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Adjusted Allocation: 0.00

Remaining: 0.00
Applicants shall respond to the prompts or questions in the areas listed below in a narrative form.

A) APPLICANT INFORMATION - General Information, Experience and Capacity

1. Project Title: Reducing Red Tape with Electronic Purchasing

2. Executive summary: Provide an executive summary of your project proposal and which goal(s) in question 9 you seek to achieve. Please limit your responses to no more than three sentences.

3. Overview of your project: Please provide a brief description of the team or individuals responsible for the implementation of this project including relevant experience in other innovative projects. You should also include descriptions and support of the project.

4. Lead applicant primary contact: - Provide the following information:
   - First Name, last Name of contact for lead applicant: Matt Huffman
   - Organizational name of lead applicant: Arcanum-Butler Local School District
   - Unique Identifier (RN/Fed Tax ID): 046631
   - Address of lead applicant: 2011 Trojan Avenue
   - Phone Number of lead applicant: 9376925174
   - Email Address of lead applicant: matt_huffman@darke.k12.oh.us

5. Secondary applicant contact: - Provide the following information, if applicable:
   - First Name, last Name of contact for secondary applicant: 
   - Organizational name of secondary applicant: 
   - Unique Identifier (RN/Fed Tax ID): 
   - Address of secondary applicant: 
   - Phone number of secondary applicant: 
   - Email address of secondary applicant: 

6. List all participating entities by name: Provide the following information for each additional participating entity, if applicable: Mention First Name, Last Name, Organizational Name, Unique Identifier (RN/Fed Tax ID), Address, Phone Number, Email Address of Contact for All Secondary Applicants in the box below.

7. Partnership and consortia agreements and letters of support: - (Click on the link below to upload necessary documents).

   * Letters of support are for districts in academic or fiscal distress only. If school or district is in academic or fiscal distress and has a commission assigned, please include a resolution from the commission in support of the project.

   * If a partnership or consortium will be established, please include the signed Straight A Description of Nature of Partnership or Description of Nature of Consortium Agreement.

   UploadStraitApplicationAttachment.aspx

8. Please provide a brief description of the team or individuals responsible for the implementation of this project including relevant experience in other innovative projects. You should also include descriptions and experiences of partnering entities.

   District Treasurer Mr. Matt Huffman will be primarily responsible for the implementation of the new purchasing process. Mr. Huffman has been with the district and in the school business for nearly 6 years. His biggest accomplishment to date is working through the construction of brand new K-12 school facility. Most recently, Mr. Huffman has supported the school district's latest venture, the Arcanum Virtual Academy. Since beginning with the district on January 1, 2008, Mr. Huffman has been a good steward of public funds held by the school district. In addition to Mr. Huffman, the Assistant to the Treasurer, Mrs. Marshali Macy, will be assisting many staff members during the conversion to the new, electronic purchasing process. Mrs. Macy has been with the district for over 25 years. Her experience in the district will be a great asset when the district converts to the electronic purchasing process. Mrs. Macy has shown an ability to adapt through the years and to continuously look for ways to make the treasurer's office more efficient.

B) PROJECT DESCRIPTION - Overall description of project and alignment with Outcomes

9. Which of the stated Straight A Fund goals does the proposal aim to achieve? - (Check all that apply)
   - Student achievement
   - Spending reductions in the five-year fiscal forecast
   - Utilization of a greater share of resources in the classroom

10. Which of the following best describes the proposed project? - (Select one)
    - New - never before implemented
    - Existing and researched-based - never implemented in your district or community school but proven successful in other educational environments
    - Mixed Concept - incorporates new and existing elements
    - Enhancing/Scale Up - elevating or expanding an effective program that is already implemented in your district, school, or consortia partnership

11. Describe the innovative project

   The school district will use the On Base - Document Management system to complete, control, and audit the purchasing process. The district currently uses a paper system to complete the purchasing process. The current paper system is slow and inefficient. By switching to an electronic purchasing system, the school district would be able to complete the purchasing process through a series of emails and supporting documentation will be stored online. Currently, employees of the school district begin the purchasing process by using a two-part order request form. The employee completely fills out the order request form by handwriting the vendor, description of the purchase, the cost to purchase the good or service, and the USAS account code. After completing the requisition form, the employee submits the order to the applicable principal. Upon the Principal's approval, the requisition is entered into the accounting system by the Building Secretary. Each Building Secretary then prints out a summary of the requisitions. The summary is then submitted to the Superintendent for his approval and signature. Finally, the summary page that is signed by the Superintendent is given to the Treasurer. After the treasurer verifies that the purchase is within the appropriations, the Treasurer signs and approves the summary page. After all signatures have been completed, the Assistant to the Treasurer converts the requisitions to a purchase order. Four copies of each purchase order are printed (vendor copy, file copy, office copy, and acceptance copy). The good or service is then ordered by either faxing or mailing the purchase order to the vendor. After the goods are received or the service is completed, the original requisitioner returns the acceptance copy of the purchase order to the Treasurer's Office. If the requisitioner certifies that all goods have been received or the services have been performed, the Treasurer's Office processes the payment. A copy of the check is stapled to the order request form, the acceptance copy of the purchase order, and an invoice for the good or service received. This packet of information is known as a voucher packet. The voucher packets are then filed, and then the purchasing process is complete. These voucher packets are pulled by the auditors during the audit period. After the packets are audited, they are stored in the district's file room for seven years, or until they are approved for disposal.

   But in contrast to the current way of completing the purchasing process, the On Base - Document Management system allows for the school district to complete the purchasing process electronically. An electronic purchasing system allows the requestor to create a requisition through the school district's online accounting software. After the requisition is submitted online, an email is automatically generated that allows the building principal to approve the requisition. If the requisition is approved by the building principal, another email is generated and sent to the Superintendent for approval. Finally, the requisition is sent to the Treasurer for approval. The electronic purchasing system allows for purchase orders to instantly be approved or disapproved, as long as the administrator has access to his or her email. After all three have approved the requisition, the Assistant to the Treasurer will convert the requisition to a purchase order. Upon being converted to a purchase order, the On Base system sends an electronic copy of the purchase order to the vendor, requestor, and building office. The Treasurer's Office no longer will need to mail or fax copies of the purchase orders. Likewise, the Treasurer's Office
12. Describe how it will meet the goal(s) selected above. If school/district receives school improvement funds/support, include a brief explanation of how this project will advance the improvement plan. Without projecting future changes to administrative staffing, the project is cost neutral. However, using an electronic purchasing process will give the district freedom in the future to restructure the Treasurer’s office, thus lowering administrative costs. For example, if the district agreed to share the Treasurer with a neighboring school district, this would allow the Treasurer to approve/disapprove purchase orders from both of the sharing school districts. If the district is able to make future changes to the Treasurer’s office personnel, such as sharing the Treasurer with another school district, this would result in spending reductions in the five-year forecast, and allow a shift of greater resources to the classroom to occur.

**C) SUSTAINABILITY - Planning for ongoing funding of the project, cost breakdown**

13. Financial Documentation - All applicants must enter or upload the following supporting information. Responses should refer to specific information in the financial documents when applicable:

   a. Enter a project budget
   b. Upload the Straight A Financial Impact Template forecasting the expected changes to the five-year forecast resulting from implementation of this project. If applying as a consortia or partnership, please include the five-year forecasts of each school district, community school or STEM school member for review.
   c. If subsection (b) is not applicable, please explain why, in addition to how the project will demonstrate sustainability and impact.

   **On Base Setup** - $4,000 On Base Annual Fee - $2,877.50 Ultimate Edge Upgrade - $2,850

14. What is the total cost for implementing the innovative project?

   $9,727.50 * Total project cost

   * Provide a brief narrative explanation of the overall budget. The narrative should include the source and amount of other funds that may be used to support this concept (e.g., Title I funding, RIT money, local funding, foundation support, etc.), and provide details on the cost of items included in the budget (i.e. staff counts and salary/benefits, equipment to be purchased and cost, etc.).

   The project budget includes an initial setup cost of $6,850. This includes both the On Base Document Management system setup as well as the upgrade to the Ultimate Edge software. In addition to the annual setup, the project includes the annual fee of $2,877.50 for the first year of the On Base Document Management system.

15. What are the new/recurring costs of your innovative project will continue once the grant has expired? If there are no new/recurring costs, please explain why.

   $2,877.50 * Specific amount of new/recurring cost (annual cost after project is implemented)

   * Narrative explanation/rationale: Provide details on the cost of items included in the budget (i.e. staff counts and salary/benefits, equipment to be purchased and cost, etc.).

   The district anticipates a minimum annual savings of $2,900. This savings will result from purchasing less supplies and a decrease in audit expenses. With the On Base Document Management system, the district anticipates saving $1,500 in supplies, including color paper, two-part order requisition forms, copier ink, and stamps to mail purchase orders. The district also anticipates savings through audit cost. By using the On Base Document Management system, the voucher packets will be available online. This will allow the auditors to find the needed information much quicker than searching through paper files. The estimated audit savings is $1,400 each year. In addition to quantifiable savings, the district also anticipates that using the On Base Document Management system will reduce the time that the administrative staff devotes to the current purchasing process. The reduction of time spent on purchasing could result in long term, significant savings, but until the On Base Document Management system is fully implemented, the quantifiable amount of savings in unknown.

16. Are there expected savings that may result from the implementation of the innovative project?

   $2,900.00 * Specific amount of expected savings (annual)

   * Narrative explanation/rationale: Provide details on the anticipated savings (i.e. staff counts and salary/benefits, equipment to be purchased and cost, etc.)

   The district anticipates a minimum annual savings of $2,900. This savings will result from purchasing less supplies and a decrease in audit expenses. With the On Base Document Management system, the district anticipates saving $1,500 in supplies, including color paper, two-part order requisition forms, copier ink, and stamps to mail purchase orders. The district also anticipates savings through audit cost. By using the On Base Document Management system, the voucher packets will be available online. This will allow the auditors to find the needed information much quicker than searching through paper files. The estimated audit savings is $1,400 each year. In addition to quantifiable savings, the district also anticipates that using the On Base Document Management system will reduce the time that the administrative staff devotes to the current purchasing process. The reduction of time spent on purchasing could result in long term, significant savings, but until the On Base Document Management system is fully implemented, the quantifiable amount of savings in unknown.

17. Provide a brief explanation of how the project is self-sustaining. If there are ongoing costs associated with the project after the term of the grant, this explanation should provide details on the cost reductions that will be made that are at least equal to the amount of new/recurring costs detailed above. If there are no new/recurring costs, explain in detail how this project will sustain itself beyond the life of the grant.

   The project is self-sustaining because the savings resulting from an electronic purchasing system are greater than the annual cost to maintain the system. The on-going costs after the grant period are $2,877.50 each year. The district expects to save at least $2,900 each year after the electronic purchasing system is implemented. The savings outweigh the annual cost by only $22.50. However, the district would be able to realize a significant savings if they were able to reduce administrative cost.

**D) IMPLEMENTATION - Timeline, communication and contingency planning**

18. Fill in the appropriate dates and an explanation of the timeline for the successful implementation of this project. In each explanation, be sure to briefly describe the largest barriers that could derail your concept or timeline for implementation and your plan to proactively mitigate such barriers. In addition, the narrative should list the stakeholders that will be engaged during that stage of the project and describe the communication that occurred as the application was developed.

   Describe the ongoing communication plan with the stakeholders as the project is implemented. (Stakeholders can include parents, community leaders, foundation support and businesses, as well as educational personnel in the affected entities.)

   * Proposal Timeline Dates

   **Plan (MM/DD/YYYY): 01/01/2014**

   * Narrative explanation

   The district implementation team would work with our local A-site to setup the On Base Management system beginning on January 1, 2014. This would include setting up the vendor and account restrictions associated for each district employee.

   **Implement (MM/DD/YYYY): 03/01/2014**

   * Narrative explanation

   The district plans to release the On Base Document Management system to building secretaries, department supervisors, and administrative staff by March 1, 2014. This would give the district over two months to setup and train the selected staff members. By releasing the system to only a select group, this would allow for any issues with the system to be fixed before the system is released to the entire school staff. All other school staff members would be trained, with full implementation beginning with the 2014-2015 school year.

   **Summative evaluation (MM/DD/YYYY): 06/30/2015**

   * Narrative explanation

   The district will evaluate the electronic purchasing process and implement any necessary corrections to the system. After a year of working through any issue that results from the new process, the district will share the successes or failures of the new purchasing process.

19. Describe the expected changes to the instructional and/or organizational practices in your institution.

   The On Base Document Management system would save all district staff members time by not being involved in the red tape that is associated with the current purchasing system. Administrative staff, teachers, and support staff will be able to spend less time focusing on purchasing and more time focusing on their job duties.

**E) SUBSTANTIAL IMPACT AND LASTING VALUE - Impact, evaluation and replication**

20. Describe the rationale, research or past success that supports the innovative project and its impact on student achievement, spending reduction in the five-year fiscal forecast or utilization of a greater share of resources in the classroom.

   One neighboring school district has implemented the On Base Document Management system. By using the On Base Document Management system, the district Treasurer, who is shared among three school districts, is able to approve purchase orders regardless of what school he is currently working at. The On Base Document Management system has made sharing a Treasurer much more feasible due to the ease of access. Since this project is cost neutral after the first year, any financial savings resulting from possible changes to the administrative personnel would result in spending reductions in the five-year forecast and a greater share of resources would be available to the classroom.
21. Is this project able to be replicated in other districts in Ohio?

Yes

22. If so, how?

If we are able to successfully implement the electronic purchasing system, we would be able to share our success with other school districts in the region and the State of Ohio. Many other school districts across the state already use some sort of electronic purchasing system. However, at this time, no other school in the county uses an electronic purchasing system. Our school district could share our successes and lessons learned with other school districts, and we could also share the lessons learned through implementation.

23. Describe the substantial value and lasting impact that the project hopes to achieve.

By using an electronic purchasing system, the district hopes to give teachers and staff members more time to be able to focus on their primary job, providing a sound education for the students of the Arcanum-Butler Local School District. The electronic purchasing system would be a tool that can be used to simplify the purchasing process. The electronic purchasing system would also open up doors for the district to be more creative with administrative positions, and will help alleviate the need for additional storage space associated with storage of voucher packets.

24. What are the specific benchmarks related to the fund goals identified in question 9 that the project aims to achieve in five years? Include any other anticipated outcomes of the project that you hope to achieve that may not be easily benchmarked.

Besides the quantifiable savings associated with reduced supply expenses and reduced audit costs, the district expects that an electronic purchasing system will be an efficient use of time for all staff members. Additionally, the electronic purchasing system would allow the administrative staff to be more efficient, which could lead to possible long-term financial savings. Although these savings are not definite and difficult to quantify before the system is fully implemented, this purchasing system will allow the district to be one step closer to lowering administrative costs.

25. Describe the plan to evaluate the impact of the concept, strategy or approaches used.

Include the method by which progress toward short- and long-term objectives will be measured. (This section should include the types of data to be collected, the formative outputs and outcomes and the systems in place to track the program's progress).

This project is simply about reducing the time associated with purchasing process. The project would be a success if all staff members were using the On Base Document system to complete purchases by the end of FY 2015. The project would be a further success if the district was able to reduce administrative cost once the project is fully implemented.

By virtue of applying for the Straight A Fund, all applicants agree to participate in the overall evaluation of the Straight A Fund for the duration of the evaluation timeframe. The Governing Board of the Straight A Fund reserves the right to conduct evaluation of the plan and request additional information in the form of data, surveys, interviews, focus groups, and any other related data to the legislature, governor, and other interested parties for an overall evaluation of the Straight A Fund.

PROGRAM ASSURANCES: I agree, on behalf of this applicant agency and/or all identified partners to abide by all assurances outlined in the Assurance section of the CCIP. In the box below, enter "I Accept" and indicate your name, title, agency/organization and today's date.

I accept

Matt Huffman
Treasurer
Arcanum Butler Local School District
October 25, 2013