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

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

1. **Project Title:**

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.

PaySmarter provides improved employee benefits and reduces school district cost at the same time. It reduces cost in the first year of implementation with reductions that last in perpetuity making more time and money available for the classroom. PaySmarter is designed to enhance your benefits package while reining in benefit-related costs - providing improved employee benefits and reduced district costs.

3. **Total Students Impacted:**

4. **Lead applicant primary contact:** Provide the following information:
   - First Name, last Name of contact for lead applicant: Daniel Schall
   - Organizational name of lead applicant: Vandalia-Butler City Schools
   - Unique Identifier (IRN/Fed Tax ID): 044958
   - Address of lead applicant: 306 S. Dixie Drive, Vandalia, OH 45377
   - Phone Number of lead applicant: 937-415.6407
   - Email Address of lead applicant: daniel.schall@vbcsd.com

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

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.

   Joe Scholler, Frost Brown Todd, Mike Suttman, McGohan Brabender, Daniel Schall, Opt Edge LLC

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. **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.**

   Mike Suttman, McGohan Brabender, Daniel Schall, Opt Edge LLC

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.**

    PaySmarter is an online benefits tool created by and for Vandalia-Butler employees. With rising costs of insurance, the district wanted a way to give employees options around how they select and what benefits they receive from the district. Accessible online during open enrollment, employees use a point system to select which benefits they want the school to provide - benefits that better fit the lifestyle of the employee. Rather than a join/waive option that the districts (most districts) have, employees can customize the benefit package while the district reduces the cost of benefits. Core benefits (typically medical, dental and sometimes vision) are offered at the negotiated rates while additional and optional benefits are offered that may be of value to the employee, for example: annuity, tuition reimbursement, FSA, gym membership, vaction days, accident insurance, critical illness high/low.

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.

    PaySmarter provides improved employee benefits for reduced district costs. Any choice that an employee makes, other than the negotiate package (core benefits), enable the district to cut costs. Optional benefits are aligned with district values (advanced education may be a huge value to the district therefore tuition reimbursement may hold a higher value) and therefore are offered at appropriate and appealing rates. Each benefit has a value - and if an employee elects a benefit that is outside the negotiated agreement - but because he/she values it more than the benefits otherwise awarded, the employee gains in personalized benefits and the district saves money.

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:
   - Enter a project budget
   - 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.

**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.**

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**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:
   - Enter a project budget
   - 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.
### Impact, evaluation and replication

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

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

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.

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

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<td>Yes</td>
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22. If so, how?

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

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.

### Evaluation - Timeline, communication and contingency planning

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.

### 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.)

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<tr>
<td>* Proposal Timeline Dates</td>
<td></td>
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<tr>
<td>Plan (MM/DD/YYYY): 01/01/2014</td>
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<tr>
<td>* Narrative explanation</td>
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<tr>
<td>For implementation, Opt Edge will work with the district to review and assess the negotiated agreement, employee handbooks, schedule of benefits, review current employee participation levels, review current open enrollment procedures and review taxation information (Section 125). After review, Opt Edge will meet with administration and provide an outline of how Opt Edge will realize targeted objectives from PaySmarter. Scope, pricing and an organized plan for implementation will be determined. Defining the TEAM: Specific roles team members will need to perform - each district implementing PaySmarter will need to identify the key participants. Participants will assist in obtaining buy-in and communication along the way. Human Resources Technology Administration Bargaining/Labor Union Assess what each group knows about benefits and open enrollment. What does each group know about the cost of benefits. Assess the level of acceptance for PaySmarter - do they buy in, neutral, or are they supportive. What is needed for comfort? Demo of the system. What other factors are going on in the district that will be competing (for attention) with PaySmarter. Identification of these things will only help Opt Edge when determining rollout and open enrollment information.</td>
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<td>Implementing PaySmarter: Creating a Project Plan Defining Objectives: Establish Savings goals Define Core benefits Identify optional benefits Implementing PaySmarter: Determine the location of the data (server) Configure the software - make it fit the district/feel like the district owns it Test the system Train administration/key participants Communication: Welcome page scripted Sponsor letters develop open enrollment materials Customizing PaySmarter Portal: Configure dollar/point conversions to district’s goals - work with McGohan Brabender and Frost Brown Todd on technical implementation and legal requirements. Test software with all technology Align technology support/troubleshooting Train Administration/Key Participants: Training covering tasks the employee in this role needs to practice and master (open enrollment, new enrollment, qualifying events, payroll) - including PaySmarter software training</td>
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<td>Go Live! Go Live occurs during open enrollment. Employees access PaySmarter 24/7 on the web. During open enrollment each eligible employee selects his/her benefits. Training the Employees: User guides will be distributed to each building. These guides provide step by step tutorials on how to use and access information in the software. Communication will also be emailed and posted appropriately highlighting training options afforded to each employee. Group training sessions will be provided as will one-on-one training. Managing and Maintaining PaySmarter: Once open enrollment is complete, a variety of reports help back-office support in completing the final paperwork and enrollment requirements of open enrollment. Opt Edge will work with district administration to determine the impact PaySmarter has on employee benefits.</td>
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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.

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.