

**COOPERATIVE EXTENSION ANNUAL CALENDAR/DEADLINES  
2021-2022**

SPECIFIC ITEM	PROCEDURE	DEADLINE	FINAL DUE DATE	CONTACT
<b>JULY</b>				
<b>Audits</b>	Upload pdf to DLG within 15 days following receipt from CPA \$100,000- 500,000 = audit every 4 years; greater than \$500,000 = audit every year	To be completed no later than 12 months after the close of the prior fiscal year	7/1/2021	Due to AED for submission to DLG and Copy Appropriate Regional
<b>County MOA Payment Due - Quarter 1</b>	Check To Director of Extension (Laura Stephenson) Accompanied By Corresponding Payment Voucher From Schedule of Disbursements	Payments are due based on the number of agreed upon installments from the Schedule of Disbursements	7/10/2021	Email Copy Of Payment Documentation To AED And Copy Appropriate Regional Support Staff
<b>Monthly KERS Reports</b>	Service Log Report-documents Expenses, Meetings & Activities, and Statistical Contacts <a href="http://ces-manuals.ca.uky.edu/content/reports">http://ces-manuals.ca.uky.edu/content/reports</a> - agent	10th of Each Month	7/15/21 (Year End)	Expenses - Copy to Area Extension Director
<b>Success Stories</b>	KERS - At least five per agent	Quarterly: October 10th, January 10th, April 10th, final two by July 15th	7/15/2021	Notify Area Extension Director when each submitted
<b>Program Indicator Data</b>	KERS - Program Indicator - One combined report is required per county	Data can be entered any time through the year.	7/15/2021	Notify Area Extension Director when submitted
<b>Registration and Board Reporting</b>	Counties shall annually complete this form on the DLG online portal SPGE Form 100 - Per KRS 65A.090	Due no later than 15 days after the start of the fiscal year	7/15/2021	Due to AED for submission to DLG and Copy Appropriate Regional Support Staff
<b>Registration Fee</b>	Paid annually after completion of registration; through the DLG portal Per KRS 65A.090	Due no later than 15 days after the start of the fiscal year	7/15/2021	Due to AED for submission to DLG and Copy Appropriate Regional Support Staff
<b>Budget Estimates</b>	Budget estimates adopted by Board must be posted on DLG SPGE Form 101 (Column 1) Per KRS 65A.080(1) and KRS 65A.020(2)(a)2	Due no later than 15 days after the start of the fiscal year	No Later Than 7/15/2021	Due to AED for submission to DLG and Copy Appropriate Regional Support Staff
<b>Financial Report For Volunteer Groups</b>	KERS		7/15/2021	
<b>SNAP-Ed Report</b>	KERS	10th of Each Month	7/15/2021	
<b>Agent Performance Appraisal Documents</b>	All Agent Self-Evaluations (Success Factors) Submitted		7/31/2021	

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<b>AUGUST</b>				
<b>4-H Online Success</b>			8/15/2021	
<b>Actual Program Support Expenses</b>	Agents and Program Assistants with a program support budget for the previous FY-must complete this form & have it signed by District Board <a href="https://cafebusinesscenter.ca.uky.edu/files/program_support_reporting_instructions.pdf">https://cafebusinesscenter.ca.uky.edu/files/program_support_reporting_instructions.pdf</a>	Instructions for running reports located on Cafe Business Center Site	8/15/2021	Due to AED for submission to DLG and Copy Appropriate Regional Support Staff
<b>Year-End Actuals Signed Form/ Excel Workbook</b>	Using the FY21 Year-End Actuals Workbook provided by EBO enter the year-end actual figures into the worksheet; Treasurer should sign a copy of the worksheet	Completion of this workbook is necessary in order to complete other required reports	8/15/2021	Submit to AED and Copy Appropriate Regional Support Staff
<b>SEPTEMBER</b>				
<b>Year-End Actuals To DLG</b>	Using the Year-End Actuals Workbook that was completed by August 15 enter the figures from the DLG SUMMARY REPORT tab into the DLG SPGE Form 101 (Column 3) via the DLG Portal Per KRS 65A.020(2)	No later than 60 days after the close of the fiscal year	9/1/2021	Due to AED for submission to DLG and Copy Appropriate Regional Support Staff
<b>Financial Statement (Publication Requirement)</b>	Financial statement to be prepared annually (this is the SUMMARY sheet from the previous step). Publish location in local newspaper where financial statement, budget and audit report may be examined. Your PUBLICATION MUST READ: <i>"The (name of the District)'s most recent audit and adopted budget can be viewed anytime on the Department for Local Government's Public Portal website. If you would like to view our most recent financial statement, please visit us at our home office located at (insert your Extension Office address), during our normal office hours of (fill in normal hours)".</i> <a href="http://kydlgweb.ky.gov/">http://kydlgweb.ky.gov/</a> Per KRS 65A.080(2)	DO NOT publish the complete Financial Statement in the newspaper.  DO NOT send to DLG  Due no later than 60 days after the close of the fiscal year	9/1/2021	Send Copy To AED
<b>County Offset Voucher</b>	Using the FY21 Year-End Actuals Workbook Offset Voucher Tab - Have Offset Voucher Signed By Fiscal Contact, EDB Treasurer and Area Extension Director	This due date has been changed to September 1	9/1/2021	Submit to AED and Copy Appropriate Regional Support Staff

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<b>Tax Rates (Established By Counties)</b>	Once you receive the worksheet calculations from Frankfort/UK you will have a district board meeting to set the tax rates for the upcoming year. Submit rates to fiscal court & file with county court clerk.  Please consider the changes that have resulted from SB5. If your county chooses to select a rate which generates MORE revenue than the compensating rate, then you now have 45 days to hold a hearing and submit your paperwork.	TBD	9/15/21 (May vary depending upon county)	Return tax rate form to AED and Copy Appropriate Regional Support Staff
<b>Motor Vehicle/Watercraft Tax Rate Return Sheet</b>	Once rates have been established please return the original to the Department of Revenue. This form is sent directly to your offices each year to be completed. Instructions on how to complete the documents can be found here: <a href="https://cafebusinesscenter.ca.uky.edu/files/motor_vehicle_tax_rate_return_letter_instructions.pdf">https://cafebusinesscenter.ca.uky.edu/files/motor_vehicle_tax_rate_return_letter_instructions.pdf</a>	Original form to Department of Revenue	9/15/21 (After tax rates have been set - May vary depending upon county)	Email copy to AED and Copy Appropriate Regional Support Staff
<b>Property Tax Rate Request Form (62A3000)</b>	Necessary to ensure that you will receive the correct property tax revenue & that they have the correct address to mail the collected revenue to <a href="https://revenue.ky.gov">https://revenue.ky.gov</a> This form is sent directly to your offices each year to be completed. Instructions on how to complete the documents can be found here: <a href="https://cafebusinesscenter.ca.uky.edu/files/62a3000_form_instructions.pdf">https://cafebusinesscenter.ca.uky.edu/files/62a3000_form_instructions.pdf</a>	Original form to Department of Revenue	9/15/21 (After tax rates have been set - May vary depending upon county)	Email copy to AED and Copy Appropriate Regional Support Staff Copy to County Clerk
<b>Final Accounting Sheets &amp; Approval Form</b>	Original Signed Sheet/Check (If applicable) to Tina Ward	TBD	TBD	Copy to AED
<b>SNAP-Ed Reports</b>	Final day to enter number of copies for reimbursement Sept. 16th Last day for assistant to submit travel Sept. 23rd Last day to enter contacts Sept. 30th	Monthly by the 10th	9/30/2021	
<b>OCTOBER</b>				
<b>County MOA Payment Due - Quarter 2</b>	Check To Director of Extension (Laura Stephenson) Accompanied By Corresponding Payment Voucher From Schedule of Disbursements	Payments are due based on the number of agreed upon installments from the Schedule of Disbursements	10/10/2021	Email Copy Of Payment Documentation To AED And Copy Appropriate Regional Support Staff
<b>Intern Applications</b>	Process opens October 1, 2021; completed form to Area Extension Director for Approval		Opens 10/1/21 Closes 12/31/21	Send to AED
<b>Agent Program Meetings</b>	TBD		Second Wednesday of Month	

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<b>NOVEMBER</b>				
<b>County Extension Council</b>	Submits a list of two (2) nominees to the County Judge Executive for each member to be appointed to the Extension District Board		11/1/2021	
<b>Equipment Inventory (State)</b>	Administrative Services Associate will be emailing counties to verify specific University of Kentucky owned inventory	Information to come from CES Administration November 1st	12/1/2021	
<b>Equipment Inventory (County)</b>	All county owned/purchased equipment over the amount of \$500 is to be accounted for at all times. (The county will need to keep a spreadsheet with the following information listed: Item/description, cost, purchased when/where, who is it assigned to/or located in the building, etc.)	Any items added or deleted throughout the year are to be documented. Information to come from CES Administration November 1st.	12/1/2021	
<b>Agent Program Meetings</b>	TBD		Second Wednesday of Month	
<b>Report To The People "Rought Draft"</b>	The PSD office will send the AEDs an additional summary, indicating which counties need to provide more information to complete their Reports to the People by 11/15/2021.  Deadline for the corrected information to be uploaded. A new link will be provided for these changes to be uploaded, after the initial submissions are reviewed.		11/22/2021 Deadline for Corrected Info To Be Uploaded	
<b>DECEMBER</b>				
<b>Equipment Inventory (State)</b>	Administrative Services Associate will be emailing counties to verify specific University of Kentucky owned inventory	Information to come from CES Administration November 1st	12/1/2021	Due to AED To Review & Submit To CES Administration
<b>Equipment Inventory (County)</b>	All county owned/purchased equipment over the amount of \$500 is to be accounted for at all times. (The county will need to keep a spreadsheet with the following information listed: Item/description, cost, purchased when/where, who is it assigned to/or located in the building, etc.)	Any items added or deleted throughout the year are to be documented. Information to come from CES Administration November 1st.	12/1/2021	Due to AED To Review & Submit To CES Administration
<b>Bi-Weekly Performance Appraisal - Self Evaluation</b>	A Self Evaluation must be completed in the Success Factors Performance Appraisal system for all county and state level bi-weekly employees. The Self Evaluation step, must be completed by January 14th.	Self-Evaluations open December 6th	Self-Evaluations Open 12/6/21 (can be submitted any time prior to 1/14)	

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Agent Program Meetings	TBD		Second Wednesday of Month	
State Extension Council Delegates Selected	Keep list current & report any changes/bios of new delegates to Director of Extension Administrative Services Assistant (Shannon Markel)		12/15/2021	Copy to Area Extension Director
Diversity Award	Submit to Café Office of Diversity		Apply By Mid December 12/15/21	
<b>JANUARY</b>				
Bi-Weekly Performance Appraisal - Self Evaluation	Success Factors Performance Appraisal. All county and state level bi-weekly employees complete "Self Evaluation".		1/14/2022	
District Board Meeting	County Judge Executive administers oath of office to incoming board members; and conducts nomination and election of new board chair KRS 164.650 <a href="http://districts.ca.uky.edu/files/oath_of_office_0.pdf">http://districts.ca.uky.edu/files/oath_of_office_0.pdf</a>		No Later Than 1/30/2022	
Review County Insurance Policies	District Board to review insurance policies whether through KACo or other company. Review financial obligations of agents.		TBD	
County MOA Payment Due - Quarter 3	Check To Director of Extension (Laura Stephenson) Accompanied By Corresponding Payment Voucher From Schedule of Disbursements	Payments are due based on the number of agreed upon installments from the Schedule of Disbursements	1/10/2022	Email Copy Of Payment Documentation To AED And Copy Appropriate Regional Support Staff
Agent Program Meetings	TBD		Second Wednesday of Month	
Update Board Members & Agent Contact Information On DLG Website	Officers must be elected by Extension District Board by January 30th	Updates must be submitted to DLG by Area Extension Directors	1/31/2022	Email to AED And Copy Appropriate Regional Support Staff
County District Board Treasurers Bonded	Within 10 days of his/her election - Treasurers must be bonded at 125% of the largest amount in hand at any one time.			
Report To The People "Final Draft"	All Reports are to be finalized and uploaded to the Report to the People website (and made available for download in PDF format).		1/31/2022	
Career Ladder Applications	Completed form to Area Extension Director <a href="https://ces-personnel.ca.uky.edu/career-ladder">https://ces-personnel.ca.uky.edu/career-ladder</a>		No Later Than Close Of Business 1/31/2022	

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<b>FEBRUARY</b>				
<b>District Board Members Appointed</b>	By law the County Judge Executive shall appoint required board members per KRS 164.635. Marketing Director (Hayley Pierce) to send out Qualtrics survey to collect information from the counties.	Deadline changed to February	By 2/1/2022	
<b>County Extension Council Officers</b>	List of officers including names and addresses - Marketing Director (Hayley Pierce) to send out Qualtrics survey to collect information from the counties.	Deadline changed to February	2/1/2022	
<b>Bi-Weekly Performance Appraisal - In-Person Meetings</b>	All in-person meetings with Supervisors and staff due no later than February 18th - All Performance Evaluations must be completed in Success Factors by March 1st.		2/18/2022	
<b>Agent Program Meetings</b>	TBD		Second Wednesday of Month	
<b>MARCH</b>				
<b>State Extension Council Meeting</b>	To be held March 1st & 2nd, 2022			
<b>Agent Program Meetings</b>	TBD		Second Wednesday of Month	
<b>Cooperative Extension Service Budget Plan "Rough Draft"</b>	Submitted to Area Extension Director/Regional Directors/Support Staff and Extension Business Operations For Review Before Signatures By Extension District Board		TBD	
<b>APRIL</b>				
<b>Space Inventory</b>	Send out to counties to reflect any changes in space - additions, additional workspaces, etc.		4/1/2022	Due to AED To Review & Submit To CES Administration
<b>Status of County Offices</b>	Update form for any new addresses, new buildings/additions, etc.		4/1/2022	Due to AED To Review & Submit To CES Administration
<b>Agent Program Meetings</b>	TBD		Second Wednesday of Month	
<b>County MOA Payment Due - Quarter 4</b>	Check To Director of Extension (Laura Stephenson) Accompanied By Corresponding Payment Voucher From Schedule of Disbursements	Payments are due based on the number of agreed upon installments from the Schedule of Disbursements	4/10/2022	Email Copy Of Payment Documentation To AED And Copy Appropriate Regional Support Staff

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<b>District Board Budget</b>	Communicate with Extension District Boards and County Budget Executive that UK Budget will not be finalized until June (which includes any merit salary adjustments). Counties should submit a DRAFT budget summary to County Budget Executive and with budget finalized and forwarded in June. Print summary sheet from Excel Budget Template, sign and submit figures to the SPGE Form 101/Column 1	Submit	4/15/2022	
<b>MAY</b>				
<b>J.Lester Miller Graduate Fellowship Applications</b>	Completed application and supporting documents to Director of Extension		5/1/2022	
<b>Gifts, Grants &amp; Contracts (Financial Report Form)</b>	Email with document to complete will be sent by Extension Business Operations Administrative Staff Assistant.		5/1/2022	Email to AED And Copy Appropriate Regional Support Staff
<b>Memorandum of Agreement</b>	3 Signed Original & Electronic File to Area Extension Director (Originals to be kept in 1. County Office, 2. Regional Office, 3. CES Administration)		5/1/2022	
<b>Schedule of Disbursements</b>	3 Signed Original & Electronic File to Area Extension Director (Originals to be kept in 1. County Office, 2. Regional Office, 3. CES Administration)		5/1/2022	
<b>Program Support Budgets</b>	Signed Originals to Area Extension Director		5/1/2022	
<b>Plan of Work "Rough Draft"</b>	Complete county rough draft due to Area Extension Director for Review		5/1/2022	
<b>Uniform Financial Information Report - UFIR (Form F-65 (KY-5))</b>	Submit to DLG for the previous fiscal year. (Can be complete earlier at close of fiscal year when books are completed, finalized and closed) KRS 65.905		Due No Later Than 5/1/2022	Due to AED for submission to DLG and Copy Appropriate Regional Support Staff
<b>Randall Barnett Award</b>	Submit to Area Extension Director - <a href="http://psd.ca.uky.edu/randallbarnett">http://psd.ca.uky.edu/randallbarnett</a>		Apply By No Later Than 5/15/2022	
<b>Agent Program Meetings</b>	TBD		Second Wednesday of Month	
<b>Affirmative Action Plan "Rough Draft"</b>	Email complete draft to Area Extension Director for review		5/15/2022	

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<b>JUNE</b>				
<b>Performance Appraisal Rating Option Sheet</b>	Signed original to AED - Only required in non-rated option year		6/1/2022	
<b>County Coordinator Lists</b>	Signed form to AED (AED to forward changes in I-9 signers to Stacy Miller) <a href="https://districts.ca.uky.edu/files/blank_coordinator_list.pdf">https://districts.ca.uky.edu/files/blank_coordinator_list.pdf</a>		6/1/2022	
<b>Fiscal Year SPGE Budgets</b>	Must be passed - Due to AED by no later than 5/15/21 - Must be submitted to DLG by 6/30/21		6/30/2022	Due to AED for submission to DLG and Copy Appropriate Regional Support Staff
<b>Plan of Work "Final"</b>	Must be submitted in KERS		6/30/2022	
<b>Affirmative Action Report</b>	Submit in KERS for previous fiscal year (2 Questions/Chart)		6/30/2022	
<b>Affirmative Action Plan "Final"</b>	Submitted in KERS		6/30/2022	
<b>American Disabilities Act Assessment Plan</b>	Update as needed; if updating, submit ADA plan along with Affirmative Action Plan to Stacy Miller in Human Resources		6/30/2022	Copy to Area Extension Director
<b>Budget Amendments</b>	Submit on DLG; SPGE Form 101/Column 2 (If Needed) KRS 65A.020(2)	Due no later than the last day of the fiscal year	6/30/2022	Due to AED for submission to DLG and Copy Appropriate Regional Support Staff
<b>In-Service Trainings</b>	All new signs ups should be submitted in KERS; Be sure to review the catalog monthly		6/30/2022	
<b>ANR, 4H, FCS Program Contact Assignments</b>	Original to Area Extension Director (AED then Emails to Appropriate Assistant Director)		Before 6/30/2022	Original due to AED who will submit to appropriate program Assistant Director.
<b>District Board Meeting</b>	To review past years budget and rectify expenditure accounts		Before 6/30/2022	
<b>Bi-Weekly Mid-Year Review</b>	(If Needed)		Before 6/30/2022	Copy to Area Extension Director