

Reviewer ID
 Name of Entity
 Record Number

Document Number
 State/Province
 Order Rec'd Number

1 = Information not present, 2= Does not satisfy criterion, 3=Proficient, 4= Outstanding

Please rate each criterion and each overall category

	<u>Policy</u>	<u>Financial</u>	<u>Operations</u>	<u>Communications</u>	<u>Criteria Description</u>
Introduction and Overview					
* C1					Table of contents (mandatory)
P1					Strategic goals & strategies
P2					Short-term organization-wide factors influencing decisions
* P3					Priorities and issues (mandatory)
* C2					Budget Overview (mandatory)
Financial Structure, Policy, and Process					
* O1					Organization chart (mandatory)
F1					Fund descriptions and fund structure
O2					Department/fund relationship
F2					Basis of Budgeting
* P4					Financial policies (mandatory)
* P5					Budget process (mandatory)
Financial Summaries					
* F3					Consolidated financial schedule (mandatory)
* F4					Three (four) year consolidated and fund financial schedules (mandatory)
* F5					Fund balance (mandatory)
* F6					Revenues (mandatory)
F7					Long-range financial plans
Capital & Debt					
* F8					Capital expenditures (mandatory)
F9					Impact of capital investments on operating budget
* F10					Debt (mandatory)
Departmental Information					
* O3					Position summary schedule (mandatory)
* O4					Department descriptions (mandatory)
O5					Unit goals and objectives
O6					Performance measures
Document-wide Criteria					
C3					Statistical/supplemental section
C4					Glossary
C5					Charts and graphs
C6					Understandability and usability
					Overall as a policy document
					Overall as a financial plan
					Overall as an operations guide
					Overall as a communications device