

HANDBOOK FOR PEER EVALUATORS



2015 Edition

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Guidelines for Preparation of the Financial Resources Review (FRR)

Through the Financial Resources Review the Commission will monitor the institution's financial and enrollment conditions.

In preparing the Financial Resources Review, the Commission asks that the institution provide the following information:

1. A Narrative Report. The narrative component of the report is a principal component of the Commission's review of the institution. The narrative should demonstrate to the Commission the institution's understanding of its fiscal and enrollment situation and provide evidence that it is developing realistic plans and taking concrete action to address its challenges. The Commission's review will focus on whether or not the financial condition of the institution has stabilized and/or improved and the likelihood of continued improvement.

The narrative should:

- a. Explain and appraise the institution's current financial and enrollment situation in terms of its strengths and concerns (for example, if the institution has debt, an explanation should be provided of how the institution is addressing the issue of debt);
- b. Describe the institution's plans and a framework for working through the above identified challenging issues (for example, how does the institution plan to enhance and strengthen available resources);
- c. Address the Board's involvement in financial planning. This includes providing evidence (through minutes of Board meetings and Board actions) of the Board's understanding of the fiscal challenges facing the institution and how they are being addressed;
- d. Explicate the assumptions underlying the institution's budgetary and enrollment projections.
- e. Discuss the contents of the audited financial statements, including any data which may require explanation to be understood.
- f. Address the nature and results of efforts taken since the last Commission review to respond to noted fiscal concerns and the outcomes of those efforts.

In completing the narrative, sufficient detailed information should be included to assure the Commission has a comprehensive understanding of the institution's fiscal and enrollment situation.

1. Actual budget results for the last three years;
2. Budget projections for a minimum of three years;
3. Actual enrollments for last three years and projected enrollments for next three years;
4. The institution's most recent audited financial statement and the accompanying management letter.

Please submit eight (8) printed copies and one electronic copy of the report as a single Adobe Acrobat file by the date requested in the Commission's notification letter.