
WEARING TWO LEIS:
When SCO is
Only One of Your Jobs
AVAA Conference 2026

Reality: 2 Jobs, One Calendar

1

Financial Aid Director: leadership, staff support, packaging, budgets, compliance, audits, and escalations.

2

VA School Certifying Official: enrollment certifications, changes, student questions, records, and VA compliance.

3

Both roles require accuracy, confidentiality, documentation, and timely communication.

4

The challenge is not simply having too much to do—it is deciding what deserves attention first.

Reframe the Goal: Manage Priorities, Not Every Minute

You cannot make every request urgent just because it is important to someone.

Protect time for high-risk work before the day fills with interruptions.

Build a repeatable system that tells you what to do next—even on a chaotic day.

Aim for dependable service, compliant processing, and sustainable work—not perfection.

A good system reduces the number of decisions you must make under pressure.

Use a Priority Filter

1 — Compliance / Student Impact

- Deadlines, certification corrections, disbursement-impacting issues, audit requests, and risks to eligibility.

2 — Time-Sensitive Operations

- Scheduled processing, required reports, deadlines, and items blocking or impacting another employee.

3 — Important, Plan It

- Policy updates, training, process improvement, staff coaching, and documentation.

4 — Routine / Can Wait

- Nonurgent email, low-impact formatting, optional meetings, and tasks that can be delegated.

Ask: What is the deadline? Who is affected? What is the consequence of waiting?

Build One Command Center

Use one trusted task list—not sticky notes, inbox flags, and memory competing with one another.

Track each task with:

- Owner
- Deadline
- Next action
- Status
- Dependency

Keep separate views for VA certifications, financial aid operations, leadership, and long-term projects.

Use a calendar for time-specific commitments; use the task list for work that must get done.

Review the list at opening, midday, and closing

Time-Block the Week Before It Starts

Reserve capacity for both roles; do not let meetings claim every open space.

MON	TUE	WED	THU	FRI
Weekly plan + priorities	VA certification focus	Staff / operations focus	Compliance / audit work	Close loops + next week
Deep-work block	Student / VA appointments	Deep-work block	Student / VA appointments	Reports + follow-up

Leave 20–30% of the week unscheduled for walk-ins, urgent issues, and unexpected corrections.

This is a sample rhythm—not a rigid schedule. Adjust it to your institution’s deadlines and service model.

Batch Similar Work to Reduce Mental Switching

VA batch: review records, process certifications, handle amendments, then document outcomes.

Financial aid batch: packaging reviews, verification follow-up, SAP items, and award adjustments.

Communication batch: respond to routine emails and return calls during planned windows.

Leadership batch: staff check-ins, approvals, policy decisions, and escalations.

Keep a short “quick capture” list for interruptions; return to the current task instead of switching immediately.

Create a VA Certification Rhythm

Use a consistent workflow; confirm all steps against current VA guidance and institutional procedures.

1. Intake	Collect request and identify the term, program, and student record.
2. Verify	Check enrollment, program applicability, prior notes, and required documentation.
3. Certify	Submit the appropriate certification accurately and within applicable requirements.
4. Monitor	Track schedule changes, withdrawals, adds/drops, and other reportable changes.
5. Close	Document action, date, follow-up needed, and unresolved questions.

Use a tracker for status and follow-up—not as a substitute for required records or official systems.

Protect the Director’s Work

Leadership work is easy to postpone because it has fewer visible immediate deadlines.

Schedule weekly time for policy, compliance monitoring, budget review, audit readiness, and staff development.

Delegate repeatable tasks with clear standards, decision limits, and an escalation path.

Create quick-reference procedures for common questions and recurring processes.

Reserve a small number of decision windows for approvals and complex cases.

Do not allow every routine question to become a meeting or a personal interruption.

Interruptions: Triage, Capture, Return

A short script can protect focus while still treating students and colleagues respectfully.

TRIAGE

Is this a safety issue, a deadline today, or a student blocked from a critical next step?

CAPTURE

Write down the request, owner, promised response time, and next action.

RETURN

Finish or safely pause the current task; then return to your planned work.

Try: “I want to give this the attention it deserves. Let me capture the details and tell you when I can follow up.”

For urgent issues, use the institution’s established escalation process.

Email Is a Communication Tool—not a Task Manager

Never let inbox zero become more important than accurate, timely work.

Check email at planned intervals when operationally feasible; avoid starting the day by reacting to every message.

Use four actions: do now if brief and truly urgent; schedule; delegate; or file for reference.

Turn messages requiring work into tasks with a due date and next step.

Use templates for common student questions, but personalize details and verify accuracy.

Set expectations for response times and emergency contact routes.

Use Checklists for High-Risk, Repeatable Work

The best checklist is short enough to use and specific enough to prevent predictable misses.

1

Build checklists for recurring certifications, term-start reviews, withdrawals, SAP processes, disbursement checks, and audit requests.

2

Include a final accuracy check and a place to record exceptions or follow-up.

3

Keep procedures current when regulations, systems, or institutional policy change.

4

Use peer review or second checks where risk, policy, or local controls call for them.

Checklists reduce rework; they do not replace professional judgment or official guidance.

The Weekly Reset: 30 Minutes That Pay You Back

Close the week deliberately so Monday does not begin with rediscovery.

REVIEW	What was completed? What is still open?
REPRIORITIZE	What deadlines and student impacts are coming next week?
REASSIGN	What can be delegated, clarified, or stopped?
RESERVE	Block time for deep work and expected peak periods.
COMMUNICATE	Tell staff and partners about deadlines, coverage, or decisions needed.

Peak Season: Shift from Routine to Surge Mode

A peak-season plan should be agreed upon before the peak arrives.

1

Identify peak dates early: term start, add/drop, certification changes, disbursement cycles, SAP deadlines, and audit windows.

2

Pause or defer low-impact projects; do not pause required controls.

3

Set temporary office hours, coverage plans, and response expectations.

4

Use a visible queue so staff know what is pending and what needs escalation.

5

After the surge, schedule a short debrief: what caused delays, what worked, and what should change?

Boundaries Are Part of Compliance

Sustainable work protects accuracy, judgment, and student service.

Set realistic response windows

Use coverage and escalation

Do not promise an immediate answer to every nonurgent request.

Clarify who handles urgent items when you are in meetings or away.

End with a shutdown routine

Ask for capacity decisions

Record open loops, set tomorrow’s first priorities, and close systems securely.

When everything cannot be done, leaders must decide what moves, who helps, or what stops.

Being committed does not mean being endlessly available.

A Sample Day That Leaves Room for Reality

Adapt the blocks to student traffic, staffing, and institutional deadlines.

Morning

8:00–8:20	Review deadlines, urgent queue, and calendar
8:20–10:00	Protected focus block: VA / financial aid processing
10:00–10:30	Email and student follow-up
10:30–11:30	Staff questions, approvals, and escalations
11:30–12:00	Update trackers; prepare next actions

Afternoon

1:00–2:30	Second focus block or scheduled student appointments
2:30–3:00	Email / calls / cross-office coordination
3:00–3:30	Compliance, documentation, or director-level work
3:30–3:45	Close loops and choose tomorrow’s top three

Keep lunch and breaks protected where possible; this example intentionally leaves flexibility for interruptions.

YOUR NEXT FIVE WORKDAYS

Choose one small change and test it—not ten changes at once.

1
Create one master task list with deadlines and owners.

2
Block two protected focus periods on your calendar.

3
Batch VA certifications and routine financial aid tasks.

4
Write one checklist for a high-risk recurring process.

5
End each day by identifying tomorrow's top three priorities.

Small systems. Clear priorities. Better service.

Discussion: What Will You Change First?

Invite participants to identify one pressure point and one practical adjustment.

STOP

What task, habit, or meeting is consuming time without enough value?

START

What simple system would prevent repeated decisions or rework?

PROTECT

What time block or boundary will you protect next week?

Thank you!

Two leis. One mission.
A system that supports both.



Stephanie Miller
Central Alabama Community College
stmiller01@cacc.edu

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