Welcome!

Quick tips for engaging during this ACCJC 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 being recorded and will be posted at accjc.org/webinar.**
Today’s Facilitators

Dr. Catherine Webb  
ACCJC Vice President

Christine Statton  
ACCJC Fiscal Review Associate
Today’s Goals

• Provide overviews of the Annual Fiscal Report and Annual Report
• Highlight improvements in the reporting requirements
• Answer your questions about the reports via Q & A session

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Background: Purpose of the Reports

• **ACCJC Policy on Monitoring Institutional Performance**

• Commission engages in annual monitoring approaches in order to:
  • Assess continued compliance with Commission Standards
  • Take into account institutional strengths and stability during the review cycle

• Process uses institutions’ self-reported data

• Primary data collection tools:
  • **Annual Fiscal Report:** key indicators of fiscal health and stability
  • **Annual Report:** headcount growth/decline; student achievement indicators

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Reporting Process

• Annual Fiscal Report and Annual Report must be completed online
• CEOs and ALOs receive instructions and password via email
• ALOs create logins for chief business officers (AFR), other supports (AR)
• CEO must certify and submit final, completed reports

• **Due dates:**

<table>
<thead>
<tr>
<th></th>
<th>Annual Reports</th>
<th>Annual Fiscal Reports</th>
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<tbody>
<tr>
<td>CA Community Colleges:</td>
<td>Friday, April 8, 2022</td>
<td>Friday, April 8, 2022</td>
</tr>
<tr>
<td>Private / Pacific Colleges:</td>
<td>Friday, April 8, 2022</td>
<td><strong>9 months after fiscal year end</strong></td>
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Monitoring Fiscal Health

• *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

• Commission Values
  • ACCJC’s Fiscal Advisory Committee reviews colleges’ financial data in alignment with the Commission’s values of integrity, quality assurance, institutional improvement, and peer review

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Fiscal Advisory Committee

• Composition
  • ACCJC Commission Chair Sonya Christian
  • ACCJC Commissioner Michael Zimmerman
  • ACCJC Vice President Catherine Webb
  • ACCJC Fiscal Review Associate Christine Statton
  • Multi-College District Representative – Fred Williams, Vice Chancellor, Finance & Facilities, North Orange CCD
  • Single-College District Representative – Dan Troy, Assistant Superintendent/Vice President of Administrative Services, Cuesta College
  • Pacific Islands Representative – Mike Unebasami, CBO, University of Hawaii CCs
  • Private College Representative – (Currently vacant; Member TBD)

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Notes and Recent Improvements

• Different template for types of institutions
• Philosophical change five years ago - 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 for 2022

California Community Colleges

- Requesting additional detail regarding Other Unrestricted Financing Sources (Acct 8900)
  - HEERF funds transferred into GFU account 8900 will count as “sustainable” revenues for 2020-21
  - Added detailed description for USDE student loan default cohort percentages

Pacific Islands, Public Institutions

- Requesting additional detail regarding revenue from other unrestricted sources (non-general fund), if applicable, and HEERF funds will be counted as sustainable.
  - Added detailed description for USDE student loan default cohort percentages

Private and Proprietary Colleges

- Added detailed description for USDE student loan default cohort percentages

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Review: Last Year’s Annual Fiscal Report Changes

California Community Colleges

• Single College Districts now have four questions auto-filled from District information
• Added questions regarding ‘current year’: significant cash flow issues, use of OPEB funds to balance GFU budget, anticipated GFU deficit, estimated FTES decline
• Audits: Questions regarding material weaknesses and significant deficiencies are expanded, and source input is clarified – input may be easier

Pacific Islands, Public Institutions

• 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 Catherine Webb at cwebb@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.
Monitoring Other Aspects Institutional Strength

• ACCJC Policy on Monitoring Institutional Performance
  • The ACCJC Annual Report collects non-fiscal data related to institutional stability and student achievement

• Commission Values
  • Data collection and monitoring conducted in alignment Commission’s values – emphasizing the value of student learning and achievement

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Data Collected through the 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
  • Institutional performance against its Institution-set Standards

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How the Data are Used in ACCJC Monitoring

• Monitor & reflect on trends within the membership
  • Report at June Commission Meeting
  • Inform dialogue and training re: accountability & ongoing improvement

• ACCJC does **not** use the information for:
  • Peer-based benchmarking
  • Aggregating data (beyond very high-level trends)
  • Comparing Annual Report submissions from one year to the next

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Changes to the Annual Report for 2022

• NONE! 😊

• Quick review of changes from past two report cycles:
  • 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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Contact Us:

For Technical Assistance:
Tom Lane
Administrative Support Specialist
tlane@accjc.org

For All Other Questions:
Catherine Webb
Vice President
cwebb@accjc.org

Accrediting Commission for Community and Junior Colleges
330 J Street, Suite 200
Sacramento, CA 95814
accjc.org
Next Webinar:

Tuesday, March 15, 2022, 1:00 – 2:00 pm PDT

Changes in Distance Education Regulations

DE practitioners from ACCJC member colleges will share how they have addressed new DE regulations at their colleges, including concrete steps taken to communicate and incorporate changes into policies and professional development.

We hope you will join us!

Details at [www.accjc.org/webinar](http://www.accjc.org/webinar)
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www.accjc.org/webinar

Thank you!