

# Sheffield Lake City Schools

## Executive Summary

This Scope of Service is in response to the Sheffield Lake City Schools' desire to pursue *The Leader in 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 19<sup>th</sup>.
- 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 Lake City Schools by providing training to build capacity and achieve results in a short timeline. These trainings are in sync with the Leader in Me model. This model develops a unique culture of leadership at each school, and will enable the organization to pursue the recognition of a Lighthouse School. This designation is reserved for the best schools or districts in the world at cultivating leaders, and currently there are only 29 such campuses globally.

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 21<sup>st</sup> century and eventually excel in the global workforce.
  - Improves academic achievement
  - Raise levels of engagement among teachers, staff, and students
  - Increase parent involvement
  - Decrease discipline referrals
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 *The Leader in Me* 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.

## I. Technical Approach Implementation Plan

*The Leader in Me* 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 *The Leader in Me* 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

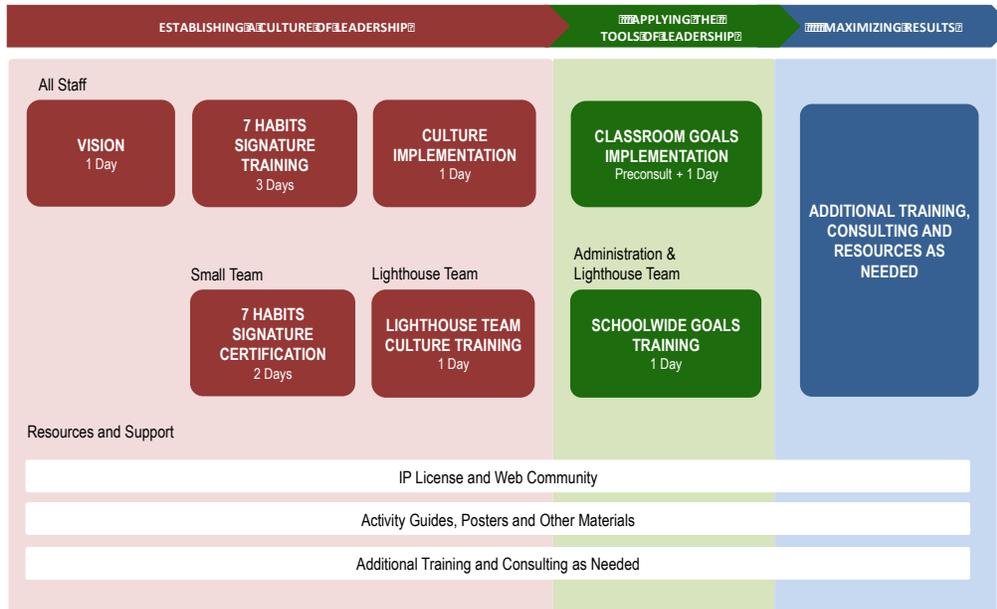
Participants in *The Leader in Me* process will learn how to:

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

## The Process

Below is the “picture” of the process for implementing *The Leader in Me*. This process is designed to produce results within a 3 year timeline

### The Leader in Me™ Implementation Process



## Deliverable 1

<b>Deliverable</b>	<b>Anticipated Hours</b>	<b>Dates</b>
<b>Vision Day workshop for all Staff in the school. This workshop will establish a shared vision of the staff's ideal school.</b>	6-8 Hours	T.B.D

### **Our Process**

#### **1. Vision Day Training: 1 Day (6-8 hours)**

Proposed Dates: T.B.D.

Participants: All school staff

Materials: Each person will receive a Vision Day Participant Guide,

#### Objective:

Training for the entire staff. 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 Leader in Me* process benefits, students, teachers, and parents.

## Deliverable 2

Deliverable	Anticipated Hours	Dates
<b>7 Habits Signature Training. This training is the foundational training for <i>The Leader in Me</i> process. It focuses on individual effectiveness.</b>	3 Days	T.B.D.

### Our Process:

#### 2. 7 Habits Signature Workshop-3 Days

Proposed Dates- T.B.D.

Participants: All school staff

Materials: 7 Habit Signature Manual, Talking Stick

The Leader in Me IP license and web community

Objective: Based on the proven principles found in Dr. Stephen R. Covey's best-selling business book, *The 7 Habits of Highly Effective People*,<sup>®</sup> 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 3

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

### Our Process:

#### 3. Team certification- 2 Days

Proposed dates TBD

Participants: 6-member team including Principal

Objective: Participants will be certified as “turn- key” trainers in *The 7 Habits of Highly Effective People*. 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.

Materials: 7 Habit Signature Facilitator Kit,

- 7 Habits Signature Facilitator Kit contains
  - 7H Signature Facilitator Guide
  - 7H Signature Facilitator Power Point
  - 7H Signature Posters with case
  - 7H Signature Participant Kit
  - 7H Facilitator Supplement Pack
  - Bag w/tag
- 7 Habit Signature DVDs

## Deliverable 4

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

### **Our Process:**

#### **4. Implementation Training- 1 Day**

Proposed Dates: TBD

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 5

Deliverable	Anticipated Hours	Dates
Lighthouse Team Training Level 1,	1 Day 8:00am-3:30pm	TBD

### Our Process:

#### 5. Lighthouse Team Training- 1 Day

Proposed Dates: TBD

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 *The Leader in Me* 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 *The Leader in Me* Implementation on track.

## Deliverable 6

<b>Deliverable</b>	<b>Anticipated Hours</b>	<b>Dates</b>
<b>Year 2 Applying the Tools of Leadership with entire Staff</b>	1 day 8:00 am-3:30pm	TBD

### **Our Process:**

Days of training

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 7

<b>Deliverable</b>	<b>Anticipated Hours</b>	<b>Dates</b>
<b>Year 2 Staff training, applying Leadership Tools Lighthouse Team Training</b>	1 Day	TBD

### **Our Process**

#### **Dates: TBD**

Participants: Lighthouse Team and Principals

Materials: Lighthouse team

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.
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

**Forestlawn Elementary (5)**  
**Date of Investment Summary, 10-23-2013**

<b>Number of Students</b>	138
<b>Number of Staff Trained</b>	27
<b>Number on Leadership Team (estimate)</b>	6
<b>Number of Activity Guides (grade 5)</b>	138
<b>Number of Classrooms</b>	11

***Vision Session - (1 day)***

Item	Amount	Quantity	Total
Consultant	\$2,600	1	\$2,600
Travel (Estimate)	\$1,200	1	\$1,200
75892 - Leader in Me - book	\$10	27	\$270
LIMADVCO - <i>The Leader in Me</i> Coaching (Yearly)	\$4,400	1	\$4,400
LIMWEB12 - Intellectual Property License/TLIM Online	\$1,900	1	\$1,900
76124 - Vision Participant Manual	\$20	27	\$540
Subtotal for Vision			\$10,910.00
Shipping			\$44.95
<b>Total for Vision</b>			<b><u>\$10,954.95</u></b>

### **7 Habits Signature & Student Materials- (3 days)**

Item	Amount	Quantity	Total
Consultant	\$2,600	3	\$7,800.00
Travel (Estimate)	\$1,600	1	\$1,600.00
76234 - Participant Manual	\$95	27	\$2,565.00
Activity Guides	\$5	138	\$690.00
Teacher Editions	\$25.95	11	\$285.45
75630 - 7 Habits of Happy Kids Books	\$11.50	11	\$126.50
75661 - 7 Habits of Happy Kids - posters	\$24.95	11	\$274.45
75691 - 7 Habits Tree Poster	\$11	11	\$121.00
76362- <i>The 7 Habits of Happy Kids</i> - board game	\$24	3	\$72.00

Subtotal for 7 Habits Signature & Student Materials	\$13,462.40
Shipping	\$115.78
<b>Total for 7 Habits Signature &amp; Student Materials</b>	<b><u>\$13,578.18</u></b>

### **Implementation Training - (1 day)**

Item	Amount	Quantity	Total
Consultant	\$2,600	1	\$2,600
Travel (Estimate)	\$1,200	1	\$1,200
76122 - Implementation Guides	\$20	27	\$540

Subtotal for Implementation	\$4,340.00
Shipping	\$27.24
<b>Total for Implementation</b>	<b><u>\$4,367.24</u></b>

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

Item	Amount	Quantity	Total
Consultant	\$2,600	1	\$2,600
Travel (Estimate) *Training coincides with Implementation	\$1,200	1	\$1,200
76134 - Lighthouse Team Training Participant Kit	\$95	6	\$570

Subtotal for Lighthouse Level I	\$4,370
Shipping	\$27.24
<b>Total for Lighthouse Level I</b>	<b><u>\$4,397.24</u></b>

### **7 Habits Signature/Families Certification - (2 days)**

Item	Amount	Quantity	Total
Consultant	\$2,600	2	\$5,200
Travel (Estimate)	\$1,400	1	\$1,400
76289 - Program DVD	\$300	1	\$300
76411 - 7 Habits Families Facilitator Kit	\$425	2	\$850
76068 - 7 Habits Signature Facilitator Kit	\$425	4	\$1,700

Subtotal for Signature/Families Certification			\$9,450
Shipping			\$69.47
<b>Total for Signature Certification</b>			<b><u>\$9,519.47</u></b>

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

Item	Amount	Quantity	Total
Consultant	\$2,600	1	\$2,600
Travel (Estimate)	\$1,200	1	\$1,200
76252 - Implementation Guides	\$20	27	\$540

Subtotal for Implementation Level II			\$4,340
Shipping			\$27.24
<b>Total for Implementation Level II</b>			<b><u>\$4,367.24</u></b>

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

Item	Amount	Quantity	Total
Consultant	\$2,600	1	\$2,600
Travel (Estimate) *Training coincides with Implementation	\$1,200	1	\$1,200
76255 - Lighthouse Kit	\$95	6	\$570

Subtotal for Lighthouse Level II			\$4,370
Shipping			\$27.24
<b>Total for Lighthouse Level II</b>			<b><u>\$4,397.24</u></b>

### **Renewal of Resources Level II**

Item	Amount	Quantity	Total
LIMADVCO - The Leader in Me Coaching (Yearly)	\$4,400	1	\$4,400
LIMWEB12 - Intellectual Property License/TLIM Online	\$1,900	1	\$1,900

<b>Total for Renewal of Resources</b>			<b><u>\$6,300.00</u></b>
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**Renewal of Resources (Yearly Beyond Level II)**

Item			
LIMADVCO - <i>The Leader in Me</i> Coaching (Yearly)	\$4,400	1	\$4,400
LIMWEB12 - Intellectual Property License/TLIM Online	\$1,900	1	\$1,900

**Total for Renewal of Resources** \$6,300.00

**Overall Total** \$64,181.56

Breakdown per budget Implementation Level	Overall	Per Student
Level I	\$42,817	\$310.27
Level II	\$15,064	\$109.16
Renewal of Resources (Yearly Beyond Level II)	\$6,300	\$45.65
	<u>\$64,182</u>	<u>\$155.03</u>
	Total	Average per level

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

**Knollwood Elementary (Pre-K-1)**  
**Date of Investment Summary, 10-23-2013**

<b>Number of Students</b>	304
<b>Number of Staff Trained</b>	24
<b>Number on Leadership Team (estimate)</b>	6
<b>Number of Activity Guides (grade 1)</b>	120
<b>Number of Classrooms</b>	23

***Vision Session - (1 day)***

Item	Amount	Quantity	Total
Consultant	\$2,600	1	\$2,600
Travel (Estimate)	\$1,200	1	\$1,200
75892 - Leader in Me - book	\$10	24	\$240
LIMADVCO - <i>The Leader in Me</i> Coaching (Yearly)	\$4,400	1	\$4,400
LIMWEB12 - Intellectual Property License/TLIM Online	\$1,900	1	\$1,900
76124 - Vision Participant Manual	\$20	24	\$480

Subtotal for Vision	\$10,820.00
Shipping	\$36.78
<b>Total for Vision</b>	<b><u>\$10,856.78</u></b>

### **7 Habits Signature & Student Materials- (3 days)**

Item	Amount	Quantity	Total
Consultant	\$2,600	3	\$7,800.00
Travel (Estimate)	\$1,600	1	\$1,600.00
76234 - Participant Manual	\$95	24	\$2,280.00
Activity Guides	\$5	120	\$600.00
Teacher Editions	\$25.95	23	\$596.85
75630 - 7 Habits of Happy Kids Books	\$11.50	23	\$264.50
75661 - 7 Habits of Happy Kids - posters	\$24.95	23	\$573.85
75691 - 7 Habits Tree Poster	\$11	23	\$253.00
76362- <i>The 7 Habits of Happy Kids</i> - board game	\$24	5	\$120.00

Subtotal for 7 Habits Signature & Student Materials \$13,968.20  
Shipping \$118.51  
**Total for 7 Habits Signature & Student Materials** **\$14,086.71**

### **Implementation Training - (1 day)**

Item	Amount	Quantity	Total
Consultant	\$2,600	1	\$2,600
Travel (Estimate)	\$1,200	1	\$1,200
76122 - Implementation Guides	\$20	24	\$480

Subtotal for Implementation \$4,280.00  
Shipping \$25.88  
**Total for Implementation** **\$4,305.88**

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

Item	Amount	Quantity	Total
Consultant	\$2,600	1	\$2,600
Travel (Estimate) *Training coincides with Implementation	\$1,200	1	\$1,200
76134 - Lighthouse Team Training Participant Kit	\$95	6	\$570

Subtotal for Lighthouse Level I \$4,370  
Shipping \$27.24  
**Total for Lighthouse Level I** **\$4,397.24**

### **7 Habits Signature/Families Certification - (2 days)**

Item	Amount	Quantity	Total
Consultant	\$2,600	2	\$5,200
Travel (Estimate)	\$1,400	1	\$1,400
76289 - Program DVD	\$300	1	\$300
76411 - 7 Habits Families Facilitator Kit	\$425	2	\$850
76068 - 7 Habits Signature Facilitator Kit	\$425	4	\$1,700

Subtotal for Signature/Families Certification			\$9,450
Shipping			\$69.47
<b>Total for Signature Certification</b>			<b><u>\$9,519.47</u></b>

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

Item	Amount	Quantity	Total
Consultant	\$2,600	1	\$2,600
Travel (Estimate)	\$1,200	1	\$1,200
76252 - Implementation Guides	\$20	24	\$480

Subtotal for Implementation Level II			\$4,280
Shipping			\$25.88
<b>Total for Implementation Level II</b>			<b><u>\$4,305.88</u></b>

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

Item	Amount	Quantity	Total
Consultant	\$2,600	1	\$2,600
Travel (Estimate) *Training coincides with Implementation	\$1,200	1	\$1,200
76255 - Lighthouse Kit	\$95	6	\$570

Subtotal for Lighthouse Level II			\$4,370
Shipping			\$27.24
<b>Total for Lighthouse Level II</b>			<b><u>\$4,397.24</u></b>

### **Renewal of Resources Level II**

Item	Amount	Quantity	Total
LIMADVCO - The Leader in Me Coaching (Yearly)	\$4,400	1	\$4,400
LIMWEB12 - Intellectual Property License/TLIM Online	\$1,900	1	\$1,900

<b>Total for Renewal of Resources</b>			<b><u>\$6,300.00</u></b>
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**Renewal of Resources (Yearly Beyond Level II)**

Item			
LIMADVCO - <i>The Leader in Me</i> Coaching (Yearly)	\$4,400	1	\$4,400
LIMWEB12 - Intellectual Property License/TLIM Online	\$1,900	1	\$1,900

**Total for Renewal of Resources** \$6,300.00

**Overall Total** \$64,469.20

Breakdown per budget Implementation Level	Overall	Per Student
Level I	\$43,166	\$141.99
Level II	\$15,003	\$49.35
Renewal of Resources (Yearly Beyond Level II)	\$6,300	\$20.72
	<u>\$64,469</u>	<u>\$70.69</u>
	Total	Average per level

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

**Tennyson Elementary (2-3)**  
**Date of Investment Summary, 10-23-2013**

<b>Number of Students</b>	267
<b>Number of Staff Trained</b>	45
<b>Number on Leadership Team (estimate)</b>	6
<b>Number of Activity Guides (grade 2-3)</b>	267
<b>Number of Classrooms</b>	25

***Vision Session - (1 day)***

Item	Amount	Quantity	Total
Consultant	\$2,600	1	\$2,600
Travel (Estimate)	\$1,200	1	\$1,200
75892 - Leader in Me - book	\$10	45	\$450
LIMADVCO - <i>The Leader in Me</i> Coaching (Yearly)	\$4,400	1	\$4,400
LIMWEB12 - Intellectual Property License/TLIM Online	\$1,900	1	\$1,900
76124 - Vision Participant Manual	\$20	45	\$900

Subtotal for Vision	\$11,450.00
Shipping	\$61.30
<b>Total for Vision</b>	<b><u>\$11,511.30</u></b>

### **7 Habits Signature & Student Materials- (3 days)**

Item	Amount	Quantity	Total
Consultant	\$2,600	3	\$7,800.00
Travel (Estimate)	\$1,600	1	\$1,600.00
76234 - Participant Manual	\$95	45	\$4,275.00
Activity Guides	\$5	267	\$1,335.00
Teacher Editions	\$25.95	25	\$648.75
75630 - 7 Habits of Happy Kids Books	\$11.50	25	\$287.50
75661 - 7 Habits of Happy Kids - posters	\$24.95	25	\$623.75
75691 - 7 Habits Tree Poster	\$11	25	\$275.00
76362- <i>The 7 Habits of Happy Kids</i> - board game	\$24	5	\$120.00

Subtotal for 7 Habits Signature & Student Materials	\$16,845.00
Shipping	\$185.26
<b>Total for 7 Habits Signature &amp; Student Materials</b>	<b><u>\$17,030.26</u></b>

### **Implementation Training - (1 day)**

Item	Amount	Quantity	Total
Consultant	\$2,600	1	\$2,600
Travel (Estimate)	\$1,200	1	\$1,200
76122 - Implementation Guides	\$20	45	\$900

Subtotal for Implementation	\$4,700.00
Shipping	\$44.95
<b>Total for Implementation</b>	<b><u>\$4,744.95</u></b>

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

Item	Amount	Quantity	Total
Consultant	\$2,600	1	\$2,600
Travel (Estimate) *Training coincides with Implementation	\$1,200	1	\$1,200
76134 - Lighthouse Team Training Participant Kit	\$95	6	\$570

Subtotal for Lighthouse Level I	\$4,370
Shipping	\$27.24
<b>Total for Lighthouse Level I</b>	<b><u>\$4,397.24</u></b>

### **7 Habits Signature/Families Certification - (2 days)**

Item	Amount	Quantity	Total
Consultant	\$2,600	2	\$5,200
Travel (Estimate)	\$1,400	1	\$1,400
76289 - Program DVD	\$300	1	\$300
76411 - 7 Habits Families Facilitator Kit	\$425	2	\$850
76068 - 7 Habits Signature Facilitator Kit	\$425	4	\$1,700

Subtotal for Signature/Families Certification			\$9,450
Shipping			\$69.47
<b>Total for Signature Certification</b>			<b><u>\$9,519.47</u></b>

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

Item	Amount	Quantity	Total
Consultant	\$2,600	1	\$2,600
Travel (Estimate)	\$1,200	1	\$1,200
76252 - Implementation Guides	\$20	45	\$900

Subtotal for Implementation Level II			\$4,700
Shipping			\$44.95
<b>Total for Implementation Level II</b>			<b><u>\$4,744.95</u></b>

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

Item	Amount	Quantity	Total
Consultant	\$2,600	1	\$2,600
Travel (Estimate) *Training coincides with Implementation	\$1,200	1	\$1,200
76255 - Lighthouse Kit	\$95	6	\$570

Subtotal for Lighthouse Level II			\$4,370
Shipping			\$27.24
<b>Total for Lighthouse Level II</b>			<b><u>\$4,397.24</u></b>

### **Renewal of Resources Level II**

Item	Amount	Quantity	Total
LIMADVCO - The Leader in Me Coaching (Yearly)	\$4,400	1	\$4,400
LIMWEB12 - Intellectual Property License/TLIM Online	\$1,900	1	\$1,900

<b>Total for Renewal of Resources</b>			<b><u>\$6,300.00</u></b>
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**Renewal of Resources (Yearly Beyond Level II)**

Item			
LIMADVCO - <i>The Leader in Me</i> Coaching (Yearly)	\$4,400	1	\$4,400
LIMWEB12 - Intellectual Property License/TLIM Online	\$1,900	1	\$1,900

**Total for Renewal of Resources** \$6,300.00

**Overall Total** \$68,945.41

Breakdown per budget Implementation Level	Overall	Per Student
Level I	\$47,203	\$176.79
Level II	\$15,442	\$57.84
Renewal of Resources (Yearly Beyond Level II)	\$6,300	\$23.60
	<u>\$68,945</u>	<u>\$86.07</u>
	Total	Average per level

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

**William Barr Elementary (4)**  
**Date of Investment Summary, 10-23-2013**

<b>Number of Students</b>	124
<b>Number of Staff Trained</b>	16
<b>Number on Leadership Team (estimate)</b>	6
<b>Number of Activity Guides (grade 4)</b>	124
<b>Number of Classrooms</b>	10

***Vision Session - (1 day)***

Item	Amount	Quantity	Total
Consultant	\$2,600	1	\$2,600
Travel (Estimate)	\$1,200	1	\$1,200
75892 - Leader in Me - book	\$10	16	\$160
LIMADVCO - <i>The Leader in Me</i> Coaching (Yearly)	\$4,400	1	\$4,400
LIMWEB12 - Intellectual Property License/TLIM Online	\$1,900	1	\$1,900
76124 - Vision Participant Manual	\$20	16	\$320

Subtotal for Vision	\$10,580.00
Shipping	\$25.88
<b>Total for Vision</b>	<b><u>\$10,605.88</u></b>

### **7 Habits Signature & Student Materials- (3 days)**

Item	Amount	Quantity	Total
Consultant	\$2,600	3	\$7,800.00
Travel (Estimate)	\$1,600	1	\$1,600.00
76234 - Participant Manual	\$95	16	\$1,520.00
Activity Guides	\$5	124	\$620.00
Teacher Editions	\$25.95	10	\$259.50
75630 - 7 Habits of Happy Kids Books	\$11.50	10	\$115.00
75661 - 7 Habits of Happy Kids - posters	\$24.95	10	\$249.50
75691 - 7 Habits Tree Poster	\$11	10	\$110.00
76362- <i>The 7 Habits of Happy Kids</i> - board game	\$24	2	\$48.00

Subtotal for 7 Habits Signature & Student Materials	\$12,274.00
Shipping	\$85.82
<b>Total for 7 Habits Signature &amp; Student Materials</b>	<b><u>\$12,359.82</u></b>

### **Implementation Training - (1 day)**

Item	Amount	Quantity	Total
Consultant	\$2,600	1	\$2,600
Travel (Estimate)	\$1,200	1	\$1,200
76122 - Implementation Guides	\$20	16	\$320

Subtotal for Implementation	\$4,120.00
Shipping	\$24.52
<b>Total for Implementation</b>	<b><u>\$4,144.52</u></b>

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

Item	Amount	Quantity	Total
Consultant	\$2,600	1	\$2,600
Travel (Estimate) *Training coincides with Implementation	\$1,200	1	\$1,200
76134 - Lighthouse Team Training Participant Kit	\$95	6	\$570

Subtotal for Lighthouse Level I	\$4,370
Shipping	\$27.24
<b>Total for Lighthouse Level I</b>	<b><u>\$4,397.24</u></b>

### **7 Habits Signature/Families Certification - (2 days)**

Item	Amount	Quantity	Total
Consultant	\$2,600	2	\$5,200
Travel (Estimate)	\$1,400	1	\$1,400
76289 - Program DVD	\$300	1	\$300
76411 - 7 Habits Families Facilitator Kit	\$425	2	\$850
76068 - 7 Habits Signature Facilitator Kit	\$425	4	\$1,700

Subtotal for Signature/Families Certification			\$9,450
Shipping			\$69.47
<b>Total for Signature Certification</b>			<b><u>\$9,519.47</u></b>

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

Item	Amount	Quantity	Total
Consultant	\$2,600	1	\$2,600
Travel (Estimate)	\$1,200	1	\$1,200
76252 - Implementation Guides	\$20	16	\$320

Subtotal for Implementation Level II			\$4,120
Shipping			\$24.52
<b>Total for Implementation Level II</b>			<b><u>\$4,144.52</u></b>

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

Item	Amount	Quantity	Total
Consultant	\$2,600	1	\$2,600
Travel (Estimate) *Training coincides with Implementation	\$1,200	1	\$1,200
76255 - Lighthouse Kit	\$95	6	\$570

Subtotal for Lighthouse Level II			\$4,370
Shipping			\$27.24
<b>Total for Lighthouse Level II</b>			<b><u>\$4,397.24</u></b>

### **Renewal of Resources Level II**

Item	Amount	Quantity	Total
LIMADVCO - The Leader in Me Coaching (Yearly)	\$4,400	1	\$4,400
LIMWEB12 - Intellectual Property License/TLIM Online	\$1,900	1	\$1,900

<b>Total for Renewal of Resources</b>			<b><u>\$6,300.00</u></b>
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**Renewal of Resources (Yearly Beyond Level II)**

Item			
LIMADVCO - <i>The Leader in Me</i> Coaching (Yearly)	\$4,400	1	\$4,400
LIMWEB12 - Intellectual Property License/TLIM Online	\$1,900	1	\$1,900

**Total for Renewal of Resources** \$6,300.00

**Overall Total** \$62,168.69

Breakdown per budget Implementation Level	Overall	Per Student
Level I	\$41,027	\$330.86
Level II	\$14,842	\$119.69
Renewal of Resources (Yearly Beyond Level II)	\$6,300	\$50.81
	<u>\$62,169</u>	<u>\$167.12</u>
	Total	Average per level

\*Investment summary guaranteed for the next 30 days

**TOTAL.....\$259,763**