### Budget

Chesapeake Union Exempted Village (945394) - Lawrence County - 2014 - Straight A Fund - Rev 0 - Straight A Fund - Application Number (447)

<table>
<thead>
<tr>
<th>Purpose Code</th>
<th>Object Code</th>
<th>Salaries 100</th>
<th>Retirement Fringe Benefits 200</th>
<th>Purchased Services 400</th>
<th>Supplies 500</th>
<th>Capital Outlay 600</th>
<th>Other 800</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instruction</td>
<td></td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Support Services</td>
<td></td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Governance/Admin</td>
<td></td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Prof Development</td>
<td></td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Family/Community</td>
<td></td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Safety</td>
<td></td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Facilities</td>
<td></td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>1,500,000.00</td>
<td>0.00</td>
<td>0.00</td>
<td>1,500,000.00</td>
</tr>
<tr>
<td>Transportation</td>
<td></td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>1,500,000.00</td>
<td>0.00</td>
<td>0.00</td>
<td>1,500,000.00</td>
</tr>
</tbody>
</table>

**Adjusted Allocation**: 0.00

**Remaining**: -1,500,000.00
The Energize Students Priority program will focus on reallocating existing facility operational budgets to fund new creative learning opportunities for students. Initial funding of the capital improvement project will allow for a significant reduction in projected energy (utility) costs, thereby allowing the District to shift budget dollars towards STEM educational programming. This initiative will allow for the promotion of student achievement by utilizing a greater share of future financial resources in the classroom, and provide a measurable reduction in the five-year fiscal forecast for district expenditures.

**A) APPLICANT INFORMATION - General Information, Experience and Capacity**

1. Project Title: Energize Students Priority

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.

The Energize Students Priority program will focus on reallocating existing facility operational budgets to fund new creative learning opportunities for students. Initial funding of the capital improvement project will allow for a significant reduction in projected energy (utility) costs, thereby allowing the District to shift budget dollars towards STEM educational programming. This initiative will allow for the promotion of student achievement by utilizing a greater share of future financial resources in the classroom, and provide a measurable reduction in the five-year fiscal forecast for district expenditures.

<table>
<thead>
<tr>
<th>Applicant Information</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name, Last Name of lead applicant:</td>
<td>Sue Ann Dial</td>
</tr>
<tr>
<td>Organizational name of lead applicant:</td>
<td>Chesapeake Union Exempted Village School District</td>
</tr>
<tr>
<td>Unique Identifier (RN/Fed Tax ID):</td>
<td>045294</td>
</tr>
<tr>
<td>Address of lead applicant:</td>
<td>10183 County Road One, Chesapeake, OH 45619</td>
</tr>
<tr>
<td>Phone Number of lead applicant:</td>
<td>740-867-3135</td>
</tr>
<tr>
<td>Email Address of lead applicant:</td>
<td><a href="mailto:sue.dial1@peake.k12.oh.us">sue.dial1@peake.k12.oh.us</a></td>
</tr>
</tbody>
</table>

3. Total Students Impacted: 1445

4. Lead applicant primary contact: Provide the following information:
   - First Name, last Name of contact for lead applicant: Sue Ann Dial
   - Organizational name of lead applicant: Chesapeake Union Exempted Village School District
   - Unique Identifier (RN/Fed Tax ID): 045294
   - Address of lead applicant: 10183 County Road One, Chesapeake, OH 45619
   - Phone Number of lead applicant: 740-867-3135
   - Email Address of lead applicant: sue.dial1@peake.k12.oh.us

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

6. List all other 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.

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.

**E) 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 Chesapeake District has an average (3 year) annual spend of $450,000 for the primary utility accounts serving the three educational buildings. When compared to the State of Ohio DOE data on similar buildings (age, size, design), Chesapeake’s energy spend is 40% higher than that of its contemporaries. Additionally, the district struggles with a lack of control of classroom temperature, which provides an inconsistent climate for a positive learning environment. A recent facility study by TMI Energy Solutions provided the district to insight on the specific issues that prevent the facilities from operating in an efficient and effective manner. A Capital Improvement project was developed that would replace ineffective building control systems, critically compromised mechanical equipment, and aging inefficient boilers. Additionally the proposal provided for the installation of an electrical generation solar array on the campus of the high school. The district selected TMI Energy Solutions, from a variety of vendors, as a facility partner to develop the project scope, specifically due to the company’s ability to provide contractual assurances to the performance (energy consumption reduction) of the new systems. Project execution would provide the district with a reduction in the Purchased Services annual spend on utilities by $120,000. This would allow the District to reduce and reallocate financial resources to student centered programming, while promoting a better learning environment with improved conditions in the classroom. The ongoing desired initiative of the District is to provide for students with innovative and effective teaching opportunities, specifically an ability to prepare students for the rigors of higher education and increase problem solving and critical thinking skills. The District believes creating a platform for STEM education will elevate student engagement and spark interest and confidence in the pursuit of career paths in science, technology, engineering and math. Funding for such programming has been the hurdle for the District to overcome. The Energize Students Priority project will provide not only a sustainable funding source, but feature a relevant on-site application of an energy performance laboratory.

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.

The Energize Student Priority program contains two stated goals. The first is to provide an increased stewardship of the financial resources dedicated to maintaining and operating the District’s educational facilities. By partnering with an industry expert, and outsourcing the responsibility for accountable results for the financial implications of this task, the District will be able to reduce the risk of poor performance in this area. The second goal is to reallocate existing operational costs to classroom based expenditures, in order to provide students with activity-oriented educational opportunities that allow for improvements in problem solving and critical thinking skills, while increasing the percentage of graduates that pursue higher education. The innovative solution is not only to use the first goal to fund the second, but to utilize the platform of ongoing energy management and production of electricity by a renewable source to provide relevant examples for students on how to apply their studies in the area of science, Technology, Engineering, and Mathematics. Chesapeake Union School District will utilize the partnership with TMI (private industry) to develop extended opportunities for students to explore relevant data and applications in their own environment.
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.

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

   1,000,000.00 * 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, RTI 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 requested funding for the project is based on the costs of the proposed Capital Improvement Project. The resultant energy savings (using the baseline of FY13 utility costs) will provide sustainable funding for this new educational programming. TMI Energy Solutions will provide the district with a financial guarantee of the energy savings for a period beyond the five year forecast. Capital Improvement Project: Installation of new DDC control systems in three educational buildings = $524,000. Replacement of Mechanical Equipment (HVAC) = $476,000. Installation of Solar Array (producing on-site electricity) = $500,000. Total CI project costs = $1,500,000. See question 15 for details on STEM education recurring programming costs.

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

   88,000.00 * 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.). If there are no new/recurring costs, please explain why.

The annual costs associated with maintaining the newly installed equipment on the Capital Improvement project and provide for assurance of savings, has been determined to be $20,000 per year. The expected life cycle for the new equipment ranges from 15 to 25 years. The implementation of the newly created STEM education program for the district will include the hiring of one new FTE, This person will serve as the director as well as instructor for the program. Expectations on the total annual cost for adding this additional resource are $68,000 and will be escalated at 3% each year in the forecast model. Outlined costs include: Salary $45,000. Fringe $18,000. Profess. Dev. $2,000. Supplies/Mat. $3,000. Professional Development and the Supplies and Material costs associated with the new program include annual training in programs such as Ohio's Project Lead the Way, and the purchase of tools and resource kits to be used in the classroom.

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

   32,000.00 * 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.).

As outlined in questions 14 and 15, the expected savings to the financial forecast model would yield a net reduction of $32,000. In the first year (FY15) of the implemented program. These savings would be reduced in the subsequent 4 years by an estimated 3% per year due to the escalation of typical cost associated with employing another Full Time equivalent personnel. The installation of the new facility equipment would produce a total utility reduction savings of $92,000 and the production of primary electric by the Solar Array would displace another $28,000 in current electric purchasing from the utility grid. The expected utility savings of $120,000 will be guaranteed by TMI Energy Solutions with the implementation of an annual Service Contract expense of $20,000. Therefore the net savings resultant form the Capital Project will be $100,000 annually. The implementation of the STEM education program would be $68,000 in year one and escalate to $76,585 by the fifth year of the program. The fiscal budget based on these two initiatives would show savings each year of the Five Year forecast.

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 scope of work outlined in the Energy Project by TMI will be completed by 6/30/2014. This will allow for the District to recognize the full guarantee of the energy savings provided by the project starting at the beginning of FY 2015. The District will utilize the first four months of calendar year 2014 to finalize the Action Plan for implementing the STEM program, resulting in a hire of the program director/instructor by June 30, 2014. High School, Middle school, and Central Office administrators will be responsible for the research and development of the ongoing programs goals and measurement benchmarks. The intent of the District is to collaborate with other districts who have successfully implemented STEM programs and continue to develop relevant course work and materials by engaging with non-profits such as the Ohio Stem Learning Network. The initial program will include participation in the Ohio Project Lead the Way by implementing accreditation of the Gateway to Technology endeavor in year one. The STEM director will be then tasked with adding the Pathway to Engineering platform by year 3. TMI Energy Solutions will be responsible for communicating and sharing relevant information about the Energy Performance of the school on a quarterly basis as well as providing an interactive portal connection to the daily and cumulative performance of the Solar Array.

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

* Narrative explanation

The Treasurer will be responsible for the monitoring and verification of the contracts of performance with TMI Energy Solutions to insure the realized utility savings continue to be in place as a funding vehicle of the STEM program. This evaluation will continue during the five year forecast period. The Superintendent, building administrators, and the new STEM program director will be responsible for tracking results of the educational programming and providing any support as needed. TMI will also assist the district in assembling and coordinating a "Green Team", which is to be comprised of a board member, TMI representative, an administrator and faculty member from each building along with the Treasurer and STEM director. This group will meet each year to provide ideas and initiatives that will allow for expanded communication and opportunities for the District and its staff and students as well as evaluation of the Energizer Students Priority program.

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): 12/17/2013

* Narrative explanation

Chesapeake Union EVSD entered into contract with TMI Energy Solutions in August 2013 to provide facility maintenance and energy management services. The District has received a full proposal for the Capital Improvement project with stated guaranteed savings that would result from the improvements and utilized those details in this application. The District intends to complete at least a portion of the project in order to restore effective operations of the existing equipment. The District has begun a process of developing an Action Plan for instilling the STEM education program as part of the curriculum. Should the application be funded, the District will elect to complete the total Capital Project in order to provide the sustainable resources needed to fund the implementation of the STEM program.

Implement (MM/DD/YYYY): 06/30/2014

* Narrative explanation

The scope of work outlined in the Energy Project by TMI will be completed by 6/30/2014. This will allow for the District to recognize the full guarantee of the energy savings provided by the project starting at the beginning of FY 2015. The District will utilize the first four months of calendar year 2014 to finalize the Action Plan for implementing the STEM program, resulting in a hire of the program director/instructor by June 30, 2014. High School, Middle school, and Central Office administrators will be responsible for the research and development of the ongoing programs goals and measurement benchmarks. The intent of the District is to collaborate with other districts who have successfully implemented STEM programs and continue to develop relevant course work and materials by engaging with non-profits such as the Ohio Stem Learning Network. The initial program will include participation in the Ohio Project Lead the Way by implementing accreditation of the Gateway to Technology endeavor in year one. The STEM director will be then tasked with adding the Pathway to Engineering platform by year 3. TMI Energy Solutions will be responsible for communicating and sharing relevant information about the Energy Performance of the school on a quarterly basis as well as providing an interactive portal connection to the daily and cumulative performance of the Solar Array.

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

* Narrative explanation

The Treasurer will be responsible for the monitoring and verification of the contracts of performance with TMI Energy Solutions to insure the realized utility savings continue to be in place as a funding vehicle of the STEM program. This evaluation will continue during the five year forecast period. The Superintendent, building administrators, and the new STEM program director will be responsible for tracking results of the educational programming and providing any support as needed. TMI will also assist the district in assembling and coordinating a "Green Team", which is to be comprised of a board member, TMI representative, an administrator and faculty member from each building along with the Treasurer and STEM director. This group will meet each year to provide ideas and initiatives that will allow for expanded communication and opportunities for the District and its staff and students as well as evaluation of the Energizer Students Priority program.
19. Describe the expected changes to the instructional and/or organizational practices in your institution.

In the current structure of the District each building principal serves as the Curriculum leader for his/her building. Team and Core discipline leaders also assist in the selection and implementation of instructional materials and course work. The hy of a new STEM director/instructor will provide for an increased focus on identification and enrichment of students who are the best candidates to participate in the STEM program. Although structured programs have been identified for the Middle school and High school level students, all elementary students will be given an opportunity to be exposed to foundational materials on occasion to build awareness and take advantage of the renewable energy component functioning in the district. Currently the responsibility of the energy usage and costs rest solely on the Treasurer’s office. By partnering with TMI, industry standards and best practices will be subject to quarterly review by the Green Team members.

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.

It is well documented that students that are given the opportunity to participate in activity, project and problem based learning will benefit and be encouraged to draw from their natural curiosity of relevant learning. This blended curriculum compliments traditional math and science course work and is a key to preparing students for a global economy. Due to budget constraints and focus on the Common Core, many districts do not have the resources to expand towards STEM programming to satisfy this expansion on education. In the case of Chesapeake, this grant application combines the historical poor performance of the facilities as a component of the existing operational budget with an opportunity to "shift" the expense allocation and cover the additional costs associated with STEM curriculum. The additional lesson for students, staff and community is to become intrinsically aware of their own stewardship and how it can have a positive impact on expanding accomplishments.

21. Is this project able to be replicated in other districts in Ohio?

- [ ] Yes
- [ ] No

22. If so, how?

As stated in question 20, the opportunity to fund STEM programming may lie within the current operating budget of the District. Not all districts will have significant opportunity for efficiency improvement, but many will. The long term commitment to campus, building, and operational status of Ohio school districts should suggest that focusing on long term solutions, such as renewable energy, may provide sustainable increased educational programming.

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

Evaluations with a focus on achievement will be a difficult measure to quantify. However the intent is to measure this by tracking of college bound students increases, specifically those entering in the fields related to STEM. Additionally achievement testing in the areas of science and math should be bench marked with historic results compared to yearly gains from the program moving forward. Reductions in spending specific to utility (energy) spends will be tracked by the TMI partnership and are stated in this application to be bench marked at $120,000 per year. The reallocation of the energy savings specifically towards STEM education should also be easily tracked as the cost centers will only included one specific program.

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.

Significant advancement in student achievement will be a difficult measure to quantify. However the intent is to measure this by tracking of college bound students increases, specifically those entering in the fields related to STEM. Additionally achievement testing in the areas of science and math should be bench marked with historic results compared to yearly gains from the program moving forward. Reductions in spending specific to utility (energy) spends will be tracked by the TMI partnership and are stated in this application to be bench marked at $120,000 per year. The reallocation of the energy savings specifically towards STEM education should also be easily tracked as the cost centers will only included one specific program.

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).

Sigma performance testing in the areas of science and math should be bench marked with historic results compared to yearly gains from the program moving forward. Redesigns in spending specific to utility (energy) spends will be tracked by the TMI partnership and are stated in this application to be bench marked at $120,000 per year. The reallocation of the energy savings specifically towards STEM education should also be easily tracked as the cost centers will only included one specific program.

20/25/13

Sue Ann Dial
Treasurer Chesapeake Union EVSD