

Developing & Maintaining an Office Operational Calendar

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Presentation Topics

- 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?

What is an Operational Calendar?

- 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

Reasons for Creating Operational Calendar

- Compile relevant data
- Provides information
- Encourage Accountability
- What else?

What to Consider?

- Size of office
- Who will it be for?
- Will there be separate calendars?
- What else?

Items needed to begin creating calendar:

- Prior Calendars
- Prior Emails
- Ask staff
- Discuss at staff meetings

Key Areas to Include: Institutional Information

- Academic calendar dates
- College-wide events
- Admissions Information
- Registrar Information
- Holidays & Class Breaks
- Billing Due Dates
- What else?

Key Areas to Include: Administrative Information

- Performance evaluations
- Report deadlines
- Office Budgets
- System setups
- Regular external meetings
- Auditors visits
- Annual training events
- What else?

Key Areas to Include: Federal/State Reporting

- FISAP deadlines
- Gainful employment reporting
- Return of Title IV (R2T4)
- State Program Reporting
- Monthly & Annual reconciliation
- What else?

Key Areas to Include: Communications

- Financial Aid publications
- Annual college publications
- Web-site updates
- Consumer Information
- FASFA filing reminders
- Award letters
- Prospective student
- What else?

Key Areas to Include: Awarding/Processing Task

- FAFSA's Processing
- Corrections to CPS
- Professional Judgment Appeals
- SAP
- Summer Awarding
- Renewal review of Scholarships
- What else?

Key Areas to Include: Other

- Staff
- Surveys
- Conferences
- Staff retreat

Maintaining the Calendar

- Assign to?
- Review when?
- What else?

Final Thoughts

Finish each day and be done with it. You have done what you could.

Tomorrow is a new day, begin it well!

Questions/Comments

NCASFAA would like to thank our Professional Affiliates!



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