

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

	Policy	Financial	Operations	Communications	Criteria Description
Grade					
* C1	☐	☐	☐	☐	Introduction and Overview
P1	☐	☐	☐	☐	Table of contents (mandatory)
P2	☐	☐	☐	☐	Strategic goals & strategies
* P3	☐	☐	☐	☐	Short-term organization-wide factors influencing decisions
* C2	☐	☐	☐	☐	Priorities and issues (mandatory)
	☐	☐	☐	☐	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

Return this rating sheet and your narrative comments to the Budget Awards Program (budgetawards@gfoa.org)