Welcome to the ACCJC Webinar!

Quick tips for engaging during the webinar:

- Ask questions by using the Q&A button in Zoom. Once the Q&A is opened, you can drag on the borders to enlarge the screen or make it smaller.

- The webinar facilitator and panelists will review the Q&A tool to respond to your questions. There will be time at the end of the session for general Q&A.

- **The chat function will be disabled during this webinar.**

- Participants’ audio and video are not available. Only the panelists will be seen and heard.

- The session is recorded and will be posted at accjc.org/webinar.

Thank you
Jared Spring,
ACCJC Events and Services Manager
Introductions

Dr. Stephanie Droker, ACCJC President
Dr. Catherine Webb, ACCJC Vice President
Christine Statton, ACCJC Fiscal Review Associate
Today’s Topic:
Annual Fiscal Report & Annual Report

• Provide overview of the Annual Fiscal Report and Annual Report
• Highlight improvements in the reporting requirements
• Support your efforts to complete the reports via Q & A session

➢ Ask questions by using the Q&A button in Zoom.
Annual Reporting Process

• Email sent to ALOs and CEOs with instructions and password information

• ALOs create account for chief business officers

• Annual Fiscal Report and Annual Report must be completed online

• CEO is responsible for certifying and submitting completed reports

• Reports are due by **Friday, April 9, 2021**
  • AFR’s for Private Colleges or Pacific Institutions are due nine months after end of fiscal year, if different than June 30th year end.

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ACCJC Fiscal Monitoring

• ACCJC Policy on Monitoring Institutional Performance
  • The ACCJC Annual Fiscal Report collects information from the institution of key data and indicators of fiscal stewardship and stability

• Aligned with the Commission’s pursuit of improvement, the fiscal advisory committee was reconstituted two years ago to review the Commission’s fiscal monitoring processes and practices

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Fiscal Review Advisory Committee

• Composition
  • ACCJC Commission Chair Sonya Christian
  • ACCJC Commissioner Michael Zimmerman
  • ACCJC President Stephanie Droker
  • ACCJC Fiscal Review Associate Christine Statton
  • Multi-College District Representative – Fred Williams, CBO, North Orange CCD
  • Single-College District Representative – David Martin, Interim Superintendent/President, Monterey Peninsula College
  • Pacific Islands Representative – Mike Unebasami, CBO, University of Hawaii CCs
  • Private College Representative – David Allen, CBO, MTI College
Recent Activities

• Different template for types of institutions
• Philosophical change - fiscal risk to fiscal health
• Scoring/weighting of the review rubric
  • Composite Financial Index (CFI) has three categories:
    • Healthy, no monitoring
    • Monitoring (no follow-up by institution needed)
    • Enhanced monitoring (formal communication to institution with follow-up required)

• Expanded instructions, pop-up instructions “Additional Information”, and clarifications to the Annual Fiscal Report
• Source documents more clearly identified

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Changes to Annual Fiscal Report

• California Community Colleges
  • Single College Districts will now have four questions auto-filled from District information, rather than entering information twice
  • Requesting additional detail regarding Other Unrestricted Financing Sources, if applicable
  • Added question regarding significant cash flow issues in the current year
  • Audits: Questions regarding material weaknesses and significant deficiencies are expanded, and source input is clarified – input may be easier
  • Added question regarding use of OPEB funds to balance the General Fund in the report year
  • Four other smaller changes, clarifications, or added questions

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Changes to Annual Fiscal Report

• Pacific Islands, Public Institutions
  • Requesting additional detail regarding revenue from other unrestricted sources (non-general fund), if applicable
  • Added question regarding end of fiscal year unrestricted cash balance at the college level

• Private and Proprietary Colleges
  • Added question regarding student loan default rate, if applicable
  • Removed question regarding contract negotiations settlement information (not applicable)

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✓ Check the Q&A for answers to questions.

For questions about the Annual Fiscal Report, contact Stephanie Droker at sdroker@accjc.org at anytime after the webinar.

For technical assistance with username & password credentials and/or logging in to the system, contact Tom Lane at tlane@accjc.org.
ACCJC Annual Report

• Data related to institutional strength and stability:
  • Headcount and Enrollment
  • Program growth or decline
  • Includes Distance Ed and Correspondence Ed

• Data related to student achievement
  • Federal Scorecard Data
  • Institution Set Standards

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What does ACCJC do with this information?

- Reflection on trends within the membership
  - June Commission meeting report on Annual Report
    - Not peer-based benchmarking
    - Not aggregating data
    - Not comparing this year’s report to prior years’ reports

- Accountability
- Improvement

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Changes in 2021 Annual Report

• Clarified instructions and data definitions (see *Getting Started Instructions*)

• Corrected omission of stretch goal for licensure examinations to be consistent with ISS data reporting template in the *Guide to Institutional Self-Evaluation, Improvement, & Peer Review*

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Check the Q&A for answers to questions.

For questions about the Annual Report, contact Catherine Webb at cwebb@accjc.org at anytime after the webinar.

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Contact Us

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Community and Junior Colleges
10 Commercial Boulevard, Suite 204
Novato, CA 94949
accjc.org
Next Webinar:

Tuesday, March 23, 2021, 1:00 – 2:00 pm PDT

ACCJC Initiatives Updates

Join Commission staff for an update on important initiatives, including:

- ACCJC Standards Review process
  - Virtual Site Visits
- Formative/Summative Review Process

Details at [www.accjc.org/webinar](http://www.accjc.org/webinar)
Your Opinion Matters!

Please complete our short survey to tell us what you thought about the webinar today.

www.accjc.org/webinar

Thank you!