

# Annual Report and Annual Fiscal Report

ACCJC Webinar

February 15 — 1:00 pm - 2:00 pm PST

# 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.**
- The session is being recorded and will be posted at [accjc.org/webinar](https://accjc.org/webinar).



*Thank you,  
**Jared Spring**  
Technology and Operations Director*

# Today's Facilitators



**Gohar Momjian**  
ACCJC Vice President



**Melynie Schiel**  
ACCJC Vice President



**Christine Statton**  
ACCJC Fiscal Review Associate

# Today's Goals

- Provide background on the Annual Fiscal Report (AFR)/Q&A
- Provide background on the Annual Report (AR)/Q&A
- Go over process for accessing and submitting the report surveys
- Highlight changes/improvements to the report questions
- Share how ACCJC uses your institution's data
- Answer your questions about the reports via Q & A session

➤ Ask questions by using the Q&A button in Zoom.

# 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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# What's New for 2024 Reports

- **New survey tool was introduced in prior year for both Reports**
  - Minor changes in functionality and process due to new reporting platform
  - New log-in and submission processes were implemented
  - Different templates for CCCs in multi-college and single-college districts
- Minor changes to questions and numbering in the AFR
- Additional question and minor changes to numbering in AR
- PDF copy of instructions & questions available on ACCJC website:  
<https://accjc.org/college-reports-to-accjc/>

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# Accessing the Reports

## Due dates:

	Annual Reports	Annual Fiscal Reports
CA Community Colleges:	Friday, April 12, 2024	Friday, April 12, 2024
Private / Pacific Colleges:	Friday, April 12, 2024	<b>9 months after fiscal year-end</b>

- ALOs received instructions and link to both surveys via email on 2/13
  - Please contact Tom Lane ([tlane@accjc.org](mailto:tlane@accjc.org)) if your ALO did not receive the links
- ALOs may share links with others as needed to complete data entry  
(CBOs, researchers, etc.)

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# Completing the Reports

- Please note the guidance on the Section Navigator page

This is the Section Navigator which will allow you to jump to any sections of the survey. You can complete the sections in any order and if you need to return to the main page, please use the back button.

- To begin or return to a section, please click the **Answer** button.
- The **Next** button at the bottom of this page will bring you to the final page of the survey. You will not be able to proceed until all sections of the survey have been completed.
- If you can't complete a section in one sitting, click **Back** to navigate back to the section navigator to complete a different section.

Section Navigator		
Section	Status	Actions
General Information *	Complete	<a href="#">Answer</a>
Enrollment Data: Unduplicated Headcount *	Complete	<a href="#">Answer</a>
Enrollment Data: Degree-applicable Enrollment (Credit Courses Only) *	Complete	<a href="#">Answer</a>
Enrollment Data: Distance Education *	Complete	<a href="#">Answer</a>
Enrollment Data: Correspondence Education *	Complete	<a href="#">Answer</a>
Federal Data *	Complete	<a href="#">Answer</a>
Institution-Set Standards: Course Completion Rates *	Complete	<a href="#">Answer</a>
Institution-Set Standards: Certificate Completion *	Complete	<a href="#">Answer</a>
Institution-Set Standards: Associate Degree Completion *	Complete	<a href="#">Answer</a>



# Submitting the Report

- Review and Submit by following the final instructions.

## Final Step

Thank you for completing the survey. As a final step, please enter your contact information. If you need to make any changes, you can click the back button or the navigation buttons below. **When you are ready, you please click the submit button at the very bottom on the survey.**

Name of person submitting this report: \*

Title of person submitting this report: \*

Email of person submitting this report: \*

Section	Status	Actions
General Information *	Complete	<a href="#">Answer</a>
Revenue *	Complete	<a href="#">Answer</a>
Expenditures/Transfers *	Complete	<a href="#">Answer</a>
Liabilities - Debt *	Complete	<a href="#">Answer</a>
Other Post-Employment Benefits (OPEBs) *	Complete	<a href="#">Answer</a>
Cash Position *	Complete	<a href="#">Answer</a>
Annual Audit Information *	Complete	<a href="#">Answer</a>
Other Information *	Complete	<a href="#">Answer</a>

By submitting this report on behalf of my institution, I confirm that the data and information contained herein is accurate and correct to the best of my knowledge. The institution acknowledges that knowingly submitting false or inaccurate data may result in notification to the U.S. Department of Education and/or accreditation action. \*

☐ Check to confirm and acknowledge

[Back](#)[Submit](#)

- For the Annual Report, the ALO and/or person submitting report will receive an email confirming submission with PDF copy of responses. There will not be a submission confirmation for the AFR.

# Certifying the Reports

## Simplified Certification Process:

- ACCJC will email a PDF copy of the submission to the ALO and CEO
- ALOs & CEOs review and reply
  - Corrections needed – (survey can be reopened)
  - No corrections – this is the final certified report

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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 Team reviews colleges' financial data in alignment with the Commission's values of integrity, quality assurance, institutional improvement, and peer review

➤ Ask questions by using the Q&A button in Zoom.

# Data Collected via the Annual Fiscal Report

## **Key indicators of sustained fiscal health, including data related to:**

- Enrollment
- Revenue
- Operating expenditures
- Long-term liabilities
- Federal financial aid (if applicable)

## **Process relies on:**

- Institutions' self-reported data (most recent Fiscal Year & two prior Fiscal Years)
- Input from practitioners at ACCJC member institutions (Fiscal Advisory Team)

# Fiscal Advisory Team

Practitioners from Member Institutions:	ACCJC Support:
<b>Paula Perez</b> <i>Vice President of Finance Campus (formerly MTI College)</i>	<b>Lori Gaskin</b> Commissioner
<b>Dan Troy</b> <i>Assistant Superintendent/VP Administrative Services Cuesta College</i>	<b>Kathleen Burke</b> Commissioner
<b>Mike Unebasami</b> <i>Associate Vice President for Administrative Affairs University of Hawaii Community Colleges</i>	<b>Christine Statton</b> <i>ACCJC Fiscal Review Associate</i>
<b>Mario Rodriguez</b> <i>Vice Chancellor, Finance &amp; Administration Los Rios Community College District</i>	<b>Melynie Schiel</b> <i>ACCJC Vice President</i>

# General Notes for the Annual Fiscal Report

- Different templates for different types of institutions
- Data definitions provided in the instructions and question prompts
- Responses are reviewed against a Composite Financial Index (CFI)
  - Healthy, no monitoring
  - Monitoring (no follow-up by institution needed)
  - Enhanced monitoring (ACCJC will communicate with institution regarding next steps)
- Philosophy for review is based on assumption of fiscal health

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# Changes to Annual Fiscal Report for 2024

## Changes (primarily California CC's and Pacific Colleges)

- Reporting of Capitalized Leases as long-term debt has been addressed (GASB 87)
- Some questions related to **OPEB** and **Debt** have been revised / simplified
- If applicable: 21-22 is the last year that HEERF funds will be counted as sustainable revenue
- Reporting of college-level allocations, expenditures, and fund balances has been eliminated
- Open-ended textbox added last year for all colleges – provide comments/context if needed

## Prior Year changes to highlight

- Different template surveys for California Community Colleges in multi-college and single-college districts
- Audit reporting was streamlined last year for all colleges





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- ✓ Check the Q&A for answers to questions.

**For technical assistance, contact Tom Lane at [tlane@accjc.org](mailto:tlane@accjc.org).**

**For other questions, contact at Christine Statton at [cstatton@accjc.org](mailto:cstatton@accjc.org).**

# Monitoring Other Aspects of 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 via the Annual Report

Data related to institutional strength and stability:

- Headcount and Enrollment
- Program growth or decline
- Includes Distance Ed and Correspondence Ed
- Includes Direct Assessment Programs

Data related to student achievement

- Federal Scorecard Data
- Institutional performance against its Institution-set Standards

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# How ACCJC Uses the Annual Report Data

Monitor & reflect on trends within the membership

- Report at June Commission Meeting
- Inform dialogue and training re: equitable student achievement, accountability, and 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 2024

- Addition of a question about Direct Assessment Programs
  - Changed subsequent numbering
  - Placeholder for colleges with pending programs
- Addition of navigation instructions
- Data definitions are now embedded on the page

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**For other questions, contact Melynie Schiel at [mschiel@accjc.org](mailto:mschiel@accjc.org).**

# Contact Us:

## Technical Assistance:

**Tom Lane**  
Administrative Support  
Specialist  
[tlane@accjc.org](mailto:tlane@accjc.org)

## Annual Fiscal Report Questions:

**Christine Statton**  
Fiscal Review Associate  
[cstatton@accjc.org](mailto:cstatton@accjc.org)

## Annual Report Questions:

**Melynie Schiel**  
Vice President  
[mschiel@accjc.org](mailto:mschiel@accjc.org)

## Accrediting Commission for Community and Junior Colleges

428 J Street, Suite 400  
Sacramento, CA 95814  
[accjc.org](http://accjc.org)



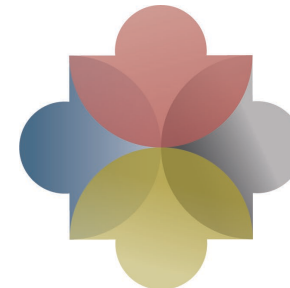
Upcoming Conference:

# **ACCJC 2024 Partners in Excellence**

**Fostering Outcomes, Improvements, and Innovations  
in Equitable Student Success**

May 9-10, 2024  
Hyatt Regency Orange County  
Garden Grove, California

Details at <https://accjc-conference.org>



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# Your Opinion Matters!

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

Thank you!