

3, 6 and 9 Month Milestones
OMF Business Operations Division - General Fund/Administrative Group Financial Analyst
Status Report

3 months
October, November, December

Key work products and projects

ACTION	STATUS	COMMENTS
Supervisor and employee have met to discuss overall responsibilities and priorities, identified essential training needs for employee.		
Have met with primary bureau customers and have discussed key operational and budget issues – site visits as appropriate		
Base revenue budget development for FY 2015-16 budget process		
Base expense budget development for FY 2015-16 budget process		
Assist assigned bureaus with costing and writing decision packages for FY 2015-16		
Issue monthly projection reports for assigned budgets		
Participate in Strategic Plan efforts as required		
OMF budgets and portfolio; differences between Internal service funds and General Fund budget approaches and deadlines		
Monthly Projections for assigned budgets; entry in rollup for General Fund and “issues list” for Council		
Participate in weekly budget analyst meetings		

Background and knowledge gained

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ACTION	STATUS	COMMENTS
Schedule required HR 2.02 Training and complete Mandatory Child Abuse Reporting training within first 60 days of employment		
Attend Benefits orientation		
Review Intro to SAP and Basic SAP Navigation Course online		
Review Employee Self Service trainings and job aides online		
SAP critical training for the following assigned roles: <i>Insert list of roles</i>		
Training in BRASS and SBFS		
Training in PatternStream		
Familiar with budget manual, budget calendar, budget development process		
Familiar with OMF Strategic Plan		
Familiar with OMF and assigned bureau org charts and programs		
Familiar with assigned bureau goals, strategies, and performance measures		
Familiar with policies and administrative rules governing accounting and finance and with comprehensive financial management policies		
Understand development of General Fund Target allocation		
Ability to review personnel paperwork, contracts, ordinances, purchases and travel requests (as applicable) and advise client bureaus on available funds		
Familiar with HR admin rules, purchasing guidelines, timekeeping guidelines		

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ACTION	STATUS	COMMENTS
Learn high level procure-to-pay process		
Others as assigned		

6 months
January, February, March

Key work products and projects

ACTION	STATUS	COMMENTS
Supervisor and employee have met and agreed upon goals for first evaluation period		
Prepare Requested Budget submissions for assigned bureaus		
Loading of narratives to Pattern Stream		
Assist Bureaus in responding to questions on Requested Budget submission		
Moving from Requested to Mayor’s Proposed Budget		
Coordinate Spring Budget Monitoring Process for client bureaus		
Monthly Projections for assigned budgets; entry in rollup for General Fund and “issues list” for Council		
<i>Insert any special projects here</i>		
Others as assigned		

Background and knowledge gained

ACTION	STATUS	COMMENTS
Other required employee training scheduled		

3, 6 and 9 Month Milestones

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ACTION	STATUS	COMMENTS
Able to prepare financial impact statements for personnel actions and ordinances		
Able to review/assist in preparing grant agreements and IGAs as needed		
Able to review/assist in preparing Council ordinances and resolutions as needed		
Able to create journal entries for billings, etc.		
Mandatory training as required		

9 months

April, May, June

Key work products and projects

ACTION	STATUS	COMMENTS
Moving from Mayor’s Proposed to Adopted Budget		
Assist assigned bureaus with planning for implementation of Adopted Budget		
Coordinate Over Expenditure Ordinance submission process for assigned bureaus		
Monthly Projections for assigned budgets; entry in rollup for General Fund and “issues list” for Council		
Yearend Coordination for client bureau – accruals, responses to audit schedules, etc.		
<i>Insert any special projects here</i>		
Others as assigned		

Background and knowledge gained

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ACTION	STATUS	COMMENTS
Other training as agreed upon with supervisor		
Mandatory training as required		