

<NAME>
2011-2012 Performance Agreement
Budget & Management Analyst

1. Professional Development Objective

Acquire knowledge and competency in County and OMB software applications in order to produce high quality work in a timely manner.

Rationale

In order to effectively perform my budget analyst duties, I must have broad knowledge of and good competency in using the various software applications needed to conduct business in Broward County and the Office of Management and Budget.

Performance Indicators

To accomplish this objective, I will receive training in, familiarize myself with the uses of, and become competent in use of the following applications:

- 1) All AMS software:
 - a. Advantage Financial System
 - b. Performance Budgeting (for budgeting and forecasting)
 - c. InfoAdvantage reporting
- 2) Patternstream budget publishing software
- 3) Features of Microsoft Office that are associated with OMB work, especially Excel, Word, and Access (if appropriate), and PowerPoint for presentations.
- 4) Outlook e-mail, calendar, scheduling, notify, and archiving.

2. Professional Development Objective

Master Budget Office rules and policies and acquire any additional skills or training that will allow me to provide high quality analysis and recommendations.

Rationale

In order to effectively perform my budget analyst duties and deliver high quality service to my agencies, it is essential that I know and understand my role, the associated responsibilities and applicable rules and policies.

Performance Indicators

To accomplish this objective, I will:

- 1) Review and become familiar with files associated with my agency assignments in order to begin learning about the business of my agencies & associated operations
- 2) Complete site visits to meet key agency contacts and increase my learning about agency businesses and operations.
- 3) Read and become familiar with the OMB Internal Control Handbook, Budget Reference Guide, and other references as necessary.
- 4) Familiarize myself with the various roles and responsibilities of a budget analyst through discussion with my supervisor and with more experienced analysts.
- 5) Identify areas in which I need additional training in order to provide excellent service to my assigned agencies and obtain approval to take appropriate courses.
- 6) Seek out all perspectives and sources of information and use those perspectives when making recommendations.

3. Professional Development Objective

Enhance my knowledge, skills and abilities related to process improvement approaches and techniques.

Rationale

Process mapping and analysis are valuable tools for documenting and analyzing business processes in order to identify improvement opportunities based on data. Learning the essential skills and methodology of this function will enhance my ability to assist my agencies and to participate in OMB consulting projects.

Performance Indicators

To accomplish this objective, I will:

- 1) Become more familiar with the application of process improvement techniques by observing and assisting with process improvement project sessions facilitated by OMB.
- 2) If assigned to a project team, exhibit my skill by correctly analyzing processes and producing appropriate work products.

4. Work Product and Achievement Objective

Perform the functions relating to operating budget development and monitoring and amending assigned agency budgets.

Rationale

As a budget analyst my responsibility is to assist the Budget Office and my assigned agencies in developing and executing responsible, balanced budgets while ensuring that they are compatible with the goals of Broward County as established by the Board of County Commissioners.

Performance Indicators

To accomplish this objective, I will:

- 1) Assist the agencies assigned to me in developing sound FY13 budgets by July 2012.
 - a. Coordinate setup of project units for Integrated Water Resources Plan (IWRP)
 - b. Implement the NRPM 5-year business plan through FY 13 budget recommendations
 - c. Identify additional revenue sources for the Environmental Lab to fully fund a PT-19 position.
 - d. Seek project proposals from the Manatee Protection Fund and Impact Fee Surcharge Fund to spend down fund balances.
- 2) Analyze supplements and/or budget requests and develop well-reasoned recommendations to the budget director.
- 3) Provide timely and complete information to my agencies for budget development.
- 4) Forecast my assigned agencies to within 5% accuracy within stated time frames.
- 5) Perform legislative analysis as required.
- 6) Perform the initial review of all Budget Change Request Forms within 48 hours.
- 7) Perform the initial review of all BGBTs submitted within 24 hours.
- 8) Meet OMB service standards 100% of the time.

5. Professional Development and Work Product Objective

Learn the County's performance management program and apply knowledge to review of agency performance reports.

Rationale

OMB manages the County's Performance Management Program. To be effective as an analyst, it is

essential that I become familiar with all aspects of the program and become skilled at developing and recognizing appropriate mission/goal statements and the different types of measures used in the program. It is also important to be able to interpret my agencies' measures in light of the services they provide to assure that performance measures meaningfully represent the results, their quality, and the relative resources required to obtain their results.

Performance Indicators

To accomplish this objective, I will:

1. Review training and reference materials related to the Performance Measurement Program, including the PM Tutorial developed by OMB, the ASPA Workbook entitled *Performance Measurement Concepts and Techniques* and OMB tools for assisting agencies in developing efficiency and outcome measures.
2. Review and become familiar with the purpose and content of the Countywide Customer Satisfaction Survey form, requirements, and tabulation methodologies.
3. Demonstrate competency with mission/goal statements and different types of measures by correctly reviewing agency goals and measures and developing appropriate alternatives when necessary.
4. Demonstrate appropriate judgment in evaluating current and proposed measures to ensure that they correctly represent the attributes they are intended to reflect and that suitable advice is provided and consensus reached with the agency regarding their new or revised measures.
5. Demonstrate thoroughness and competency in reviewing agency performance reports by ensuring appropriate cause and effect relationships in explanatory notes and variance explanations, reviewing all assigned aspects of agency reports, and consistently meeting review deadlines

6. Work Product and Achievement Objective

Perform the functions relating to development, monitoring, and amending of my assigned agencies' capital budgets throughout the year.

Rationale

Broward County requires a stable capital plan in order to properly plan for the future. Thorough analysis of capital requests is necessary to efficiently use available resources to provide for future capital needs.

Performance Indicators

To accomplish this objective, I will:

- 1) Develop a sound FY13 capital budget and a balanced and responsible five-year capital program by July 2012.
- 2) Review the capital budgets of my assigned agencies and meeting with the capital program manager or coordinator to discuss key issues and problems prior to the start of the capital budget process.
- 3) Produce thorough analyses of capital project requests and operating budget impacts.