



Chaos is Not a Strategy: How an Operational Calendar Saves Lives

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Let's Talk About the Chaos



OUR SHOPS
DESCRIBED



CONSIDERATIONS

The Problem: Chaos Feels Productive

- Without an Operational Calendar (Plan):
 - Everything feels urgent
 - Deadlines (institutional, federal...etc.) sneak up on you
 - Compliance becomes reactive
 - The LOUDEST Voice Wins
 - You live in email





Operational Calendar Unpacked – the WHAT

- Events
- Activities
- Key Actions
- Benchmarks



Operational Calendar Unpacked - Federal Musts

- Reporting Deadlines
- Reconciliation
Timelines
- Cash Management
- R2T4 Cadence
- Annual Notifications

Operational Calendar: Important Federal Musts

- **FISAP Submission:** Oct 1
- **FISAP Corrections:** Dec 15
- Underuse Penalty Waiver (FSEOG/FWS): Feb 2
- Foreign Gift & Contract Reporting (Section 117): Jan 31 & July 31
- GE/FVT Reporting: Sept 30
- **Pell/TEACH/Direct Loan/Work Study Reconciliation:** monthly
- Federal Work-Study Earnings Report: Sept 30
- Exit Counseling: 30 days
- Cohort Default Rate Published (Final): Sept 30
- **Satisfactory Academic Progress: ??**
- **Administrative Cost Allowance:** Oct 1
- Pell Grant Closeout: Sept 30
- Direct Loan Closeout: July 31
- IPEDS: Feb
- Net Price Calculator: annually
- Notice of the availability of financial aid: annually
- **V4/V5 Reporting:** 30 days
- Voter Registration Materials:
- Constitution Day: Sept 17
- Equity in Athletics: Oct 15
- Security Report: Oct 1
- **R2T4:** 30 days

A close-up photograph of a red pushpin stuck into a calendar grid. The pushpin is positioned over the number 16. The calendar grid shows numbers 14, 15, 16, 17, 18 in the top row and 21, 22, 23, 24 in the bottom row. The pushpin is bright red with a silver metal stem.

Operational Calendar Unpacked – the **WHEN**

- Deadlines
 - Daily
 - Weekly
 - Monthly
 - Annual
 - Non-routine (FAFSA changes)



Operational Calendar Unpacked – the WHO

- Accountability
 - Who owns what?
 - Who is backup?
 - Who reviews Completion?

Before you Start – the HOW

Who needs access?

Do you need regular reminders?

What format:

- Outlook, Excel, Word, OneNote...etc.
- Format Pros and Cons

Where to Begin?

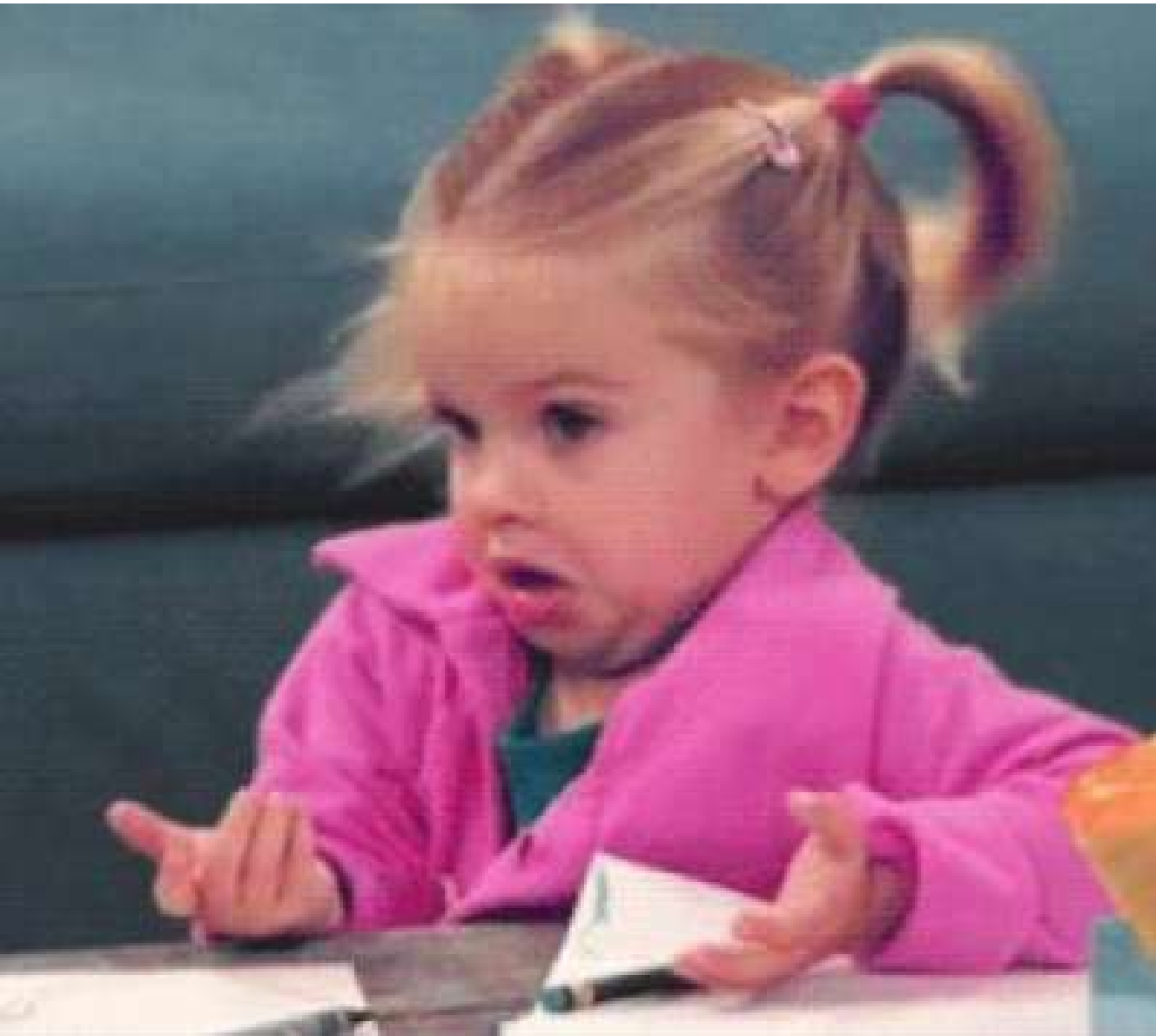
- *Leverage Your Network-*
 - Colleagues
 - LISTSERV
 - NASFAA (Don't start for scratch!)
- *Ground Decisions in Policy*
 - Federal Regulations
 - Institutional Policies
 - Procedures
 - Day-to-Day Operations



Maintenance: Because Calendars Rot

- *How will you keep your calendar current?*
 - Assign ownership & Accountability
 - Schedule recurring reviews and updates
 - Incorporate regularity and deadline changes
 - Document Updates and version history





Why this Matters

- Sanity
- Manage Responsibility
- Holding you Accountable
- Train New Staff
- Map for Succession

Chaos in Order



Show and Tell



Continuous Improvement

Show and Tell: Northern State

	A	B	C	D	E	F	G	H	I	J
1	Task	Detail	Frequency	Owner	Janua	Februa	Marcl	April	May	June
194	Office budget	review	Monthly	Director	x	x	x	x	x	x
195	Overcommitments		Monthly	Director	x	x	x	x	x	x
196	Packaging philosophy		Annually	Director						
197	Pell LEUs		Semester	Director						
198	PJs/special circumstances		Non-routine	Director						
199	PLUS loans		Daily	Director						
200	Publications	cost sheets	Annually	Director					x	
201	Publications	application materials	Annually	Director						
202	Publications	aid offer guides	Annually	Director						
203	Reconciliation	SDEAF report	Annually	Director						x
204	Reconciliation	Finance/ED	Monthly	Director	x	x	x	x	x	x
205	Reconciliation	all funds	Weekly	Director						
206	Reconciliation	Foundation scholarships/Eide Bailly	Annually	Director						x
207	RSRENRL	freeze enrollment	Semester	Director						
208	SAIG Enrollment	TG mailboxes	Annually	Director						
209	SDBOR scholarships	review applicants (Scarborough, Fowler/Kaden)	Annually	Director			x			
210	SDBOR scholarships	courtesy email for SDOS	Annually	Director					x	
211	SDBOR scholarships	eligibility and rosters (Critical Teaching Needs, Dakota Corps)	Semester	Director						
212	SDEAF	awarding, overcommitment, reporting and program review	Monthly	Director	x	x	x	x	x	x
213	Staff evaluations		Annually	Director						
214	Staff retreat		Non-routine	Director						
215	Staff timecards		Monthly	Director	x	x	x	x	x	x
216	Study abroad		Non-routine	Director						
217	Summer aid	disbursing	Summer	Director					x	x
218	TEACH	applications	Daily	Director						
219	TEACH	monitoring	Monthly	Director	x	x	x	x	x	x
220	TEACH	exit letters	Semester	Director						
221	TEACH	communications	Semester	Director						
222	Title III application		Annually	Director		x				
223	V4/V5 reporting		Monthly	Director	x	x	x	x	x	x
224	Voter registration notice	years with national elections	Annually	Director						
225	Withdrawals/R2T4		Weekly	Director						

Show and Tell: University of Mary

April 2026

In office

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30 11 AM Daily Sweep 11 AM Daily Sweep	31 11 AM Daily Sweep	Apr 1 11 AM Daily Sweep	2 11 AM Daily Sweep	3 11 AM Daily Sweep	4
6 9 AM Monthly SA +3	7 10 AM Daily ISIR L 11 AM Daily Sweep	8 9 AM Weekly Aid +2	9 10 AM Daily ISIR L +2	10 10 AM Daily ISIR L 11 AM Daily Sweep	11 7 AM APRIL SOAR
13 10 AM Daily ISIR L 11 AM Daily Sweep	14 10 AM Daily ISIR L 11 AM Daily Sweep	15 9 AM Weekly Aid +2	16 10 AM Daily ISIR L +2	17 10 AM Daily ISIR L 11 AM Daily Sweep	18
20 10 AM Daily ISIR L 11 AM Daily Sweep	21 10 AM Daily ISIR L 11 AM Daily Sweep	22 9 AM Weekly Aid +2	23 10 AM Daily ISIR L +2	24 9 AM REMINDER: +2	25 8 AM Graduation
27 9 AM Campus E +2	28 10 AM Daily ISIR L 11 AM Daily Sweep	29 8 AM Final Spring +3	30 8 AM Spring SAP I +4	May 1 10 AM Daily ISIR L 11 AM Daily Sweep	2

Resource Links

NASFAA:

- Ask Regs: [NASFAA AskRegs: Does NASFAA Provide Sample Financial Aid Operational Calendars?](#)
- Financial Aid Calendar Templates: [Financial Aid Calendar Templates](#)
- Webinar Slides: [NASFAA's Business Services Webinar: Why Your Financial Aid Office Needs an Operational Calendar - Presented November 2, 2022](#)

IPEDS Data Collection Schedule: [Timing Of IPEDS Data Collection, Coverage, And Release Cycle](#)

FAFSA Processing Cycle: [2025-26 FAFSA Processing Timeline Update | Knowledge Center](#)

FSA Handbook: [2025-2026 Federal Student Aid Handbook | 2025-2026 Federal Student Aid Handbook](#)

Federal Register, 2025-26 Reports and other deadlines:

<https://www.federalregister.gov/documents/2025/12/10/2025-22377/2025-2026-award-year-deadline-dates-for-reports-and-other-records-associated-with->

Phone a Friend



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