# Instructions for Using
## Annual Planning Calendar for Program Management:
## A Customizable Roadmap for Program and Fiscal Leaders

Head Start five-year grants require the development of data-informed goals and objectives as well as a mechanism for continuous improvement. Through the Head Start inclusive leadership model, the governing body, Policy Council, and program's management team must collaborate to develop a system of planning and oversight that will achieve progress toward their goals and ensure quality services for children and families.

The following calendar outlines the requirements for programs in the area of planning, including the development and implementation of oversight systems, which are critical to planning for continuous improvement. Head Start programs operate with differing fiscal years and program calendars. The attached calendar outlines the planning requirements so that programs can identify the required planning activity and determine how it fits into their operational calendar. The activity list includes the leadership and administrative functions and requirements of the grant development and oversight process. Additional program area activities can be added.

## How to Use the Annual Planning Calendar for Program Management

1) Start with the "Activity List" sheet at the bottom of the page.
2) Select the month and year that you want to start planning.
3) In the date column, enter the date when the activity will be completed.

4) If the events are recurring, enter them manually in the calendar page.
5) Dates will be automatically populated into the calendar view.
6) When all the activities have been assigned a date, go to the "Calendar" sheet at the bottom of the page to view the dates in a calendar view.
7) Cells may need to be adjusted in order to show all of the text. To do so, adjust the size of the row by dragging the boundary below the numbered row. You may also select the cell and find "Wrap Text" in the ribbon above.
8) The calendar may be printed or kept for reference.
9) To access control boxes using a keyboard, navigate to the cell and press alt and the down arrow. Use the up and down arrows to navigate the menu, then press enter to make your selection.

**Adding activites:**

1) Use the "Additional Items" box.
2) If you run out of rows, right-click an existing entry and select "Insert."
3) Select "Entire Row."
4) Add activity.

**Note: Some timeframes or activities have notes with helpful information. They have an indicator in the top right corner of the cell. See the example below.**

| Example |
|---|

**Hover your mouse over that cell to reveal the note, or right-click and select "Show/Hide Notes."**
**You can show all the notes by navigating to the top of the page and selecting "Review" and "Show All Notes." For screen reader users, select a cell with a note and press Shift and F2 for the notes window.**
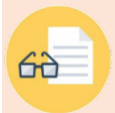
## Program Planning Resources

Foundations for Excellence: A Guide for Five-Year Planning and Continuous Improvement 2nd Edition

Self-Assessment: Your Annual Journey

Community Assessment: The Foundation for Program Planning

End of Instructions for Use

# Annual Planning Calendar for Program Management: A Customizable Roadmap for Program and Fiscal Leaders

**Program Name:** *Your Program Name Here*

Set your calendar start below:

| Month | October | *Enter Project Month start here* |
|---|---|---|
| Year | 2023 | *Enter Project Year here* |

## Prior to the Five-Year Project Period

| Progress | Date to be completed | Activity | Citation |
|---|---|---|---|
| | | Conduct a communitywide strategic planning and needs assessment to design a program that meets community needs. | 1302.11(b) |
| | | Ensure appropriate governance structure (e.g., governing body, Tribal Council, Policy Council) and bylaws are in place. | Sec. 642(c) |
| | | Establish Policy Council selection procedures. | Sec. 642(c)(1)(E)(iv)(VI) |
| | | Develop strategic long-term goals to ensure responsive program services. | 1302.102(a) |

## Start of Project Period

| Progress | Date to be completed | Activity | Citation |
|---|---|---|---|
| | | Complete Governance, Leadership, and Oversight Capacity Screener and training plan. | |
| | | Begin implementation of action plans for five-year goals and objectives. | 1302.102(b)(2) |
| | | Begin monitoring identified data for progress on goals and compliance with the Head Start Program Performance Standards (HSPPS). | 1302.102(b) |
| | | Design and implement coordinated approaches. | 1302.101(b) |
| | | Begin implementation of the governing body/Tribal Council and Policy Council orientation and training plan. | 1301.5 |

| Progress | Date to be completed | Activity | Citation |
|---|---|---|---|
| | | Support the governing body/Tribal Council in establishing procedures and guidelines for accessing and collecting information. | Sec. 642(c)(1)(E)(iv)(IV) |

## Annually at the Beginning of the Program Year

| Progress | Date to be completed | Activity | Citation |
|---|---|---|---|
| | | Establish the Policy Council. | 1301.3(a) |
| | | Begin or continue implementation of action plans for five-year goals and objectives, including any modified or added goals or objectives. | 1302.102(b)(1) |
| | | Begin or continue monitoring identified data for progress on goals, including any modified or added goals or objectives, and compliance with the HSPPS. | 1302.102(c)(1) |

## Monthly

| Progress | Date to be completed | Activity | Citation |
|---|---|---|---|
| | | Provide monthly reports so that the governing body/Tribal council and the Policy Council have accurate and regular information about program planning, policies, and Head Start agency operations. | Sec. 642(d)(2), |
| | | | 1301.2(b)(2) |
| | | | 1301.3(c)(2) |
| | | | 1302.102(b) |
| | | Report enrollment in the HSES | Sec.641A(h)(2) |

## Quarterly

| Progress | Date to be completed | Activity | Citation |
|---|---|---|---|
| | | Submit Federal Financial Report (SF-425) detailing cash transactions made for federal award(s) and separate reports detailing expenditures made for the same award(s). | ACF-PI-HS-17-04 |

## Semi-Annually

| Progress | Date to be completed | Activity | Citation |
|---|---|---|---|
| | | Submit semiannual Federal Financial Report (SF-425). | ACF-PI-HS-17-04 |

## Annually

| Progress | Date to be completed | Activity | Citation |
|---|---|---|---|
| | | Conduct community assessment or community assessment update. | 1302.11(b)(1) and (2) |
| | | Develop/update selection criteria. | 1302.14(a)(1) |
| | | Support the governing body/Tribal Council in establishing and approving procedures and criteria for recruitment, selection, and enrollment of children. | Sec. 642(c)(1)(E)(iv)(II) |
| | | | Sec. 642(c)(2)(D)(ii) |
| | | | 1302.14(a)(1) |
| | | Submit selection criteria to governing body/Tribal Council and Policy Council for review and approval. | Sec. 642(c)(1)(E)(iv)(II) |
| | | | Sec. 642(c)(2)(D)(ii) |
| | | Submit reports to the governing body/Tribal Council and Policy Council. | 1301.2(b)(2) |
| | | | 1301.3(c)(2) |
| | | | Sec. 642(d)(2) |
| | | Publish and disseminate the annual report. | 1302.102(d)(2) |
| | | | Sec. 644(a)(2) |
| | | Complete an audit and submit a copy of the audit management letter and of any audit findings as they relate to the Head Start program. | Sec. 647 (c)(1)-(3) |
| | | | 75.100(d) |
| | | In preparation for the grant application process, register (or renew registration) with System for Award Management (Sam). Allow at least two weeks for registration to be complete on Grants.gov. | https://www.acf.hhs.gov/grants/howto |

## Annually at the End of the Program Year

| Progress | Date to be completed | Activity | Citation |
|---|---|---|---|
| | | Identify topics and data for self-assessment. | 1302.102(b)(2)(i) |
| | | Communicate and collaborate with the governing body/Tribal Council and the Policy Council to conduct annual self-assessment and Identify key findings. | 1302.102(b)(2)(ii) |
| | | Involve program leadership in the process of developing program improvement plan. | 1302.102(c )(2)(i - v) |

| Progress | Date to be completed | Activity | Citation |
|---|---|---|---|
|  |  | Revise objectives and/or create new goals as needed and plan for ongoing improvements. | 1302.102(c)(2)(i–v) |
|  |  | Update staff training and professional development system. | 1302.102(c)(2)(i) and (v) |
|  |  |  | 1302.92 |
|  |  | Identify systems, policies, and procedures in need of updates. | 1302.102(c)(1) and (2) |
|  |  | Identify and address staffing needs for upcoming year. | 1302.102(c)(2) |
|  |  | Identify and address facility needs for upcoming year. | 1302.102(c) |
|  |  |  | 1303.44(a)(1) |
|  |  | Complete training and technical assistance (TTA) plan for upcoming year. | Sec. 648(d)(1) |
|  |  | Prepare and submit the Program Information Report (PIR). | 1302.102(d)(1) |

## Annually at the End of the *Grant* Year

| Progress | Date to be completed | Activity | Citation |
|---|---|---|---|
|  |  | Inform the governing body/Tribal Council and the Policy Council of planning and budgeting process. | 1301.1 |
|  |  | Ensure updated community assessment and self-assessment data are ready for use in planning. | 1302.11(b) |
|  |  | Begin engaging governing body/Tribal Council, Policy Council, and program leadership in planning and goal setting process. | 1302.102(a) and (c) |
|  |  | Develop a budget that supports program goals and objectives. | 75.210(d) |
|  |  |  | 75.301 |
|  |  | Submit a grant application to the governing body/Tribal Council and the Policy Council for approval. | Sec. 642(c)(1)(E)(iv)(III) |
|  |  |  | Sec. 642(c)(2)(D)(iii) |
|  |  | Submit a funding application for the next year. | 75.206 |
|  |  | Electronically submit a Real Property Standard Forms (SF-429A, SF-429B, and SF-429C). | ACF-PI-HS-17-03 |

| Progress | Date to be completed | Activity | Citation |
|---|---|---|---|
| | | Submit Federal Financial Report (SF-425), Annual and Final. | ACF-PI-HS-17-04 |

## At the End of the Five-Year Project Period

| Progress | Date to be completed | Activity | Citation |
|---|---|---|---|
| | | Submit Tangible Personal Property Report (SF-428A, SF-428B, and SF-428S) within 90 days of the end of five year grant. | ACF-PI-HS-17-04 |

## Ongoing Activities

| | | Activity | Citation |
|---|---|---|---|
| | | Design and implement coordinated approaches in the areas of training and professional development, the full and effective participation of children who are dual language learners and their families, the full and effective participation of children with disabilities, and the management of program data (listed as start of year activity). | 1302.101(b) |
| | | In collaboration with the governing body and Policy Council, use ongoing monitoring results, data on school readiness, and other information described in 1302.102 of the HSPPS and in section 642(d)(2) of the Head Start Act for strategic direction, ongoing oversight, and continuous improvement. | 1301.2(c)(2) |
| | | | 1301.3(c)(2) |
| | | | 1302.102 |
| | | Provide TTA or orientation for the governing body and Policy Council. | 1301.5 |

## Additional Items

| Progress | Date to be completed | Activity | Citation (if appropriate) |
|---|---|---|---|
| | | | |
| | | | |

**Program Name: Your Program Name Here**

## October 2023

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
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| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| #NAME? | #NAME? | #NAME? | #NAME? | #NAME? | #NAME? | #NAME? |
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| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
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| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| #NAME? | #NAME? | #NAME? | #NAME? | #NAME? | #NAME? | #NAME? |
| 29 | 30 | 31 | | | | |
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## November 2023

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| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
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| 26 | 27 | 28 | 29 | 30 | | |
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## December 2023

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| 10 | 11 | 12 | 13 | 14 | 15 | 16 |
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| 17 | 18 | 19 | 20 | 21 | 22 | 23 |
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# A Customizable Roadmap for Program and Fiscal Leaders

## January 2024

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| | 1 | 2 | 3 | 4 | 5 | 6 |
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| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
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| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
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| 28 | 29 | 30 | 31 | | | |
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## A Customizable Roadmap for Program and Fiscal Leaders

## February 2024

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| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| #NAME? | #NAME? | #NAME? | #NAME? | #NAME? | #NAME? | #NAME? |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
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| 25 | 26 | 27 | 28 | 29 | | |
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## March 2024

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## April 2024

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A Customizable Roadmap for Program and Fiscal Leaders

## May 2024

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# A Customizable Roadmap for Program and Fiscal Leaders

| June 2024 | | | | | | |
|---|---|---|---|---|---|---|
| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
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| 9 | 10 | 11 | 12 | 13 | 14 | 15 |
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| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| #NAME? | #NAME? | #NAME? | #NAME? | #NAME? | #NAME? | #NAME? |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| #NAME? | #NAME? | #NAME? | #NAME? | #NAME? | #NAME? | #NAME? |
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A Customizable Roadmap for Program and Fiscal Leaders

## July 2024

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| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| #NAME? | #NAME? | #NAME? | #NAME? | #NAME? | #NAME? | #NAME? |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
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| 28 | 29 | 30 | 31 |  |  |  |
| #NAME? | #NAME? | #NAME? | #NAME? | #NAME? | #NAME? | #NAME? |
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## August 2024

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| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| #NAME? | #NAME? | #NAME? | #NAME? | #NAME? | #NAME? | #NAME? |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
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| 25 | 26 | 27 | 28 | 29 | 30 | 31 |
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# A Customizable Roadmap for Program and Fiscal Leaders

| September 2024 | | | | | | |
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| #NAME? | #NAME? | #NAME? | #NAME? | #NAME? | #NAME? | #NAME? |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| #NAME? | #NAME? | #NAME? | #NAME? | #NAME? | #NAME? | #NAME? |
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