



Individualized Professional Development Plan

Action Plan: Fiscal Officer Staff Sample

Instructions: Develop a plan to support career development within current job role or in preparation for a new position.

| Staff Name: Kai D. (Accountant) | | Supervisor Name: Avery Welch (CFO) | | Date Achieved: 9/19 | |
|---|--|---|---|---|--|
| | | | | Date Developed: 6/01 | |
| Staff meets HSPPS qualifications for job role: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> Not yet If not yet, job-related degree/certification completion needed: <input type="checkbox"/> CDA or equivalent <input type="checkbox"/> AA degree <input type="checkbox"/> BA degree <input type="checkbox"/> Advanced <input checked="" type="checkbox"/> Coursework, clock hours, or CEUs to maintain certification or credential | | | Ongoing training and professional development, coaching/mentoring, and reflective supervision, and other included in plan: <input checked="" type="checkbox"/> Coursework or training in an area of interest <input checked="" type="checkbox"/> Coaching/Mentoring <input type="checkbox"/> Reflective Supervision/Practice <input type="checkbox"/> Team Project(s) <input type="checkbox"/> Rotational Assignment <input type="checkbox"/> Other: | | |
| GOAL: To increase knowledge of fiscal reporting by earning a CPA certification. | | | | | |
| Steps needed to achieve this goal | | Resources needed (People, materials, financial support) | | Timeframe (Realistic time needed to complete step) | |
| | | | | Date Completed | |
| 1 To apply for uniform CPA examination. | | Funding (TTA or other means) to purchase all 4 sections of CPA in GA is \$952 plus the initial \$170 application fee and \$35 registration fee | | Anticipated completion 4 weeks | |
| 2 Enroll in prep classes to prepare for CPA examination. | | Funding (TTA or other means) to enroll in CPA exam preparation | | 4 weeks | |
| 3 Study for CPA exam and review course materials. | | Time allocated for study. Study materials, practice/sample tests, study groups/ Meet with CFO if I have any questions while going through exam prep review. | | 6 months | |
| 4 Sit for the CPA exam; the exam consists of four, four-hour sections: Auditing and Attestation (AUD), Business Environment and Concepts (BEC), Financial Accounting and Reporting (FAR), and Regulation (REG). | | Internet access, time availability (4 hrs. for each section) | | (7 months) 4/01 | |
| Potential Challenges: No Challenges identified at this time. | | | | | |
| Date to revisit Goal: | | <input type="checkbox"/> I have achieved this goal by meeting the criteria specified in the goal achievement statement (s) above | | <input checked="" type="checkbox"/> I am making progress toward this goal and will keep implementing my action plan | |
| | | | | <input type="checkbox"/> I need to make changes to my plan to achieve this goal by revising the goal or changing the action steps | |

Staff Signature and Date: Kai D. 01/14

Supervisor Signature and Date: Avery W. 01/14

The IPDP Profile and Action Plan are sample forms. Head Start programs are not required to use them. Regardless of the form used, the intent is to help staff and their supervisor, or a human resource professional explore potential career goals and plan steps to achieve them. Users can include additional copies of each form as needed.



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Action Plan Follow-up Notes and Status Updates

Instructions: This form is completed by you and those in attendance to capture progress made toward achieving your career goal.

| Follow-up and Status Updates | Attendees | Date |
|--|----------------------------|--------------|
| <p>9/22 met with CFO & CEO</p> <ul style="list-style-type: none"> Kai secured tuition funding to enrolled in college CPA course. Kai signed employee tuition reimbursement agreement stating he promises to stay with his agency 2 years upon completion of CPA certification. If Kai forfeits the agreement, he will be responsible for paying back the agency. <p>Agreed on next meeting date 10/22.</p> | <p>Kai D. Avery W.</p> | <p>9/22</p> |
| <p>10/20 met with CFO</p> <ul style="list-style-type: none"> Financial essentials coursework nearing completion; 2 more modules are needed to complete the series. Kai reports enjoying the modules; however, they are a bit on the basic knowledge level. Kai plans to join a CPA study group session and dedicate two hours in the evenings on Wednesday and Fridays to study independently for the exam. Kai states that his home internet is sometimes unstable. Because he is a hybrid employee (working from home 3 days/week), the program is looking into funds to upgrade his home internet since so much of his goal completion relies on internet resources (ECKLC, zoom study groups, etc.). Agreed on next meeting date 12/01 with CEO. | <p>Kai D. Avery W.</p> | <p>10/20</p> |
| | | |

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