



# Ohio Fiscal Academy

Cohort 6 January 20, 2016 to September 23, 2016

## Contact Information

OFA Coordinator: Jason Vermilion  
 Email: [OhioFiscalAcademy@obm.ohio.gov](mailto:OhioFiscalAcademy@obm.ohio.gov)  
[Jason.Vermilion@obm.ohio.gov](mailto:Jason.Vermilion@obm.ohio.gov)

Phone:  
 Between Tiers: 614-728-8754 (Office)

Location:  
 State of Ohio Library  
 274 E 1st Ave #100, Columbus, OH 43201  
 (614) 644-7061

## Program Overview

The Ohio Fiscal Academy (OFA) is a certification program that strives to build fiscal professionals that will lead the great State of Ohio. This is a robust, three-tiered program that provides operational, theoretical, and hands-on experiences for participants.

## Program Objectives

After completing the Ohio Fiscal Academy, participants will be able to:

- Create networking opportunities with forward-thinking state agency change agents.
- Demonstrate cross agency fiscal knowledge.
- Support for a culture of responsibility and management in state government.
- Understand the high-level, big picture concept of state fiscal processes.
- Understand how those processes connect to their agencies through discussions.

## Course Schedule

Schedule	Topics	Assignments and Activities	Due Dates
Webinar Kick-Off Jan. 20, 2016	<ul style="list-style-type: none"> <li>• Expectations</li> <li>• Policy</li> <li>• Location</li> </ul>	<ul style="list-style-type: none"> <li>• Ice breaker</li> </ul>	<ul style="list-style-type: none"> <li>• Image due 12/31/15</li> </ul>
Pre-Tier Assignments	<ul style="list-style-type: none"> <li>• CFO Interview</li> <li>• Procurement</li> </ul>	<ul style="list-style-type: none"> <li>• CFO Interview worksheet</li> <li>• E-Learning</li> </ul>	<ul style="list-style-type: none"> <li>• Due: 2/19/2016</li> <li>• Due: 2/19/16</li> </ul>
Tier 1 – 2/22-2/26	<ul style="list-style-type: none"> <li>• True Colors</li> <li>• Organizing the Fiscal Office</li> <li>• Budget Overview</li> <li>• Payroll Connection</li> </ul>	Lectures/Presentations	During Tier

Revision Date: 01/06/2016



# Ohio Fiscal Academy

Cohort 6 January 20, 2016 to September 23, 2016

Schedule	Topics	Assignments and Activities	Due Dates
	<ul style="list-style-type: none"> <li>State Law &amp; Policy</li> <li>JCARR</li> <li>LSC</li> <li>Value Management</li> <li>BI 101</li> <li>Procurement Q&amp;A</li> </ul>		
<b>Between Tier Assignments</b>	<ul style="list-style-type: none"> <li>Legislative Roadmap</li> <li>Capstone Proposal</li> </ul>	<ul style="list-style-type: none"> <li>Worksheet</li> <li>Meet with team and mentor</li> </ul>	<ul style="list-style-type: none"> <li>Due by 5/19/16</li> <li>Due by 4/01/16</li> </ul>
<b>Tier 2 – 5/23-5/27</b>	<ul style="list-style-type: none"> <li>Disbursements</li> <li>Allotments</li> <li>Chart of Accounts</li> <li>Controlling Board Overview</li> <li>Practical Budget</li> <li>Federal Grants Management</li> <li>CAFR</li> <li>CFO Roundtable</li> </ul>	Lectures/Presentations	During Tier
<b>Between Tier Assignments</b>	<ul style="list-style-type: none"> <li>Attend Controlling Board Meeting</li> <li>SWCAP</li> <li>Capstone Project</li> </ul>	<ul style="list-style-type: none"> <li>Live meeting-TBD</li> <li>E-Learning</li> <li>Meet with team and mentor</li> </ul>	<ul style="list-style-type: none"> <li>Date-TBD</li> <li>Due by 6/10/16</li> <li>Due by 9/16/16</li> </ul>
<b>Tier 3 – 9/12-9/16</b>	<ul style="list-style-type: none"> <li>Auditor of State</li> <li>Office of Internal Audit</li> <li>OIA Internal Controls</li> <li>Forecasting</li> <li>Capital Planning</li> <li>Debt Management</li> <li>Inspector General</li> <li>Capstone Presentations</li> <li>SWCAP Q&amp;A</li> </ul>	Lectures/Presentations	During Tier



# Ohio Fiscal Academy

Cohort 6 January 20, 2016 to September 23, 2016

Schedule	Topics	Assignments and Activities	Due Dates
Graduation	<ul style="list-style-type: none"> <li>Ceremony</li> </ul>	<ul style="list-style-type: none"> <li>Present certificates</li> </ul>	<ul style="list-style-type: none"> <li>9/23/16</li> <li>10AM</li> <li>William Green Auditorium 2<sup>nd</sup> Floor</li> </ul>

Course Description	
Course Title	Description
Auditor of State	The Auditor of State (AOS) is an elected constitutional officer who is responsible for financial statement of all public offices in Ohio. This includes cities, villages, school districts, universities, townships, state agencies, boards and commissions. This course helps to understand the AOS's scope and methods for ensuring funds are spent correctly and stop abuse.
A Budget Overview	This course is designed to give participants insight into the reasons for different appropriations bills and the order that processes happen during the budget planning cycle. The course discusses the actors involved in the budget cycle and the planning they put into it. Participants will also discuss budget recommendations.
Budget Practical Planning	This course speaks to the standard principles of an agency's budgeting process; Identifying agency goals and priorities, determining how to structure the agency goals and estimating the budget amounts to fund agency programs.
Capital Planning	In this course, participants gain an understanding of the agency's role in the capital planning process. The course also provides insight on preparing a capital budget and how to find useful information in OAKS FIN and OAKS BI.
CFO Round Table	Participants will have an opportunity to speak with CFO's from a number of different agencies in both a formal and informal setting.
Chart of Accounts	This course is designed to give insight on identifying the DNA of an agency. The course helps the learner gain an understanding of ChartFields and their roles in programs. The course explores priorities, funding, and comprehending trees.



# Ohio Fiscal Academy

Cohort 6 January 20, 2016 to September 23, 2016

Course Description	
Course Title	Description
Comprehensive Annual Financial Report & Schedule of Expenditures (CAFR)	This course is designed to help participants gain an idea of what OBM's Financial Reporting group does and why. OBM Financial Reporting does the majority of work in pulling the information together to create the CAFR. There is a reliance on the agencies to ensure that the information within OAKS is accurate. It will save time, effort, and frustration for everyone involved in the financial aspects of the State when errors are corrected and accurate information is available in OAKS.
Controlling Board Overview	Explore the function of the Controlling Board and its members. What they look for in a request? Why something may be pulled for review? What type of questions the agency representative can expect from the board? What is this parliamentary procedure and how do you conduct yourself?
Debt Management	The Debt Management course explains OBM's role as the state debt manager, the various reasons for issuing debt, and the effect of debt on budget bills. It also describes the steps to issue debt, the agency steps in the capital planning process, and agency debt management responsibilities regarding how to monitor and share debt information.
Disbursements	This course looks at the purpose and requirements for the OBM Monthly Financial Report and how it fits in the overall fiscal planning process. Students explore topics such as: Allotments, Disbursements, Monthly Financial Report, Disbursement Task, Guidance and Memo, Component Analysis, GRF Payroll Disbursements, Non-Payroll Patterns, trends, and changes.



# Ohio Fiscal Academy

Cohort 6 January 20, 2016 to September 23, 2016

Course Description	
Course Title	Description
Federal Grants Management	The Federal Grants Management course presents an overview of the world of Federal Grants and State Government giving the main concepts and responsibilities that surround Federal Grants Management. Upon completion of the course, learners will be able to summarize the history of federal grants, recognize the various types of federal grants, use grant terminology, outline the pre-award process, explain the requirements post-award activities, describe the grant close-out process, and demonstrate ability to troubleshoot issues.
Forecasting	This course helps define forecasting and its importance. Participants will gain an understanding of how to gather, analyze, and evaluate forecasting data.
Inspector General	This course is an overview of the Office of the Inspector General. After completing the course, you will have a better understanding of the following topics: how to file a complaint, the investigation process, and common issues in investigations.
Joint Committee on Agency Rule Review (JCARR)	This course is intended to introduce the primary function of JCARR. Topics discussed include the Register of Ohio and who maintains it, what are Rule Summaries and Fiscal Analysis (RAFA), and the different categories of filed rules.
Legislative Service Commission (LSC)	Who and what are the Legislative Service Commission (LSC)? What are the LSC Budget Products? What is the Legislative Process? This class answers these questions and more.
Office of Internal Audit	The Office of Internal Audit helps participants understand the general principles of the Committee of Sponsoring Organization (COSO) and the roles of various audit organizations. Presenters also discuss how participants can best prepare for future audits.



# Ohio Fiscal Academy

Cohort 6 January 20, 2016 to September 23, 2016

Course Description	
Course Title	Description
Organizing the Fiscal Office	The intention of this course is to define a fiscal office. It explores how to identify and evaluate the "as is" fiscal office and organization. Participants will gain knowledge on how to develop a transition plan, as well as, methods to achieve success in the fiscal office.
Procurement	This course provides resources for the procurement process. Whether you procure or not, you will find knowledge of procurement topics valuable to your office. Participants discuss state resources, DAS contracts, direct purchase authority, prior approvals, ordering, receipt, payment, contract compliance, and emergency purchases. The course also helps students gain an understanding of Minority Business Enterprise (MBE) and Encouraging Diversity, Growth and Equity (EDGE) programs.
State Audit Committee	In this course, participants gain insight on the mission of the State Audit Committee and whom the Committee serves. It also looks to communicate an understanding the role of OBM's Office of Internal Audit (OIA) and the typical internal audit process.
State Law & Policy	The State Law and Policy course gives learners the history of the Ohio Constitution and Laws and how it fits with the Ohio Revised Code, Ohio Administrative Code, Executive Orders, and Polices and Directives. Students also discuss how to interpret the law and what laws are important?
Statewide Allocation Plan	This course defines SWCAP and its purpose, as well as, the roles of Federal and State Government. It also discusses how costs are calculated and the State recovery of SWCAP costs. The course concludes with reporting requirements and the centralized services that SWCAP reports.



# Ohio Fiscal Academy

Cohort 6 January 20, 2016 to September 23, 2016

Course Description	
Course Title	Description
Strategic Budget Planning	The Strategic Budget Planning course is designed to give state fiscal office staff, budget staff, and other financial professionals an understanding of the steps a fiscal organization must take in the generation of the State's biennial budget. What are the functions, people, processes, and stakeholders that must be involved in the many activities of the Budget Process?
The Payroll Connection	This course is designed to give insight on how to determine cost calculations and recognize fringe payroll costs. The course also seeks to aid participants in understanding check-off charges and comprehending the payroll process from beginning to end. Participants will also discover how to read Payroll Journals.
True Colors	True Colors is a model of personality identification that is easy to understand, remember and apply. With the colors of Blue, Gold, Green and Orange – True Colors distills the elaborate concepts of personality theory into a user-friendly, practical tool used to foster healthy productive relationships.
Value Management	In this course, students are introduced to the mission and vision of Office of Budget and Management's Value Management Office. Presenters discuss why OBM created the Office and how it leverages support to you and for your agency.

## Attendance Policy

The OBM Training Academy strives to provide an excellent Ohio Fiscal Academy certification experience. OFA is designed to leverage subject matter experts from across the state to afford you a positive and rewarding learning and networking experience.

Full participation in courses, activities, between tier assignments, and assessments is expected of all cohort participants. OBM Training Academy will keep a record of attendance throughout the program. As participation in the Ohio Fiscal Academy was the result of nomination from the participant's supervisor and CFO, and the dates and times for the in-class training portions were clearly communicated, the OBM Training Academy has a strict attendance policy and may notify the participant's supervisor and CFO of absences or excessive tardiness as they occur. While the OBM Training Academy realizes unexpected emergencies do occur, it should be a rare

Revision Date: 01/06/2016



# Ohio Fiscal Academy

Cohort 6 January 20, 2016 to September 23, 2016

occurrence. Missed content will require remediation before a participant will be issued a certification. Remediation must take place within the following cohort. If missed material is not made up within the following cohort, the participant will be removed from the program and asked to reapply and retake the entire certification program. \*Entrance into the next cohort would not be guaranteed.

## **Tardiness**

Arriving on time for the start of each day and returning on time from breaks and lunches is expected of all participants.

Excessive tardiness may result in removal from the program at the discretion of the OFA. Tardiness that exceeds 25% of the course will be counted as an **absence** and you will be asked to repeat the course.

*Example: The day starts with a 1 hour course at 9:00am. The participant calls in to notify that he or she is running late. The participant arrives at 9:16am. 25% of a 1 hour course is 15 minutes. Therefore, the participant has accrued 1 absence and is required to re-take the course during the next cohort.*

## **Removal for Non-Attendance**

Absences accrue over the entire program and do not reset at the start of each tier. Each course topic missed is considered an absence. On the **fifth cumulative course absence OR third cumulative day absence (whichever occurs first)**, participants will be removed from the current cohort due to the amount of time missed from instruction. Notification of the removal will be communicated via an email to the cohort member, their supervisor and/or CFO, and the OBM Training Program Manager. The removal notification will include details (dates, course/activity titles, and times) of absences. The removed participant may reapply. Entrance into the next cohort is not guaranteed. If accepted, the participant will be required to repeat all courses and activities.

## **Between Tier Assignments (BTA) and Meetings**

There will be between tier assignments that will have due dates prior to the next tier start date. Any assignments not turned in by the stated due date will be considered missed. Missed assignments must be completed and turned in prior to the end of the cohort in order to graduate. Missed assignments are reflected as a course absence and will accumulate with the other course absences as stated earlier.

Scheduled meeting assignments (e.g. Controlling Board) are considered required BTAs. Missing a scheduled meeting will accrue a course absence. If the absence occurs during a meeting that is otherwise regularly scheduled, the participant can complete the meeting during the current cohort and would not have to wait until the next. The absence will still count cumulatively.



# Ohio Fiscal Academy

Cohort 6 January 20, 2016 to September 23, 2016

The capstone teams are required to meet face-to-face with their capstone mentors at least once per between tier periods. Any absences from the scheduled between tier face-to-face meeting will be considered a course absence.

## ***Make-Up Requirements for Missed Content***

Any content missed during absences must be made-up by the cohort participants within a calendar year from the date of absence, or within the next available cohort. Additionally, the participant will be held to the current year's OFA curriculum and graduation requirements. Upon completion of all missed content, the participant will become "Certified." The participant must adhere to the original cohort's recertification schedule and may not have the full two-years to complete recertification requirements.

Missed between tier assignments must be made up during the **current** cohort and turned in no later than 5pm two days prior to the graduation date.

*Note: The participant will be permitted to attend his or her cohort's graduation but will not receive the certificate or "Certified" designation until coursework and/or missed assignments are complete. All courses marked as absences must be made up during the next cohort. Any course not made up during the next cohort will be considered incomplete and the participant will be removed from the program as a non-graduate.*

## **Recertification Policy**

Professional development is required for OFA Certified Fiscal Professionals to remain current in the field and to enhance their continued competence. To fulfill this requirement, OFA Alumni must accumulate a minimum of 16 OFA recertification points during each 2 year recertification period in order to maintain their OFA Certified Fiscal Professional designation. Further, OFA Alumni must have successfully completed every course and assignment to become certified and eligible to accrue recertification points.

Recertification points must be earned during the active 2-year recertification cycle to be applicable to current recertification. Any extra points earned during a 2-year period will not carry forward into the next 2-year cycle as the intent of requiring recertification is to assist the fiscal professional in staying **current** in the management and fiscal worlds.

Certified Ohio Fiscal Professionals (COFPs) are responsible for sending the request for credit to the Ohio Fiscal Academy email. Proof of attendance and/or completion of the recertification criteria is also the responsibility of the COFP. Failure to submit the email request may result in the request being denied. The following categories are examples and are not all-inclusive. If you have completed an activity that we do not have listed, please send proof of attendance, the agenda, and a brief justification of why the activity should count for recertification points. We will



# Ohio Fiscal Academy

Cohort 6 January 20, 2016 to September 23, 2016

consider all submissions; however the awarding of points is at the sole discretion of the OBM Training Academy.

For guidance about what activities are eligible for recertification credit, please thoroughly review this document and the OFA Website at <http://obm.ohio.gov/ofa>. The following descriptions provide further details and examples about how points are awarded and earned by category. If you have additional questions after reviewing all materials, please contact [ohiofiscalacademy@obm.ohio.gov](mailto:ohiofiscalacademy@obm.ohio.gov) for clarification.

## At A Glance

Continuing Education	Maximum Allowable Points per Recertification Period – 16pts
<a href="#">College Coursework</a>	1 point per contact hour (minus breaks/lunch)
<a href="#">Webinars</a>	1 point per contact hour (minus breaks/lunch)
<a href="#">e-Learnings</a>	1 point per contact hour (minus breaks/lunch)
<a href="#">Fiscal/Leadership Conferences</a>	1 point per contact hour (minus breaks/lunch)
<a href="#">Association Participation</a>	4pts max-member, additional 4 points-officer
OFA Community Involvement	Maximum Allowable Points per Recertification Period – 16pts
Curriculum	
<a href="#">Instructor Delivery</a>	8 point maximum per recertification period.
<a href="#">Course Review</a>	8 point maximum per recertification period.
<a href="#">Panel Participation</a>	4 point maximum per roundtable/panel.
Fiscal Knowledge Exchange	
<a href="#">Submitter</a>	4 points per approved submission. No maximum.
<a href="#">SME Reviewers</a>	<i>1 year term. 4 points awarded/year. 8 point maximum per recertification period.</i>
<a href="#">Approvers</a>	<i>1 year term. 4 points awarded/year. 8 point maximum per recertification period.</i>



# Ohio Fiscal Academy

Cohort 6 January 20, 2016 to September 23, 2016

## Capstone

<a href="#">Review Panel</a>	8 point maximum per recertification period.
<a href="#">Overview Presentation</a>	4 point maximum per recertification period.
<a href="#">Capstone Presentations</a>	2 points/presentation, 4 point maximum per two year cycle.
<a href="#">Capstone Mentor</a>	8 point maximum per recertification period.
<a href="#">OFA 1 time projects</a>	Varies at the discretion of the Ohio Fiscal Academy.

## Publication

<a href="#">Research and Publishing</a>	4 points awarded for each unique article not for each publication of same article up to 8 points max.
---	---

## Continuing Education

16 point maximum per two year cycle.

Category	Maximum Allowable Points per Recertification Period – 16pts
College Coursework	1 point per contact hour (minus breaks/lunch)
Webinars	1 point per contact hour (minus breaks/lunch)
e-Learnings	1 point per contact hour (minus breaks/lunch)
Fiscal/Leadership Conferences	1 point per contact hour (minus breaks/lunch)
Association Participation	4pts max-member, additional 4 points-officer

*\*\*The listed categories are just examples. If you have completed an activity that we do not have listed, please send proof of attendance, the agenda, and a brief justification of why the activity should count for recertification points. We will consider all submissions; however the awarding of points is at the sole discretion of the OBM Training Academy.*

Points are accrued for all approved continuing education events including on-line training. Educational activities must directly contribute to the OFA Certified Fiscal Professional's understanding of an agency's fiscal management responsibilities. Points will accrue on a one point per hour of coursework beginning with a one hour minimum and will be rounded down to



# Ohio Fiscal Academy

Cohort 6 January 20, 2016 to September 23, 2016

the nearest hour. Recertification points are not awarded for time spent in non-educational time such as breaks, networking, registration, preparation, outside assignments, and so forth. If you feel an activity qualifies but it is not listed as approved for OFA, please submit your proof of attendance, an agenda, and a brief justification as to how the course helped you in a fiscal or leadership way. Send your submission to [ohiofiscalacademy@obm.ohio.gov](mailto:ohiofiscalacademy@obm.ohio.gov) to request the activity be reviewed for inclusion. *\*Submissions do not guarantee acceptance.*

Examples of eligible continuing education activities:

**College Coursework** – Fiscal/leadership topics and/or courses leading towards a degree in a fiscal/leadership capacity.

**Webinars** – Fiscal or leadership topics accepted. e.g. “Coaching Teams: Facilitating Leadership and Results”

- If course is less than one hour, you will be asked to combine multiple shorter qualifying courses to obtain the one recertification point.

**e-Learning** – Fiscal or leadership topics accepted. e.g. “What’s New in FIN 9.2”

- If course is less than one hour, you will be asked to combine multiple shorter qualifying courses to obtain the one recertification point.

**Fiscal/Leadership conferences or seminars** – e.g. “15<sup>th</sup> Annual Emerging Trends in Fraud Conference”

**Association Participation** – Being actively involved in a fiscal or leadership association or being involved in a fiscal or leadership role can earn you recertification points. e.g. OGFOA

- Member – If you are a general member, you can receive 2 points per confirmed membership per year.
- Officer, trustee, or committee – Holding one of these titles can net you 2 additional points per year. Confirmation of position and time in service must be confirmed.

[Back to “At a Glance”](#)



# Ohio Fiscal Academy

Cohort 6 January 20, 2016 to September 23, 2016

## OFA Community Involvement

16 point maximum per two year cycle.

Category	Maximum Allowable Points per Recertification Period – 16pts
<b>Curriculum</b>	
Instructor Delivery	8 point maximum per recertification period.
Course Review	8 point maximum per recertification period.
Panel Participation	4 point maximum per roundtable/panel.
<b>Fiscal Knowledge Exchange</b>	
Submissions	4 points per approved submission. No maximum.
SME Reviewers	1 year term. 4 points awarded/year. 8 point maximum per recertification period.
Approvers	1 year term. 4 points awarded/year. 8 point maximum per recertification period.
<b>Capstone</b>	
Review Panel	8 point maximum per recertification period.
Overview Presentation	4 point maximum per recertification period.
Capstone Mentor	8 point maximum per recertification period.
OFA 1 time projects	Varies at the discretion of the Ohio Fiscal Academy.

## Curriculum

OFA is committed to bring life experiences together with course content to enrich the learning experience. This goal could not happen without Subject Matter Experts (SMEs). Each course has a pool of SMEs to provide the course delivery to each cohort and to review the course material to ensure the most current and accurate information. The categories are as follows:



# Ohio Fiscal Academy

Cohort 6 January 20, 2016 to September 23, 2016

## ***Instructor Delivery***

*8 point maximum per two year cycle.*

The pool of instructors is built from legacy CFOs and OFA graduates. Certified Ohio Fiscal Professionals (COFP) are awarded 8 points for a 2 year term. The current instructors will have the first option to renew their 2 year term before OFA solicits replacements. They may work as an independent instructor or with a team of instructors for a course. Eligibility for the “Presenting or Instructing for OFA” points include becoming a SME (subject matter expert) for the course and assisting with the pre-delivery preparation of all associated course materials (Learner’s Guide, PowerPoint, Instructor Guide, and any auxiliary materials). Pre-delivery preparation includes taking “content ownership” for the course and partnering with the OBM Training Academy for draft reviews, edit update requests, notification of material changes due to new policies, laws, regulations, etc. and maintenance and control of course activities (as applicable).

## **Course Review**

*8 point maximum for two courses.*

Course reviewers act as the content owners for the pre-delivery preparation. Pre-delivery preparation includes taking “content ownership” for the course and partnering with the OBM Training Academy for draft reviews, edit update requests, notification of material changes due to new policies, laws, regulations, etc. and maintenance and control of course activities (as applicable). Four points are awarded for participation in the curriculum review of one of the OFA courses during any of the three OFA Tiers for a 2 year term. The course reviewer can participate with 2 courses as long as the courses are in different tiers for a maximum of 8 points.

## ***Panel Participation***

*4 point maximum per roundtable/panel.*

Any COFP that is selected to participate in a panel/roundtable during a cohort tier will receive 4 recertification points. e.g. CFO Roundtable.

## ***Fiscal Knowledge Exchange***

Originating as an Ohio Fiscal Academy capstone project, the Fiscal Knowledge Exchange provides state fiscal employees a place to share and access approved submissions in key financial management areas. As a way to help fellow graduates, the project team and OFA have partnered to offer recertification points for approved submissions. Also, the project team is in need of reviewers to examine the content against state policy, and for effectiveness and appropriateness.

[Back to “At a Glance”](#)



# Ohio Fiscal Academy

Cohort 6 January 20, 2016 to September 23, 2016

## **Submitter**

*4 points per approved submission. No maximum.*

**\*NEW\*** Any fiscal employee can earn OFA credits for submitting a practice to the Fiscal Knowledge Exchange that is subsequently published on the site. Submissions should be able to be applied across a range of agencies, should contain a sufficiently descriptive title to let site users know if it pertains to their circumstances, should contain sufficient detail to allow for implementation and may also contain attachments with presentations, workbooks, or detailed instructions. Generally, these practices will improve efficiency or effectiveness, reduce cost, reduce errors and/or speed up processing time.

## **Subject Matter Expert (SME) Reviewer**

*1 year term. 4 points awarded/year. 8 point maximum per recertification period.*

**\*NEW\*** These individuals are selected based on their proficiency in a business area, training, or interest in a subject area. SME reviewers can comment on any subject area, but are expected to review submissions in the areas that they are assigned. SME reviewers can earn OFA credits for participating in the Fiscal Knowledge Exchange.

## **Approver**

*1 year term. 4 points awarded/year. 8 point maximum per recertification period.*

**\*NEW\*** These individuals are central service agency representatives who respond to questions on state policy and procedures. Only approvers and the Site Administrator may publish material to the site. Approvers and site administrators can earn OFA credits for participating in the Fiscal Knowledge Exchange.

## **Capstone**

The capstone projects begin during the tier 1 week and culminate with the presentations on the last day of the final tier 3.

[Back to "At a Glance"](#)



# Ohio Fiscal Academy

Cohort 6 January 20, 2016 to September 23, 2016

## **Capstone Review Panel**

*8 point maximum per two year cycle*

Eight points are awarded to OFA Alumni who contribute their experience and expertise to the Ohio Fiscal Academy's current cohorts by participating in the Capstone Project Review Panel. Cohort teams complete a fiscal related capstone project as a cumulative assignment across the span of the entire program. On the last day of the 3<sup>rd</sup> tier, the teams present the project to the cohort, OBM Training Academy Program Manager or designee and the Capstone Project Review Panel (OFA Alumni, SMEs, and other interested parties).

The Review Panel will provide immediate feedback to the project team in the form of written and verbal feedback. The responsibilities of the review panel include reviewing the 10 to 20 page Case Study/Research Essay (provided 1 week prior to presentation day) for each team, attending the live presentations on the last day of Tier 3 for each team, and provide written and verbal feedback to the project team members using the evaluation guidelines as outlined in the Capstone Project Review Panel Guide.

## **Presentations**

The capstone projects have been highly successful. Though the purpose of the projects for OFA purposes focuses on the journey during the life of the project, the projects have been so successful that some projects have become initiated programs. Also, in assisting the new OFA participants, graduates who have completed the capstones have been asked to come back and present their experiences.

## **Capstone Overview**

*4 point maximum per two year cycle.*

**\*NEW\*** OFA will ask for volunteers to share their experiences of the capstone process during tier1 to help the new participants. The selected volunteers will receive 2 points for sharing their experiences during a 1 hour session.

## **Capstone Presentations**

*2 points/presentation, 4 point maximum per two year cycle*

**\*NEW\*** Capstone projects that gain interest from agencies may be asked to provide their capstone presentation to a live audience. Teams that are asked to present their findings again after the initial presentation day may be awarded recertification points. Two points will be awarded per presentation. There is a two presentation cap for points. Only OFA participants who have fully satisfied all OFA requirements will be awarded points. Participants who need to make up courses or assignments will not receive the recertification points.

[Back to "At a Glance"](#)



# Ohio Fiscal Academy

Cohort 6 January 20, 2016 to September 23, 2016

## **Capstone Mentor**

*8 point maximum per two year cycle.*

**\*NEW\*** Capstone mentors are OFA graduates who have previously completed the capstone experience. OFA will solicit for volunteers before each cohort. 4 mentors will be chosen. The mentor will be placed with a capstone team to assist them during their capstone experience. Mentors will be required to meet face-to-face with the capstone (at least) once during each between tier period to check on progress and offer support and suggestions at the team's request. The mentor will do their best to be available to the team and their needs. An evaluation survey will be completed by each capstone team member on the mentor before points are awarded. Lackluster survey responses may impact the number of points credited. A maximum value of eight points will be awarded per cohort.

## **OFA 1 Time Project**

There may be times where the OFA will send an opportunity for COFPs to assist on valuable short term projects *e.g. Piloting a new class*. In these cases, OFA will determine the selection criteria and select the volunteers. The recertification points will vary depending on the project and are at the discretion of the Ohio Fiscal Academy.

## **Publication**

### **Research and Publishing**

*8 point maximum per two year cycle.*

Four points are awarded for conducting the primary research on a state fiscal related topic if the research results are published in a scholarly financial journal or publication. Submit a copy of the published article(s) to OFA via the [OhioFiscalAcademy@obm.ohio.gov](mailto:OhioFiscalAcademy@obm.ohio.gov) email or send the links to online articles to obtain research and publishing credit. To obtain recertification credit, the article(s) must be a minimum of 1,000 words must contain facts and data and **not** be an editorial or opinion piece, and be published in a professional publication (not a blog or agency published newsletter). (4 points awarded for each unique article not for each publication of same article up to 8 points max.)

[Back to "At a Glance"](#)