive Director requesting support (**send original copy**)
2. **Proposal Narrative (no more than 6 pages, described above)**
3. **Budget and budget justification**
4. **Letters of support**
5. **Required Documentation**
 - Organization's most recent audited financial statements. If audited statements are not available, internal statements with a copy of the most recent 990 Form should be submitted

- Documentation of Tax-Exempt Status which must include:
 - Copy of IRS Determination Letter
 - Confirmation of being currently in good standing (attached)
 - Grantee Self-Designation Form with applicable documents (attached)
- Most recent annual report
- List of the governing board
- Key staff members' bios
- Contact information

Organizations that receive grants will be asked to sign a Grant Agreement and provide a Grant Report. The Grant Report Requirements are attached.

S. D. BECHTEL, JR. FOUNDATION
STEPHEN BECHTEL FUND
P. O. BOX 193809
SAN FRANCISCO, CA 94119-3809

NON-PROFIT DOCUMENTATION

In addition to including your organization's IRS Determination Letter as requested above, please read the statement below and return with an authorized person's signature.

By signing below, I confirm that _____ is a non-profit organization in good standing with the I.R.S. The organization agrees to notify the Foundation or the Fund should its non-profit status change in the future.

Signed,

Name

Date

Title

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GRANTEE SELF-DESIGNATION FORM

Organization Name: _____

EIN: _____ **IRS Classification(s):** _____

Is your organization a Supporting Organization? (*Supporting organizations are legitimate public charities with an IRC Sec. 501(c)(3) designation and a further classification of IRC Sec. 509(a)(3).*)

No. _____ **is not a supporting organization.**

If you answered "No", please attach a copy of your organization's determination letter from the IRS and return with signed form.

Yes. _____ **is a supporting organization.**

If you answered "Yes", please check the box below that describes the type of supporting organization.

Also, please attach the following to this signed form: (1) A recent letter from the organization's legal counsel that certifies the type of supporting organization, (2) A list of the supported organizations which the supporting organization supports, and (3) A copy of the supporting organization's determination letter from the IRS. (Please note that the letter from the organization's legal counsel can be generic and does not need to be addressed specifically to the Foundation or the Fund by name.)

Type I Supporting Organization (A parent subsidiary relationship exists and the charity generally appoints the majority of the board of the supporting organization.)

Type II Supporting Organization (An overlapping board relationship exists where at least a majority of the supporting organization's board members are also members of the public charity's board.)

Type III Supporting Organization – Functionally Integrated (One member of the supporting organization's board is appointed by the supported organization and there is a greater degree of independence from the supported organization. The supporting organization is an integral part of the organization that it supports.)

Type III Supporting Organization – Non-Functionally Integrated (Same as above, but the supporting organization is not an integral part of the organization that it supports.)

Signature of Officer or Trustee: _____

Name: _____ Title: _____

Date: _____

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GRANT REPORT REQUIREMENTS

Progress interviews at six month intervals and final written grant report are required. The final report should be submitted on the date specified on the Grant Agreement to the Foundation, depending on which provided the grant. Reporting should address the following topics:

Six-month Progress Reporting Interview

The grantee progress interview is an opportunity for grantees to discuss their activities, challenges and accomplishments in progressing towards their goals. The interviews will be conducted by phone.

Grantees will be asked to reflect on and respond to the following questions:

- What major activities have you conducted in working toward accomplishing the objectives outlined in your proposal?
- What challenges have you experienced and how are you overcoming them?
- What have been your accomplishments to date in working towards accomplishing your objectives?
- How are you tracking progress toward accomplishing your desired outcomes?
- Overall, how are feeling about your progress toward accomplishing your objectives? About your program's potential for having an impact?
- Do you anticipate any changes in how the grant funds will be spent? If you anticipate any significant departures from the original budget, please submit a revised budget and explanation for the changes.
- Please submit a table showing detailed original budget figures, actual revenues and expenses, and variances. Include an explanation of any variance from original budget.

End of Grant Report

Grantees will submit a written progress report near the end of their 24 month grants. Please respond to the following questions in your grant-end report:

- What have been your accomplishments, successes and challenges in achieving the activities and objectives outlined in your proposal?
- Did you make any adjustments to your program's design or activities?
- What have been your overall lessons learned from implementing this project?
- Please comment on how you have evaluated progress on your program's objectives.
- How will you sustain the activities/accomplishments supported with this grant?
- If the entire grant has not been used, please propose a timeline for how the remaining funds will be used.
- If the grant assisted your organization in obtaining funds from other sources, please describe.
- Financial report: Please include a table showing detailed original budget figures, actual revenues and expenses, and variances. Include an explanation of any variance from original budget.