# Budget

**Buckeye Local (048470) - Medina County - 2015 - Straight A Fund - Rev 0 - Straight A Fund - Application Number (259)**

U.S.A.S. Fund #:
Plus/Minus Sheet (opens new window)

<table>
<thead>
<tr>
<th>Purpose Code</th>
<th>Object Code</th>
<th>Salaries 100</th>
<th>Retirement Fringe Benefits 200</th>
<th>Purchased Services 400</th>
<th>Supplies 500</th>
<th>Capital Outlay 600</th>
<th>Other 800</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instruction</td>
<td>100</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Support Services</td>
<td>200</td>
<td>103,470.39</td>
<td>17,489.61</td>
<td>117,340.00</td>
<td>7,000.00</td>
<td>0.00</td>
<td>0.00</td>
<td>245,300.00</td>
</tr>
<tr>
<td>Governance/Admin</td>
<td>300</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Prof Development</td>
<td>400</td>
<td>0.00</td>
<td>0.00</td>
<td>4,000.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>4,000.00</td>
</tr>
<tr>
<td>Family/Community</td>
<td>500</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Safety</td>
<td>600</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Facilities</td>
<td>700</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Transportation</td>
<td>800</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>103,470.39</td>
<td>17,489.61</td>
<td>121,340.00</td>
<td>7,000.00</td>
<td>0.00</td>
<td>0.00</td>
<td>249,300.00</td>
</tr>
</tbody>
</table>

**Adjusted Allocation** 0.00

**Remaining** -249,300.00
Please respond to the prompts or questions in the areas listed below in a narrative form.

**A) APPLICANT INFORMATION - General Information**

1. **Project Title:**
   A Self-Sustaining Prog to Reduce Costs & Improve Quality of Supp. Serv. by with Lean Enterprise Concepts in two Medina County Schools

2. **Executive summary:** Please limit your responses to no more than three sentences.
   Buckeye Local School District and Cloverleaf Local School District see an opportunity to use Lean enterprise concepts and tools, which have been proven effective in industry and health care, to reduce the costs of support services while improving their quality. A successful pilot effort using Lean enterprise concepts and methods within the Medina City Schools has created interest in the approach on the part of the Districts. The Districts are applying for a Straight A Fund grant of $245,000 to form a consortium to implement this innovative approach.

This is an ultra-concise description of the overall project. It should not include anything other than a brief description of the project and the goals it hopes to achieve.

3. **Total Students Impacted:**
   5000
   This is the number of students that will be directly impacted by implementation of the project. This does not include students that may be impacted if the project is replicated or scaled up in the future.

4. **Please indicate which of the following grade levels will be impacted:**

<table>
<thead>
<tr>
<th>Grade Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-K Special Education</td>
</tr>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>3</td>
</tr>
<tr>
<td>4</td>
</tr>
<tr>
<td>5</td>
</tr>
<tr>
<td>6</td>
</tr>
<tr>
<td>7</td>
</tr>
<tr>
<td>8</td>
</tr>
<tr>
<td>9</td>
</tr>
<tr>
<td>10</td>
</tr>
<tr>
<td>11</td>
</tr>
<tr>
<td>12</td>
</tr>
</tbody>
</table>

5. **Lead applicant primary contact:** - Provide the following information:
   First Name, last Name of contact for lead applicant
   Brian Williams, Superintendent

   Organizational name of lead applicant
   Buckeye Local Schools

   Address of lead applicant
   3044 Columbia Rd Medina Ohio 44256

   Phone Number of lead applicant
   330 722 8257 ext 1003

   Email Address of lead applicant
   bwilliams@buckeyeschools.org

6. **Are you submitting your application as a consortium?** - Select one checkbox below
   - Yes
   - No

   If you are applying as consortium, please list all consortium members by name on the "Consortium Member" page by clicking on the link below. If an educational service center is applying as the lead applicant for a consortium, the first consortium member entered must be a client district of the educational service center.

   Add Consortium Members

7. **Are you partnering with anyone to plan, implement, or evaluate your project?** - Select one checkbox below
   - Yes
B) PROJECT DESCRIPTION - Overall description of project and alignment with goals

8. Describe the innovative project: - Provide the following information

The response should provide a clear and concise description of the project and its major components. Later questions will address specific outcomes and the measures of success.

The current state or problem to be solved; and

The need for the public education system to reinvent itself has never been greater. Higher standards and expectations will be confronting school districts in the next few years; those expectations are coming at a time when education resources are still limited. Finding new ways to do more with fewer resources remains the norm. America spends $602 Billion annually on education (2010 Census Report). (Nearly 30% of that sum, $179B, goes to support services.) Ohio will spend $15B on K-12 education in 2013. If we assume that national averages hold for Ohio, the state spends about $4.5B on support services. Both consortium members have been through a difficult financial period. Buckeye Local Schools District recently passed a levy after failing to do so for nearly two decades. Cloverleaf Local School District is seeking to pass a levy in November that would restore high school busing, restore half-day kindergarten, cap elementary classes at 28 pupils, restore 9th grade sports, and restore important extracurricular activities such as student council, Children’s Theater.

The proposed innovation and how it relates to solving the problem or improving on the current state.

The consortium will undertake a twelve-month project during which Lean enterprise concepts and methods will be introduced to the administrators, staff, and managers in the two school districts. They will be trained, coached, and facilitated as they identify and carry out a series of process improvement projects. During the project, the consortium will focus solely on support services, where Lean tools have already been successfully applied and the opportunities for cost savings and service improvements are considerable. The project will provide a model for implementation in districts throughout Ohio. This project will begin with the formation of a consortium Leadership Team and a Steering Committee within each of the participating school districts. The Leadership Team and Steering Committees will receive training in Lean concepts and tools. The Steering Committees will then identify improvement opportunities, establish teams and assign capable team members, provide administrative support and conduct positive reinforcement and recognition events. Teams will be established in three operational departments in each District: maintenance and custodial, food service, and transportation. Project Objectives The primary benefit of the application of Lean methods is the improvement in quality and reduction in cost of routinely carried out processes in support services. These improvements lead to reductions in waste, delays, scrap, rework, overtime, excess materials and supplies. WINOC’s experience with the application in other sectors makes us confident that, properly applied, Lean methods will lead to cost savings in support services of 3% annually. The proposed approach is very sustainable and replicable. The advisory Partners have implemented Lean concepts and tools in a variety of settings, including education. The consortium intends to build and implement a model valid for other districts throughout Ohio. The districts are willing to provide benchmarking and mentoring opportunities for other interested Ohio school districts. Project Measures Cost reduction and service quality metrics will be identified and/or developed by the Project Leadership Team and the District Steering Committees, in coordination with the District Treasurers, as part of their initial planning. The cost per pupil in nutrition services, transportation, and facilities maintenance will be among the measures selected. Quality of service measures, e.g., timely response, will also be developed for each of those departments.

9. Which of the stated Straight A Fund goals does the proposal aim to achieve? - (Check all that apply)

Applicants should select any and all goals the proposal aims to achieve. The description of how the goals will be met should provide the reader with a clear understanding of what the project will look like when implemented, with a clear connection between the components of the project and the stated goals of the fund. If partnerships/consortia are part of the project, this section should describe briefly how the various entities will work together in the project. More detailed descriptions of the roles and activities will be addressed in Question 16.

- Student achievement (Describe the specific changes in student achievement you anticipate as a result of this innovation (include grade levels, content areas as appropriate) in the box below.)

- Spending reductions in the five-year fiscal forecast or positive performance on other approved fiscal measures (Describe the specific reductions you anticipate in terms of dollars and spending categories over a five-year period in the box below or the positive performance you will achieve on other approved fiscal measures. Other approved fiscal measures include a reduction in spending over a five-year period in the operating budget approved by your organization's executive board or its equivalent.)

We anticipate that the application of lean methods in the two Districts will save no less that 3% of the budgets devoted to purchased services and supplies in the transportation, maintenance, and nutrition services departments. This is a reduction of $88.6K across the two districts in the first year. Savings would accrue at the same 3% rate in subsequent years as the teams identified and eliminated further process wastes.

- Utilization of a greater share of resources in the classroom (Describe specific resources (Personnel, Time, Course offerings, etc.) that will be enhanced in the classroom as a result of this innovation in the box below.)

- Implementing a shared services delivery model (Describe how your shared services delivery model will demonstrate increased efficiency and effectiveness, long-term sustainability, and scalability in the box below.)

Shared Services Model The two Districts will co-implement the lean initiative in both the planning and implementation phases. In addition to
C) SUSTAINABILITY - Planning for ongoing funding of the project, cost breakdown

11. Financial Documentation: - All applicants must enter or upload the following supporting information. The information in these documents must correspond to your responses in questions 11-14.

* Enter a project budget in CCIP (by clicking the link below)

Enter Budget

* If applicable, upload the Consortium Budget Worksheet (by clicking the link below)

* Upload the Financial Impact Table (by clicking the link below)

* Upload the Supplemental Financial Reporting Metrics (by clicking the link below)

Upload Documents

For applicants without an ODE Report Card for 2012-2013, provide a brief narrative explanation of the impact of your grant project on per pupil expenditures or why this metric does not apply to your grant project instead of uploading the Supplemental Financial Reporting Metric.

The project budget is entered directly in CCIP. For consortia, this project budget must reflect the information provided by the applicant in the Consortium Budget Worksheet. Directions for the Financial Impact Table are located on the first tab. Applicants must submit one Financial Impact Table with each application. For consortium applications, each consortium member must add an additional tab on the Financial Impact Tables. Partners are not required to submit a Financial Impact Table.

Applicants with an "Ohio School Report Card" for the 2012-2013 school year must upload the Supplemental Financial Reporting Metrics to provide additional information about cost savings and sustainability. Directions for the Supplemental Financial Reporting Metrics are located on the first tab of the document. If your organization does not have an "Ohio School Report Card" for the 2012-2013 school year, please provide an explanation in the text box about how your grant project will impact expenditures per pupil or why expenditure per pupil data does not apply to your grant project.

Educational service center, county boards of developmental disabilities, and institutions of higher education seeking to achieve positive performance on other approved fiscal measures should submit the budget information approved by an executive board or its equivalent on the appropriate tabs of the Financial Impact Table. Educational service centers should use the "ESC" tab and county boards of developmental disabilities and institutions of higher education should use the "non-traditional" tab.

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

Responses should provide rationale and evidence for each of the budget items and associated costs outlined in the project budget. In no case should the total projected expenses in the budget narrative exceed the total project costs in the budget grid.

245,000.00 State the total project cost.

* Provide a brief narrative explanation of the overall budget.

The total cost of the project for both Districts is $245,000. Those funds will be used to reimburse the Districts for the involvement of staff and administrators, training and coaching from advisory partner WINOC, other expenses associated with training (materials and rental of off-site meeting rooms), and reimbursing the two administrative partners for administrative and staff time spent supporting the project. There are five main components to the Proposal: 1. Project Leadership Team 2. District Steering Committees 3. District Process Improvement Teams 4. District Facilitators 5. Benchmarking Initiative 6. Final Review Project Leadership Team Training the Project Leadership Team and facilitating meetings will cost $24,000. These funds will pay for three leaders from each District, a participant from each of the two administrative partners, and training and facilitation by the advisory partner. The Project Leadership Team is vital to setting goals for the overall initiative, tracking its progress and assuring replicability and sustainability of the approach. District Steering Committees Training the two District Steering Committees and facilitating their meetings will cost $51,000. These funds will pay for seven leaders from each District, and training and facilitation by the advisory partner. The Steering Committees are essential for developing metrics, identifying improvement opportunities, and monitoring the progress of the Process Improvement Teams in each District. District Process Improvement Teams Training the Process Improvement teams and facilitating their meetings will cost $142,000. These funds will pay for three teams of six members in each of the two Districts. The Process Improvement Teams will address the improvement opportunities identified by the District Steering Committees. District Facilitators One in-District facilitator will be identified by each District. The budget sets aside $19,200 for the training and coaching of the facilitators as well as for their time facilitating Steering Committee and Process Improvement Team Meetings. The in-District facilitators help assure the sustainability of the lean initiative after the project is completed. Benchmarking Initiative Members of the Steering Committees...
and some Team members will identify and communicate with other districts that are applying best practices in continual improvement of operations. Examples might be better ways to handle maintenance work orders, ideas to encourage students to buy more lunches, efficient inventory systems. The trip will include three staff from each District and one advisor. The budget includes $4,700 for the time of the District participants and an advisor and travel for all. The Benchmarking Initiative serves as a unique opportunity to further educate the Districts as to the efficacy of lean concepts and methods. Final Review The Project Leadership Team will plan and administer a Final Review of the project in June. This review will take the form of a symposium in which District Teams give presentations on their specific projects. A report from this symposium will be issued to Ohio Dept. of Education as part of the project's final review. The OSC and Medina ESC will take the lead in planning and carrying out this symposium. The Final Review symposium will cost $2,800. These funds will pay for the administrative partners’ time for administering the Final Review. (District Staff and Advisory partners’ time is already accounted for in the budget for Project Leadership Team.) Administrators and staff of other Districts, ERC’s and schools will be invited to the Final Review to learn about the project and its outcomes. This format is seen as important to the ability to deploy and replicate the approach in other Districts.

13. Will there be any costs incurred as a result of maintaining and sustaining the project after June 30th of your grant year?

Sustainability costs include any ongoing spending related to the grant project after June 30th of your grant year. Examples of sustainability costs include annual professional development, equipment maintenance, and software license agreements. To every extent possible, rationale for the specific amounts given should be outlined. The costs outlined in the narrative section should be consistent and verified by the financial documentation submitted and explained in the Financial Impact Table. If the project does not have sustainability costs, applicants should explain why.

- Yes - If yes, provide a narrative explanation of your sustainability costs as detailed in the Financial Impact Table in the box below.

The only recurring cost not presently accounted for in existing District budgets would be a supplemental contract for a District Facilitator of $4,000 per year. This would be more than compensated for by the anticipated savings. On-going meetings of the District Steering Committees and improvement teams will be the only additional activities. All of these activities will involve personnel already embedded in District budgets. Improvement proposals made by the teams might require additional expenditures but these would be reviewed and dispatched on a case by case basis by District administration. A return on investment would be calculated for each such additional expenditure.

- No - If no, please explain why (i.e. maintenance plan included in purchase price of equipment) in the box below.

14. Will there be any expected savings as a result of implementing the project?

- Yes

Applicants with sustainability costs in question 13 or seeking to achieve significant advancement in spending reductions in the five-year forecast must address this response. Expected savings should match the information provided by the applicant in the Financial Impact Table. All spending reductions must be verifiable, permanent, and credible. Applicants may only respond "No" if the project will not incur any increased costs as a result of maintaining and sustaining the project after June 30th of your grant year. The Governing Board will use the cost savings as a tiebreaker between applications with similar scores during its final selection process. Cost savings will be calculated as the amount of expected cost savings less sustainability costs relative to the project budget.

4,000.00 If yes, specify the amount of annual expected savings. If no, enter 0.

If yes, provide details on the expected savings (i.e. staff counts and salary/benefits, equipment to be purchased and cost, etc.). If no, please explain

Expected savings are 3% per year from each of Purchased Services and Supplies and Materials within the three target departments in each District. At present expenditure levels, this would be a savings of $52.3K annually for Cloverleaf District and $36.4K annually for Buckeye District for a total of $88.7K annually for both districts Buckeye Local Schools District has spent an average of $682.2K on purchased services per year for the past eight years in the maintenance, transportation, and nutrition services departments. The District has spent an average of $529.4K per year for supplies in the three departments during the same period Cloverleaf School District has spent an average of $1.03M on purchased services per year and $714.6K on supplies in the three departments over the same period. The lean project teams would identify projects that would provide savings in a number of areas: Reduction of parts and materials purchases through better inventory control, Reduction of cost of outsourced maintenance and repairs through improved maintenance processes and the professional development of in-district maintenance personnel Sharing of maintenance expertise to avoid outsourcing maintenance and repairs Co-purchasing of supplies and equipment will generate cost reductions. Sharing equipment that either District already owns or co-renting equipment Sharing transportation costs to parochial schools Consolidation of transportation services for special circumstances Co-purchasing of fuel Because the Lean methods and tools will continue to be utilized by the districts, it is expected that these types of savings can be achieved each year.

15. Provide a brief explanation of how the project is self-sustaining.

All Straight A Fund grant projects must be expenditure neutral. For applications with increased ongoing spending as documented in question 11-14, this spending must be offset by expected savings or reallocation of existing resources. These spending reductions must be verifiable, permanent, and credible. This information must match the information provided in your Financial Impact Table. Projected additional income may not be used to offset increased ongoing spending because additional income is not allowed by statute. Please consider inflationary costs like salaries and maintenance fees when considering whether increased ongoing spending has been offset for at least five years after June 30th of your grant year. For applications without increased ongoing spending as documented in questions 11-14, please demonstrate how you can sustain the project without incurring any increased ongoing costs.

For educational service centers and county boards of developmental disabilities that are members of a consortium, any increased ongoing spending at the educational service center or county board of developmental disabilities may also be offset with the verifiable, permanent, and credible
spending reductions of other members of the consortium. This increased ongoing spending must be less than or equal to the sum of the spending reductions for the entire consortium.

Explain in detail how this project will sustain itself for at least five years after June 30th of your grant year.

Much of the planning and implementation of the project is designed to assure that it is self-sustaining. The training of district leaders, staff, and teachers, the development and training teams, and the development of in-District facilitators are all designed to assure that knowledge and skills are instilled in the districts and can be further employed when the project is complete. Further, the process improvements undertaken during the project itself and the benefits associated with them (quality and cost) can be expected to remain in place upon completion of the initiative. All of the activities that are initiated within the project will continue (e.g., project leadership team, district steering committees, on-going measurement and analysis, identification of improvement opportunities, the team approach to carrying out process improvements and solving problems, in-district facilitators). Further, additional expenses incurred by the districts (i.e., supplemental contract for District Facilitator) are covered by savings derived from process improvements. The primary goal of the project is to leave the districts with sustainable capabilities.

D) IMPLEMENTATION - Timeline, scope of work and contingency planning

16. Please provide a brief description of the team or individuals responsible for the implementation of this project, including other consortium members and/or partners.

This response should include a list of qualifications for the applicant and others associated with the grant. If the application is for a consortium or a partnership, the lead should provide information on its ability to manage the grant in an effective and efficient manner. Include the partner/consortium members’ qualifications, skills and experience with innovative project implementation and projects of similar scope.

Enter Implementation Team information by clicking the link below:

Add Implementation Team

For Questions 17-19 please describe each phase of your project, including its timeline, scope of work, and anticipated barriers to success.

A complete response to these questions will demonstrate specific awareness of the context in which the project will be implemented, the major barriers that need to be overcome and the time it will take to implement the project with fidelity. A strong plan for implementing, communicating and coordinating the project should be outlined, including coordination and communication in and amongst members of the consortium or partnership (if applicable). It is recognized that specific action steps may not be included, but the outline of the major implementation steps should demonstrate a thoughtful plan for achieving the goals of the project. The timeline should reflect significant and important milestones in an appropriate and reasonable time frame.

17. Planning - Activities prior to the grant implementation

* Date Range August - September 2014

* List of scope of work (activities and/or events including project evaluation discussions, communication and coordination among entities).

Establish and Train Project Leadership Team A Project Leadership Team (PLT) will be established for the consortium. The PLT will include district superintendents, the Executive Director of the Ohio Schools Council, the Superintendent of the Medina County Education Service Center among others. The members of the PLT will attend 24 hours of training that will expose team members to important Lean concepts and engage them in planning the project. The role of the PLT will be to develop the overall goals and calendar for the initiative. Establish and Train District Steering Committees. A Steering Committee (DSC) will be established within each district. The DSC’s will attend 24 hours of training in lean concepts. The DSC’s will be responsible for developing improvement goals within the district, developing measures for the evaluation of the initiative as a whole as well as for individual team progress within the district, developing recognition events, and developing a calendar for the implementation of the project within the district. The DSC’s will meet monthly when the training is complete. Develop Lean Metrics The DSC’s will develop and deploy measures that will be used to evaluate the effectiveness of the initiative. The selected metrics will focus on support services cost and quality. The PLT and the DSC’s will review metrics at each of their meetings. Identify Lean Projects The DSC’s will identify several process improvement opportunities in target service departments.

* Anticipated barriers to successful completion of the planning phase

The only likely barrier would be the challenge in scheduling the planning sessions due to calendars and time constraints.

18. Implementation - Process to achieve project goals

* Date Range October 2014 through May 2015

* List of scope of work (activities and/or events, including deliverables, project milestones, interim measurements, communication, and coordination).

The advisory partner (WINOC) will coordinate and administer these activities along with the in-District facilitators. The consortium will participate in these activities. Together, these actions, undertaken with energy and discipline, assure that sustainable, measurable improvements are achieved. Establish and train Process Improvement Teams. Three teams of service department supervisors and employees will be established in each District to address specific quality and cost improvements as identified by the DSC’s. The teams will receive 16 hours of training in Lean methods and tools before and during the projects. The Process Improvement Teams (PIT) will meet weekly after their initial training. The meetings will be facilitated by WINOC advisors and the in-District facilitators. During the meetings, the PIT’s will use the Lean tools and methods to develop process improvements. They will propose their solutions to the DSC and the District Treasurer. Benchmarking With the help of the partners, the consortium will identify and visit other districts or schools that have begun to implement continual improvement programs. Those participating in the benchmarking visit(s) will bring what they’ve learned back to the consortium.

* Anticipated barriers to successful completion of the implementation phase.

As is the case for the planning phase, no barriers other than the challenges of scheduling the activities described here are anticipated.
19. Summative Evaluation - Plans to analyze the results of the project

* Date Range May - June 2015

* List of scope of work (activities and/or events, including quantitative and qualitative benchmarks and other project milestones).

Project Review and Assessment by Project Leadership Team In June, the PLT and the DSC’s will meet to review the progress of the initiative and plan for further deployment. The partners will invite other educators to this final meeting as a way of communicating the approach and its results. The primary stakeholders in this initiative will be district leaders (including the District School Boards) and staff. They will be actively engaged in the project as set forth by the Project Description. District leaders, in particular, have already been a vital part of the development of this project and proposal: they have attended a number of meetings to develop the initiative covered herein. Regular meetings of the PLT and the DSC’s will serve to keep District leaders engaged and involved. Process improvement team meetings will involve a number of staff in each district. The Final Review will invite members from all stakeholder groups as well as other Districts to learn about the initiative.

* Anticipated barriers to successful completion of the summative evaluation phase.

No barriers other than the scheduling challenge mentioned in the other two phases are anticipated.

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

The response should illustrate the critical instructional and/or organizational changes that will result from implementation of the grant and the impact of these changes. These changes can include permanent changes to current district processes, new processes that will be incorporated or the removal of redundant or duplicative processes. The response may also outline the expected change in behaviors of individuals (changes to classroom practice, collaboration across district boundaries, changes to a typical work day for specific staff members, etc.). The expected changes should be realistic and significant in moving the institution forward.

Please enter your response below:

The Districts will support and continue all of the practices promulgated by the project. District Steering Committee meetings, updating and review of relevant metrics, identification of process improvement opportunities, and the development and training of new process improvement teams will all continue unabated after the project is finished. It's also expected that the teams will design and implement process improvements that will be sustained after the project is completed. While it's difficult to anticipate the precise nature of these improvements, we expect that they will make processes less costly, less prone to delays and errors, more efficient and more capable of providing a high level of service to schools and students. In each case, changes will be documented, communicated, and evaluated to assure on-going benefits.

E) SUBSTANTIAL IMPACT AND LASTING VALUE - Impact, evaluation and replication

The responses in this section are focused on the ability to design a method for evaluating the project's capacity for long-term sustainable results. Therefore, the questions focus on the method of defining the problem(s) the project hopes to solve and the measures that will determine if the problem(s) have been solved.

21. 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 response should provide a concise explanation of items which provide rationale that will support the probability of successfully achieving the goals of the project. Answers may differ based on the various levels of development that are possible. If the proposal is for a new, never before implemented project, the response should provide logical, coherent explanations of the anticipated results based on some past experience or rationale. For projects that have been implemented on a smaller scale or successfully in other organizations, the response should provide the quantifiable results of the other projects. If available, relevant research in support of this particular proposal should also be included.

Please enter your response below.

Lean enterprise tools (work place organization, simplifying and improving work processes to eliminate waste, better control of inventory, and team problem solving), have been used in a variety of industries, primarily health care and manufacturing. When implemented effectively (good planning, good communication, wide participation, good evaluation of results), the use of Lean concepts and tools have provided a variety of benefits including reduced delays, reduced errors, reduced lead times, improved product and service quality, reduced overtime, reduced inventories of supplies, materials, and maintenance components. A 2002 study by McKinsey and Co. found that companies in six industries experienced an average savings of 24% of baseline costs, ranging from 16% in the electronics industry to 35% in the aerospace and defense industry. Elkhart General Hospital of South Bend, Indiana ($600M annual revenue) reports savings of $6.5M that it attributes to employing lean methods. Health care provider Denver Health ($750M annual revenues) calculates that lean practices have resulted in savings of $28.6M. The use of Lean concepts and tools in education, while not untied, is innovative. Still, there is reason to believe that Lean concepts and tools will make an impact in the service departments of the districts. Those departments depend on labor-intensive processes that transform materials and knowledge into tangible products and service for the schools. Those processes, while not always routine, are carried out frequently and consistently. The desired outcomes of those services are readily articulated. The productivity and quality of those services is fairly easily measured. As such, they are a near ideal environment for the application of Lean methods and tools. In academic year 2011-12, WINOC implemented a pilot lean project in the Medina City Schools. Several projects were completed. Savings from those projects exceeded 3% of operating costs in those departments. For example, insourcing bus maintenance from neighboring school districts gained over $40k in revenues. A plan to increase after-hours use of facilities program eliminated unplanned interruptions to janitorial duties and raised revenues to offset the costs of preparation and energy for facilities use for an estimated net gain of $20k per academic year. In food services, a project that increased the number of purchased meals through menu benchmarking and promotion led to estimated increased revenues and subsidies of more than $50k per academic year. This project, as in those cases, the stated objectives are met through: 1. Collaborative planning by district leaders that includes the development of explicit metrics that are regularly monitored. 2. Training of leaders, and staff in proven Lean methods and facilitation in their application to support and administrative processes. 3. Establishment and support of teams that will use Lean methods and tools to improve processes and develop solutions to extant process problems. 4. Benchmarking
22. Describe the overall plan to evaluate the impact of the concept, strategy or approaches used in the project.

This plan should include the methodology for measuring all of the project outcomes. Applicants should make sure to outline quantitative approaches to assess progress and measure the overall impact of the project proposal. The response should provide a clear outline of the methods, process, timelines and data requirements for the final analysis of the project's progress, success or failure. The applicant should provide information on how the lessons learned from the project can and will be shared with other education providers in Ohio.

* Include the name and contact information of the person who will be responsible for conducting the evaluation and whether this will be an internal or external evaluation.

The following individuals will be the partners who will have primary responsibility for evaluating the effectiveness of the project. William J. Koran, Superintendent Medina County Schools Education Service Center 124 West Washington St., Medina Ohio. 44256 330-723-6393 WKoran@medina-esc.org William J. Zelei, Executive Director Ohio Schools Council 6133 Rockside Rd. Suite 10, Independence Ohio 44131 216-447-3100, ext.102 wzelei@osconline.org

* 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 project’s progress).

The short term goal of the initiative is the design and implementation of an ongoing program of continual improvement within the two Districts. Measures relevant to this goal will be adherence to the project plan and calendar. Longer term goals include reductions in cost and improvements in quality of support services. Establishing these metrics will be an important part of the DSC's initial planning efforts. Metrics relevant to both short and long term goals will be reviewed monthly throughout the project by the Project Leadership Team and the District Steering Committees. If the metrics show that progress toward goals in inadequate, the Project Leadership Team will assess and ensure the level of resources devoted to the project as well as the effectiveness of those resources. The PLT will then make changes to the initiative, either adding or redeploying resources as appropriate.

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

The success of the project will be measured by progress on the metrics. As stated, the PLT and the DSC's will review these metrics at each monthly meeting. In addition, they will review progress on the activities at each stage of the initiative. A final review and assessment at the completion of the project will be conducted by the combined PLT and the DSC's. Medina ESC and the OSC will take steps to invite educators from across the region to attend this final review meeting as a way of communicating the approach and its results. A report of these findings will be available in August 2014.

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

The response should provide specific quantifiable measures of the grant outcomes and how the project will lead to successful attainment of the project goals. Applicants should describe how the program or project will continue after the grant period has expired.

Please enter your response below.

The substantial value and lasting impact of this initiative lies in its ability to generate on-going reductions in cost (3% annually) and improvements in the quality of support services. During the period of the project, the advisory partners and the consortium members will establish an approach that will continue within the individual Districts long after its completion. Leadership on the part of the DSC’s, assistance by the in-District facilitators, and generation of improvement ideas by Process Improvement Teams will continue beyond the end of the project.

24. Describe the specific benchmarks, by goal as answered in question 9, which 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 applicant should provide details on the quantifiable measures of short- and long-term objectives that will be tracked and the source of benchmark comparative data points. Responses should include specified measurement periods and preliminary success points that will be used to validate successful implementation of the project. If a similar project has been successfully implemented in other districts or schools, identification of these comparable benchmarks should be included.

* Student Achievement

* Spending Reduction in the five-year fiscal forecast

Establishment of specific metrics to assess progress in reducing support service costs while improving their quality is a central component of this initiative. The consortium and its partners anticipate that support services supplies and purchased services costs will be reduced by 3% annually. DSC’s will develop the metrics as part of their planning, develop channels for communicating the metrics, and will review the metrics monthly throughout the project. In June, the consortium will carry out a final review in which it will assess progress toward the first year's savings. Though few other Districts have implemented such an initiative, we will use comparative data from non-consortium Districts as an aid in assessing performance.

* Utilization of a greater share of resources in the classroom

* Implementation of a shared services delivery model

Some of the savings will come as a result of co-purchasing of supplies and of sharing resources. The savings that come as a direct result to shared services will be captured and communicated.
25. Is this project able to be replicated in other districts in Ohio?

- Yes
- No

* Explain your response

The consortium is confident of the ability to replicate this initiative. The program is based on proven methods and tools that have been shown to be effective wherever they've been employed: careful planning, broad education of concepts and tools, close attention to measures of progress, identification of important improvement opportunities, wide participation in addressing those opportunities, regular and frequent communications to all stakeholders will assure the ongoing success of the initiative. While innovative in education, the program outlined herein has been replicated in a wide variety of industrial and service contexts for several decades. A long-run goal of the project is the deployment of these methods to districts across the state. There is every reason to believe that districts would be eager to apply Lean methods and tools once they have been designed for and proven to be effective in similar environments. It is the intention of the consortium to invite other state districts to review the initiative and its results. We also expect, with the assistance of the OSC, to communicate our progress to other districts via a regular contact with the other superintendents and school boards in the region. Replication of this initiative in other districts would be carried out in two phases. In the first phase, the consortium would raise the awareness of other districts as to the efficacy of Lean concepts and tools through contact with other boards and districts and by offering to serve as hosts for benchmarking visits by other districts who commit to utilizing Lean methods. The second phase would entail actually deploying Lean concepts and tools in other Districts. The deployment plan used by this consortium can be used directly as a model for implementing Lean methods in other districts. Medina ESC and the OSC will take steps to assure that the progress and outcomes of the project are communicated throughout their regions. This will include inviting educators to the final review meeting. Again, this model of deployment has been proven in a variety of other settings. The consortium is confident that a successful implementation in our Districts can be readily replicated in any other District within the state.

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 time frame. The Governing Board of the Straight A Fund reserves the right to conduct an evaluation of the project and request additional information in the form of data, surveys, interviews, focus groups and other related data on behalf of the General Assembly, Governor and other interested parties for an overall evaluation of the Straight A Fund.

PROGRAM ASSURANCES: I agree, on behalf of this applicant, and any or all identified consortium members or partners, that all supporting documents contain information approved by a relevant executive board or its equivalent and to abide by all assurances outlined in the Straight A Assurances (available in the document library section of the CCIP).
## Consortium Contacts

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Telephone Number</th>
<th>Email Address</th>
<th>Organization Name</th>
<th>IRN</th>
<th>Address</th>
<th>Delete Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daryl</td>
<td>Kubilus,</td>
<td>330 948 2500</td>
<td><a href="mailto:daryl.kubilus@cloverleaflocal.org">daryl.kubilus@cloverleaflocal.org</a></td>
<td>Cloverleaf Local</td>
<td>048488</td>
<td>8525 Friendsville Rd, Lodi, OH, 44254-9706</td>
<td></td>
</tr>
</tbody>
</table>
## Partnerships

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Telephone Number</th>
<th>Email Address</th>
<th>Organization Name</th>
<th>IRN</th>
<th>Address</th>
<th>Delete Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Al</td>
<td>Catani</td>
<td>216 409 7731</td>
<td><a href="mailto:alcatani@yahoo.com">alcatani@yahoo.com</a></td>
<td>Work in Northeast Ohio Council</td>
<td></td>
<td>Al Catani, President, 110 Champion Ln, Chagrin Falls, OH, 44022</td>
<td></td>
</tr>
<tr>
<td>William</td>
<td>Koran</td>
<td>330 723 6393</td>
<td><a href="mailto:wkoran@medina-esc.org">wkoran@medina-esc.org</a></td>
<td>Medina County ESC</td>
<td>048454</td>
<td>124 W Washington St, Medina, OH, 44256-2244</td>
<td></td>
</tr>
<tr>
<td>William</td>
<td>Zelei</td>
<td>216 447 3100 ext 102</td>
<td><a href="mailto:wzelei@osconline.org">wzelei@osconline.org</a></td>
<td>Ohio Schools Council</td>
<td></td>
<td>William J Zelei, Executive Director, 6133 Rockside Rd Suite 10, Independence, OH, 44313</td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td>Last Name</td>
<td>Title</td>
<td>Responsibilities</td>
<td>Qualifications</td>
<td>Prior Relevant Experience</td>
<td>Delete Contact</td>
<td></td>
</tr>
<tr>
<td>------------</td>
<td>-----------</td>
<td>-------</td>
<td>------------------</td>
<td>----------------</td>
<td>--------------------------</td>
<td>----------------</td>
<td></td>
</tr>
<tr>
<td>William</td>
<td>Zelei</td>
<td>Executive Director, Ohio Schools Council</td>
<td>Ohio Schools Council will serve as a member of the Project Leadership Team and attend training and bi-monthly meetings.</td>
<td>OSC will also help with outreach in identifying other districts that are considering Lean techniques in education. It will work with the Medina ESC in administering the final project review to which other Districts will be invited.</td>
<td>OSC will also help with outreach in identifying other districts that are considering Lean techniques in education. It will work with the Medina ESC in administering the final project review to which other Districts will be invited.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Al</td>
<td>Catani</td>
<td>President of Work in Northeast Ohio Council</td>
<td>Work in Northeast Ohio Council (WINOC) will provide the training, coaching, and facilitating to the Project Leadership Team, the District Steering Committees, and Process Improvement Teams in the Districts. They will also coordinate other outside advisors that will provide additional services. WINOC has been assisting industry, health care, education and public sector organizations improve performance by engaging employees for more than three decades. As a not-for-profit provider of training and advisory services, WINOC is well aware of the importance to any organization of careful stewardship of resources while improving the quality of product and service.</td>
<td>Participating in the Project from WINOC will be President Al Catani, Vice President Bob Meyer and Director of Advisory Services George P. Bohan.</td>
<td>WINOC will expand its own resources with the services of LeanOhio.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Will</td>
<td>Koran</td>
<td>Superintendent</td>
<td>The Medina Education Service Center will participate as a member of the Leadership Team that meets bi-monthly. It will provide guidance in planning the process, communications, identifying opportunities for benchmarking, and co-sponsoring the Final Review Workshop.</td>
<td>It will provide guidance in planning the process, communications, identifying opportunities for benchmarking, and co-sponsoring the Final Review Workshop.</td>
<td>It will provide guidance in planning the process, communications, identifying opportunities for benchmarking, and co-sponsoring the Final Review Workshop.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brian</td>
<td>Williams</td>
<td>Superintendent</td>
<td>The Lead Applicant is Buckeye Local Schools (IRN #048470) and Secondary Applicant is Cloverleaf Local Schools (IRN #048488). Buckeye Local Schools District will serve as the fiscal agent and the primary administrator of the grant. The Districts will work together to maintain contact with the consortium's members and partners, sustain consistent communications among</td>
<td>Buckeye Local School District comprises three elementary schools, a junior high, and a high school in Medina County. The district is a semi-rural area with many new housing developments and changing demographics. About 21% of its students qualify for free or reduced lunch. The Buckeye Local School has been through a difficult financial period. It was recently removed.</td>
<td>Buckeye Local School District comprises three elementary schools, a junior high, and a high school in Medina County. The district is a semi-rural area with many new housing developments and changing demographics. About 21% of its students qualify for free or reduced lunch. The Buckeye Local School has been through a difficult financial period. It was recently removed.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
consortium members and stakeholders, attend meetings of the Project Leadership Team and Steering Committees, sponsor Project Teams, develop a clear project management plan, and make sure all reports are completed.

Daryl Kubilus Jr. Superintendent

The Lead Applicant is Buckeye Local Schools (IRN #048470) and Secondary Applicant is Cloverleaf Local Schools (IRN #048488). Buckeye Local Schools District will serve as the fiscal agent and the primary administrator of the grant. The Districts will work together to maintain contact with the consortium's members and partners, sustain consistent communications among consortium members and stakeholders, attend meetings of the Project Leadership Team and Steering Committees, sponsor Project Teams, develop a clear project management plan, and make sure all reports are completed.

Cloverleaf Local School District School District The Cloverleaf Local School District comprises 119 square miles in Southwest Medina County. The District contains three elementary schools, one middle school and one high school. About 35% of Cloverleaf's student population qualifies for free/reduced lunch. In January, 2012, the Cloverleaf Local School District was officially designated as a district in "Fiscal Emergency" by the Auditor of State.

District have been through a difficult financial period. It was recently removed from the designation of fiscal emergency.

Despite the economic adversity of the school district, Cloverleaf Local School District rose from a rating of "Effective" on the 2008-09 State Report Card to "Excellent with Distinction" on the 2011-12 State Report Card. In fact, Cloverleaf Local School District was the only school district in the State of Ohio to be rated "Excellent with Distinction" while simultaneously in "Fiscal Emergency" during the 2011-12 school year. After cutting over $7 million from its operating budget over the course of the last five years, the Cloverleaf Local School District is seeking to pass a levy in May that would restore high school busing, half-day kindergarten and opening its buildings back up to the community.