

Reviewer Id \_\_\_\_\_  
Name of entity \_\_\_\_\_  
Record number \_\_\_\_\_

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**Please rate each criterion and each overall category on the line preceding the description**

**1 = Information not present, 2= Does not satisfy criterion, 3=Proficient, 4= Outstanding, N/A= not applicable  
(Note that if a criterion is rated N/A, the narrative must indicate why the item does not apply.)**

**Policy Document (PD)**

- \* \_\_\_\_\_ PD # 1: Financial policies (**mandatory**)
- \_\_\_\_\_ PD # 2: Long-term non-financial goals & objectives
- \_\_\_\_\_ PD # 3: Short-term organization-wide initiatives
- \* \_\_\_\_\_ PD # 4: Priorities and issues (**mandatory**)
- \_\_\_\_\_ PD # 5: Unit goals and objectives
- \_\_\_\_\_ Overall as a policy document

**Financial Plan (FP)**

- \_\_\_\_\_ FP # 1: Funds and fund structure
- \* \_\_\_\_\_ FP # 2: Consolidated financial overview (**mandatory**)
- \* \_\_\_\_\_ FP # 3: Three (four) year financial information (**mandatory**)
- \* \_\_\_\_\_ FP # 4: Major revenues (**mandatory**)
- \* \_\_\_\_\_ FP # 5: Changes in fund balance/equity (**mandatory**)
- \* \_\_\_\_\_ FP # 6: Capital expenditures (**mandatory**)
- \_\_\_\_\_ FP # 7: Impact of capital improvements on operating budget
- \* \_\_\_\_\_ FP # 8: Debt (**mandatory**)
- \_\_\_\_\_ FP # 9: Basis of budgeting
- \_\_\_\_\_ Overall as a financial plan

**Operations Guide (OG)**

- \* \_\_\_\_\_ OG # 1: Description of functions (**mandatory**)
- \_\_\_\_\_ OG # 2: Performance measures
- \* \_\_\_\_\_ OG # 3: Organization chart (**mandatory**)
- \* \_\_\_\_\_ OG # 4: Summary position information (**mandatory**)
- \_\_\_\_\_ Overall as an operations guide

**Communications Device (CD)**

- \_\_\_\_\_ CD # 1: Budget issues
- \_\_\_\_\_ CD # 2: Other planning processes
- \* \_\_\_\_\_ CD # 3: Budget process (**mandatory**)
- \* \_\_\_\_\_ CD # 4: Charts and graphs (**mandatory**)
- \_\_\_\_\_ CD # 5: Relationship between functional units and financial structure
- \* \_\_\_\_\_ CD # 6: Table of contents (**mandatory**)
- \_\_\_\_\_ CD # 7: Glossary
- \_\_\_\_\_ CD # 8: Statistical and supplemental information
- \_\_\_\_\_ CD # 9: Understandability and usability
- \_\_\_\_\_ Overall as a communications device

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