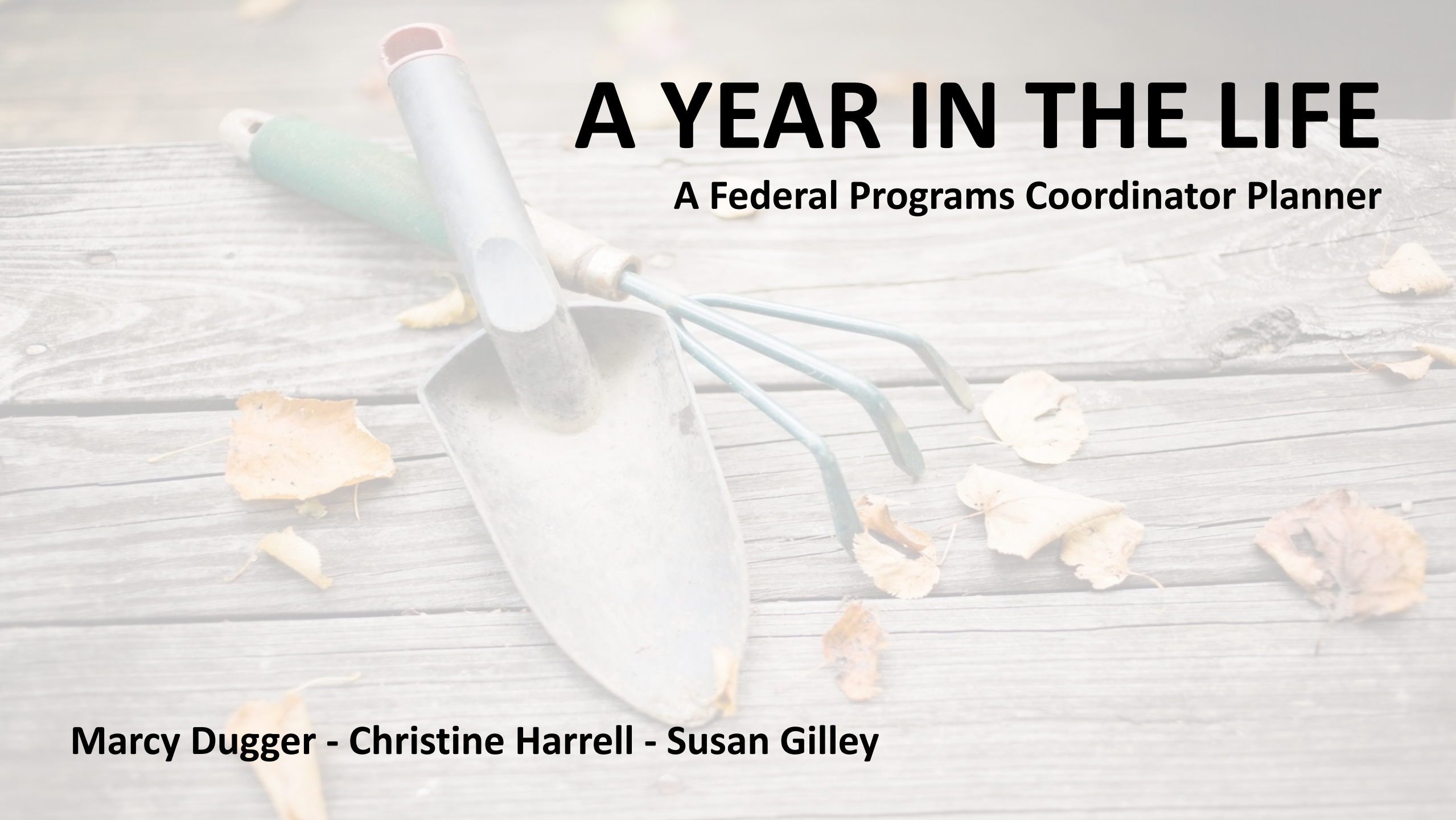


The background of the entire page is a photograph of a weathered wooden surface, possibly a garden bench or table. Scattered across the wood are several dry, yellowish-brown autumn leaves. Two gardening tools are visible: a silver metal trowel with a red handle and a green-handled garden fork. The trowel is positioned vertically, and the fork lies horizontally behind it. The overall tone is soft and natural, with a slight vignette effect.

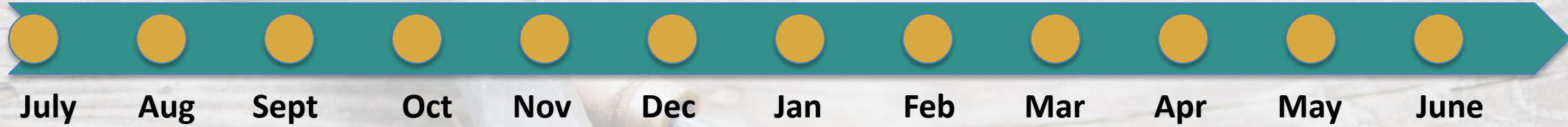
A YEAR IN THE LIFE

A Federal Programs Coordinator Planner

Marcy Dugger - Christine Harrell - Susan Gilley

A YEAR IN THE LIFE

A Federal Programs Coordinator Planner



Federal_Coordinator_Planner

File Edit View Insert Format Data Tools Extensions Help

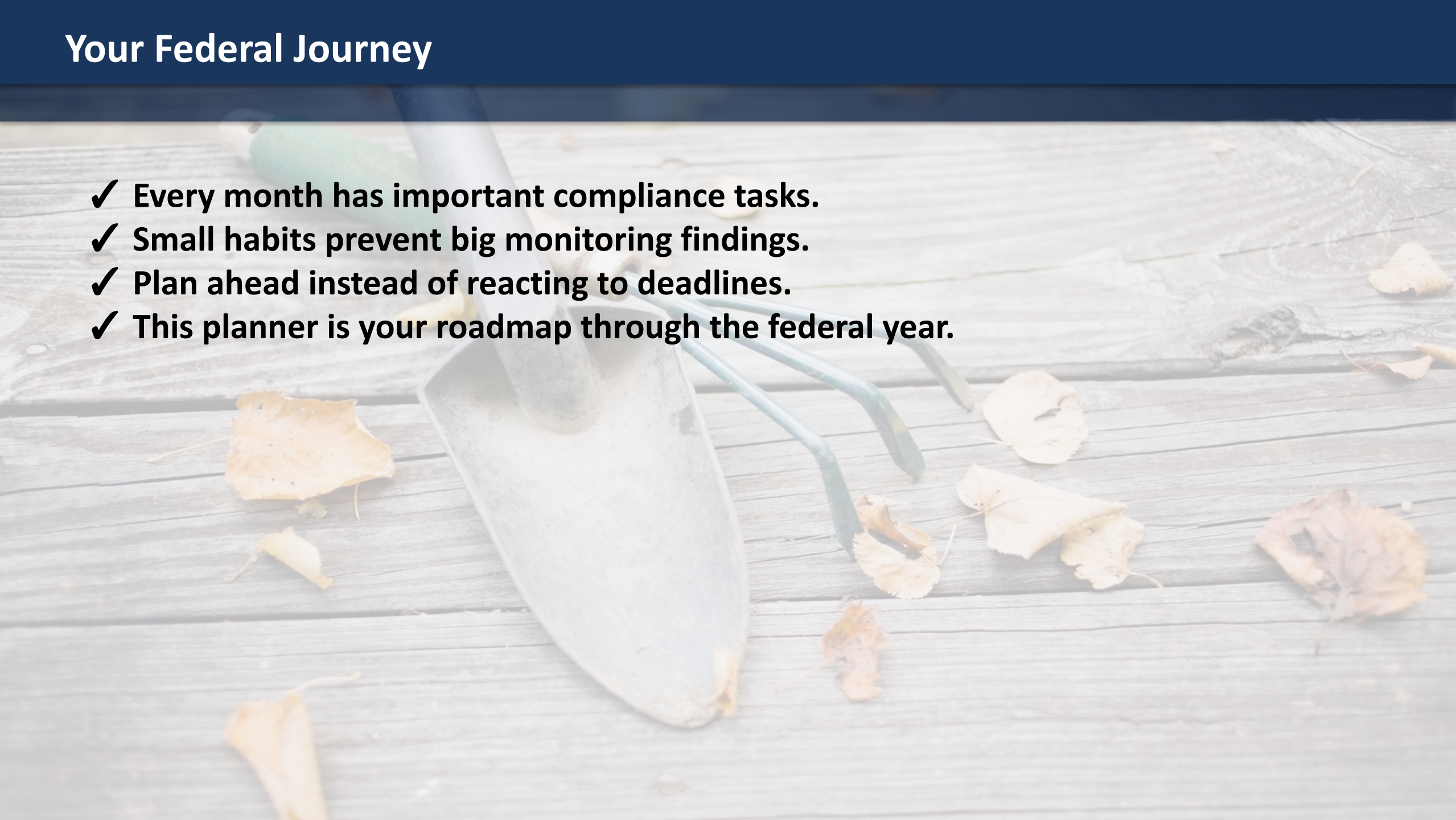
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	A	B	C	D	E	F	G	H	I	J	K	L
1												
2		A YEAR IN THE LIFE										
3		<u>A Federal Programs Coordinator Planner — Resource Companion</u>										
4		This workbook is the take-home companion to the "Year in the Life" presentation. Each tab covers one month: the mini-lunch session date and presenter, that month's federal-programs compliance tasks, and where to find related resources in the shared AAFC Records Retention drive.										
5												
6												
7												
8		SHARED RESOURCE FOLDER										
9		AAFC Records Retention shared folder here:										
10		https://drive.google.com/drive/folders/1-OikNHbvb40ttVY9m2cDAq80PIEGYaF6?usp=sharing										
11												
12		MONTH-AT-A-GLANCE										
13		Month	Session Date	Last Year's Presenter(s)	Topic	Related Resource Folder(s)						
14		July	No mini-session — self-paced	—	Budgeting 101	Budgets, Parent & Family...						
15		August	No mini-session — self-paced	—	School Starts	Budgets, Parent & Family..., FGMS						
16		September	Date TBD — set after DESE 2026	—	FGMS	FGMS, Health and Wellness, Parent & Family..., AAFC Presentations						
17		October	Regional Meetings	—	Comparability Report	Budgets, Expenditure Ledgers						
18		November	TBD	Kim	Federal Monitoring & Indistar Uploads	Indistar Documents, Improvement Plans						
19		December	TBD	Amanda (resources by Lea)	Time Certifications	Health and Wellness, Other Duties						

+ ≡ Cover ▾ July ▾ August ▾ September ▾ October ▾ November ▾ December ▾ January ▾ February ▾ March ▾ April ▾ | < >

Your Federal Journey

- 
- A background image showing a shovel and a rake lying on a wooden deck. Several dry, brown leaves are scattered around the tools. The shovel is in the foreground, and the rake is behind it. The scene is outdoors, likely in autumn.
- ✓ Every month has important compliance tasks.
 - ✓ Small habits prevent big monitoring findings.
 - ✓ Plan ahead instead of reacting to deadlines.
 - ✓ This planner is your roadmap through the federal year.

Building the Shed (July - August)

"Gardens are not made by singing "Oh, how beautiful," and sitting in the shade"

- GET TO KNOW YOUR BUSINESS MANAGER
- [Monthly To Do List](#)
- [State Required Information \(Website\)](#)
- [DESE Contact List](#)
- Time Certification Sheets (Federal Funds)
 - [Monthly time cert \(FTE divided by more than one fund\)](#)
 - [Semester time cert \(100% FTE same fund\)](#)
- [Standards for Accreditation](#)
- [Monitoring Document](#)
- [Preliminary Allocations](#) (July)
- Review Preliminary budgets
- Title I Meetings (get documentation) (August)
- Important eFinance reports - Expenditure Audit Trail and Detail Distribution Detail

JULY

Laying the Foundation

Monthly Focus

No mini-session this month — self-paced prep

Budgeting 101

- New allocations
- Hiring & staffing
- Purchasing plans

[Sam.gov](https://sam.gov)

[Vendor Checklist](#)

- Carryover review

Think Ahead

What should already be finished before school starts?

Presenter Notes:

- Approve Parent/Family plans
- Verify new para credentials
- Finalize next year's budget

AUGUST

Ready, Set, Implement

Monthly Focus

No mini-session this month — self-paced prep

School starts

- Notifications
- Inventory
- Contracts
- Documentation

Reminder

Set up your electronic filing system now.

Presenter Notes:

- Aug 1: post Parent/Family Plan
- Submit final budget (eFinance)
- Begin spend & code cycle

Acquiring the Tools (September - December)

"The best tool in the garden is the knowledge of the gardner."

- Connect with your AAFC Region Representative
- Plug in to area Co-Op (Job Alike Meetings)
- Fall AAFC Conference (September)
- Dig in and understand your budgets (Spending Handbook)
 - What are you paying for?
 - What can you pay for?
- Monitoring Document - work on plugging in documentation pieces

SEPTEMBER

Finding Your Rhythm

Monthly Focus

Date TBD — set after DESE 2026

DESE Updates

FGMS

Grant Amendments

Focus

Stay organized before monitoring season.

Presenter Notes:

- Back-to-school Title I meetings
- SHI kickoff & modules
- Fall AAFC Meeting (Hot Springs)

OCTOBER

Checking Your Course

Monthly Focus

Regional Meetings

Comparability

Regional Meetings

Budget Review

Checkpoint

Verify documentation matches expenditures.

Presenter Notes:

- Reconcile audit trail vs. budget
- Prep for Comparability review
- Continue spend & code cycle

NOVEMBER

Monitoring Matters

Monthly Focus

Nov 4 • Presenter: Kim

Federal Monitoring Indistar or ArAPP Uploads

Tip

Collect evidence as you go.

Presenter Notes:

- Collect monitoring evidence
- Complete Indistar uploads
- Continue spend & code cycle

DECEMBER

Document Everything

Monthly Focus

Dec 2 • Presenter: Amanda (resources by Lea)

Time Certifications

Payroll Documentation

Remember

If it isn't documented...

Presenter Notes:

- Time certifications due
- Payroll documentation
- Health/Wellness check-in

Polishing Your Tools (January - March)

"A dirty hoe is a happy hoe."

- Shore up budgets (Federal are due April 1)
 - [FGMS](#)
- [Final Allocations](#) (February)
- Start Private School Consultation (March)
- Start School Health Index Modules (February)
 - Must do modules 1, 2, 3, 4, 10, 11
- Monitoring Document - work on plugging in documentation pieces

JANUARY

Mid-Year Tune-Up

Monthly Focus

Jan 6 • Presenter: Marcy

SHI Platform - [Link to Presentation](#)

Mid-Year Review

Question

Are you on track financially?

Presenter Notes:

- SHI platform review
- Mid-year budget check
- Continue spend & code cycle

FEBRUARY

Planning Ahead

Monthly Focus

Feb 3 • Presenter: Susan

Budget Finalization - [Link to Presentation](#)

Carryover Planning

Prepare

Begin thinking about next year.

Presenter Notes:

- Budget finalization prep
- Carryover planning
- Continue spend & code cycle

MARCH

Building Partnerships

Monthly Focus

Mar 3 • Presenters: Amanda, Kim & Lori

Private School Consultation

[Link to Presentation](#)

Collaboration

Documentation is key.

Presenter Notes:

- Private school consultation
- School Improvement Plan updates
- Budget prep for FGMS/eFinance

Water and Cultivate (April - May)

"Weeds are misplaced flowers."

- [ARApp Overview](#) (DESE slidedeck)
- [ARApp Checklist](#)
- Start to spend down budgets to under 15%(Title I/Migrant)
- Build your ARApp team
- Time Certification Sheets (make sure you have all signatures)
- Monitoring Document - work on plugging in documentation pieces

Monthly Focus

Apr 7 • Presenter: Lea

Needs Assessment Resources & Program Evaluation

- [The_School_Data_Investigation.pptx](#)
- [Multiple Measures LP1S30 UA.pdf](#)
- [needsassessmentguidebook-508_003.pdf](#)
- [- Link for the template of this](#)

Reflect

Use data to drive planning.

Presenter Notes:

- Needs Assessment due
- Board approves budgets & SIP
- Confirm no function code >10%

MAY

Finishing Strong

Monthly Focus

May 5 • Presenter: Michelle

Indistar Uploads

Title IV Report - [Link to Presentation](#)

Celebrate

Almost there!

Presenter Notes:

- May 1: FGMS/eFinance deadline
- Indistar & Title IV uploads
- Spring AAFC Meeting (Hot Springs)

Weed it and Reap (June)

"You know you are a real gardener, if you cheer when you see a worm in the dirt."

- **ARApp Due (June 30)**
 - **Uploads to ARApp**
 - **Private School Consultation**
 - **LEA Assurances**
 - **SPED Maintenance of Effort (if applicable)**
 - **ALE Consortium MOU (if applicable)**
 - **Make sure it is board approved**
- **Monitoring Document - work on plugging in documentation pieces**

JUNE

Closing the Chapter

Monthly Focus

No mini-session — wrap-up month

Final Reimbursements

Archive Files

Reset

Prepare for a fresh start.

Presenter Notes:

- Post Parent Plan in Indistar
- Upload next year's budgets
- Confirm no function code >10%

Gardening Basics (Budget Breakdown)

"There are no gardening mistakes, only experiments."

Fund **Location** **Subject**
6501-1591-001-000-00-66100
Function **Program** **Account**

10% Variance (Fund and Function code)

Gardening Basics (Creating Budget Worksheets)

"The best fertilizer is the gardener's shadow."

eFinance

eForms & Tools > Cognos Reporting

COGNOS

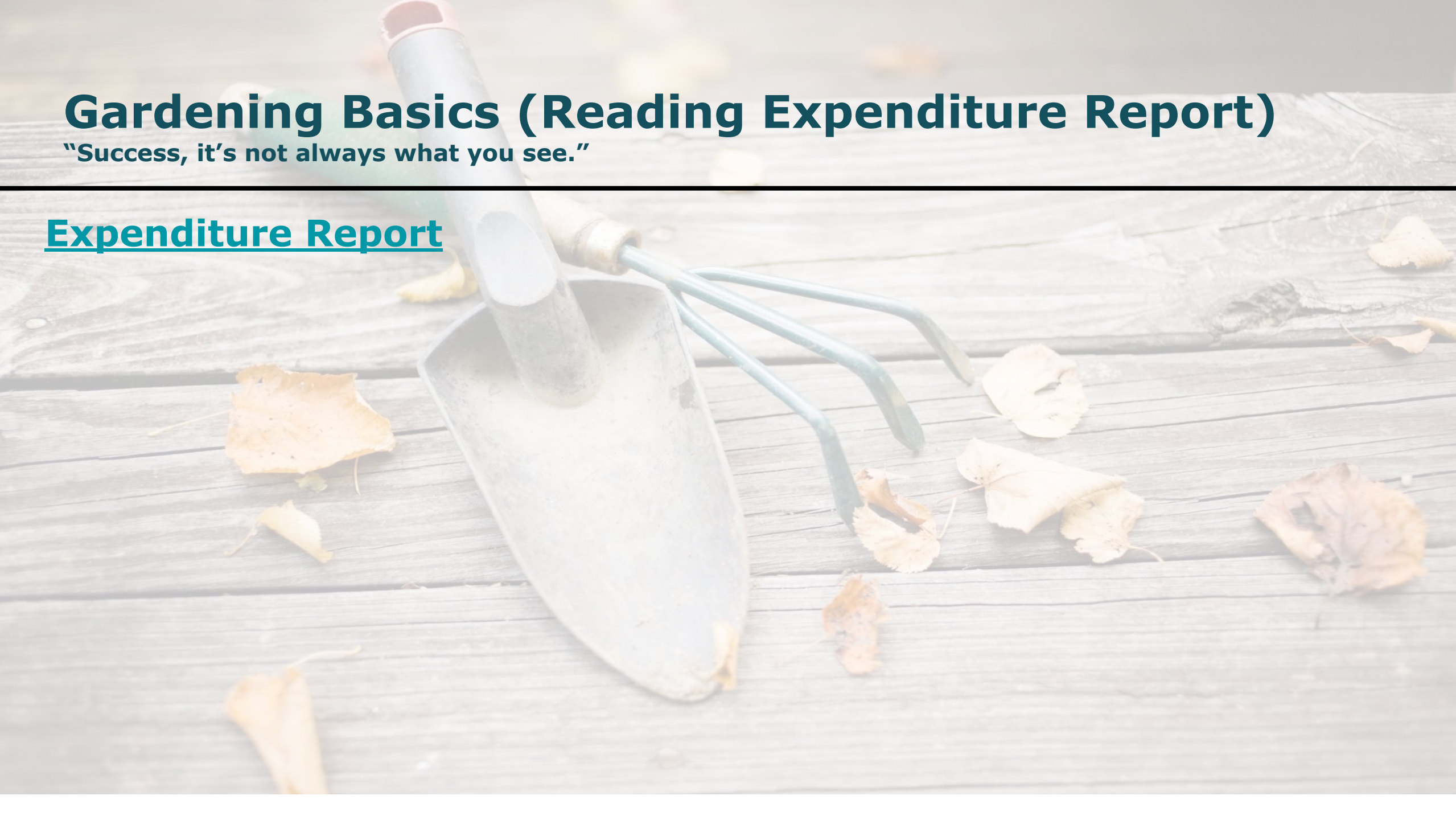
**Team content > Financial Management System > Fund accounting
Manager > 2. Federal Program Reports for Budgets and Budget
Adjustments > Budget Worksheet**

[Budget Worksheet](#)

Gardening Basics (Reading Expenditure Report)

"Success, it's not always what you see."

Expenditure Report

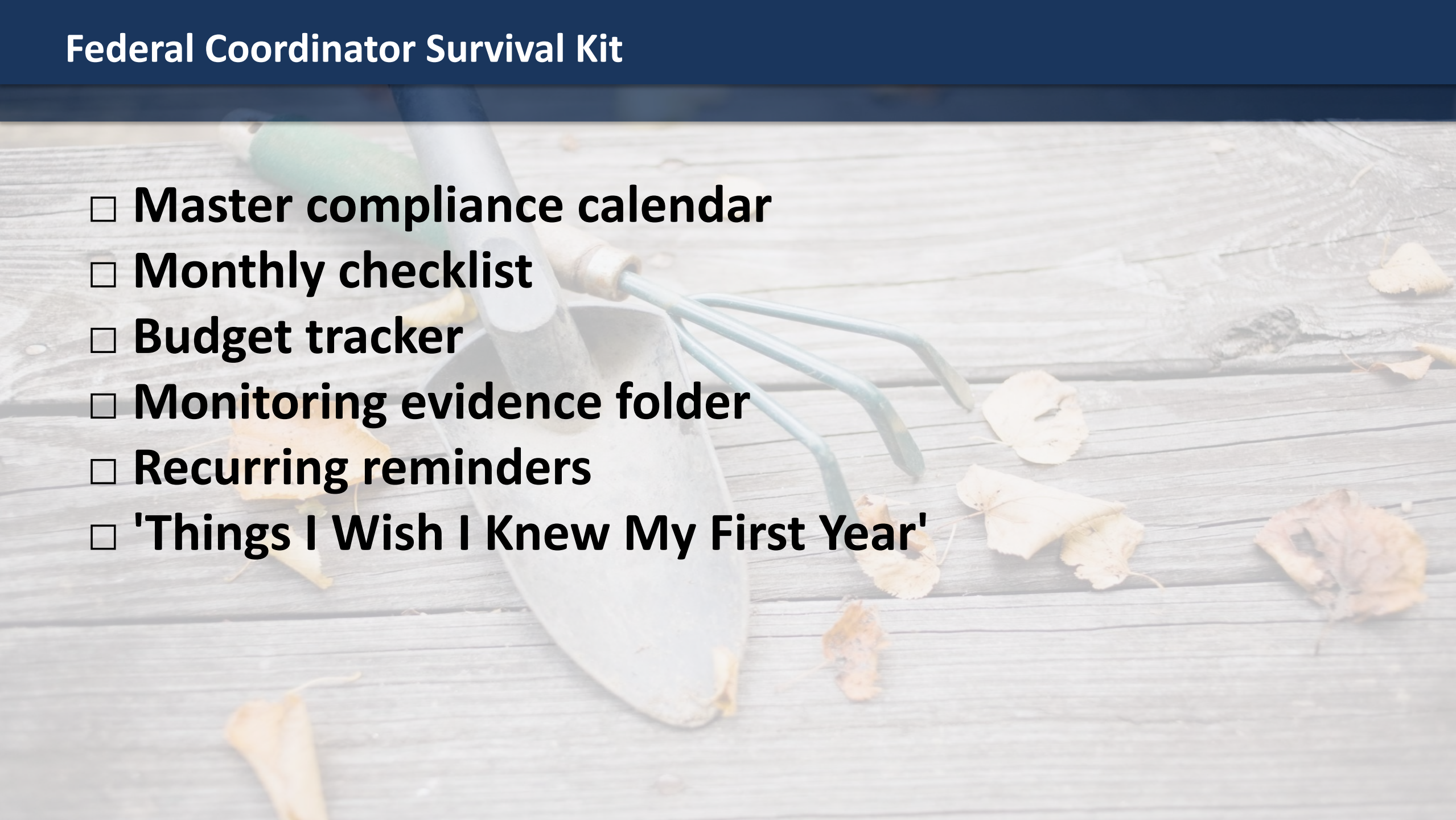


Compost Happens

“Plant seeds of kindness and watch them grow.”

- [Common Acronyms](#)
- [DESE Reports](#) (carryover, federal fund statements, maintenance of effort, maintenance of equity, Title I comparability, funding notifications)
- [Dyslexia Report](#)
- [Educator Effectiveness System \(EES\)](#)
- [Grants Management](#)
- [Indistar](#)
- [LEA Insights](#)
- [My School Info](#)
- [Out of State Travel Request](#)
- [School Health Index \(SHI\)](#)
- [SIS Code Check](#)
- [Standards for Accreditation](#)
- [State Aid Notices](#)

Federal Coordinator Survival Kit

- 
- ☐ **Master compliance calendar**
 - ☐ **Monthly checklist**
 - ☐ **Budget tracker**
 - ☐ **Monitoring evidence folder**
 - ☐ **Recurring reminders**
 - ☐ **'Things I Wish I Knew My First Year'**