

Develop an Operational Calendar to Improve Efficiency

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The operation of a modern financial aid office requires the financial aid administrator to track and monitor a large number of tasks, activities and processes. The larger the aid office, the more difficult this is to do. How do you know if everyone did what they were supposed to do?

A tool that I found useful was an operational calendar. I developed it using Excel and it included the “Five W’s” Who, What, When, Where, and Why.

Benefits

The benefits of using an operational calendar are numerous. It improves time management as staff knows what they need to do and when to do it. The calendar also assists with business process analysis and task coordination in that you can visually see if the sequence and dates make sense relative to other actions being taken by the office.

Staff participation in the process encourages ownership and acceptance. It also provides the staff a shared view of the near future.

Creating the Calendar

The first step in the development of the calendar is to create a listing of all the events which will occur during the year using a format similar to the one above. Since these events do not require any action, enter NA for the “Completed?” date.

The next step is to post the calendar to a shared drive or office intranet page and then to ask the staff to add all of the tasks and activities that they are responsible for.

The third step is to schedule a monthly “Calendar Review” meeting. Prior to this meeting, send a reminder email to the staff asking them to review the calendar and to enter the “Completed?” date for all of the items for which they are responsible.

Example:

When	What	Who	Completed?	Where/Why
Aug 24	No vacations for this week	All	NA	First week of classes
Aug 24	Enrolled less than ½ time email	John	Aug 25	Encourage to take more hours so that can get aid
Aug 25	Check for receipt of State grant funds	Mary	Aug 26	Need funds for Aug 28 disbursement
Aug 27	Check for receipt of Fed Grant funds	Mary	Aug 28	Need funds for Aug 28 disbursement
Aug 28	Drop/add ends at 5:00	NA	NA	Students cannot change class schedules
Aug 28	Book auth expire at 5:00. Run program BS 003	Bookstore, Mary	Aug 28	Expenses need to be posted before aid is disbursed to student acct
Aug 29	Run program FA 235 at 12:01 am	John	Aug 29	Disburse aid to student account
Aug 31	Run program FA 120	John		Give report to Mary so she can see how much aid was disbursed
Aug 31	Confirm checks were mailed	Mary		So staff can answer student queries
Sep 1	Begin reviewing daily drop reports for R2T4	Ann	Ongoing	R2T4 reviews were started on Sep 1

Review the Calendar Monthly

Three activities are to be completed at each calendar review meeting. The first activity is to review all of the tasks for the past month to insure that they were all completed. If any task is not completed, then a note as to why and the projected completion date should be entered into the When/Why column. At this time, you should also critique the activities to determine whether or not any changes need to be made for next year.

The next activity is to review the entries for the current month. Is there any task missing from the list? Are there any dates which need to be changed? Do any of the tasks need to be reassigned to someone else?

The third activity is to review the tasks and events for the upcoming month. This review is similar to the current month review. By looking ahead, everyone is aware of the challenges ahead and many unpleasant surprises can be eliminated.

Practice Makes Perfect

The first few times that you conduct the calendar review meetings, you may find that it will take several hours to conduct the review. However, over time, the meetings will become progressively shorter. After several years of doing this, we were able to complete the monthly calendar review within 15 to 30 minutes.

You may object that you are too busy to do this. I would counter that if you are too busy to do it, then it is critical that you take the time to do it. Remember the old adage: *If you don't take time to sharpen the saw, then it will take twice as long to fell the tree.*