**Donna Munoz**

**Review notes**

Goal 1: Met

* Developed and maintained good working relationships
* For OCMHII, Vincent and I were the drivers with setting up the fund and training Viteos. After that point she did a good job guiding them through Class B on a monthly / quarterly basis. She assists in providing them with feedback during the close process to help make the process more efficient.
* Did a good job working with Computech; however, additional training was needed. That’s not to say she did a bad job, just that she performed at the sr accountant level, not exceeded.
* Training and working with the third parties is fairly new and a work in progress. Therefore, it’s hard to say that her goal was exceeded.

Goal 2: On target

* Donna’s work on Future Fund and SSG weekly cash sheet started in Q3
* She has a steeper learning curve then she discusses for FF (example is time spent on financial statements)
* By taking on this more complex fund and additional work, she seems overwhelmed. Not to say she’s doing a bad job. Just means she has more growth ahead.
* Notes regarding her audit coordinator role seem more like work in progress so don’t meet the exceed category

Goal 3: Met

* Donna should view asking for assistance at her level as a positive thing. We are a team and I would rather her not spin her wheels. She should take a step back and look at the big picture in order to ask though-out, meaningful questions. This will help guide her through her work and any task at hand. It’s not always the quantity but more so the quality she should focus on. She’s been working on this and doing a good job since you talked to her.
* Definitely a team player and has stepped in to help out other staff. However, she needs to be able to balance this with her current work so that the quality isn’t compromised and that she is still able to efficiently meet her deadlines.
* Donna is good at execution and requires a manager to guide her through the process and appropriate approach. That’s not a negative thing. It’s what we expect from someone at her level.

Goal 4: Met

* Great team player and has an excellent attitude

Goal 5: Met

* In addition to industry knowledge, I would encourage Donna to spend time learning about her fund’s structures. I would also encourage her to take the time to understand how the fund operates (i.e., the waterfall).

Goal 6: Ongoing

Results-orientation: Fully Meets

Business / Functional Expertise: Fully Meets

Influence: Fully Meets

Collaboration: Exceeds

Forthrightness: Fully Meets

Development-focus: Fully Meets

Key Strengths and Additional Accomplishments:

* Great positive attitude
* Team player
  + Takes ownership and accountability of her own work and maintains an optimistic attitude, even when stepping in to assist others
  + Great relationship with other staff
* Demonstrated growth this past quarter by challenging herself and taking on new, more complex funds. Still a work in progress (her own words)
  + Approached each challenge as a learning opportunity and as a way to enhance both her technical skills and knowledge of Oaktree
  + Responsive to all staff, managers and other groups within the firm and actively follows up on questions and requests. She sees something through from start to finish and can execute well with guidance.

Keys areas for Development and Improvement:

Same areas we discussed last week

* Balance additional workload with remaining accurate and efficient. Taking on more work shouldn’t compromise the quality of other deliverables. This is not to say she produces bad work. It’s more so that she has a steeper learning curve than she perceives and should be cautious about getting overloaded and overwhelmed.
* Keeping managers up to date rather than spin wheels (she’s already taking steps towards asking more thought out questions). This way she will understand better the purpose of her work.
* Seeing big picture and learning about fund structure and waterfall.
* Becoming more knowledgeable about GWI and ARC
* Continue to leverage internal and external relationships which will make her even more resourceful