GENERATING GRANT AGREEMENTS

A Project for Leader.org

Zach Stanford

Executive Summary

Description of Business
I work for Leader.org, a nonprofit foundation. The Foundation distributes about 150 grants each year to help K-8 schools implement The Leader In Me program. Each grant contains a combination of classroom materials, student activity guides, and training days. As such, each grant is unique and results in a different dollar amount.

In the past three years, Leader.org has created and generated these grants entirely through its Salesforce account. Schools apply for a grant through an online application and Leader.org captures and stores this information in its Salesforce account. This has worked relatively well in recent years. However, this year, the Foundation has added some complex logic to determine a school's grant package. We submitted our customization requests to a Salesforce developer and the bid came in at $26,000! I told my boss that I thought we might be able to do the entire process with VBA in Excel.

Overview of System Built
This project has four main objectives:
1. Create an Excel spreadsheet to calculate a grant package for a given school.
2. Import the raw data from Salesforce, clean the data, and organize it into the spreadsheet.
3. Generate grant exhibits from the spreadsheet that include the products, prices, and total amounts for the grant.
4. Merge Excel grant exhibits with the Word grant agreement and save it as a PDF file.

A major challenge with this project was that I had to make the grant agreement PDFs look clean and professional. This required me to install Adobe Acrobat Pro in order to manipulate PDFs through VBA. A prerequisite to running this macro successfully is that a user must have Adobe Acrobat Pro installed on their machine. The final output of this project (the grant PDF) is attached in Appendix A.

*NOTE: The uploaded workbook does not contain sensitive data. Actual Foundation school names have been replaced with a random list of Utah school names found online.

Implementation Documentation

Designing the Template

The first task was to create an Excel spreadsheet that would build the grant package for a given school based on the school's input numbers. As can be seen in Figure 1, columns A through F include all possible products, along with their relevant SKUs and prices. Each individual school has its own Quantity column and Total column (as can be seen in columns BKA and BKB). These columns are based on a school's input values in rows 2 through 68. The completed template takes a school's inputs and calculates the total grant amount based on different logic that can be viewed on the Master tab of the workbook.

	A	B	C	D	E	F	BKA	BKB
1	**GrantSheet**						**Shoreview Elementary School**	
131	2	Year 2 (for grantees starting TLIM in Year 1)						
132		Aligning Academics / Lighthouse Team 2 (2 consecutive days by Dec 31, 20'				**Price**	Quantity	Total
133		C001i		BA	Consultant Days – Aligning Academics (1 consultant, 1 day)	$2,600.00	1	$2,600.00
134		C001j		BB	Consultant Days – Lighthouse Team 2 (1 consultant, 1 day)	$2,600.00	1	$2,600.00
135		**C001**		**BC**	**Total Consultant Days**		2	**$5,200.00**
136		**NEED**		**BD**	Aligning Academics **TLIM** Field Guide (if Elementary school = 1 per elementary/General teacher + 5 extra; if PreK–8 school = 1 per Grades preK–5/General teacher + 5 extra; if Middle school = 0)	$45.00	55	$2,475.00
137		**NEED**		**BE**	Aligning Academics **LEAD** Field Guide (if Middle school = 1 per Grades 6–9/General teacher + 5 extra; if PreK–8 school = 1 per Grades 6–9 teacher; if Elementary school = 0)	$45.00	0	$0.00
138		**NEED**		**BF**	Lighthouse Team 2 TLIM Guide (if Elementary or PreK–8 school = 10; if Middle school = 0)	$45.00	10	$450.00
139		**NEED**		**BG**	Lighthouse Team 2 **LEAD** Guide (if Middle school = 10; if PreK–8 or Elementary school = 0)	$45.00	0	$0.00

Figure 1: Snapshot of the master grantsheet

Importing the Salesforce Data

I considered automating the retrieval of the data from Salesforce, but I decided that it was not an efficient exercise because this report will only ever be pulled once. The products and prices in columns E and F (Figure 1) may change, but a school's address, tax exemption status, and number of classrooms will not change for purposes of creating a grant. I used the report builder tool in Salesforce to pull a report with all of the school's input information. I pasted this data onto a new spreadsheet in the Workbook. A total of 102 variables (columns) were imported for 208 schools (rows).

At this point, I used VBA to clean the data and copy and paste it into the appropriate cells on the Master tab of the grantsheet. After pasting the data onto the "Paste SF Inputs Report" tab, the User can autopopulate the grantsheet with the Salesforce data by navigating to the Ribbon→Macros→Process SF Data (See Figure 2).

It takes approximately two minutes for the Macro to populate the entire grantsheet. This is very fast considering that it is populating 66,271 cells on the Master tab (Range A1:BLF511).

An intermediate step of this Macro is that it is updating each school's package based on predetermined settings. If the user wants to simply update the Master tab without reimporting the Salesforce data, he or she can click on the "Update Master Tab" button on the Ribbon.
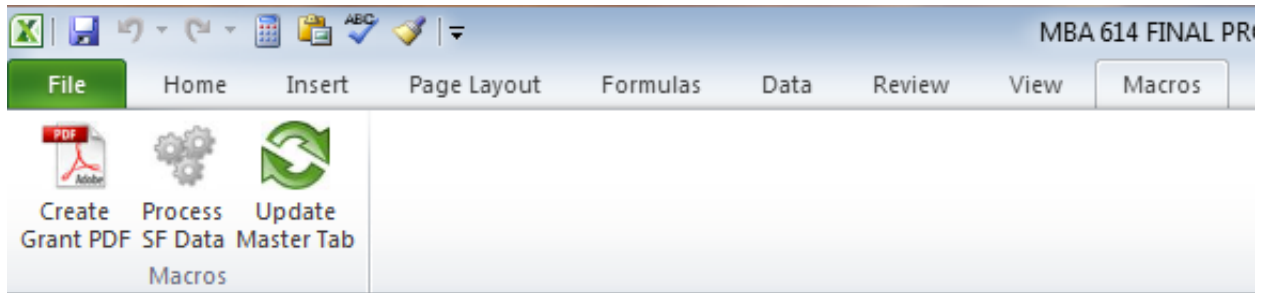

Figure 2: Customized Ribbon
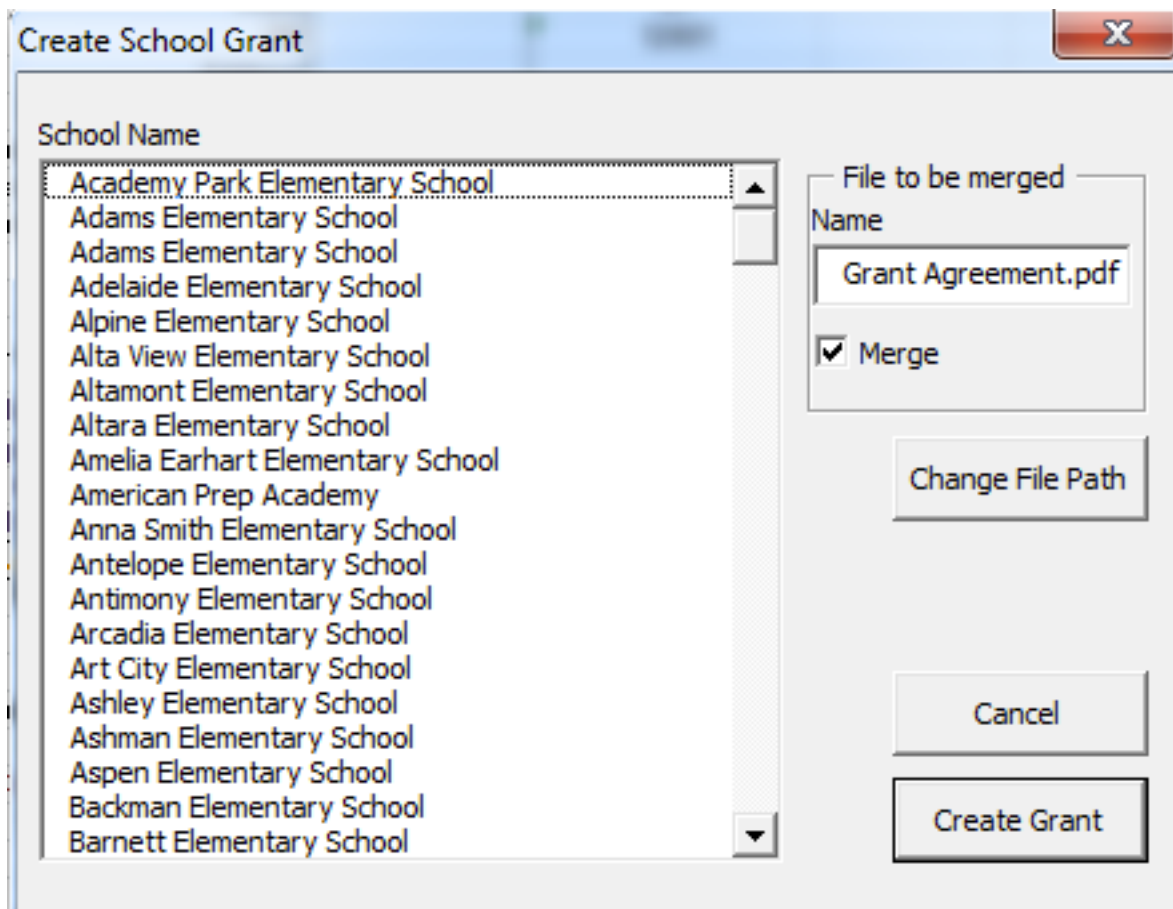
Creating PDF Exhibit Templates

The final grant agreement PDF will have seven pages of text, a signature page, and four exhibits (See Appendix A for final output). The seven pages of text will come from the Word document that we will merge to the Excel exhibits later on. I created a separate tab for the signature page and each of the exhibits. Exhibits A and B are just generic templates that are the same for every school. These will simply be merged into the final PDF along with the other exhibits. The signature page template requires a bit of VBA code to populate the name of the school, principal, and district signer. Populating Exhibits C and D requires the most coding because these are the two exhibits that contain all of the grant information calculated on the Master tab. As can be seen in the figure below, I created a template that will be the starting point for the creation of a grant for an individual school. The macro will bring in the quantities and prices from the Master tab.

Figure 3: Grant PDF template

Year 1			
7 Habits 4.0 / Launching Leadership (req'd as 3 consecutive days - by Dec 31, 2015)			
	Price	**Quantity**	**Total**
Consultant Days - 7 Habits Signature 4.0 for Large Staff Schools (4 [2 consultants, 2 days each] unless school previously had 7 Habits)	$2,600.00		
Consultant Days - Launching Leadership for Large Staff Schools (2 [2 consultants, 1 day each] unless school previously had Implementation 1)	$2,600.00		
Consultant Days - Habits Signature 4.0 for Standard Staff Schools (2 [1 consultant, 2 days] unless school previously had 7 Habits)	$2,600.00		
Consultant Days - Launching Leadership for Standard Staff Schools (1 [1 consultant, 1 day] unless school previously had Implementation 1)	$2,600.00		
Total Consultant Days			
TLIM Lev K Teacher Ed 2.0 (1 per teacher)	$25.95		
TLIM Lev 1 Teacher Ed 2.0 (1 per teacher)	$25.95		

User Inputs

To initiate the macro, the user can click on the "Create Grant PDF" button on the Macro tab of the ribbon. This brings up a user form that requires a few simple inputs from the user (Figure 4). The essential input, of course, is the school for which the user would like to create a grant. Populating this list box was slightly difficult because the Salesforce data is not pulled in alphabetically. I didn't want to risk messing up the raw Salesforce data, so I had the macro copy only the school names from the Salesforce data tab and paste them onto a blank worksheet that I called "Workspace". Here I have the code sort the data alphabetically so I can run a loop to pull in each of the school names upon the initialization of the user form.

Figure 4: User form to create grant

The user can also, optionally, select the "Change File Path" to save the finalized PDF agreement in a new location. The default file path is the desktop. The important point here is that if the user wants to merge the resulting Excel PDF with another PDF, the second PDF *must* already be stored in the chosen file path. The default (for purposes of this submission) is to merge the Excel PDF with a PDF on the desktop called "Grant Agreement.pdf". The Foundation has the default folder path to its Dropbox account where it already has a "Grant Agreement.pdf" saved.

Sub Procedures

Once the user selects a school and clicks "Create Grant", the button calls the "CreateGrantMasterSub()". This is simply a master sub that should help a VBA user understand the code more easily. The code successively calls lower level subs as shown in the screenshot in Figure 5. I will detail each of the sub procedures below.

1. *Create School Templates:* This sub procedure duplicates the Grant PDF tab (Exhibits C and D). The duplicated Grant PDF tab will be populated with the relevant data for the selected school. As we will see later on, these duplicated tabs will be exported to a new workbook and deleted from the main workbook before the macro is complete.

2. *Find School Column:* The only thing that the user has given us at this point is the school name. We must translate this into relevant information by looping through all school names on the grantsheet until we find the one that the user has selected. This variable is essential because it tells us which column contains the data we are interested in.

```
Sub CreateGrantMasterSub()

Call createSchoolTemplates
Call findSchoolColumn
Call populateArrays
Call populateGrantPDF
Call editNewSheet
Call createSigPage
Call createNewWorkbook
Call mergePDFs
Call filesCleanup

End Sub
```

Figure 5: Sub procedure hierarchy

3. *Populate Arrays:* We now need to populate six arrays that we will later refer to. The first five are from the Master tab: a row index array, a product array, a price array, a quantity array, and a total dollar amount array. We also populate a row index array on the Grant PDF tab.

4. *Populate Grant PDF:* The two row index arrays serve as links to ensure that the data is being pulled into the correct sections of the template. Column D on the Master tab has an index letter next to each product that ranges from A to CZ.

5. *Edit New Sheet:* Even though we have populated the school's PDF Grant tab with grant information, we still need to apply quite a bit of code to get it into the format we desire. The first step is to hide rows with zero quantities. We don't want to give schools grants with irrelevant information so I hid all of these unused product rows. At the top of the Grant PDF tab, there are five notes. Based on certain logic, I hid these notes where irrelevant.

6. *Create Signature Page:* The signature page required some tweaking because I needed to bring in the name of the principal and the name of the school. In addition, some schools required district signers, but not all. I extracted a field from the Salesforce raw data and created a boolean variable to signify whether or not the given school needed a district

signer. If yes, the code brings in the district signers name. If no, the code hides the district signer section so that it will not be included on the PDF. (The finalized grant agreement PDF will be sent to the school through Docusign.)

7. *Create New Workbook:* This sub procedure creates a new workbook and transfers over all of the relevant tabs. This is done so that the entire workbook can be saved as a PDF. Four sheets are copied from the original workbook to the new workbook: (1) the school's customized signature tab, (2) Exhibit A template, (3) Exhibit B template, (4) the school's customized grant. The code then saves this entire workbook as PDF format in the previously selected destination folder. If the user deselected the merge checkbox, the process stops here because the resulting Excel PDF has been created. Otherwise, the code moves to the merge PDFs sub procedure.

8. *Merge PDFs:* At this point, we have two PDFs in the destination folder: (1) the PDF generated from Excel in the previous step and (2) the PDF file the user desires to merge. The sub procedure looks in the user selected file path for these two files and merges them. It is using the Adobe Acrobat library reference to complete this step. After it merges the two files, it saves the final PDF in the destination folder.

9. *Files Cleanup:* This step assumes that the user only cares about the merged PDF, and not the intermediate Excel generated PDF. The code searches the destination folder for the PDF that was generated in Step 7 and deletes it. This step also deletes the tabs that were created on the original master spreadsheet. Finally, the code generates a message that tells the user that the merged file is saved in the destination file. The user is asked whether he or she wants to open the newly created PDF file and the macro ends.

Discussion of Learning

This project took me over 100 hours to complete, but I learned a great deal in the process. The breadth of the project alone gave me the opportunity to implement many of the topics we discussed in class such as arrays, user forms, loops, multiple modules, ribbon customization and working with files and folders. This class has been my first exposure to any type of programming, but I now feel confident in my ability to solve business problems with VBA.

There were many little innovations that were required along the way. Most often these problems were solved by trial and error. However, there were a couple of major breakthroughs that are worth highlighting.

- A school's grant was created from a standard template. In Step 5, I needed to delete irrelevant rows from the standard template for a given school. My code used the delete function to delete these rows. Unfortunately, it takes VBA about just as long to delete 50 rows as it does for the user to do it manually. This made my code take about five minutes to generate a grant for one school. I searched the web for quicker ways to

delete multiple rows, but none of the options saved much time. The big picture was that I did not want empty rows to show up on the PDF version of the grant. I realized that simply hiding the rows in Excel would also hide the rows when the grant was saved as a PDF. Hiding rows instead of deleting rows decreased my runtime from about five minutes to five seconds.

- I realized that there are scenarios where a school might be missing an entire grant component. For example, if a school has already performed Year 1 training, it will not receive a Year 1 component. The zero quantity logic already removes the all the products for these quantites from the school's grants, but this left the component headings on the grant with nothing to show for it. The solution I came to was to first find whether or not the sum total of a component was zero by referring to the component total. If the component total was not zero, that means there was at least one product in the component and the title should remain. However, if the component sum total was zero, that means that the entire component should be removed from the school's grant. The distance between the component sum total and the component headings will never change because there is a fixed number of products in between the heading and the total. Thus, if the component heading was 37 rows above the component total (and if the component total was zero), I hid the row: schoolPDF.Rows(i - 37).EntireRow.Hidden = True

- Probably the most challenging part of this project was figuring out how to generate the final grant PDF. The problem was that the final grant PDF required a seven-page word document to merge with the Excel generated exhibits. I tried using VBA for Word to pull in the exhibits from Excel and to save the merged document as a PDF. This proved to be ineffective because it was very laborious and challenging to pull in and format the exhibits from the spreadsheet. At one point, I had almost given up the hope of automating the merging of the PDF documents because I didn't think it was possible to control Adobe Acrobat with VBA. However, thanks to a piece of code that I found online, I was able to manipulate Adobe Acrobat to merge the two PDFs. The format of each PDF was maintained and the merge worked flawlessly.

- As discussed in Step 4 above, indexing the products proved to be a great innovation. I originally used absolute cell references, but I worried what might happen if a user added or deleted a row. Using indexes ensured that all of the products would be correctly pulled in from the VBA array.

Assistance

I completed the majority of this project using my own VBA knowledge that I have learned from this class. There were a few instances where I relied on outside assistance as discussed below.

- The biggest form of assistance I received on this project was the code to merge the PDFs. I found it online on a VBA help forum.[1] I was under the impression that VBA could only manipulate Microsoft Office applications, but this help forum gave me code to manipulate Adobe Acrobat Pro. To do so, I had to add the Acrobat reference in the tools section of the VBE. I had to understand the code and make a few modifications, but it was a huge help.
- I met with Dr. Allen to ask him for help in setting up VBA for Word. He spent some time helping me start the code that would allow me to transfer the exhibits from Excel to Word. Though I ultimately did not use this code (because I manipulated Acrobat instead), it was still very helpful assistance because it helped me realize the limitations with using Word for my objectives.

Conclusion

The project proved to be a great success as it accomplished all of the objectives. This solution resulted in cost savings of $26,000 that would have otherwise been required to pay a Salesforce developer. The Foundation successfully used the macro last week to generate grant PDFs for grantee schools. The CEO and COO of the Foundation are both very pleased with this system and grateful for the money and time that it saved.

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[1] http://www.vbaexpress.com/forum/showthread.php?47310-Need-code-to-merge-PDF-files-in-a-folder-using-adobe-acrobat-X

APPENDIX A: GRANT AGREEMENT

WHO DOES WHAT?

leader.org	Sponsors it
FranklinCovey EDUCATION	Delivers it
YOUR SCHOOL	Implements it

LEADER.ORG

CONDITIONAL GRANT

SERVICES AND SPONSORSHIP AGREEMENT

This Services and Sponsorship Agreement (this "**Agreement**") is entered into to be effective as of this 1st day of April 2015 (the "Effective Date") by and between Franklin Covey Client Sales, Inc., a Utah corporation ("**FranklinCovey**"), Leader.org, a Utah nonprofit corporation ("**Sponsor**") and the school identified on the signature page below ("**School**").

RECITALS

WHEREAS, FranklinCovey offers to schools a unique educational solution, entitled "The Leader in Me®," which helps schools establish a culture of character and leadership with its teachers and students (the "**TLIM Solution**").

WHEREAS, upon review of School's grant application, Sponsor desires to sponsor School, and as a grant to School, pay to FranklinCovey a portion of the funding necessary for the delivery of Year 1 Components (defined below) listed in Exhibit C following FranklinCovey's delivery of said Year 1 Components to School.

WHEREAS, if School meets or exceeds the requirements for Year 1 Components, Sponsor may authorize School to receive the Year 2 Components (defined below) listed in Exhibit C as an extension of its grant to School.

WHEREAS, if School meets or exceeds the requirements for Year 2 Components, Sponsor may authorize School to receive the Year 3 Components (defined below) listed in Exhibit C as an extension of its grant to School.

NOW, THEREFORE, in consideration of the premises and the covenants contained herein, the parties agree as follows:

AGREEMENT

A. **Performance Requirements of School**. As a condition to Sponsor's funding of the delivery of the TLIM Solution, the School agrees to meet or exceed the requirements outlined below.

1. <u>Training</u>. Per the grant terms, School shall commit to have all teachers, staff, and administrators participate in the TLIM Solution Year 1 Components and, if approved, Year 2 and/or Year 3 Components training as prescribed in the attached Exhibit C.

2. <u>Data.</u> Except as may be otherwise limited by Federal and State law, School shall provide the following data to Sponsor and/or FranklinCovey each year during the five (5) year "**Term**" (described in Section J below):

   a. Online surveys for staff (administrators, teachers, staff), parents and students (grades 4-6) administered and taken anonymously through FranklinCovey's The Leader in Me Online portal at various stages of each school year (e.g., prior to Year 1 Term training, end of each school year).

   b. Student discipline referrals (to be provided after completion of each school year during the Term).

   c. Student attendance (to be provided after completion of each school year during the Term).

   d. Academic test scores (overall % of students passing grade-level Math and Reading—to be provided as soon as School receives the data after the completion of each school year during the Term).

   e. Gallup Student Poll (Gallup, the well-known research company, offers an annual Student Poll to public schools and districts (grades 5 and above only) at no cost through a web-based survey. The poll measures three key indicators shown to drive student achievement, future employment and leadership skills: 1) student hope for the future, 2) engagement with school, and 3) well-being. School shall participate in this poll and share data with Sponsor in the fall of each school year during the Term). (NOTE: Sponsor will send to School instructions for how to administer this online.)

3. <u>Lighthouse Team</u>. The School shall organize and actively engage, during the Term, a school "**Lighthouse Team**" to lead and continually improve the implementation of the TLIM Solution and to focus the School's efforts on qualifying for "**Lighthouse Milestone**" status.

4. <u>Lighthouse Milestone</u>. The School shall make best efforts to be fully qualified to achieve the Lighthouse Milestone (see Exhibit A) within three (3) years of beginning the implementation of the TLIM Solution.

5. <u>Leadership Events</u>. The School will hold a "**Leadership Event**" as referenced in Exhibit A prior to the end of every academic school year for the duration of the Term to showcase the School's leadership work.

6. <u>Progress to Lighthouse Assessment Reports</u>. At the end of each school year for the duration of the Term of this Agreement, School will submit a "**Progress to Lighthouse Assessment Report**" to Sponsor containing the following information described. (NOTE: The information provided in the Reports must not include the names of students or any other personal information that may violate applicable privacy laws, unless written permission is received from the individual being identified, and in the case of a student, permission from the parent or guardian.)

   a. School's self-assessment of progress towards Lighthouse Milestone with reference to the nine "**Lighthouse Criteria**" as described on Exhibit A.

   b. A summary of the School's successes, challenges and key learning experiences resulting from implementing the TLIM Solution. This summary shall also contain detailed stories of how the TLIM Solution has positively impacted students, teachers, staff, administrators, parents and families.

   c. Information about each annual **Leadership Event**.

   d. Once the Lighthouse Milestone is achieved per Exhibit A, a summary of how the principal has provided mentoring services during the school year to other principals working to achieve the Lighthouse Milestone.

7. <u>Commitment to Continuity in LIM Process</u>. The School, in conjunction with district personnel, shall make best efforts to ensure School's continued engagement and pursuit of the Lighthouse Milestone in the event a principal change during the Term of this agreement.

IN WITNESS WHEREOF, the undersigned parties have executed this Agreement by their duly authorized representatives to be effective as of the date set forth above.

FRANKLIN COVEY CLIENT SALES, INC.

Name: Angie Witzel

Title: Client Services Manager

Signature: _____

GREENVILLE ELEMENTARY SCHOOL

Name: Shonda Dunn

Title: Principal

Signature: _____

Name:

Title: Huber

Signature: _____

LEADER.ORG

Name: Sonya Warner

Title: Grant Manager

Signature: _____

EXHIBIT A
Lighthouse Milestone Criteria

Lighthouse Criteria	Recommended Steps to Achieve Lighthouse Milestone
1. Lighthouse Team A Lighthouse team is in place, meets regularly, and oversees schoolwide implementation of the leadership model.	- Implement a few key initiatives focused on engaging students, staff, parents, and community members in the school's leadership model. - Support schoolwide New-Staff Orientation and Ongoing Staff Development in *The Leader in Me* process.
2. Leadership Environment School environment reinforces the leadership model.	- Add leadership language and tools to displays and bulletin boards in hallways and classrooms. - Incorporate music, art, and technology into the school and campus environment that reinforce individual worth and leadership principles.
3. Integrated Instruction and Curriculum Teachers are integrating leadership language into instruction and curriculum daily.	- Teach and reinforce the *7 Habits* through literature. - When developing lesson plans, integrate teachable moments for reinforcing leadership principles and tools.
4. Staff Collaboration Staff works together effectively to build a culture of leadership in classrooms, and throughout the school.	- Establish processes for mentoring and modeling the leadership principles and tools to new staff members. - Use existing or establish new team structures that allow the entire staff (teaching and nonteaching) to actively collaborate in building a culture of leadership.
5. Student Leadership Students are provided with meaningful leadership roles and responsibilities.	- Create roles for students using the word "leader" (e.g., "Leader of Technology", "Leader in Nutrition") that allow students to develop skills vital to the 21st century. - Allow students to take responsibility for planning school-wide activities that support the leadership theme.
6. Parent Involvement Parents are involved in activities that support the leadership model and have an understanding of the common language being used at the school.	- Equip parents with a general understanding of the *7 Habits*. Get started by inviting them to a Parent Night to introduce the leadership model and sending home a copy of *The Leader in Me* Parent's Guide. - Involve parents in leading activities that support the leadership theme.
7. Leadership Events The school is holding events to share their leadership model with the community and other schools.	- Hold a mini or full Leadership Day or similar event. Invite parents, business partners, and educators from other schools to come learn about and see your school's unique leadership model. - Invite community leaders to come to the school to share leadership insights and experiences with students.
8. Goal Tracking A system is in place for setting and tracking goals at the student, classroom, and schoolwide level.	- Create a system for tracking and displaying schoolwide, classroom, and individual teacher goals. - Equip students with a Data Notebook and leadership tools to set and track academic and personal goals.
9. Measurable Results The school is seeing improvements as a result of implementing The Leader in Me process.	- Choose indicators to measure, collect baseline data, and track regularly to determine where and to what degree the leadership model is bringing improvements (e.g., discipline referrals, academic achievement, attendance and/or tardies, staff and/or parent satisfaction). - Record anecdotal evidence (e.g., success stories, parent testimonials, noted improvements in student self-confidence).

EXHIBIT B

Year	FranklinCovey Deliverable	School Annual Sustainment Core (Paid to FranklinCovey)
	TLIM Coaching System™	$4,950 + coach travel & expenses
	TLIM Online/Intellectual Property License (20% discount)	$1,200
1	**Total**	**$6,150 + coach travel & expenses**
	TLIM Coaching System™	$4,950 + coach travel & expenses
	TLIM Online/Intellectual Property License (20% discount)	$1,200
2	**Total**	**$6,150 + coach travel & expenses**
	TLIM Coaching System™	$4,950 + coach travel & expenses
	TLIM Online/Intellectual Property License (20% discount)	$1,200
3	**Total**	**$6,150 + coach travel & expenses**
	TLIM Coaching System™	$4,950 + coach travel & expenses
	TLIM Online/Intellectual Property License (20% discount)	$1,200
4	**Total**	**$6,150 + coach travel & expenses**
	TLIM Coaching System™	$4,950 + coach travel & expenses
	TLIM Online/Intellectual Property License (20% discount)	$1,200
5	**Total**	**$6,150 + coach travel & expenses**

EXHIBIT C
Grant Components

NOTES:

1. We are pleased to sponsor the services and materials as shown in this exhibit, which are based on your application and the numbers you provided. By necessity these numbers remain fixed, and we will not be able to accommodate changes. If you desire additional services or materials, we invite you to contact your FranklinCovey Client Partner to place an order, the costs for which you will naturally be responsible.

2. Should you choose to configure or time the delivery of these components in ways that increase the cost of delivering these components (for instance breaking the 7 Habits / Launching Leadership training into three, NON-consecutive days), you will be responsible to cover the extra costs. Please work carefully with FranklinCovey to manage these costs, particularly the variable travel and shipping costs.

3. Sales taxes, if applicable, are not included in these estimates but will be covered by Sponsor.

Year 1			
7 Habits 4.0 / Launching Leadership (req'd as 3 consecutive days - by Dec 31, 2015)			
	Price	**Quantity**	**Total**
Consultant Days - 7 Habits Signature 4.0 for Standard Staff Schools (2 [1 consultant, 2 days] unless school previously had 7 Habits)	$2,600.00	2	$5,200.00
Consultant Days - Launching Leadership for Standard Staff Schools (1 [1 consultant, 1 day] unless school previously had Implementation 1)	$2,600.00	1	$2,600.00
Total Consultant Days		3	$7,800.00
TLIM Lev 3 Teacher Ed 2.0 (1 per teacher)	$25.95	6	$155.70
TLIM Lev 4 Teacher Ed 2.0 (1 per teacher)	$25.95	5	$129.75
TLIM Lev 5 Teacher Ed 2.0 (1 per teacher)	$25.95	5	$129.75
Total Teacher Guides			$415.20
7 Habits of Happy Kids books (if Elementary or PreK-8 school = 1 per elementary/General classroom; if Middle school = 0)	$11.50	23	$264.50
7 Habits of Happy Kids poster set (if Elementary or PreK-8 school = 1 per elementary/General classroom; if Middle school = 0)	$24.95	23	$573.85
7 Habits Tree Poster (if Elementary or PreK-8 school = 1 per elementary/General classroom; if Middle school = 0)	$11.00	23	$253.00
Total Classroom Materials			$1,091.35
The Leader in Me book - 2nd Edition (1 per Non-teaching staff)	$10.00	21	$210.00
7 Habits 4.0 Participant Manual (1 per Total Staff--unless the school previously had 7HSig)	$105.00	55	$5,775.00

Launching Leadership TLIM Field Guide (if Elementary = 1 per Total Staff; if PreK-8 = 1 per elementary/General/non-teaching staff; if Middle = 0)	$45.00	55	$2,475.00
Total Other Materials			$8,460.00
Subtotal - Fixed			**$17,766.55**
Travel Cap (costs exceeding Travel Budget [below] may be covered up to Travel Cap by Sponsor; this number is NOT included in grant estimates)		3	$1,600.00
Travel Budget			$1,120.00
Shipping			$260.97
Subtotal - Variable (Estimate)			**$1,380.97**
			$19,147.52

Creating Culture / Lighthouse Team 1 (2 consecutive days - by Dec 31, 2015)			
	Price	**Quantity**	**Total**
Consultant Days - Creating Culture for Standard Staff Schools (1 [1 consultant, 1 day] unless school previously had Implementation 1)	$2,600.00	1	$2,600.00
Consultant Days - Lighthouse Team 1 for Standard Staff Schools (1 [1 consultant, 1 day] unless school previously had Lighthouse 1)	$2,600.00	1	$2,600.00
Total Consultant Days		2	$5,200.00
Creating Culture TLIM Field Guide (unless school previously had Impl. 1, if Elementary = 1 per Total Staff; if K-8 = 1 per Grades preK-5/General/non-teaching staff; if Middle = 0)	$45.00	55	$2,475.00
Lighthouse Team 1 TLIM Guide (unless the school previously had LH I, if Elementary or PreK-8 school = 10; if Middle school = 0)	$45.00	10	$450.00
7 Habits 4.0 Facilitator Kit (1 per school--unless the school previously had 7HCert)	$425.00	1	$425.00
7 Habits Families Facilitator Kit (1 per school--unless the school previously had 7HCert)	$425.00	1	$425.00
7 Habits 4.0 Program DVD (1 per school--unless the school previously had 7HCert)	$300.00	1	$300.00
Subtotal - Fixed			**$9,275.00**
Travel Cap (costs exceeding Travel Budget [below] may be covered up to Travel Cap by Sponsor; this number is NOT included in grant estimates)		2	$1,400.00
Travel Budget			$980.00
Shipping			$119.26
Subtotal - Variable (Estimate)			**$1,099.26**
			$10,374.26

Year 2 (for grantees starting TLIM in Year 1)

Aligning Academics / Lighthouse Team 2 (2 consecutive days by Dec 31, 2016)

	Price	Quantity	Total
Consultant Days - Aligning Academics (1 consultant, 1 day)	$2,600.00	1	$2,600.00
Consultant Days - Lighthouse Team 2 (1 consultant, 1 day)	$2,600.00	1	$2,600.00
Total Consultant Days		2	$5,200.00
Aligning Academics TLIM Field Guide (if Elementary school = 1 per elementary/General teacher + 5 extra; if PreK-8 school = 1 per Grades preK-5/General teacher + 5 extra; if Middle school = 0)	$45.00	39	$1,755.00
Lighthouse Team 2 TLIM Guide (if Elementary or PreK-8 school = 10; if Middle school = 0)	$45.00	10	$450.00
Subtotal - Fixed			$7,405.00
Travel Cap (costs exceeding Travel Budget [below] may be covered up to Travel Cap by Sponsor; this number is NOT included in grant estimates)		2	$1,400.00
Travel Budget			$980.00
Shipping			$79.97
Subtotal - Variable (Estimate)			$1,059.97
			$8,464.97

Year 3

Empowering Instruction (1 day by Dec 31, 2017)

	Price	Quantity	Total
Consultant Days - Empowering Instruction (1 consultant, 1 day)	$2,600.00	1	$2,600.00
Total Consultant Days		1	$2,600.00
Empowering Instruction TLIM Field Guide (if Elementary school = 1 per elementary/General teacher + 5 extra; if PreK-8 school = 1 per Grades preK-5/General teacher + 5 extra; if Middle school = 0)	$45.00	39	$1,755.00
Subtotal - Fixed			$4,355.00
Travel Cap (costs exceeding Travel Budget [below] may be covered up to Travel Cap by Sponsor; this number is NOT included in grant estimates)		1	$1,200.00
Travel Budget			$840.00
Shipping			$71.56
Subtotal - Variable (Estimate)			$911.56
			$5,266.56

Totals

Year 1 - Foundation Contribution	$29,521.78

Year 2 - Potential Foundation Contribution	$8,464.97
Year 3 - Potential Foundation Contribution	$5,266.56
Grant Total - Foundation Total Contribution	**$43,253.31**

EXHIBIT D

FranklinCovey Donated Student Materials

NOTES:

1. FranklinCovey is pleased to announce a one-time donation of one year's worth of TLIM/LEAD Student Materials (as shown in this exhibit). This is made possible by the company's policy of donating one student workbook for every 7 Habits Signature 4.0 Participant Kit sold worldwide.

2.The Student Materials shown in this exhibit are based on your application and the numbers you provided to Leader.org. By necessity these numbers remain fixed. If you desire additional services or materials, we invite you to contact your FranklinCovey Client Partner to place an order, the costs for which you will naturally be responsible.

FC Donated Student Materials	Price	Quantity	Total
TLIM Lev 3 Student Act Gd 2.0 (1 per student)	$5.00	130	$650.00
TLIM Lev 4 Student Act Gd 2.0 (1 per student)	$5.00	165	$825.00
TLIM Lev 5 Student Act Gd 2.0 (1 per student)	$5.00	137	$685.00
Subtotal - Fixed			**$2,160.00**
Shipping			$79.97
Subtotal - Variable (Estimate)			**$79.97**
			$2,239.97