Enter Once, Use Many Times

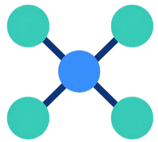
Using Excel, Copilot, and Connected Tools to Reduce Duplicate Work in Federal Programs

Excel Workbooks

One master workbook connects school budgets, applications, and amendments automatically.

01

AI Tools



AI-powered drafting, formula help, and narrative refinement for federal programs work.

02

Connected Tools

NotebookLM and integrated workflows that reduce duplicate entry and manual effort.

03

Presenter

Keirah Bandstra
Federal Programs Specialist

04

Which federal programs process consumes the most time in your district?

Mentimeter Link

Let's Talk About It

Choose one process from the word cloud and discuss:

Time Consuming

What makes it time consuming?

01

Frustrations

What creates the most frustration?

03

Duplicate Entry

Where does duplicate entry occur?

02

Possible Solutions

What would make it easier?

04

We'll share a few ideas with the whole group in 5 minutes.

Why I Started Building These Tools

I wanted to spend less time:	And more time: Supprting Schools
Re-Entering Information	
Combining Spreadsheets	Analyzing Needs
Chasing Missing Information	Planning Services
Manual Amendments	Improving Processes

Moving Information vs Using Information

Our expertise should be spent on decisions, not duplicate data entry.

01

Moving Information

- Re-entering data
- Combining spreadsheets
- Updating forms
- Fixing Mistakes

Using Information

- Supporting schools
- Making Decisions
- Planning services
- Improving outcomes

02

Before Workflow

Same information. Fewer touch points.

BEFORE: School Budget

Data entered at school level, then manually re-entered into the district spreadsheet.

BEFORE: District Master Sheet

Separate data entry

BEFORE: Hand Keys & Corrections

Manual translation and corrections.

BEFORE: DOE Application & Amendments

Manual entry, copy and paste.

BEFORE: Repeat

My Evolution

How my tools grew from a basic spreadsheet to AI-powered workflows

Version 1: Basic Spreadsheet

Simple data entry for school budgets

Version 2: Formulas and Automation

Automated calculations & improved consistency across sheets.

Version 3: Conditional Formatting

Color-coded alerts flagged missing fields, budget warnings, and errors before submission.

Versions 4 & 5: Connected Workbooks + Copilot & NotebookLM

One master workbook feeds all outputs. Copilot and NotebookLM accelerate drafting, analysis, and decision-making.

School Budget Templates

Instructions

Dropdown Menus

Required Fields

Allocation Tracking

Conditional Formatting

Using color-coded highlights to catch errors before submission.

Missing Descriptions

Yellow highlights flag budget line items with no description entered.

01

Budget Warnings

Red highlights alert when spending exceeds allocated budget amounts.

02

Error Notifications

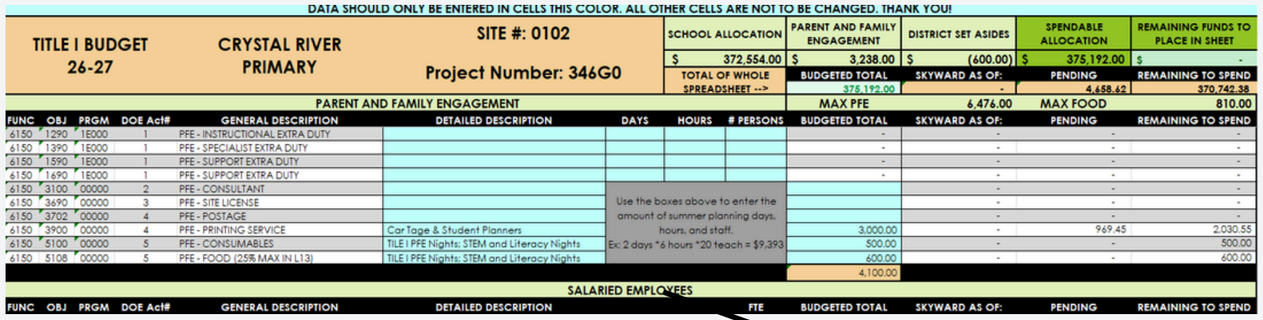
Green confirms all fields are complete and values are within range.

04

One Source of Truth

Multiple school budget sheets feed into one master workbook — driving applications and amendments.

School Budget Sheets



DATA SHOULD ONLY BE ENTERED IN CELLS THIS COLOR. ALL OTHER CELLS ARE NOT TO BE CHANGED. THANK YOU!

TITLE I BUDGET 26-27	CRYSTAL RIVER PRIMARY	SITE #: 0102 Project Number: 346G0	SCHOOL ALLOCATION	PARENT AND FAMILY ENGAGEMENT	DISTRICT SET ASIDES	SPENDABLE ALLOCATION	REMAINING FUNDS TO PLACE IN SHEET
			$ 372,554.00	$ 3,238.00	$ (600.00)	$ 375,192.00	$ -
			TOTAL OF WHOLE SPREADSHEET -->	BUDGETED TOTAL	SKYWARD AS OF:	PENDING	REMAINING TO SPEND
				375,192.00	-	4,458.62	370,742.38

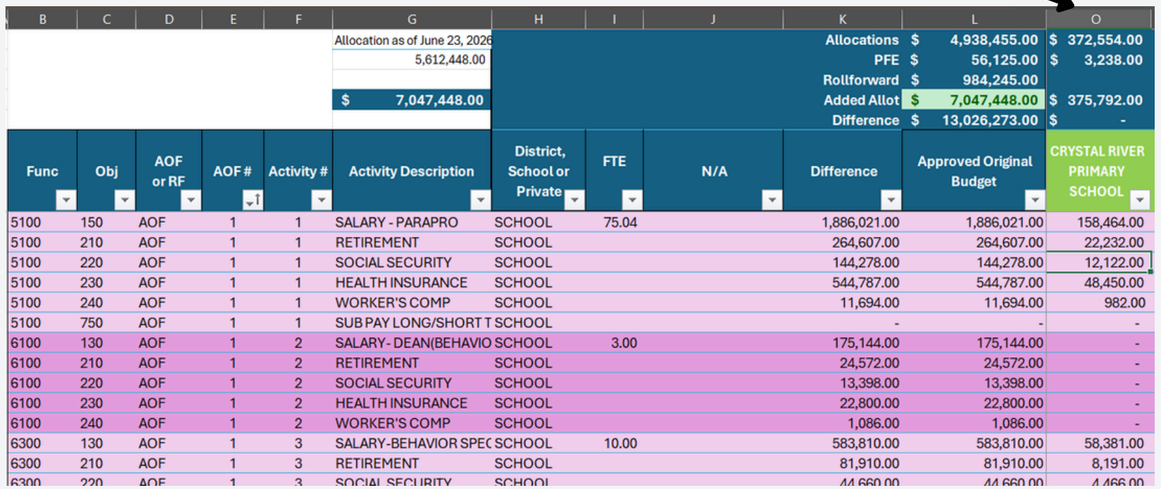
PARENT AND FAMILY ENGAGEMENT — MAX PFE 6,476.00 — MAX FOOD 810.00

FUNC	OBJ	PRGM	DOE Act#	GENERAL DESCRIPTION	DETAILED DESCRIPTION	DAYS	HOURS	# PERSONS	BUDGETED TOTAL	SKYWARD AS OF:	PENDING	REMAINING TO SPEND
6150	1290	1E000	1	PFE - INSTRUCTIONAL EXTRA DUTY					-	-	-	-
6150	1390	1E000	1	PFE - SPECIALIST EXTRA DUTY					-	-	-	-
6150	1590	1E000	1	PFE - SUPPORT EXTRA DUTY					-	-	-	-
6150	1690	1E000	1	PFE - SUPPORT EXTRA DUTY					-	-	-	-
6150	3100	00000	2	PFE - CONSULTANT						-	-	-
6150	3690	00000	3	PFE - SITE LICENSE		Use the boxes above to enter the amount of summer planning days, hours, and staff.				-	-	-
6150	3702	00000	4	PFE - POSTAGE						-	-	-
6150	3900	00000	4	PFE - PRINTING SERVICE	Car Tage & Student Planners				3,000.00	-	969.45	2,030.55
6150	5100	00000	5	PFE - CONSUMABLES	TILE I PFE Nights: STEM and Literacy Nights	Ex: 2 days *6 hours *20 teach = $9,393			500.00	-	-	500.00
6150	5108	00000	5	PFE - FOOD (25% MAX IN L13)	TILE I PFE Nights: STEM and Literacy Nights				600.00	-	-	600.00
									4,100.00			

SALARIED EMPLOYEES

FUNC	OBJ	PRGM	DOE Act#	GENERAL DESCRIPTION	DETAILED DESCRIPTION	FTE	BUDGETED TOTAL	SKYWARD AS OF:	PENDING	REMAINING TO SPEND

Master Workbook

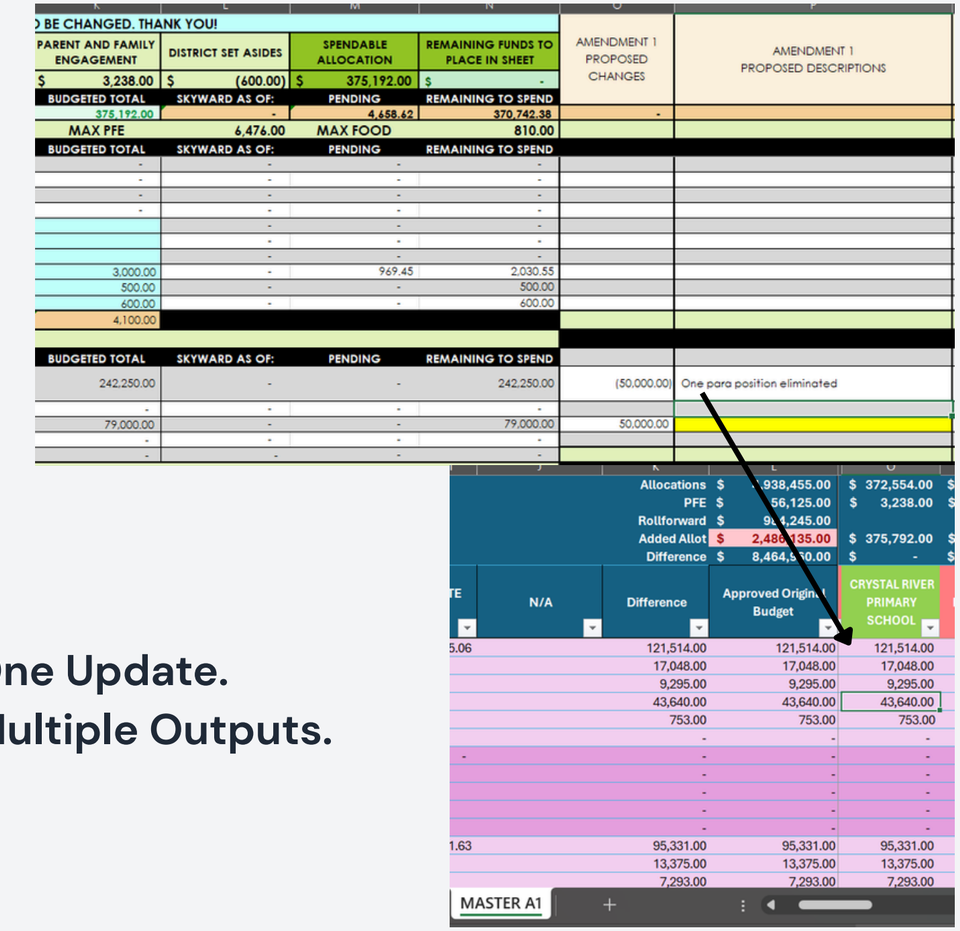


Allocation as of June 23, 2026: 5,612,448.00 + $ 7,047,448.00

Allocations	$ 4,938,455.00	$ 372,554.00
PFE	$ 56,125.00	$ 3,238.00
Rollforward	$ 984,245.00	
Added Allot	$ 7,047,448.00	$ 375,792.00
Difference	$ 13,026,273.00	$ -

Func	Obj	AOF or RF	AOF #	Activity #	Activity Description	District, School or Private	FTE	N/A	Difference	Approved Original Budget	CRYSTAL RIVER PRIMARY SCHOOL
5100	150	AOF	1	1	SALARY - PARAPRO	SCHOOL	75.04		1,886,021.00	1,886,021.00	158,464.00
5100	210	AOF	1	1	RETIREMENT	SCHOOL			264,607.00	264,607.00	22,232.00
5100	220	AOF	1	1	SOCIAL SECURITY	SCHOOL			144,278.00	144,278.00	12,122.00
5100	230	AOF	1	1	HEALTH INSURANCE	SCHOOL			544,787.00	544,787.00	48,450.00
5100	240	AOF	1	1	WORKER'S COMP	SCHOOL			11,694.00	11,694.00	982.00
5100	750	AOF	1	1	SUB PAY LONG/SHORT T	SCHOOL			-	-	-
6100	130	AOF	1	2	SALARY- DEAN(BEHAVIO	SCHOOL	3.00		175,144.00	175,144.00	-
6100	210	AOF	1	2	RETIREMENT	SCHOOL			24,572.00	24,572.00	-
6100	220	AOF	1	2	SOCIAL SECURITY	SCHOOL			13,398.00	13,398.00	-
6100	230	AOF	1	2	HEALTH INSURANCE	SCHOOL			22,800.00	22,800.00	-
6100	240	AOF	1	2	WORKER'S COMP	SCHOOL			1,086.00	1,086.00	-
6300	130	AOF	1	3	SALARY-BEHAVIOR SPEC	SCHOOL	10.00		583,810.00	583,810.00	58,381.00
6300	210	AOF	1	3	RETIREMENT	SCHOOL			81,910.00	81,910.00	8,191.00
6300	220	AOF	1	3	SOCIAL SECURITY	SCHOOL			44,660.00	44,660.00	4,466.00

Applications & Amendments



) BE CHANGED. THANK YOU!

PARENT AND FAMILY ENGAGEMENT	DISTRICT SET ASIDES	SPENDABLE ALLOCATION	REMAINING FUNDS TO PLACE IN SHEET	AMENDMENT 1 PROPOSED CHANGES	AMENDMENT 1 PROPOSED DESCRIPTIONS
$ 3,238.00	$ (600.00)	$ 375,192.00	$ -		
BUDGETED TOTAL	SKYWARD AS OF:	PENDING	REMAINING TO SPEND		
375,192.00	-	4,458.62	370,742.38	-	
MAX PFE	6,476.00	MAX FOOD	810.00		

BUDGETED TOTAL	SKYWARD AS OF:	PENDING	REMAINING TO SPEND
-	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-
	-	-	-
	-	-	-
	-	-	-
3,000.00	-	969.45	2,030.55
500.00	-	-	500.00
600.00	-	-	600.00
4,100.00			

BUDGETED TOTAL	SKYWARD AS OF:	PENDING	REMAINING TO SPEND		
242,250.00	-	-	242,250.00	(50,000.00)	One para position eliminated
-	-	-	-		
79,000.00	-	-	79,000.00	50,000.00	
-	-	-	-		
-	-	-	-		

Allocations	$ 4,938,455.00	$ 372,554.00
PFE	$ 56,125.00	$ 3,238.00
Rollforward	$ 984,245.00	
Added Allot	$ 2,488,135.00	$ 375,792.00
Difference	$ 8,464,550.00	$ -

N/A	Difference	Approved Original Budget	CRYSTAL RIVER PRIMARY SCHOOL
5.06	121,514.00	121,514.00	121,514.00
	17,048.00	17,048.00	17,048.00
	9,295.00	9,295.00	9,295.00
	43,640.00	43,640.00	43,640.00
	753.00	753.00	753.00
	-	-	-
-	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-
1.63	95,331.00	95,331.00	95,331.00
	13,375.00	13,375.00	13,375.00
	7,293.00	7,293.00	7,293.00

MASTER A1

One Update.
Multiple Outputs.

How Are You Collecting School Budgets Today?

Share your current process. Let's learn from each other.

Current Collection Method

How do schools submit budgets to your district? Email, spreadsheet, paper form, or shared drive?

Pain Points & Challenges

Where does the process break down? What causes delays, errors, or duplicate work?

What Would Help Most?

If you could change one thing about your budget collection process, what would it be?

Amendment Tracking

A streamlined process flow: from school-level amendments to state submission.

School Amendment

School submits budget amendment request to the district federal programs office.

Master Amendment

District consolidates school amendments into the master amendment workbook.

FDOE Amendment

Finalized amendment submitted to the Florida Department of Education for approval.

Submission Complete

Amendment approved, records updated, and all stakeholders notified of changes.

Where I'm Going Next

Future ideas I’m intent on exploring.

Smart Amendment Alerts

Automated notifications when amendment thresholds are reached or approvals are needed.

01

Validation Checks

Built-in rules that flag errors and missing data before submission to FDOE.

03

Automated Calculations

Formulas and logic that auto-calculate allocations, carryover, and budget balances.

02

AI-Supported Workflows

Copilot and NotebookLM integrated to draft, summarize, and guide compliance steps.

04

Lessons Learned

The most helpful tool isn’t always the most sophisticated. It’s the one people will actually use.

What Worked:

- Keep Forms Simple for Schools
- Build Around Real Problems
- Prevent Errors Before Submission
- Create One Source of Truth

What Didn’t Work

- Assuming Users Read Directions
- Too Many Manual Steps
- Overcomplicated Forms
- Building Solutions Before Understanding the Process

Using Copilot in Federal Programs

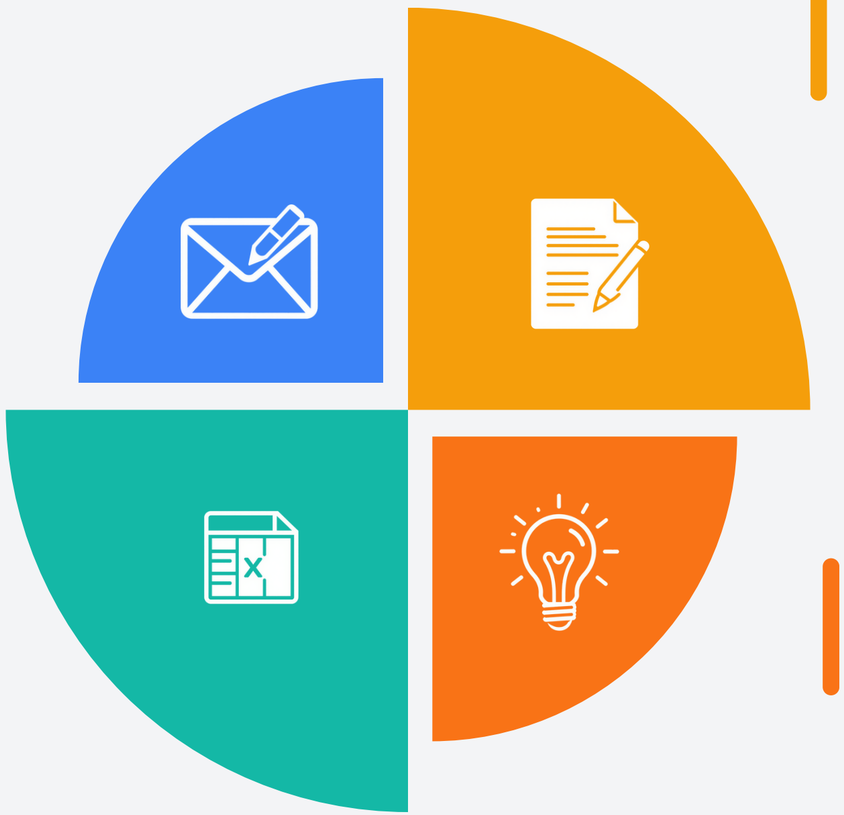
Copilot doesn’t replace my work. It helps me complete routine tasks more efficently.

Drafting Emails

Quickly draft professional communications to schools, staff, and stakeholders with AI-assisted writing.

Refining Narratives

Strengthen grant narratives, program descriptions, and compliance documents with AI-powered editing.



Formula Assistance

Get help building and troubleshooting Excel formulas to automate calculations and reduce manual entry.

Brainstorming Solutions

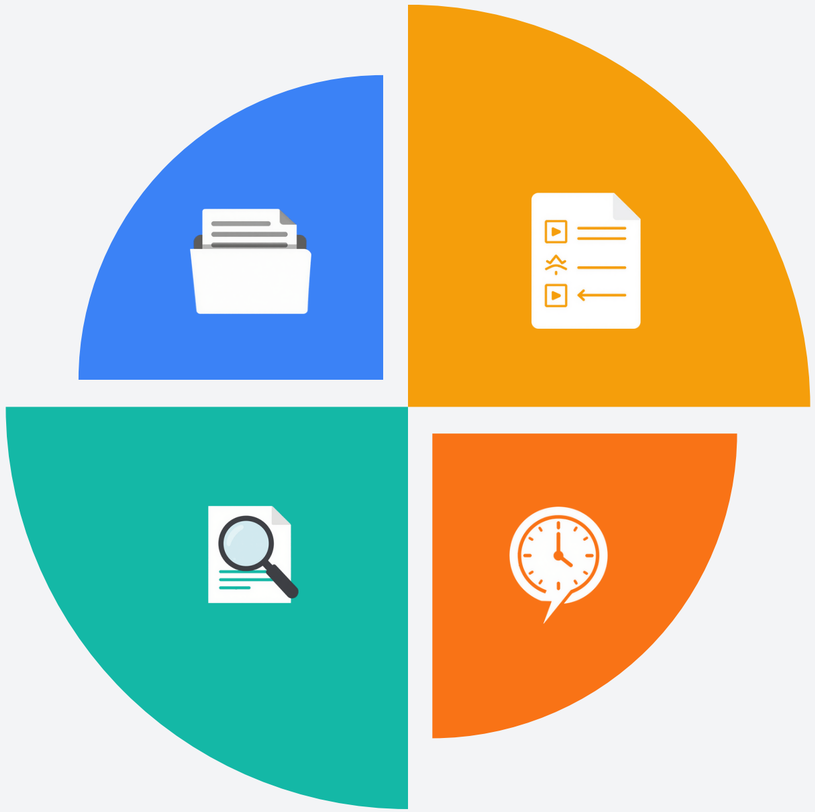
Use Copilot to explore new approaches, summarize large documents, and generate actionable ideas.

Using NotebookLM to Work Smarter

Upload your documents and let NotebookLM become your knowledge assistant.

Copilot Helps Me Create:

- Improve Narratives
- Draft Emails & Documents
- Brainstorm Solutions & Create Formulas
- Summarize Information



Notebook LM Helps Me Retrieve:

- Grant Guidance
- Monitoring Documents
- Technical Assistance
- Policies and Procedures

AI Is a Tool. Expertise Is the Value.

The most helpful tool isn't always the most sophisticated. It's the one people will actually use.

AI Can

- Organize Information
- Summarize Documents
- Generate Drafts and Suggest Ideas
- Save Time

AI Cannot

- Understand Local Context
- Make Compliance Decisions
- Exercise Professional Judgment
- Replace Your Expertise and Build Relationships

If You Could Automate One Federal Programs Task Tomorrow...

Mentimeter Link

Examples

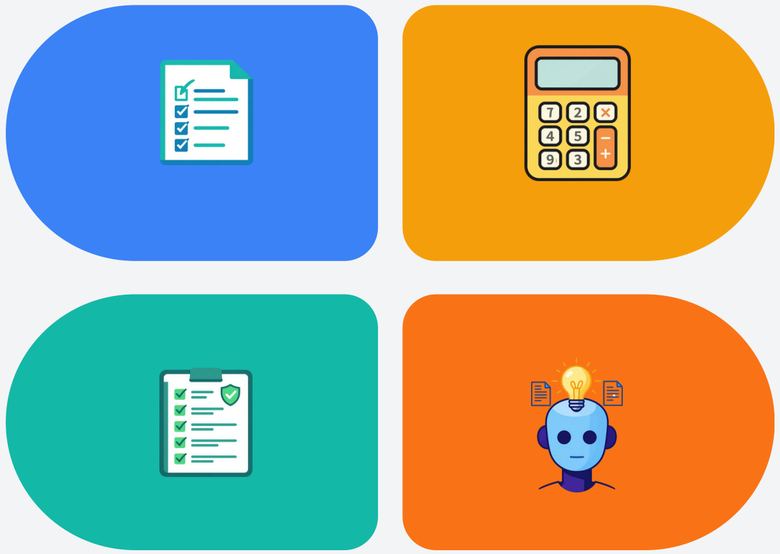
- Amendments
- School Budgets
- DOE 101
- Private Schools
- Inventory
- Applications
- Data Collection

What Should We Build Next?

Let's Think Beyond Today's Session

What repetitive task would you most like to eliminate?

What have you built that others might benefit from?



What tool do you wish existed?

What could we create together?

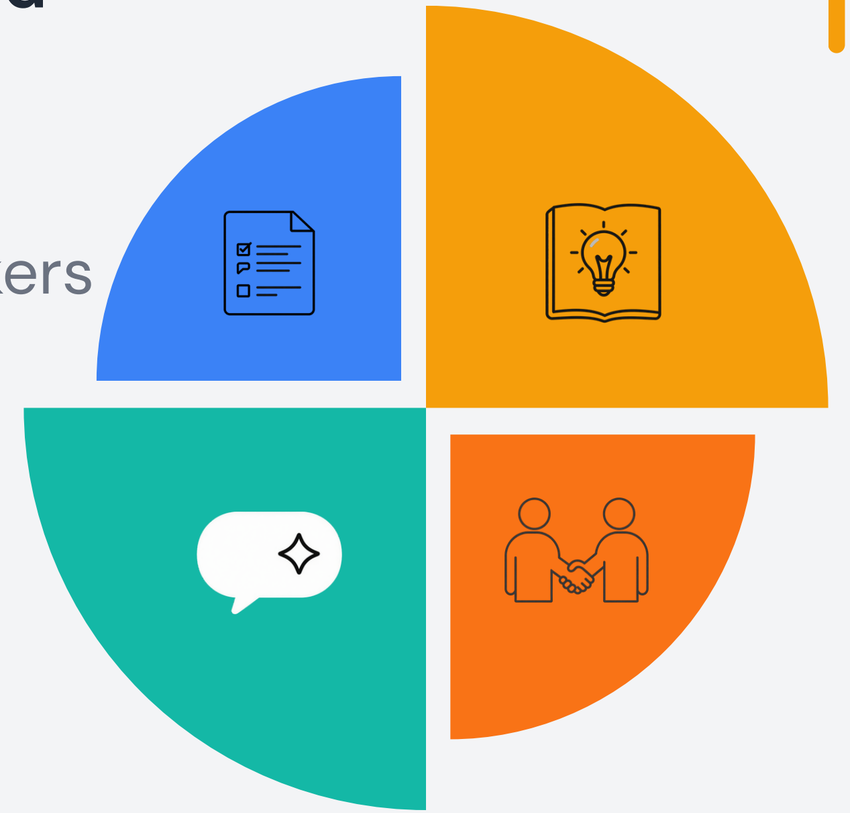
Let's stop solving the same problems 67 different ways.

Building a Community of Practice

We can learn faster together than we can separately.

Imagine If We Shared

- Templates
- Budget tools
- Amendment trackers
- Copilot prompts
- NotebookLM examples
- Lessons learned
- Process improvements



What Could We Gain?

✓ Save time
✓ Reduce duplication
✓ Improve accuracy
✓ Learn from one another
✓ Improve support for schools

Join the Conversation.

Enter Once. Use Many Times.

Scan the QR code to:

- Request templates and resources
- Share tools you've created
- Join future collaboration efforts
- Stay connected with colleagues across Florida
- Explore AI and automation ideas for Federal Programs

The goal isn't better spreadsheets. The goal is better processes.

We Don't Have to Work the Way We've Always Worked

Enter Once, Use Many Times

Use Technology Intentionally

Reduce Duplicate Work

Create One Source of Truth

Keep Learning & Collaborating

Share What Works

Thank You, Keirah Bandstra
Federal Programs Specialist
bandstrak@citrusschools.org
352-726-1931 ext 2242