

Coordinator's Yearly Checklist

July:

Check early for outstanding invoices from previous fiscal year. Those funds must be paid out by July 25.

Finalize previous school year's Implementation Report section on Action Components.

Update your Center's information page on FRYSC Counts! for principal changes, AC Chairperson change, or other data change.

If you have a new principal, do these things: 1) Add the new principal(s)' name on your FRYSC Counts! Center information page (school data); 2) Inform your RPM of principal change; and 3) Schedule a time with him/her to take the Principal's Training Module together.

If district personnel have changed (superintendent, district contact, finance officer), remind district contact to make changes on the district information page of FRYSC Counts!.

If center staffing has changed, prepare Request form and Center Operations revision for your next Advisory Council meeting.

Prepare Surveys for fall Needs Assessment to go home in school's 'first day' packet.

Gather data needed to complete the Other Information section on your FRYSC Counts! Center Information page.

Set up Group Programs in Infinite Campus for the upcoming program year.

Start a PD Tracking form for the new training year (June 1 – May 31)

August:

- Input data needed to complete the Other Information section on your Center Information page. Due **AUGUST 15**.

Upload any changes to Advisory Council membership (on-going throughout year).

Evaluate August's programs/activities as they occur. Record implementation info on Action Component.

Enter August Infinite Campus (IC) data.

September:

Evaluate September's programs/activities as they occur. Record implementation info on Action Component.

Complete Implementation Report on previous year by **SEPTEMBER 30**. Review at September or October advisory council meeting; note review in meeting Minutes.

Submit Impact Report on previous year's key activity(s) using "Before" and "After" data gathered at that time.

Enter September's IC data.

Gather data for your school/community needs assessment from various sources and surveys.

Register for Fall Institute (if going), and make hotel reservations.

Plan now for gathering "Before" (pre-activity) data for key activities planned for the year.

October:

Prepare results of whole needs assessment to discuss at next Advisory council meeting.
Evaluate October's programs/activities as they occur. Record implementation info on Action Component.
Make arrangements/register for Fall Institute (VOV or Fall Institute required each year).
Record/update current year's PD Tracking on FRYSC Counts!.
Enter October's IC data.

November:

Evaluate November's programs/activities as they occur. Record implementation info on Action Component.
Review Budget for any needed changes. If needed, prepare Budget Amendment and Request form for next Advisory Council meeting.
Enter November's IC data.

December:

December odd year only: Review new Continuation Program Plan documents for next two-year plan due March 1.
Evaluate December's programs/activities as they occur. Record implementation info on Action Component.
Enter December's IC data.

January:

At next advisory council meeting, use Needs Assessment results to plan Action Components for following year OR for the new two-year Continuation Program Plan (even # years).
Even # years: Prepare new Continuation Program Plan. Get needed signatures. Follow instructions on Program Plan preparation from your RPM.
Evaluate January's programs/activities as they occur. Record implementation info on Action Component.
Upload changes to Advisory Council member list as needed, and **notify RPM** of upload.
Enter January's IC data.
Review center spending: Have you spent approximately ½ of your allocation?
Gather "After" (post-activity) data from first semester key activities.
Gather "Before" (pre-activity) data for planned 2nd semester key activities.

February:

Even # years: Finalize new Continuation Program Plan for March 1st due date.
Evaluate February's programs/activities as they occur. Record implementation info on Action Component.
Update working copy of PD Tracking form on FRYSC Counts!
Enter February's IC data.

March:

Even # years: Completed Continuation Program Plan due **MARCH 1st**.

Meet with Finance Officer to review current year budget and projected expenditures in preparation for final budget amendment due April 30.

Prepare Budget Amendment and Request form for final budget amendment for your March OR April advisory council meeting.

Evaluate March's programs/activities as they occur. Record implementation info on Action Component.

Enter March's IC data

Make sure center personnel are evaluated (coordinator - by principal/district contact; center support staff - by coordinator).

Submit scholarship application for Victory over Violence conference lodging, if needed. **The due date changes every year.**

April:

Receive new per student amount/budget allocation for the next fiscal year; prepare budget for new year.

Schedule an advisory council meeting in time to approve new budget by its due date.

If there are contracts every year with the same folks (mental health, etc.): Get next year's contracts approved by advisory council, then signed by contractee and ready to upload with Purchase Request (if \$1,000 or over) on FRYSC Counts!

Evaluate April's programs/activities as they occur. Record implementation info on Action Component.

Submit current fiscal year's final Budget Amendment plus signed Request form no later than **APRIL 30**.

Enter April's IC data.

Submit new budget on FRYSC Counts! by required due date.

May:

Evaluate May's programs/activities as they occur. Record implementation info on Action Component.

Notify RPM of any anticipated staffing changes for the next school year.

Notify RPM of any anticipated district contact, principal, superintendent or finance officer change for next year.

Enter May's IC data.

Gather "After" (post-activity) data for 2nd semester activities.

Complete registration for VOV (if going), and make hotel reservations.

June:

Encumber all remaining funds by June 30. Ensure invoices are received and paid by July 25.

Finalize the school year's PD Tracking form on FRYSC Counts! It is due June 30th.

Evaluate June's programs/activities as they occur. Record implementation info on Action Component.

Finalize Implementation recording from Action Components.

(June continued on next page)

June, continued:

Finalize Infinite Campus data entries for the year. **Check with district for final school year entry date.**

If center location change is proposed, contact your RPM to schedule a site visit PRIOR to change.

Prepare Request form and Center Operations revision for your next Advisory Council meeting. ** See "What to Do" hand out for making changes.

Rev. 12/19/19

Appendix F

RECORDS RETENTION SCHEDULE
Family Resource and Youth Services Centers
(FRYSC)
June 2012 update

Series No.	Record Title and Description	Retain at Agency (Years)	Disposition Instructions
L4444	FRYSC Funding Request/Notification of Change Form (used to document center/district information to make sure that it is up to date.)	2 years	Destroy
L4445	FRYSC MUNIS Reports (This series documents expenditures of funds and tracks expenses of FRYSCs within the school district.)	3 years	Destroy after audit
L4446	FRYSC Request Form for purchases and amendments, and accompanying documentation (This document is the coversheet for all amendments to the approved continuation program plan-excluding Advisory Council amendments- and purchase requests for single items more than \$500, subcontracts or goods over \$1000. Such requests must be approved and signed by the FRYSC Regional Program Manager.)	3 years	Destroy after audit
L4447	FRYSC Confidentiality Statement (This series is used to obtain authorization from the parent/guardian for the evaluation and treatment of minors/dependents and to delineate the limits of confidentiality for a client. It is used to show district compliance with state and federal requirements and protect them from legal action.)	1	Retain until minor reaches age of majority
L4448	FRYSC Parental Consent Forms (This series documents parent/guardian consent for students to participate in a FRYSC activity. It is used to facilitate services to students in the school district and protect the district from potential legal actions undertaken by a parent or guardian plus informing parent/guardian of FRYSC activity).	2	Destroy
L4449	FRYSC Needs Surveys and Results (This is used to determine the needs of the school, parents, students, and/or community in order for the center to design services to meet those needs. The series can provide statistical as well as narrative information about health, education, and social service needs.)	5	Destroy
L4451	FRYSC Program Monitoring Report (This series is used to document contractual compliance and provide technical assistance to the local FRYSCs. The report captures at a glance the strengths, concerns, and corrective action needed.)	P	Retain
L4452	FRYSC Interagency Agreements (This series permits the local FRYSC to enter into an agreement with other localities and agencies on a basis of mutual advantage to provide services and facilities that accord best with geographic, economic, population and other factors influencing the needs and development of local communities. It is used as a legally enforceable document to indicate what participating parties will be doing under the agreement.)	P	Retain
L4453	FRYSC Community Resource Directory (This series is used to provide information on resources in the community that may be used to help students and families served by a FRYSC. It provides a convenient and ready reference to services and reduces confusion as to services provided and the person to contact.)	1	Destroy when superseded, obsolete or outdated
L4457	FRYSC Individual Student Case File (This series consolidates and documents in one file information relating to the services	1	Destroy one year after graduation or

	provided by the FRYSC. They form one of two categories of non-education records maintained at a FRYSC operated by a school district. These records are considered school records and are used to plan services for the individual student). (C) KRS 61.878		after student reaches age 22
L4458	FRYSC Family Case File (This series is used to coordinate the resources of communities to address the individualized needs of families eligible for services provided by a school FRYSC. KERA established the FRYSC program in an effort to promote the flow of resources and support to families in ways that strengthen the functioning and enhance the growth and development of the individual members and the family unit. It is used to indicate what services have been provided to a family under the program.) (C) KRS 61.878	I	Destroy one year after family member graduation or student reaches age 22
	New FRYSC Program Plan (This document contains all information required by the legislation establishing the funding opportunity for FRYSCs. If the program plan is approved and funded, this becomes the foundational document for the Family Resource/Youth Services Center.)	P	Retain
	Continuation Program Plan (The continuation program plan is submitted annually by each FRYSC. Information included in the full document includes the continuation coversheet/eligibility for free and reduced school meals, budget/narrative information, core and optional action components, center information, Advisory Council Assurances, SBDM Assurances, and School District Assurances. This document, once approved, is incorporated into the contract with the school district as if attached.)	5 years	Destroy
	FRYSC Advisory Council Amendments and Minutes (This documents a change to the approved FRYSC Advisory Council. As members rotate off the council, an updated advisory council listing must be submitted to the FRYSC Regional Program Manager. Minutes document advisory council approval for all center operations documentation, budget approvals and purchase requests.)	3 years	Destroy

REQUIRED Form, Report or Action	Due Date	District Contact Responsibilities	Coordinator Responsibilities	Other Personnel Responsibilities	How to Submit: <i>*Notify RPM when upload is made</i>
Funding Request /Invoice Letter (submitted to request funding/initiate payment for the upcoming fiscal year)	July 15	1) District Contact Prepares Invoice for superintendent signature		Superintendent: Signs	District Contact: email to DFRYSC Budget and Contracts Administrator
End of Year MUNIS reports (for previous fiscal year*) <i>*Funds must be encumbered by June 30 and spent by July 25</i>	August 15	Ensure completion		Finance Officer: Prepares and submits electronically	Finance Officer: Follow submission instructions from Division office
Other Information Fields	August 15		Update on FRYSC Counts! Center page		Update on FRYSC Counts! center page and SAVE at the bottom of the screen
Coordinator PD Tracking Form	August 15	The Districts are responsible for ensuring that coordinators receive all required training hours.	Retain copies of training certificates at center		PD Tracking Forms will be submitted directly on FRYSC Counts!
End of Year Program Reports 1. Implementation Report 2. Impact Report (via FRYSC Counts!)	Sept. 30		1.Prepares Report and presents to advisory council; (no signature page) 2.Completes and submits Impact survey	Advisory Council reviews and is noted in meeting Minutes	Impact Reports will be located directly on FRYSC Counts!
Free Lunch, Enrollment and Center Information	Pulled from KDE	1.) Follow instructions from DFRYSC concerning verification of data pull, review process, and	1)Follow instructions from DFRYSC concerning verification of data pull, review process, and	FRAM coordinators and Food Services Directors: Maintain up to date direct	These numbers will be received from the Kentucky Department of Education.

		reporting of preschool numbers/Special circumstances	reporting of preschool numbers/special circumstances	certification imports, federal forms in POS system, and HIFs.	
Mid-Year MUNIS Report	Upon Request only	Ensure completion		Finance Officer: Prepares and submits electronically	Finance Officer: Follow submission instructions from RPM
Continuation Program Plan <i>(even numbered years only)</i>	March 1	1) Review and maintain copy for files	Prepares new budget and program plan; presents to advisory council and SBDM	Advisory Council: Reviews and approves next year's budget and program plan	Coordinator uploads items required
Budget and Narrative	Yearly, following announcement of allocation amounts				
Evaluation of Coordinator	Per district policy, but every 2 years at minimum	1) Complete with principal 2) Ensure completion	1) Keep evaluation on file 2) Evaluate support staff, if applicable	If serves 1 school: Principal: Complete with District Contact input. If serves > 1 school: District Contact completes with principal input	n/a
District/Center Changes *Required when: -New coordinator is hired -New Supt. is hired -Change in District Contact or Finance Officer -Center has new name, phone, or address -Coordinator has new name	Per change	District Contact maintains "District Information page" on FRYSC Counts! -Superintendent info -District Contact info -Finance Officer info	Coordinator maintains "Center Information" on FRYSC Counts! -Center info -Coordinator info -Staff info -AC Chair info		*Must be kept up to date in order to receive timely communication from the Division

-Coordinator has new email address -New AC Chair					
Request form *Required to accompany: - Revisions: Budget, center operations, action components - Purchases: Single item ≥ \$500; Goods ≥\$1,000; Subcontracts ≥ \$1,000.	As needed	Signs after AC approval (if is Designee)	Prepares; signs, presents to advisory council for approval	Advisory Council Chair: Signs Superintendent: Signs (unless has Designee)	Coordinator: Scan signature page and upload to FRYSC Counts! with any accompanying document
Advisory Council Listing Revision <i>Note: Request form not needed</i>	As needed		Prepares upon change in membership		Coordinator uploads within 2 weeks of change
Advisory Council New Coordinator Hiring Confirmation	As needed	Signs after hiring new coordinator		Hiring committee Chair: Signs Superintendent: Signs	District Contact: Scan with signatures and upload to <u>Center</u> page within 1 week of hiring
Reconfiguration Request Letter	Dec. 21	1) Consult with RPM first 2) Write request letter		Advisory Council: Recommends Superintendent: Signs	District Contact: Submits the request to the RPM via e-mail
Waiver Request form *of full-time coordinator	Contact RPM	1) Consult with RPM 2) Prepare 3) Request for renewal required		Superintendent: Signs request letter on district letter head	District Contact: Submits the request to the RPM via e-mail.
Alternative Distribution Funding Request with spreadsheet (new or annual renewal -	Contact RPM -	1)Consult with RPM first 2) Prepare Request letter and spreadsheet		Superintendent: Signs Request letter on district letter head	District Contact: Submits request letter and spreadsheet to the RPM via e-mail. (detailed instructions available upon request to rpm on submission requirements)

Activity/Program Checklist



Name of Program:

Date of Program:

Items:

Volunteers:

- Flyers/email sent out
- Purchase Order submitted
- Speaker Contacted/confirmed
- Food ordered
- Receipt turned in

Date:

Date:

Date:

Date:

Date:

