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Behind Every Show-Stopping Performance  
is a Perfectly Timed Production

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- . Financial aid isn't just compliance—it's performance
- . Students only see the "show"
- . Our job is to run the backstage flawlessly
- . Today's focus: two behind-the-scenes tools
  - **Operational capacity**
  - **Operational calendars**



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## Agenda + Learning Objectives

- Define operational capacity and calendars in FA
- Talk about getting buy-in from the team
- Identify peak workload "acts" in the aid cycle
- Build simple excel tools to:
  - Track staff capacity
  - Map an operational calendar
- Use both tools together to anticipate problems **before** they hit

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## ACT I:

### Understanding Operational Capacity



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## What is operational capacity?

- The amount of work your office can *realistically* complete during a specific period, with the staff and systems you have.

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### What is operational capacity?

- Capacity ≠ headcount
- Capacity includes:
  - . Experience
  - . Time
  - . Training
  - . System limitations
  - . Interruptions (emails, calls, walk-ins)

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### Why Capacity Matters in FA

- . Common pain points:
    - FAFSA season overload
    - Constant 'unprecedented' change
    - Packaging backlogs
    - Verification pile-ups
    - Burnout after peak cycles
- "We're always behind—no matter how hard we work"

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### Why Capacity Matters in FA

Many problems labeled "performance issues" are actually **capacity planning issues**.

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### Capacity Myths to Let Go Of

- “We’ll just work harder during peak”
- “Everyone is equally productive”
- “We can plan once a year and forget it”
- “Excel is too basic for this”

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### How to advocate for staff

- When you have positions on the line or need to advocate for increases, it’s important to have data to back up your position or your ask

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### Act II

Winning the Cast Over



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Getting Staff Buy-In Without Triggering Fear

Why Staff Feel Threatened:

- “This is going to be used to judge my performance”
- “They’re trying to prove we don’t need more staff”
- “They’ll use this to micromanage my time”
- “This will be used against us, not for us”

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Reframing the Purpose (Language Matters)

What staff often hear:

“We’re tracking capacity.”

What they need to hear instead:

- “We’re documenting reality”
- “We’re protecting the team from unrealistic expectations”
- “This shows when too much work exists—not who works hardest”

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Position Capacity Tools as a Shield, Not a Spotlight

Use this exact framing:

“This tool does not measure people. It measures systems and volume.”

Concrete examples to share:

- It explains why deadlines slip
- It justifies temporary staffing
- It shows why new initiatives can’t be added “just because”
- It supports burnout prevention conversations

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Involve Staff Before the Tool Is Built

**Do not build this in isolation.**

Ways to include staff early:

Ask them:

- “What tasks take the longest?”
- “What always gets underestimated?”
- “Where do we lose time that leadership never sees?”

Let them:

- Estimate task time ranges
- Flag seasonal stress points
- Identify invisible labor (emails, troubleshooting, interruptions)

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Make the Data Collective—Not Individual

**Strong best practice:**

- Track team-level capacity, not individual productivity
- Avoid comparisons between staff
- Avoid ranking, quotas, or “should be able to” expectations

Language to model:

“This shows what we can handle—together.”

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Normalize Imperfect Data

“This will never be perfect—and that’s okay.”

Help staff understand:

- Estimates will change
- Volume fluctuates
- The goal is **directional truth**, not precision

This reduces:

- Anxiety
- Perfectionism
- Fear of being “wrong”

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### Use the Tool Publicly In Their Defense

This is where trust is made or broken.

Examples you can share:

- Showing leadership why a deadline moved
- Explaining why a new initiative was delayed
- Demonstrating why overtime is unsustainable
- Advocating for training time or staffing

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### What Not to Do

Avoid:

- Tying capacity data to performance reviews
- Using it to justify removing positions
- Treating it as static or permanent
- Saying "the spreadsheet says..."

Say:

"The data supports what the team has been telling us."

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### Small Wins That Build Buy-In

Encourage attendees to start with:

- One week or month
- One process
- One small change that improves workload balance

Then celebrate:

- Fewer fire-drills
- Better pacing
- Clearer expectations
- Fewer late nights

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### Trust Is the Real Infrastructure

You can have the best stage design in the world—  
but without **trust** backstage,  
the show still falls apart.

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### ACT III:

Building a Capacity Tracking Tool in Excel



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### Capacity Tool – Core Components

#### Staff Capacity Table

Columns:

- Staff Name
- Role
- FTE%
- Weekly Hours Available
- Planned Non-Aid Time (meetings, projects)
- Net Aid Hours Available
- **Include your student employees!!!**

\*Key: *Net* hours, not wishful hours

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Sample Formula Logic (Easy Excel Formulas)

Examples you can describe verbally:

- Weekly hours × FTE
- Subtract standing commitments
- Convert weekly capacity to monthly or seasonal capacity

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Matching Capacity to Tasks

**Task Load Estimates**

Columns:

- Task (FAFSA review, verification, appeals)
- Average time per item
- Expected volume
- Total hours required

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Matching Capacity to Tasks

If **total hours required** > **total hours available**,  
the math – NOT THE TEAM – is failing.

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Reflection

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- What tasks eat the most time in your office?
- Which tasks are most unpredictable?

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ACT IV:

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Choreographing the Year



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What Is an Operational Calendar?

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An operational calendar is not:

- An academic calendar
- A compliance checklist
- A student-facing deadline list

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### What Is an Operational Calendar?

It is:

A behind-the-scenes list map of when work *actually happens*.

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### Why Operational Calendars Matter

They help you:

- See collisions before they happen
- Identify unrealistic overlaps
- Justify staffing or deadline changes
- Stop treating every cycle like a surprise

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### Building the Calendar in Excel

Structure:

- Rows = Major processes
- Columns = Months (or weeks)
- Color-coded intensity:
  - o Light
  - o Medium
  - o Heavy

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Building the Calendar in Excel

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Examples of rows:

- FAFSA intake
- Verification
- Packaging
- Appeals
- Satisfactory Academic Progress
- Reporting & reconciliation
- System Setup

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Layering "Scene Changes"

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Add markers for:

- Policy changes
- Staffing changes
- System upgrades – quarterly updates
- Training periods
- Institutional deadlines

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Layering "Scene Changes"

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Most breakdowns happen at **transitions**, not peaks.

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Visualizing the Trouble Spots

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When you step back, the calendar shows:

- Overlapping heavy workload months
- Months with no recovery time
- “Impossible” periods where everything is due at once

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Visualizing the Trouble Spots

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Encourage them to:

- Print it
- Hang it
- Talk about it as a team

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ACT V:

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Using Capacity + Calendars Together



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## The Power Combo

When you overlay:

- Capacity data (hours)
- Calendar data (timing)

You can:

- Forecast backlogs
- Adjust deadlines proactively
- Reassign work before burnout
- Explain decisions to leadership with data

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## Real-World Use Cases

Examples:

- Moving verification start dates
- Justifying temporary help
- Staggering SAP reviews
- Defending a later packaging timeline

Take “we’re overwhelmed” to “here’s the math.”

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## Communicating with Leadership

Operational tools help change the conversation from:

**“Why can’t your team handle this?”**

To:

**“Here’s what happens when 600 hours of work meet 420 hours of capacity.”**

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### Finale & Takeaways

- Capacity is measurable—even imperfectly
- Calendars should reflect work, not just deadlines
- Excel is powerful because it’s:
  - o Accessible
  - o Transparent
  - o Easy to adapt
- These tools are living documents, not one-time projects

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### Standing Ovation to Close

Your office doesn’t need to be heroic—it needs a script, a schedule, and a realistic understanding of the cast.

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**Thank you!**  
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**IASFAA Spring 2026**

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