



Recertification Policy

Revised: 11/30/15

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 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 for clarification.

At A Glance

Continuing Education	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

OFA Community Involvement	Maximum Allowable Points per Recertification Period – 16pts
Curriculum	
Instructor Delivery	8 point maximum per recertification period.
Course Review	8 point maximum per recertification period.
Panel Participation	4 point maximum per roundtable/panel.



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Fiscal Knowledge Exchange

Submitter	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.

Capstone

Review Panel	8 point maximum per recertification period.
Overview Presentation	4 point maximum per recertification period.
Capstone Presentations	2 points/presentation, 4 point maximum per two year cycle.
Capstone Mentor	8 point maximum per recertification period.

[OFA 1 time projects](#) Varies at the discretion of the Ohio Fiscal Academy.

[Research and Publishing](#) 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.*



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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 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 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. “15th 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.

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OFA Community Involvement

16 point maximum per two year cycle.

Category	Maximum Allowable Points per Recertification Period – 16pts
Curriculum	
Instructor Delivery	8 point maximum per recertification period.
Course Review	8 point maximum per recertification period.
Panel Participation	4 point maximum per roundtable/panel.
Fiscal Knowledge Exchange	
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.
Capstone	
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:

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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.

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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.

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 3rd 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.

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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.

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.

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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 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.)

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