## Budget

**U.S.A.S. Fund #**

**Plus/Minus Sheet (opens new window)**

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### Adjusted Allocation

| Remaining | -34,868.00 |
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: Leadership Is Our Legacy

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 implementation of The Leader In Me is coordinated through an established team called the Lighthouse Team. This team is comprised of 9 members: the principal, the school counselor, one staff member from each grade level, an Intervention teacher and the Instructional Coach. This team meets twice per month to coordinate and determine the best way to build the 7 Habits into the school culture.

3. Total Students Impacted: 420

4. Lead applicant primary contact: - Provide the following information:

   First Name, Last Name of contact for lead applicant: Jennifer Russell

5. Secondary applicant contact: - Provide the following information, if applicable:

   First Name, last Name of contact for 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 (IRN/Fed Tax ID), Address, Phone Number, Email Address of Contact for All Secondary Applicants in the box below.

   N/A

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.

   UploadGrantAttachment.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.

The staff and community of Heritage Elementary believe that we only have one chance to prepare our children for an unpredictable global workplace. We are committed to providing our students the tools to develop the essential life skills and inherent characteristics they will need for success in the 21st century. The Pickerington Local School District's motto is "Every Child, Every Day, Whatever It Takes" and we at Heritage believe that a leadership foundation and culture will facilitate this goal. Research done by the Center of Creative Leadership in 2012, found that the competencies needed to be successful in the workplace are self-motivation/discipline, effective communication, learning agility, self-awareness and adaptability. And 98% of respondents across all age groups believed that leadership development should start before age 18. With the help of the FranklinCovey organization and the books The Leader In Me and The 7 Habits of Highly Effective People, we will provide a common language and a common set of tools in which to bring leadership qualities to our entire school population. This process will touch students, teachers, administrators, and parents; a community of over 900 people. It is not a curriculum, but rather a process of integrating the 7 Habits into our existing curriculum and systems to increase student achievement and to create and sustain a positive, engaging school culture. The students will learn and live the 7 Habits in their daily life here at Heritage as well as using the same language at home with their families. This all-encompassing approach will reinforce these habits into qualities the student will retain for a lifetime. HABIT 1: Be Proactive - You're In Charge; HABIT 2: Begin With the End in Mind - Have A Plan; HABIT 3: Put First Things First - Work First, Then Play; HABIT 4: Think Win-Win - Everyone Can Win; HABIT 5: Seek First to Understand, Then to Be Understood - Listen Before You Talk; HABIT 6: Synergize - Together is Better; HABIT 7: Sharpen the Saw - balance Feels Best; The 7 Habits training provides staff with a common language and bonding experience. The content enhances the teacher's ability to close the achievement gap while charging students with managing their learning, behaviors and relationships, emotional intelligence, social skills, and life skills. The 7 Habits content is the foundation for building a school-wide leadership culture. Through this process, students will begin to think of themselves as important, contributing leaders and they will become increasingly enthusiastic about their learning. The result is an intrinsically motivated student who takes ownership and becomes an active participant in his or her own education.

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 staff and community of Heritage Elementary believe that we only have one chance to prepare our children for an unpredictable global workplace. We are committed to providing our students the tools to develop the essential life skills and inherent characteristics they will need for success in the 21st century. The Pickerington Local School District's motto is "Every Child, Every Day, Whatever It Takes" and we at Heritage believe that a leadership foundation and culture will facilitate this goal. Research done by the Center of Creative Leadership in 2012, found that the competencies needed to be successful in the workplace are self-motivation/discipline, effective communication, learning agility, self-awareness and adaptability. And 98% of respondents across all age groups believed that leadership development should start before age 18. With the help of the FranklinCovey organization and the books The Leader In Me and The 7 Habits of Highly Effective People, we will provide a common language and a common set of tools in which to bring leadership qualities to our entire school population. This process will touch students, teachers, administrators, and parents; a community of over 900 people. This process, students will begin to think of themselves as important, contributing leaders and they will become increasingly enthusiastic about their learning. The result is an intrinsically motivated student who takes ownership and becomes an active participant in his or her own education.

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.

   This past summer staff members were trained on how to use The Leader in Me principles to integrate concepts of the new Common Core State Standards and goal setting is one example of this. Teachers will help students set and track personal, class and school-wide goals to reach accomplishments. Transforming a building culture is a three to five year process but our objective is to experience increased sustainability of the approach.
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.

The costs of implementation are one-time costs and funding sources have been through fundraising/PTO efforts. There is no impact on the district 5-year forecast.

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

34,868.00* Total project cost

* Specific amount of new/recurring cost (annual cost after project is implemented)

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.

0.00* Specific amount of new/recurring costs (annual cost after project is implemented)

One-time costs, no sustainability.

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

0.00* Specific amount of expected savings (annual)

None: does not affect the 5-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.

No new or recurring costs (NO SUSTAINABILITY)

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): 08/01/2012

Principal and counselor started a book review/study with teachers for The Leader In Me by Stephen Covey. This led to the Principal and Counselor attending a FranklinCovey symposium to visit local schools that had implemented The Leader In Me. (Chillicothe City Schools and Benjamin Harrison Elementary in Marion City Schools) Nine staff members attended Leadership Days at Lighthouse Schools; Scioto Ridge Elementary, Olentangy Local Schools and Worthington Estates School; Worthington City Schools.

Implement (MM/DD/YYYY): 06/01/2013

* Narrative explanation

TRAINING FROM FRANKLIN/COVEY Vision Day Training - June 6, 2013 - This training set the big picture and secured buy-in from the staff. Staff saw how a leadership model could transform a school and what an impact it can have on their classroom and students. 7 Habits Training - August 12th and 14th, 2013 - Staff learned to apply and internalize the 7 Habits. This training formed the tools from which we model our goals and grow. Implementation Training - TBD (Currently proposed for December 20, 2013) - The focus of this training is taking the 7 Habits and leadership principles to the students. It teaches them to integrate them into the existing instruction, curriculum, systems and environment. Lighthouse Team Training Level 1 - TBD - The Lighthouse Team is critical to the implementation of The Leader In Me as they are the driving force for the implementation. These designated staff members receive specialized training to mentor teachers, developing an implementation plan and ensure the approach is implemented properly. Certification/Family Certification Training - TBD - The certification process is critical to the sustainability of the approach. It gives us the ability to train new staff, parents and other stakeholders. It also allows us to institutionalize the habits through systematic renewal. This keeps the culture intact regardless of staff turnover or student mobility. Empowerment Day - TBD - This training creates deeper leadership learning for students and equips our school with real-world tools and best practices for empowering students. Students move into the use of leadership and quality tools, student-led conferences and helping. Leadership Notebooks evolve to be a more whole-child, leadership tool. Lighthouse Team Training Level 2 - TBD - This training reviews the purpose of the team in a greater depth and teaches the team the most effective ways to identify and track school-level goals. CHALLENGES The viability of the Leader In Me approach is highly dependent on stakeholder buy-in. Currently, the staff and community are owning the process and highly motivated with building our leadership culture. To continue on this path, the continuation of the training with the prescribed implementation is critical. The training that FranklinCovey provides teaches the staff methods and provides the tools they need to continue the implementation without taxing their teaching time. If the model is modified, teachers would need to spend more time planning lessons, for example, to incorporate The Leader in Me. A preliminary study conducted by FranklinCovey on the schools in Quincy Public Schools in Quincy, Illinois shows a marked increase in raising the percentage of students meeting or exceeding the standards for how they can fully implemented the prescribed approach than those who modified the implementation. Eight schools implemented the approach, 4 fully and 4 moderately and the difference is more than 10 percentage points for those who fully implemented the approach. Parent/community support is being carried out through continuous communication and involvement. Our school environment, website, newsletters, weekly communications, and marquee are transforming into a reflection of leadership. We are systematically educating our community through every resource available. Once our Certification Team is trained, they will be working with our community through events and forums to continue to educate and implement this leadership culture in their homes. If funding from Straight A is granted, Heritage Elementary will be ensured the continual support from our stakeholders by having the proper resources available to us.

Summative evaluation (MM/DD/YYYY): 08/01/2014

* Narrative explanation

A preliminary evaluation will be completed with all stakeholders to determine what impact the approach has had on the school culture and student achievement. Goals and benchmarks for the
19. Describe the expected changes to the instructional and/or organizational practices in your institution.

ORGANIZATIONAL CHANGES 7 Habits Language - Used by all staff to reinforce the habits; Leadership Teams Established - Students will become responsible for their part in the running of our school; School-wide Behavior Monitoring System - Used by all staff to reinforce the habits; Instructional Changes - Students will become responsible for their part in the running of our school.

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.

The Leader In Me approach was developed by Muriel Summers, Principal of AB Combs Elementary and Dr. Stephen Covey. AB Combs Elementary was a struggling magnet school of 350 students on the verge of being demagnetized when this approach was developed and implemented in 1999. By 2006, AB Combs had an enrollment of over 800 students and became the #1 magnet school in the country. In January 2012, the Center for Research and Reform in Education for Johns Hopkins University conducted a study regarding the Implementation Quality and Outcomes of The Leader In Me. Two schools, a west coast school and a southeast coast school. These findings were prevalent at both schools: Staff spent more time on class instruction due to decreased behavior issues in the classroom; Though the cultures had only been in place a few years, two for one school and three for the other, they found similar increases in grade-level Reading/Language Arts and Mathematics scores on state assessments; Student survey responses were similar between the schools and included comments regarding: feeling more confident; making better choices; not being afraid to make new friends; seeing teachers encouraging them more; Stakeholder survey responses, also very similar, included: The Leader In Me positively improves the school climate; It gives the school a prideful identity and unique sense of purpose; Stakeholders have increased collaboration; The culture stresses the recognition of one’s potential rather than the weaknesses; Student leadership roles, public speaking and accountability increase self-monitoring and self-confidence; It makes teaching easier and more enjoyable.

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

Yes

22. If so, how?

The approach is implemented via contract with Frank Covey. The process would be similar to the planning and implementation that we are following. Though the contract can be modified from the prescribed implementation, full implementation has proven more effective in increasing student achievement. Heritage Elementary plans to fully implement the prescribed approach and has a good chance of becoming a Lighthouse School. A school receives Lighthouse Status when they have implemented all nine Lighthouse School Criteria. Those are: Lighthouse Team; Leadership Environment, Integrated Instruction and Curriculum, Staff Collaboration, Student Leadership, Parent Involvement, Leadership Events, Goal Tracking and Measurable Results. Once a school has become a Lighthouse School, they will be utilized to facilitate other schools/districts in learning about the process. With the use of symposiums, Leadership Days and school visitations, other entities will be able to experience the leadership culture that has been established. This could mean more Ohio schools, especially those within our district and the south-eastern part of the state, having the opportunity to see and experience the difference the approach is making in our school and the education of our students.

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

We firmly believe that the approach outcomes will include: Students will leave Heritage with the mind-set, the skill-set, and the tool-set they need to live, work and thrive in the 21st Century. Students’ academic performance and growth will continue to have a positive trend forward. Students will learn to be accountable for their academic progress and take ownership of their education. Students will develop independent skills, interdependent skills, social/emotional stability, as well as technical skills that will empower them to thrive in the 21st Century. Students will gain confidence from learning new skills, being given leadership responsibilities, and frequently being recognized for their accomplishments. The school culture will be engaging, positive and have an overall decrease in behavioral issues. Stakeholders will have greater pride, satisfaction and involvement in our school. Community leaders and businesses will support and promote the advantages achieved here at Heritage. There will be continuous renewal of the 7 Habits within our school culture through the efforts of our Certification Team.

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.

The first year of the approach will establish benchmarks for the future years’ evaluations. The expectation for the end of 2013-14 will be: Decrease in the number behavior incidents school-wide compared to 2012-13; Increase in academic achievement will be difficult to assess at the end of 2013-14 with the implementation of the Common Core, new instructional strategies as well as the first year of the Leader In Me approach. STAR Reading/Math Assessments and DRA will be used to preliminarily evaluate the academic growth. Benchmarks for the academic achievement goals will be set at the end of 2013-14 for 2014-15 and the long-term; See increase in the number of parents volunteering in our school compared to 2012-13; Staff survey data showing satisfaction with the first year results of the Leader In Me approach.

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).

* Include the method, process and/or procedure by which the program will modify or change the program plan if measured progress is insufficient to meet program objectives.

Multiple methods and data types will be used to assess the results of our efforts. Data collected in the student Leadership Notebooks and analyzed for evidence of growth; Students demonstration of their knowledge of the 7 Habits during interactions with peers, staff, and parents; Common quarterly assessments such as the Developmental Reading Assessment and STAR reading and math assessments will be used to determine growth; DAA results/PARCC results; Evaluating the students’ participation in leadership opportunities; Summative evaluation of stakeholder surveys, student surveys for older students and oral questionnaires for younger students; Evaluate the change in the student discipline referrals. Both cohort and cross-sectional data groups will be used to evaluate the data. This will allow us to look at differences in the outcomes compared to the number of years the student has experienced our leadership culture. Some academic student data will be collected from middle school years to see the lasting effects on their achievement.

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.