

Sheffield Middle School

21st Century Leadership School

powered by ***The 7 Habits of Highly Effective People®***

Executive Summary

This Scope of Service is in response to the Sheffield Middles School's desire to pursue *21st Century Leadership School powered by The 7 Habits of Highly Effective People Me[®]* process customized as outlined in the Statement of Work provided for this proposal includes:

A. Overview of FranklinCovey

B. Job to be done

- State of American Education system
- Scope
- Training Process

C. Technical Approach

- Implementation Plan
- The Process

FranklinCovey Overview

FranklinCovey (NYSE:FC) is a global leader in executive coaching, expert facilitation, effectiveness training, productivity tools, and assessment services for organizations and individuals. FranklinCovey helps organizations succeed by unleashing the power of their teams to focus and execute on top priorities. Clients include numerous agencies and departments within the three branches of federal government, 90 of the Fortune 100 companies, thousands of small and mid-sized businesses, as well as numerous educational institutions.

FranklinCovey currently comprises a powerful diversity of professional skills, talents, and experience. We have more than 1,500 associates in over 144 countries. Our extensive client base includes thousands of business, government, and educational organizations, as well as millions of individual clients.

Job to be done

State of American Education system

The state of the United States Education system is in decline. Necessary measures need to be taken to improve the way our education system functions as a whole. Obviously creating more value for students in education is the primary goal. But there are other factors that contribute to what the students learn. Both the administrative and teaching staffs can benefit in an adjustment of the way they view education. Our education system has become too focused on the end result instead of embracing the process that it takes to achieve the end result. Education needs to improve across the nation to better impact our youth and our future. We believe this change starts with you. Here are a few statistics that show the current state of education in America and the widespread impact:

- Every year, on average, 1.2 million students drop out of high school and it will cost an estimated \$319 billion in lost income over the course of their lifetimes.
- In a time of increasing global competition US education is falling behind. Forty years ago the US had the highest graduation rate in the world, now America is ranked 19th.
- The increase of dropout rates is one of the country's costliest problems, from the loss in potential income, less in tax receipts, higher unemployment, government aid, the cost of incarceration and the increased chance of incarceration.
- Unless high schools are able to graduate their students at higher rates, nearly 13 million students will drop out over the next decade. The result of this will result in the loss of \$3 trillion to the nation.
- Currently, only 70% all American high school students graduate on time. Of that number, only 52% of Hispanic and 56% of African American students graduate on time.
- The US Census Bureau projects that minority population will increase and by 2050 approximately 50% of the US population will be African American, Hispanic, or Asian.
- It is vital that minority graduation rates are increased or the percentage of Americans that do not complete high school will increasingly decline.
- Dropouts are more than eight times likely to be in jail or prison than a high school graduate.
- Low teacher retention rates are an extreme problem. By combining school and district level costs associated with teacher attrition, the National Commission on Teaching and America's Future estimate it cost an estimated \$7.34 billion annually to hire, recruit and train replacement teachers.

Scope

FranklinCovey shall assist Sheffield Middle School by providing training to build capacity and achieve results in a short timeline. These trainings are in sync with the *21st Century Leadership School powered by The 7 Habits of Highly Effective People®*. This model develops a unique culture of leadership at each school, and will enable the organization to pursue the recognition of a Lighthouse School.

In addition, this process will:

1. Build capacity at their organization to sustain the Leader in Me initiative year after year
2. Equip their team with the skill set to develop a culture of leadership throughout each school.
3. Train school staff and administrators to use effective leadership skills to enhance school performance in the key priorities identified:
 - Help students develop the skills and self-confidence to succeed as leaders in the 21st century and eventually excel in the global workforce.
 - Creates a culture that produces career and college ready students
 - Improves academic achievement and decreases discipline referrals
 - Raise levels of engagement among teachers, staff, students, and community stakeholders
 - Increase parent involvement
4. Develop a team of staff in each school who are certified in the 7 Habits in order to equip them to teach colleagues the methodologies of their culture, establishing key goals and objectives for each priority, and measuring success against established standards and expectations.

Training Requirements

Year 1 - FranklinCovey will provide an on-site training program to all staff that will enable them to establish a culture of leadership.

1. FranklinCovey will assist the school in establishing a vision of their Ideal school and classroom leadership culture.
2. Staff will learn and apply *The 7 Habits of Highly Effective People*, based on universal principles of leadership. As they practice the 7 Habits, staff and students will begin to reap the rewards of cooperation and collaboration.
3. The schools will implement the 7 Habits into their modeling, curriculum, instruction, environment, systems, and traditions.
4. The staff will establish a “Lighthouse Team” for the school. The Lighthouse Team is the “Action” team for the building. They are responsible for the continuous process of improvement.
5. All staff members will be given access to *21st Century Leadership School powered by The 7 Habits of Highly Effective People* Web Community.

Year 2 - FranklinCovey will provide an on-site training program to all staff that will enable them to apply the tools of leadership.

1. Instruct school staff to identify their highest work priorities by separating the merely important from the highly important.
2. Be able to align their team to focus on the most important work objectives.
3. Encourage team members to tackle challenges with individual commitment.
4. Provide an accountability system using data and reports to measure success in reaching established goals and priorities.
5. Train school staff members to take ownership of their own performance.

Year 3 - FranklinCovey will provide an on-site training program to all staff that will enable them to operate at a high level of trust and execute the school's most important goals.

1. Develop the skill set to operate a high trust inside the schoolhouse.
2. Develop high trust relationships with school's external stakeholders: parents and community members
3. Encourage team members to tackle challenges with individual commitment.
4. Train school student body to take ownership of their own performance, and the daily operation of the schoolhouse.

I. Technical Approach

Implementation Plan

21st Century Leadership School powered by *The 7 Habits of Highly Effective People* integrates timeless leadership principles into a school culture and curriculum, providing students with practical character and life skills relevant for the 21st century challenges of today.

The process has proven to build children's self-confidence and interpersonal skills, elevate student achievement, and reduce school-wide discipline problems. Teachers are enthusiastically expressing delight in the approach, and parents and community leaders are synergistically joining in to make it happen.

FranklinCovey's process helps schools:

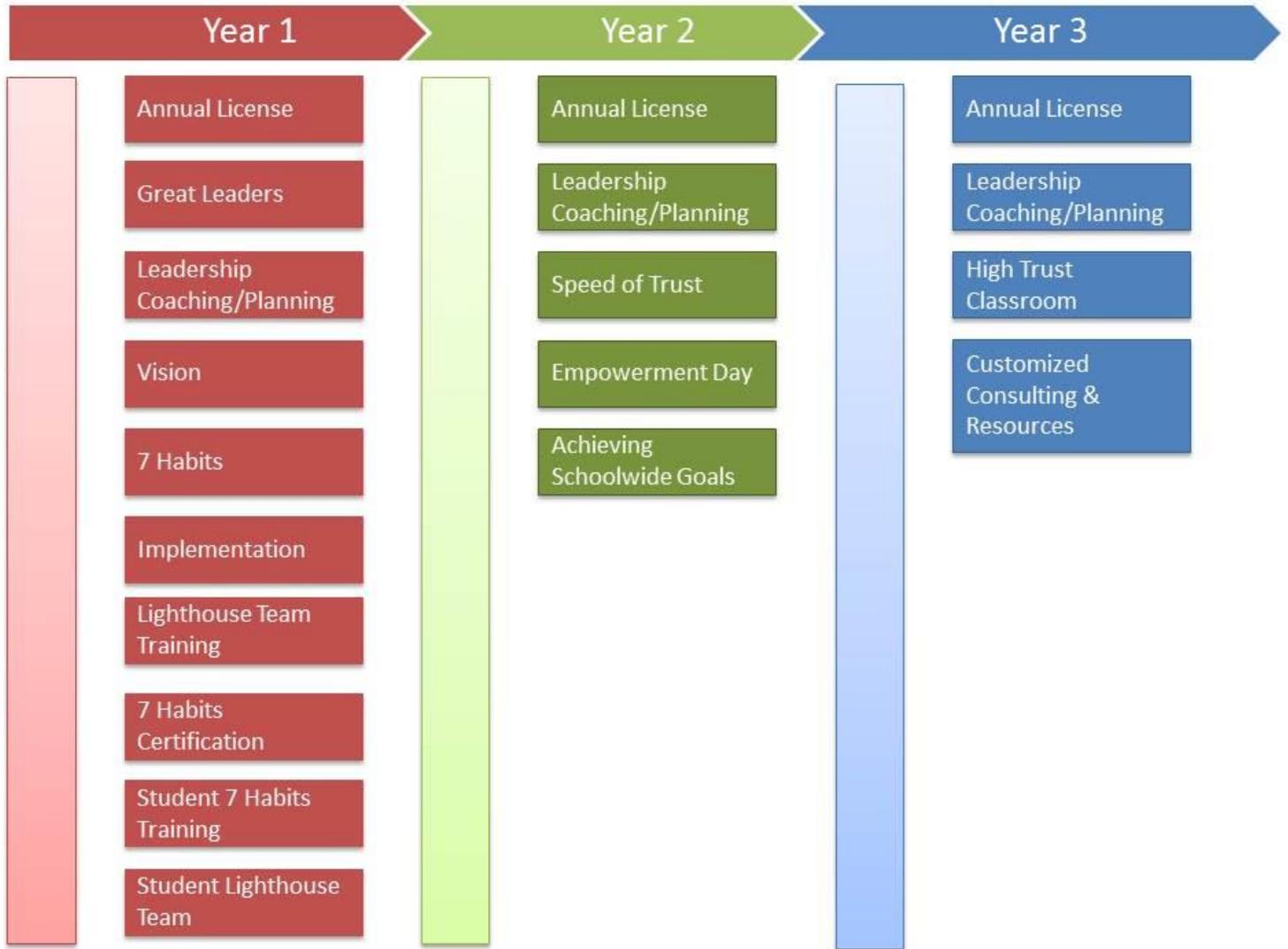
- Introduce a framework of character development into the curriculum
- Create a common language for greatness within the school
- Increase teacher satisfaction
- Improve academic achievement
- Decrease discipline referrals
- Engage parents and the community in supporting the school's greatness initiatives

Participants in the process will learn how to:

- Take responsibility
- Resolve conflicts
- Build effective interpersonal relationships
- Communicate effectively with others
- Become career and college ready
- Create a guiding vision for educational, professional, and personal success

The Process

Below is the “picture” of the process for implementing *21st Century Leadership School powered by The 7 Habits of Highly Effective People*. This process is designed to produce results within a 3 year timeline.



Deliverable 1

Deliverable	Anticipated Hours	Dates
Great Leaders workshop for the leadership team of the school. This workshop advances the skillset of the school's leaders.	3 Days	T.B.D

Our Process

1. Great Leaders Training: 3 Days

Participants: 10 member team including principals

Materials: Each person will receive a Great Leaders Participant Guide,

Objective:

The leadership team gains a true sense of their goals, measures and targets for their school. When they get very focused in this regard, they can achieve excellence with *21st Century Leadership School powered by The 7 Habits of Highly Effective People* process. There is a realization that Vision, Mission and Goals must connect to the 7 Habits culture of the school.

They create scoreboards and a cadence of accountability for weekly discussions around their lead and lag measures. They typically focus on 3 goal areas: culture, reading and math. This may vary, but certainly culture and reading are critical measures in every school.

The culture piece connects with the 7 Habits and leadership journey. There is also a realization that the culture of the building must be one of "service". This culture of service often leads to the creation of service standards that are practiced throughout the staff and student population. It is through coaching, design, implementation and accountability that all of these components come together to create measurable success.

Deliverable 2

Deliverable	Anticipated Hours	Dates
Vision Day workshop for all Staff in the school. This workshop will establish a shared vision of the staff's ideal school.	1 Day	T.B.D

Our Process

2. Vision Day Training: 1 Day

Participants: All school staff

Materials: Vision Day Participant Guide, *21st Century Leadership School powered by The 7 Habits of Highly Effective People* IP license and web community

Objective:

The staff will have the opportunity to begin to envision what their ideal school would look like through the 6 essential ingredients: Modeling, Environment, Curriculum, Instruction, Systems, and Traditions. They will also have an initial overview of *The 7 Habits of Highly Effective People*. By the end of the vision day the staff will understand how the process benefits, students, teachers, and parents.

Deliverable 3

Deliverable	Anticipated Hours	Dates
Leadership Coaching/Planning for the leadership team in the school. This workshop develops the leadership skillset of the school's leaders.	6 Days	T.B.D

Our Process

3. Leadership Coaching/Planning: 6 Days

Proposed Dates: 1-2 days per quarter

Participants: 10 member team including principal

Objective:

The leadership team receives coaching on scoreboards and a cadence of accountability for weekly discussions around their lead and lag measures. Wildly Important Goals (WIGs) are updated and specific action plans are developed for barriers observed.

Deliverable 4

Deliverable	Anticipated Hours	Dates
7 Habits Signature Training. This training is the foundational training for <i>21st Century Leadership School powered by The 7 Habits of Highly Effective People</i> process. It focuses on individual effectiveness.	3 Days	T.B.D.

Our Process:

4. 7 Habits Signature Workshop: 3 Days

Participants: All school staff

Materials: 7 Habit Signature Manual, Talking Stick

Objective: Based on the proven principles found in Dr. Stephen R. Covey's best-selling business book, *The 7 Habits of Highly Effective People*,[®] Signature training helps your school achieve sustained superior results by focusing on making individuals more effective. Participants gain hands-on experience, applying timeless principles that yield greater productivity, improved communication, strengthened relationships, increased influence, and laser-like focus on critical priorities. The course includes over 30 award-winning videos. In *The 7 Habits of Highly Effective People* Signature Program, participants learn how to: take initiative, balance key priorities, improve interpersonal communication, leverage creative collaboration, and apply principles for achieving a balanced life.

Deliverable 5

Deliverable	Anticipated Hours	Dates
Implementation Training, staff will collaborate on how to implement leadership into the 6 essential ingredients: modeling, curriculum, instruction, environment, systems, and traditions.	1 Day	TBD

Our Process:

5. Implementation Training: 1 Day

Participants: All school staff

Objectives: Staff will revisit and refine their vision of their school and identify tools and resources available for application. Staff will create an action plan for implementation of the leadership process using the six essential ingredients in their classroom and school.

Materials: Implementation Participant Guide for each staff member

Deliverable 6

Deliverable	Anticipated Hours	Dates
Lighthouse Team Training Level 1	1 Day	TBD

Our Process:

6. Lighthouse Team Training: 1 Day

Participants: 6 members including Principal

Materials: Lighthouse Team Participant Guidebooks, Flip Chart

Objectives:

1. Members of the Lighthouse team will identify key roles on the team.
2. Consultant will work with the team to provide them with skills that will assist them to work effectively as a team.
3. Identify the criteria for the school to become a *Leader in Me*, Lighthouse school.
4. Review the 6 Essential Ingredients of a leadership culture.
5. Provide the team with resources to train new staff and to share a deeper dive into the key areas of *21st Century Leadership School powered by The 7 Habits of Highly Effective People* process with staff, students, parents, and the community.
6. The end in mind: Have a draft of a clear school wide Implementation Plan Timeline to keep *21st Century Leadership School powered by The 7 Habits of Highly Effective People* Implementation on track.

Deliverable 7

Deliverable	Anticipated Hours	Dates
Lighthouse Team certification in <i>The 7 Habits of Highly Effective People and Families</i> .	2 Days	TBD

Our Process:

7. Team certification: 2 Days

Participants: 10-member team including Principal

Materials: 7 Habit Signature Facilitator Kit, Facilitator DVD, 7 Habits Families Facilitator Kit, Facilitator DVD

Objective: Participants will be certified as “turn- key” trainers in *The 7 Habits of Highly Effective People and 7 Habits of Highly Effective Families*. This certification will allow for greater sustainability of the Leadership process. The certified staff will be able to deliver the content to new staff, provide refresher courses, and hold workshops for families of their students.

Deliverable 8

Deliverable	Anticipated Hours	Dates
7 Habits Teen Training. This training is the foundational training for <i>21st Century Leadership School powered by The 7 Habits of Highly Effective People</i> process. It focuses on individual effectiveness as a student.	1 Day	T.B.D.

Our Process:

8. 7 Habits Teen Workshop: 1 Day

Participants: All school students; co-facilitated by Lighthouse Team

Materials: 7 Habits of Highly Effective Teens® paperback

Objective: Based on the proven principles found in Sean Covey's best-selling book, *The 7 Habits of Highly Effective Teens*,® training helps your school's students achieve sustained superior results by focusing on making students more effective. Participants gain hands-on experience, applying timeless principles that yield greater productivity, improved communication, strengthened relationships, increased influence, and laser-like focus on critical priorities. Students learn how to: take initiative, balance key priorities, improve interpersonal communication, leverage creative collaboration, and apply principles for achieving a balanced life.

Deliverable 9

Deliverable	Anticipated Hours	Dates
Student Lighthouse Team Training	1 Day	TBD

Our Process:

9. Student Lighthouse Team Training: 1 Day

Participants: 12 student team; co-facilitated by Lighthouse Team

Materials: Lighthouse Team Participant Guidebooks, Flip Chart

Objectives:

1. Members of the Lighthouse team will identify key roles on the team.
2. Consultant will work with the team to provide them with skills that will assist them to work effectively as a team and lead fellow students.
3. Identify the criteria for the school to become a *21st Century Leadership School powered by The 7 Habits of Highly Effective People*, Lighthouse school.
4. Review the 6 Essential Ingredients of a leadership culture.
5. Provide the team with resources to train new students and to share a deeper dive into the key areas of *21st Century Leadership School powered by The 7 Habits of Highly Effective People* process with staff, students, parents, and the community.
6. The end in mind: Have a draft of a clear school wide Implementation Plan Timeline to keep *21st Century Leadership School powered by The 7 Habits of Highly Effective People* Implementation on track.

Deliverable 10

Deliverable	Anticipated Hours	Dates
Leadership Coaching/Planning for the leadership team in the school Level 2	6 Days	T.B.D

Our Process

10. Leadership Coaching/Planning: 6 Days

Proposed Dates: 1-2 days per quarter

Participants: 10 member team including principals

Objective:

The leadership team receives coaching on scoreboards and a cadence of accountability for weekly discussions around their lead and lag measures. Wildly Important Goals (WIGs) are updated and specific action plans are developed for barriers observed. Focused coaching on transferring ownership of the school over to the student body.

Deliverable 11

Deliverable	Anticipated Hours	Dates
Speed of Trust	2 Days	T.B.D.

Our Process:

11. Working at the Speed of Trust: 2 Days

Participants: All school staff

Materials: Speed of Trust manual

Objective: Based on the proven trust principles found in Stephen M. R. Covey's best-selling business book, *The Speed of Trust*[®] training helps your school achieve sustained superior results by focusing on making individuals more effective. Participants discover how to communicate transparently with peers and students, improve their track record of keeping commitments, focus on improving internal "customer service" with others who depend on their work, build team trust and much more. Increase trust with school stakeholders: students, parents, and community members. Create an environment of high trust that will result in increased creativity, innovation, and greater commitment to achieving success.

Deliverable 12

Deliverable	Anticipated Hours	Dates
Empowerment Day: Applying the Tools of Leadership with entire Staff	1 day	TBD

Our Process:

12. Empowerment Day: 1 Day

Participants: Entire Staff

Materials: Level 2 Implementation Participant Guidebooks

Objectives:

1. Shared buy-in and commitment to the Wildly Important Goals.
2. The creation of lead measures at the team level.
3. The creation and design of simple, yet compelling, scoreboards for tracking the progress of the WIGs. This consists of a few critical “leading” and “lagging” indicators for the goal.
4. Agreement on the weekly process for accountability and follow-through on prior commitments (The WIG Session).

Deliverable 13

Deliverable	Anticipated Hours	Dates
Achieving Schoolwide goals: Applying Leadership Tools Lighthouse Team Training	1 Day	TBD

Our Process

13. Achieving Schoolwide Goals: 1 Day

Participants: Lighthouse Team and principals

Materials: Lighthouse Team Training manual

Objectives: Lighthouse Team is prepared to teach and implement the 4 Disciplines with their school. This includes being able to:

1. Teach a 45-minute overview of the 4 Disciplines of Execution.
2. Ratify the WIG and Lead Measures with the team
3. Finalize the Scoreboard with the team
4. Conduct the first WIG Session
5. Understand the key “watch outs” for each discipline

Deliverable 14

Deliverable	Anticipated Hours	Dates
Leadership Coaching/Planning for the leadership team in the school Level 3	4 Days	T.B.D

Our Process

14. Leadership Coaching/Planning: 4 Days

Proposed Dates: 1 day per quarter

Participants: 10 member team including principals

Objective:

The leadership team receives coaching on scoreboards and a cadence of accountability for weekly discussions around their lead and lag measures. Wildly Important Goals (WIGs) are updated and specific action plans are developed for barriers observed. Focused coaching on transferring ownership of the school over to the student body.

Sheffield Middle School (6-8)
Date of Investment Summary, 10-23-2013

Number of Staff Trained	58
Number on Leadership Team (estimate)	10
Number of Students	423
Number of Classrooms	35

Leadership: Great Leaders, Great Teams, Great Results - (3 days)

Item	Amount	Quantity	Total	YEAR 1
Consultant	\$2,500	3	\$7,500	
Travel (Estimate)	\$1,600	1	\$1,600	
KELDP - Participant Manual	\$137	10	\$1,370	
Subtotal for Leadership			\$10,470.00	
Shipping			\$61.30	
Total for Leadership			<u>\$10,531.30</u>	

Leadership Coaching/ Planning - (6 days)

Item	Amount	Quantity	Total	YEAR 1
Consultant	\$2,500	6	\$15,000	
Travel (Estimate)	\$500	6	\$3,000	
Intellectual Property License/ Web Community Access	\$1,000	1	\$1,000	
Subtotal for Leadership Coaching			\$19,000.00	
Subtotal for Leadership Coaching			<u>\$19,000.00</u>	

Vision Session - (1 day)

Item	Amount	Quantity	Total	YEAR 1
Consultant	\$2,500	1	\$2,500	
Travel (Estimate)	\$1,000	1	\$1,000	
76124 - Vision Participant Manual	\$20	58	\$1,160	
Subtotal for Vision			\$4,660.00	
Shipping			\$61.30	
Total for Vision			<u>\$4,721.30</u>	

7 Habits Signature & Student Materials - (3 days)

Item	Amount	Quantity	Total	YEAR 1
Consultant	\$2,500	3	\$7,500.00	
Travel (Estimate)	\$1,600	1	\$1,600.00	
74970 - Participant Manual	\$93	58	\$5,394.00	
Student Portfolios	\$8	423	\$3,172.50	
Teacher Annotated Edition	\$20	58	\$1,157.10	
29664- 7 Habits of Highly Effective Teens	\$7	58	\$420.50	
75288 - 7 Habits Teens - posters	\$35	35	\$1,225.00	
75691 - 7 Habits Tree Poster	\$10	35	\$350.00	

Subtotal for 7 Habits Signature & Student Materials \$20,819.10
Shipping \$307.85
Total for 7 Habits Signature & Student Materials **\$21,126.95**

Implementation Training - (1 day)

Item	Amount	Quantity	Total	YEAR 1
Consultant	\$2,500	1	\$2,500	
Travel (Estimate)	\$1,000	1	\$1,000	
76122 - Implementation Guides	\$20	58	\$1,160	

Subtotal for Implementation \$4,660.00
Shipping \$61.30
Total for Implementation **\$4,721.30**

Lighthouse Team Level I - Culture Training - (1 day)

Item	Amount	Quantity	Total	YEAR 1
Consultant	\$2,500	1	\$2,500	
Travel (Estimate)	\$1,000	1	\$1,000	
75910 - Lighthouse Team Training Participant Kit	\$95	10	\$950	

Subtotal for Lighthouse Level I \$4,450
Shipping \$53.12
Total for Lighthouse Level I **\$4,503.12**

7 Habits Signature Certification - (2 days)

Item	Amount	Quantity	Total	YEAR 1
Consultant	\$2,500	2	\$5,000	
Travel (Estimate)	\$1,200	1	\$1,200	
75021 - Program DVD	\$300	1	\$300	
76068 - Facilitator Kit	\$425	6	\$2,550	

Subtotal for Signature Certification \$9,050
Shipping \$85.82
Total for Signature Certification **\$9,135.82**

7 Habits Families Certification - (1 day included in Signature Certification)

Item	Amount	Quantity	Total	YEAR 1
76289 - Program DVD	\$300	1	\$300	
76411 - Facilitator Kit	\$425	6	\$2,550	

Subtotal for Signature Certification \$2,850
Shipping \$85.82
Total for Signature Certification \$2,935.82

Student 7 Habits Teens Training - (1 day)

Item	Amount	Quantity	Total	YEAR 1
Consultant	\$2,500	1	\$2,500	
Travel (Estimate)	\$1,000	1	\$1,000	

Subtotal for Student 7 Habits \$3,500
Total for Student 7 Habits \$3,500.00

Student Lighthouse Team Training - (1 day)

Item	Amount	Quantity	Total	YEAR 1
Consultant	\$2,500	1	\$2,500	
Travel (Estimate) *Coincides with 7 Habits Teens	\$300	1	\$300	

Subtotal for Lighthouse Team \$2,800
Total for Lighthouse Team \$2,800.00

Leadership Coaching/ Planning - (6 days)

Item	Amount	Quantity	Total	YEAR 2
Consultant	\$2,500	6	\$15,000	
Travel (Estimate)	\$1,000	6	\$6,000	
Intellectual Property License/ Web Community Access	\$1,000	1	\$1,000	

Subtotal for Leadership Coaching \$22,000.00
Subtotal for Leadership Coaching \$22,000.00

Speed of Trust - (2 days)

Item	Amount	Quantity	Total	YEAR 2
Consultant	\$2,500	2	\$5,000	
Travel (Estimate)	\$1,200	1	\$1,200	
75920 - Participant Manual	\$137	58	\$7,946	

Subtotal for Speed of Trust \$14,146.00
Shipping \$198.88
Total for Speed of Trust \$14,344.88

Implementation Training Level II - Empowerment Day - (1 day)

Item	Amount	Quantity	Total	YEAR 2
Consultant	\$2,500	1	\$2,500	
Travel (Estimate)	\$1,000	1	\$1,000	
75854 - Implementation Guides	\$20	58	\$1,160	

Subtotal for Implementation Level II	\$4,660
Shipping	\$61.30
Total for Implementation Level II	<u>\$4,721.30</u>

Lighthouse Team Training Level II - Achieving Schoolwide Goals - (1 day)

Item	Amount	Quantity	Total	YEAR 2
Consultant	\$2,500	1	\$2,500	
Travel (Estimate) *Training coincides with Implementation	\$300	1	\$300	
75910 - Lighthouse Kit	\$95	10	\$950	

Subtotal for Lighthouse Level II	\$3,750
Shipping	\$53.12
Total for Lighthouse Level II	<u>\$3,803.12</u>

Leadership Coaching/ Planning - (4 days)

Item	Amount	Quantity	Total	YEAR 3
Consultant	\$2,500	4	\$10,000	
Travel (Estimate)	\$1,000	4	\$4,000	
Intellectual Property License/ Web Community Access	\$1,000	1	\$1,000	

Subtotal for Leadership Coaching	\$14,000.00
Subtotal for Leadership Coaching	<u>\$14,000.00</u>

Overall Total **\$138,909**

Breakdown per budget cycle	Overall	Per Student	% of Student Expenditure	Percent of Student Expenditure
Year 1	\$80,040	\$189.22	2.226%	1.84%
Year 2	\$44,869	\$106.07	1.248%	1.03%
Year 3	\$14,000	\$33.10		0.32%
	<u>\$138,909</u>	<u>\$65.68</u>		\$10,297
	Total	Average per cycle		

***Investment summary guaranteed for the next 30 days**

***Based on average expenditure per student**

Source: National Center for Education Statistics

