

Developing and Maintaining an Office Operational Calendar

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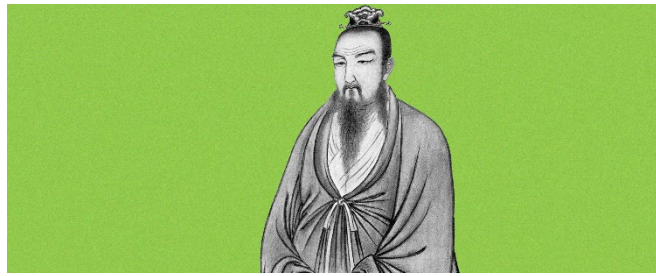


Presentation Topics

The following questions will be answered:

- ▶ What is an operational calendar?
- ▶ Why should your office create one?
- ▶ How will your office use the calendar?
- ▶ What items should you include on the calendar?
- ▶ What format should you use?
- ▶ How will your office maintain the calendar?



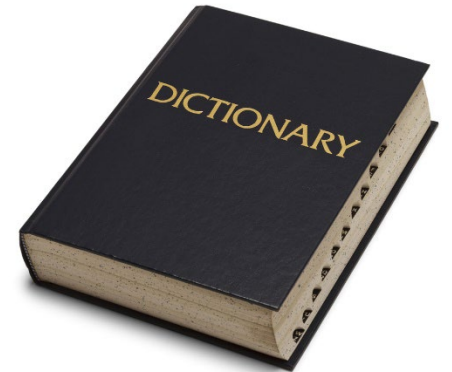


Confucius said:

“A man who
does not plan
long ahead
will find trouble
at his door.”



Definition of an operational calendar



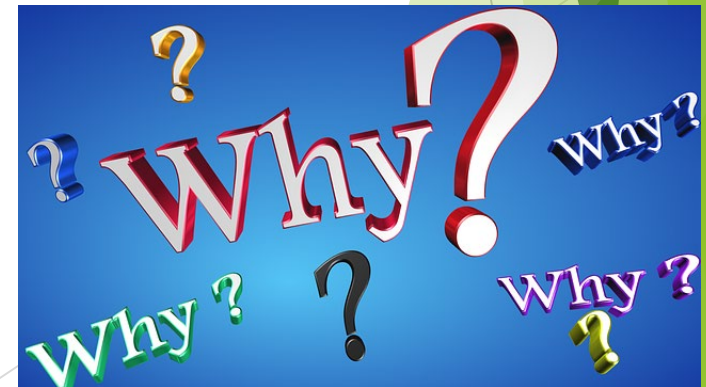
From the Merriam-Webster online dictionary:

Operational - ready for use: able to be used; ready for or in condition to undertake a desired function

Calendar - a list or schedule of events or activities that occur at different times throughout the year; an orderly list

Why create an operational calendar?

- ▶ Compile all relevant events, meetings, activities, deadlines, timelines required to meet deadlines, reports, time sensitive tasks, etc. in one place
- ▶ Document to those outside our office of the full scope of your responsibilities
- ▶ Reduce/eliminate the frequency of missing key deadlines
- ▶ Encourage accountability among staff
- ▶ What else?



How will it be used?

- ▶ Size of office
- ▶ Will it be for all staff or just management?
- ▶ Will there be separate calendars for different areas/departments of the office? If so, will there still be a master calendar?
- ▶ Will there be separate calendars for the types of items/activities included (institutional, state, federal, etc.)? If so, will there still be a master calendar?
- ▶ What else?



What to include?

- ▶ Start with any prior calendars that have already been created
- ▶ Read prior e-mails from respective time periods
- ▶ Solicit staff input via e-mail
- ▶ Discuss at staff meetings
- ▶ Review information already available on your school's website or in printed publications
- ▶ NASFAA Today's News
- ▶ Review information from state, regional, and national association
- ▶ US Department of Education - federal registers and notices
- ▶ What else?

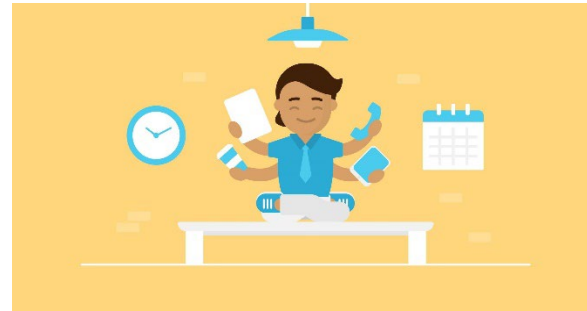
Institutional Information

- ▶ Academic calendar dates
 - ▶ first day of classes
 - ▶ last day to drop
 - ▶ last day to withdraw
 - ▶ last day of classes
- ▶ College-wide events
- ▶ Admissions Open Houses
- ▶ Registration for classes
- ▶ Holidays and class breaks
- ▶ Billing due dates and other important Business Office dates
- ▶ What else?



Administrative Tasks

- ▶ Staff performance evaluations
- ▶ Other HR tasks such as leave requests, timesheets, etc.
- ▶ Management report deadlines
- ▶ Office budgets
- ▶ System setups
- ▶ Regular external meetings
- ▶ Auditors visits
- ▶ Annual training events (inside and outside aid office)
- ▶ Cost of Attendance construction/updates
- ▶ What else?



Communications

- ▶ Annual financial aid publications
- ▶ Financial aid events such as FAFSA Day and High School nights
- ▶ Annual college publications
- ▶ Web-site updates
- ▶ Consumer information
- ▶ FAFSA filing reminders
- ▶ Financial Aid Offer supplements
- ▶ Prospective student information
- ▶ What else?



Reporting



- ▶ FISAP deadlines (initial and corrections)
- ▶ Gainful employment reporting
- ▶ Return to Title IV (R2T4) calculations and refunds/returns
- ▶ NCHED, IPEDS, Child Care, Scholarships, Finish Line Grant, and other reporting
- ▶ Monthly and annual program-specific reporting/reconciliation
- ▶ Net Price Calculator updates
- ▶ What else?

Awarding/Processing Tasks

- ▶ Processing FAFSAs
- ▶ Submitting corrections to FPS
- ▶ Transfer monitoring/MRRs
- ▶ Awarding/packaging aid
- ▶ Processing Special/Unusual Circumstances appeals
- ▶ Satisfactory Academic Progress (SAP) review dates, notices, appeals
- ▶ Summer awarding
- ▶ Scholarship renewal reviews
- ▶ What else?

Other Key Areas

- ▶ Program specific dates/timelines/deadlines
- ▶ Staff birthdays
- ▶ Annual surveys
- ▶ Conferences
- ▶ NCAA Reporting
- ▶ Office/staff retreat
- ▶ Outreach events
- ▶ What else?





Calendar Format

- ▶ Will it be available in paper format and stored on the office network drive?
- ▶ Will it be an electronic version with shared update access?
- ▶ Will it be an electronic version with limited update access?
- ▶ Will it be organized by functional areas, key positions, specific people or some other method?
- ▶ How will you know when the calendar has been updated?

Maintaining the Calendar

- ▶ Assign to one or more individuals; if more than one, how will changes be coordinated?
- ▶ Review periodically at staff meetings - documenting what has recently occurred and looking forward to upcoming events/deadlines
- ▶ Continue to monitor e-mails for new items to add
- ▶ Provide management oversight
- ▶ Should other departments have view access to the calendar?
- ▶ What else?

“Finish each day and be done with it. You have done what you could. Some blunders and absurdities no doubt crept in, forget them as soon as you can. Tomorrow is a new day, begin it well and serenely and with too high a spirit to be encumbered with your old nonsense.”

-- Ralph Waldo Emerson

