

June 30, 2023

Annmarie  
Financial Consultant  
Village of Burr Ridge  
7660 S. County Line Road  
Burr Ridge, IL 60504

Dear Ms. Mampe:

We are pleased to inform you, based on the examination of your budget by a panel of independent reviewers, that your budget document has been awarded the Distinguished Budget Presentation Award from Government Finance Officers Association (GFOA) for the current fiscal period. This award is the highest form of recognition in governmental budgeting. Its attainment represents a significant achievement by your organization.

The Distinguished Budget Presentation Award is valid for one year. To continue your participation in the program, it will be necessary to submit your next annual budget document to GFOA within 90 days of the proposed budget's submission to the legislature or within 90 days of the budget's final adoption. Information about how to submit an application for the Distinguished Budget Program application is posted on GFOA's website.

Each program participant is provided with confidential comments and suggestions for possible improvements to the budget document. Your comments are enclosed. We urge you to carefully consider the suggestions offered by our reviewers as you prepare your next budget.

When a Distinguished Budget Presentation Award is granted to an entity, a Certificate of Recognition for Budget Presentation is also presented to the individual(s) or department designated as being primarily responsible for its having achieved the award. Enclosed is a Certificate of Recognition for Budget Preparation for:

### **Finance Department**

Continuing participants will receive a brass medallion that will be mailed separately. First-time recipients will receive an award plaque within eight to ten weeks. Enclosed is a camera-ready reproduction of the award for inclusion in your next budget. If you reproduce the camera-ready image in your next budget, it should be accompanied by a statement indicating continued compliance with program criteria. The following standardized text should be used:

Government Finance Officers Association of the United States and Canada (GFOA) presented a Distinguished Budget Presentation Award to **Village of Burr Ridge, Illinois**, for its Annual Budget for the fiscal year beginning **May 01, 2023**. In order to receive this award, a governmental unit must publish a budget document that meets program criteria as a policy document, as a financial plan, as an operations guide, and as a communications device.

This award is valid for a period of one year only. We believe our current budget continues to conform to program requirements, and we are submitting it to GFOA to determine its eligibility for another award.

A press release is enclosed.

Upon request, GFOA can provide a video from its Executive Director congratulating your specific entity for winning the Budget Award.

We appreciate your participation in this program, and we sincerely hope that your example will encourage others in their efforts to achieve and maintain excellence in governmental budgeting. The most current list of award recipients can be found on GFOA's website at [www.gfoa.org](http://www.gfoa.org). If we can be of further assistance, please contact the Technical Services Center at (312) 977-9700.

Sincerely,

A handwritten signature in black ink that reads "Michele Mark Levine". The signature is written in a cursive style with a large initial "M".

Michele Mark Levine  
Director, Technical Services Center

Enclosure

## FOR IMMEDIATE RELEASE

June 30, 2023

**For more information, contact:**

**Technical Services Center**

**Phone: (312) 977-9700**

**Fax: (312) 977-4806**

**E-mail: [budgetawards@gfoa.org](mailto:budgetawards@gfoa.org)**

(Chicago, Illinois)--Government Finance Officers Association is pleased to announce that **Village of Burr Ridge, Illinois**, has received GFOA's Distinguished Budget Presentation Award for its budget.

The award represents a significant achievement by the entity. It reflects the commitment of the governing body and staff to meeting the highest principles of governmental budgeting. In order to receive the budget award, the entity had to satisfy nationally recognized guidelines for effective budget presentation. These guidelines are designed to assess how well an entity's budget serves as:

- a policy document
- a financial plan
- an operations guide
- a communications device

Budget documents must be rated "proficient" in all four categories, and in the fourteen mandatory criteria within those categories, to receive the award.

When a Distinguished Budget Presentation Award is granted to an entity, a Certificate of Recognition for Budget Presentation is also presented to the individual(s) or department designated as being primarily responsible for having achieved the award. This has been presented to **Finance Department**.

There are over 1,700 participants in the Budget Awards Program. The most recent Budget Award recipients, along with their corresponding budget documents, are posted quarterly on GFOA's website. Award recipients have pioneered efforts to improve the quality of budgeting and provide an excellent example for other governments throughout North America.

*Government Finance Officers Association (GFOA) advances excellence in government finance by providing best practices, professional development, resources and practical research for more than 22,500 members and the communities they serve.*



GOVERNMENT FINANCE OFFICERS ASSOCIATION

*Distinguished  
Budget Presentation  
Award*

PRESENTED TO

**Village of Burr Ridge  
Illinois**

For the Fiscal Year Beginning

**May 01, 2023**

*Christopher P. Morill*

Executive Director



**The Government Finance Officers Association  
of the United States and Canada**

*presents this*

**CERTIFICATE OF RECOGNITION FOR BUDGET PREPARATION**

*to*

**Finance Department  
Village of Burr Ridge, Illinois**



*The Certificate of Recognition for Budget Preparation is presented by the Government Finance Officers Association to those individuals who have been instrumental in their government unit achieving a Distinguished Budget Presentation Award. The Distinguished Budget Presentation Award, which is the highest award in governmental budgeting, is presented to those government units whose budgets are judged to adhere to program standards*

Executive Director

*Christopher P. Morill*

Date: **June 30, 2023**

**BUDGET REVIEW COMPOSITE RATING FORM**  
**GFOA Distinguished Budget Presentation Awards Program**  
**For budgets beginning January 1, 2023 or later**

Agency: **Village of Burr Ridge**

Fiscal Year beginning: **5/1/2023**

Document number: **B9948763**

At least 2 of the three reviewers must rate the document "proficient" or "outstanding" on all four overall categories and all mandatory criteria in order for the document to receive the award

Information Not Present (1)			Does Not Satisfy (2)			Proficient (3)			Outstanding (4)			
R1	R2	R3	R1	R2	R3	R1	R2	R3	R1	R2	R3	
						✓				✓	✓	<b>Introduction and Overview</b>
						✓	✓	✓				* C1 Table of contents (mandatory)
						✓	✓	✓				* P1 Strategic goals & strategies (mandatory)
						✓	✓	✓				* P2 Priorities and issues (mandatory)
						✓	✓	✓				* C2 Budget overview (mandatory)
												<b>Financial Structure, Policy, and Process</b>
						✓	✓	✓				* O1 Organizational chart (mandatory)
						✓		✓		✓		F1 Fund descriptions and fund structure
						✓		✓		✓		O2 Department/fund relationship
						✓	✓	✓				F2 Basis of budgeting
						✓	✓	✓				* P3 Financial policies (mandatory)
						✓	✓	✓				* P4 Budget process (mandatory)
												<b>Financial Summaries</b>
						✓	✓	✓				* F3 Consolidated financial schedule (mandatory)
						✓	✓	✓				F4 Three (four) year consolidated & fund financial schedules
						✓	✓	✓				* F5 Fund balance (mandatory)
						✓	✓	✓				* F6 Revenues (mandatory)
				✓	✓	✓	✓	✓				F7 Long-range operating financial plans
												<b>Capital &amp; Debt</b>
						✓	✓	✓				* F8 Capital program (mandatory)
						✓	✓	✓				* F9 Debt (mandatory)
												<b>Departmental Information</b>
						✓	✓				✓	* O3 Position summary schedule (mandatory)
						✓	✓				✓	* O4 Departmental/program descriptions (mandatory)
						✓	✓				✓	O5 Departmental/program goals and objectives
						✓	✓				✓	* O6 Performance measures (mandatory)
												<b>Document-wide Criteria</b>
						✓	✓	✓				C3 Statistical/supplemental section
						✓	✓	✓				C4 Glossary
						✓	✓	✓			✓	C5 Charts and graphs
						✓	✓	✓			✓	C6 Understandability and usability
												<b>Overall</b>
						✓	✓	✓				<b>Overall as a policy document</b>
						✓	✓	✓				<b>Overall as a financial plan</b>
						✓	✓	✓				<b>Overall as a operations guide</b>
						✓	✓	✓			✓	<b>Overall as a communications device</b>

- N Special Capital recognition (three "outstanding ratings on F8)
- N Special Performance Measure recognition (three "outstanding" ratings on O6)
- N Special Strategic Goals and Strategies recognition (three "outstanding" ratings on P1)
- N Special Financial Policies recognition (three "outstanding" ratings on P3)
- N Special Budget Process recognition (three "outstanding" ratings on P4)
- N Special Long Range Financial Plans recognition (three "outstanding" ratings on F7)

Name of Entity: Village of Burr Ridge  
Reviewer ID R 203  
Fiscal Year:

State/Province: IL  
Document Number B9948763  
Record Number 26321002

## Introduction and Overview

### **#C1. Mandatory: Include a table of contents that makes it simple to locate information. 4-outstanding**

Criteria Location Guide Questions

1. Is a comprehensive table of contents provided for easy navigation (may take a variety of forms related to the approach used to present budgetary information)? **Yes**
2. Do all pages in the table of contents electronically link to the corresponding content location (pages in a traditional document or other content in an electronic form)? **Yes**
3. Are the page numbers or similar reference points in the table of contents consistent with the referenced page numbers? **No**

### **#P1. Mandatory: Provide a coherent statement of organization-wide, strategic goals and strategies that address long-term concerns and issues. 3-proficient**

Criteria Location Guide Questions

1. Are strategic goals included? **Yes**
2. Is the process for creating the strategic goals explained? **Yes**
3. Are action plans and/or strategies included to show how these goals will be accomplished? **Yes**

### **#P2. Mandatory: Provide a budget message that articulates priorities and issues for the upcoming year. The message should describe significant changes in priorities from the current year and explain the factors that led to those changes. The message may take one of several forms (e.g., transmittal letter, budget summary section). 3-proficient**

Criteria Location Guide Questions

1. Does the message highlight the principal issues facing the governing body in developing the budget (e.g., policy issues, economic factors, regulatory, and legislative challenges)? **Yes, the message addresses most of the recommended elements.**
2. Does the message describe the actions to be taken to address these issues? **Yes**
3. Does the message explain how the priorities for the budget year differ from the priorities of the current year? **Yes**
4. Are major changes in service levels, fees, and/or taxes presented? **Yes**

### **#C2. Mandatory: An overview of significant budgetary items and trends should be provided. The overview should be presented within the budget as a separate section (e.g., budget-in brief) or integrated within the transmittal letter. 3-proficient**

#### Criteria Location Guide Questions

1. Is an overview contained in the budget message/transmittal letter, executive summary, or in a separate budget-in-brief? **Yes**
2. Is summary information on significant budgetary items conveyed in an easy to consume format? **Yes**
3. Is summary information on budgetary trends provided? **Yes**
4. Is a summary of changes presented between the proposed to adopted budget? **Not clearly**

#### **Financial Structure, Policy, and Process**

##### **#O1. Mandatory: Provide an organization chart for the entire entity. 3-proficient**

#### Criteria Location Guide Question

1. Is a legible organization chart provided which shows the entire entity? **Yes**

##### **#F1: Describe all funds that are subject to appropriation. 4-outstanding**

#### Criteria Location Guide Questions

1. Are a narrative and/or a graphic overview of the entity's budgetary fund structure included in the document? **Yes, both narrative and graphic**
2. Do the materials indicate which funds are appropriated? (Other funds for which financial plans are prepared also may be included in the document.) **Yes**
3. Is each individual major fund described? **Yes**
4. If additional or fewer funds are included in the audited financial statements, is this indicated? **Yes**

##### **#O2: Provide narrative, tables, schedules, or matrices to show the relationship between functional units, major funds, and nonmajor funds in the aggregate. 4-outstanding**

#### Criteria Location Guide Questions

1. Is the relationship between the entity's functional units, major funds, and nonmajor funds in the aggregate explained or illustrated? **Yes, the table on page 21 does this well.**

##### **#F2: Explain the basis of budgeting for all funds, whether cash, modified accrual, or some other statutory basis. 3-proficient**

#### Criteria Location Guide Questions

1. Is the basis of budgeting defined (eg. modified accrual, cash, or accrual) for all funds? **Yes**
2. If the basis of budgeting is the same as the basis of accounting used in the entity's audited financial statements, is that fact clearly stated? **N/A**
3. If the basis of budgeting is not the same as the basis of accounting used in the entity's audited financial statements, are the differences described? **Yes**

##### **#P3. Mandatory: Include a coherent statement of entity-wide long-term financial policies. 3-proficient**

#### Criteria Location Guide Questions

1. Is there a summary of financial policies? **Yes**



2. Do the financial policies include the entity's definition of a balanced budget? **Yes**
3. Does the budget comply with relevant financial policies? **Unclear**

**#P4. Mandatory: Describe the process for preparing, reviewing, and adopting the budget for the coming fiscal year.** Also, describe the procedures for amending the budget after adoption. *3-proficient*

Criteria Location Guide Questions

1. Is a description of the process (including amendments) used to develop, review, and adopt the budget included? **Yes**
2. Is a budget calendar provided to supplement (not replace) the narrative information on the budget process? **Yes**
3. Is there a discussion of how the public is involved in the budget process? **Yes**

#### **Financial Summaries**

**#F3. Mandatory: Present a summary of major revenues and expenditures, as well as other financing sources and uses, to provide an overview of the total resources budgeted by the organization.** *3-proficient*

Criteria Location Guide Questions

1. Is an overview of revenues and other financing sources and expenditures and other financing uses of all appropriated funds included? **Yes**
2. Are revenues and other financing sources and expenditures and other financing uses presented either (1) together in a single schedule or (2) in separate but adjacent/sequential schedules or (3) in a matrix? **Yes**
3. Are revenues presented by major type in this schedule (e.g., property taxes, intergovernmental, sales taxes, fees and charges)? **Yes**
4. Are expenditures presented by function, program, or spending component in this schedule? **Yes**

**#F4: Include summaries of revenues and other financing sources, and of expenditures and other financing uses for the prior year actual, the current year budget and/or estimated current year actual, and the proposed budget year.** *3-proficient*

Criteria Location Guide Questions

1. Are revenues and other financing sources and expenditures and other financing uses for the prior year, the current year, and the budget year presented together on the same schedule(s) or on schedules presented on adjacent/sequential pages? **Yes**
2. Is this information presented for the appropriated funds in total? **Yes**
3. Is this information also presented at a minimum for each major fund and for other (i.e. nonmajor) funds in the aggregate (or for each significant fund and other funds in the aggregate if no appropriated funds are included)? **Yes**

4. Are revenues presented by major type in this schedule (e.g., property taxes, intergovernmental, sales taxes, fees and charges)? **Yes**

5. Are expenditures presented by function, program, or spending component in this schedule? **Yes**

**#F5. Mandatory: Include projected changes in fund balance/net position for appropriated funds included in the budget presentation. 3-proficient**

Criteria Location Guide Questions

1. Is the entity's definition of fund balance (net position if no governmental funds) included? **Yes**

2. Is the fund balance /net position information presented for the budget year? **Yes**

3. Is there a schedule showing (1) beginning fund balances, (2) increases or decreases in total fund balances, and (3) ending fund balances for appropriated governmental funds? **Yes**

4. Is this information presented at a minimum for each major fund and for nonmajor governmental funds in the aggregate? **Yes**

5. If fund balances of any major fund or the nonmajor funds in the aggregate are anticipated to increase or decline by more than 10%, does the document include a discussion of the causes and/or consequences of these changes in fund balance? **Yes**

6. If an entity has no governmental funds, is the change in net position presented for (1) the entity as a whole, (2) the main operating fund, and (3) each significant fund? **N/A**

7. If an entity has no governmental funds and the net position is anticipated to change by more than 10%, do the materials include a discussion of the causes and/or consequences of those changes? **N/A**

**#F6. Mandatory: Describe major revenue sources, explain the underlying assumptions for the revenue estimates, and discuss significant revenue trends. 3-proficient**

Criteria Location Guide Questions

1. Are individual revenue sources described? **Yes**

2. Do the revenue sources that are described represent at least 75 percent of the total revenues of all appropriated funds? **Yes**

3. Are the methods used to estimate revenues for the budget year described (e.g., trend analysis, estimates from another government or consulting firm)? **Yes**

4. If revenues are projected based on trend information, are both those trends and the underlying assumptions adequately described? **Yes**

**#F7: Explain long-range operating financial plans and its effect upon the budget and the budget process. 2-does not satisfy**

Criteria Location Guide Questions

1. Do your long-range financial plans for major funds (beyond just the General Fund) extend out at least two years beyond the budget year? **No, there is a brief discussion but I didn't see a forecast.**

2. Are the assumptions used in the long-range operating financial plans identified? **N/A**

3. Is there a concise explanation of the significance of the long-range operating financial plans in its relation to achieving strategic goals? **N/A**

### **Capital & Debt**

**#F8. Mandatory: Include budgeted capital expenditures, whether authorized in the operating budget or in a separate capital budget. 3-proficient**

Criteria Location Guide Questions

1. Are "capital expenditures" defined? **Yes**
2. Do the materials indicate the total dollar amount (for both sources and uses) of the capital program for the budget year(s) and/or multiyear capital plan? **Yes**
3. Are significant nonrecurring capital expenditures described along with dollar amounts? **Yes, the document includes brief descriptions of the major projects.**
4. What is the process to identify funded projects? **Yes**
5. Is there a description and quantification of how specific nonrecurring capital projects will affect the entity's current and future operating budget? **Yes**

**#F9. Mandatory: Include financial data on current debt obligations, describe the relationship between current debt levels and legal debt limits, and explain the effects of existing debt levels on current operations. 3-proficient**

Criteria Location Guide Questions

1. Are debt limits and coverage requirements described and calculated? **Yes**
2. Is the amount of principal and interest payments presented through maturity for each fund? **Not evident**
3. Are bond ratings shown? **Yes**
4. Is the purpose of the different debt obligations included? **Yes**

### **Departmental Information**

**#O3. Mandatory: A schedule or summary table of personnel or position counts for prior, current and budgeted years shall be provided. 3-proficient**

Criteria Location Guide Questions

1. Is a summary table of position counts provided for the entire entity? **Yes**
2. Does the table include the prior year, the current year, and budget year position counts? **Yes**
3. Are changes in staffing levels for the budget year explained? **Yes**

**#O4. Mandatory: Include departmental/program descriptions. 3-proficient**

Criteria Location Guide Questions

1. Are organizational units clearly presented (e.g., divisions, departments, offices, agencies, or programs)? **Yes**

2. Are descriptions provided along with major priorities in each organizational program? **Yes**

**#O5: Include clearly stated goals and objectives of the department or program. 3-proficient**

Criteria Location Guide Questions

1. Are departmental/program goals and objectives described? **Yes**

2. Are departmental/program goals clearly linked to the strategic goals of the entity? **Yes**

3. Are objectives quantifiable? **Generally**

4. Are timeframes on objectives noted? **Not typically**

**#O6: Mandatory: Provide objective measures of progress toward accomplishing the government's mission as well as goals and objectives for specific departments and programs. 3-proficient**

Criteria Location Guide Questions

1. Are performance data for individual departments or programs included in the document? **Yes**

2. Are performance data directly related to the stated goals and objectives of the department or program? **Yes**

3. Do performance measures focus on results and accomplishments (e.g., output measures, efficiency and effectiveness measures) rather than inputs (e.g., dollars spent)? **Yes**

### **Document-wide Criteria**

**#C3: Include statistical and supplemental data** that describe the organization, its community, and population. It should also furnish other pertinent background information related to the services provided. *3-proficient*

Criteria Location Guide Questions

1. Is statistical information that defines the community included (e.g., population, composition of population, land area, and average household income)? **Yes**

2. Is supplemental information on the local economy included (e.g., major industries, top taxpayers, employment levels, and comparisons to other local communities)? **Yes**

3. Is other pertinent information on the community (e.g., local history, location, public safety, education, culture, recreation, transportation, healthcare, utilities, and governmental structure) included? **Yes**

**#C4: A glossary should be included for any terminology (including abbreviations and acronyms) that is not readily understandable to a reasonably informed lay reader. 3-proficient**

Criteria Location Guide Questions

1. Is a glossary that defines technical terms related to finance and accounting, as well as non-financial terms related to the entity? **Yes**

2. Are acronyms or abbreviations used in the document defined in the glossary? **Yes**

3. Is the glossary written in non-technical language? **Yes**

**#C5: Charts and graphs should be used, where appropriate, to highlight financial and statistical information.** Narrative interpretation should be provided when the messages conveyed by the graphs are not self-evident. *3-proficient*

Criteria Location Guide Questions

1. Are charts and graphs used in the document to convey essential information (e.g., key policies, trends, choices and impacts)? **Yes**
2. Are graphics explained? **Yes**

**#C6: The budget information should be produced and formatted in such a way as to enhance its understanding by the average reader.** It should be attractive, consistent, and oriented to the reader's needs. *3-proficient*

Criteria Location Guide Questions

1. Are page formatting and font consistent? **Yes**
2. Is the level of detail appropriate? **Yes**
3. Are text, tables, and graphs legible and accurate? **Yes**
4. Are links included to other forms of budget communication, like videos, social media, etc.? **Yes**

**T666 B9948763**

C1 – Outstanding. The links in the Table of Contents were very helpful in navigating the document.

O2 – Outstanding. The use of a matrix makes the relationship between departments and funds very clear.

F7 – Does not satisfy. The long-range financial plan must include all major funds.

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**Document-Wide Criteria**

Outstanding use of charts and graphs. Very understandable. As a Communication Device, the budget document is outstanding.

Name of Entity: Village of Burr Ridge  
Reviewer ID T844  
Fiscal Year: 2023

State/Province: IL  
Document Number B9948763  
Record Number 26321002

### Introduction and Overview

- C1. **Mandatory:** The document shall include a table of contents that makes it easier to locate information. **Proficient, linking items in the table of contents to their corresponding pages to improves navigation of the electronic version of the document.**
- P1. **Mandatory:** The document shall provide a coherent statement of organization-wide, strategic goals and strategies that address long-term concerns and issues. **Proficient.**
- P2. **Mandatory:** The document shall include a budget message that articulates priorities and issues for the upcoming year. The message should describe significant changes in priorities from the current year and explain the factors that led to those changes. The message may take one of several forms (e.g., transmittal letter, budget summary section). **Proficient.**
- C2. **Mandatory:** The document shall provide an overview of significant budgetary items and trends. The overview should be presented within the budget document either in a separate section (e.g., budget-in brief) or integrated within the transmittal letter. **Proficient.**

### Financial Structure, Policy, and Process

- O1. **Mandatory:** The document shall include an organization chart(s) for the entire entity. **Proficient.**
- F1. The document should describe all funds that are subject to appropriation. **Proficient.**
- O2. The document should provide narrative, tables, schedules, or matrices to show the relationship between functional units, major funds, and nonmajor funds in the aggregate. **Proficient. The matrix is very helpful to show the relationship between funds and operating departments.**
- F2. The document shall explain the basis of budgeting for all funds, whether cash, modified accrual, or some other statutory basis. **Proficient.**
- P3. **Mandatory:** The document shall include a coherent statement of entity-wide long-term financial policies. **Proficient.**
- P4. **Mandatory:** The document shall describe the process for preparing, reviewing, and adopting the budget for the coming fiscal year. Also, describe the procedures for amending the budget after adoption. **Proficient.**

## **Financial Summaries**

- F3. **Mandatory:** The document shall present a summary of major revenues and expenditures, as well as other financing sources and uses, to provide an overview of the total resources budgeted by the organization. **Proficient.**
- F4. The document should include summaries of revenues and other financing sources, and of expenditures and other financing uses for the prior year actual, the current year budget and/or estimated current year actual, and the proposed budget year. **Proficient.**
- F5. **Mandatory:** The document shall include projected changes in fund balances/net position for appropriated funds included in the budget presentation. **Proficient.**
- F6. **Mandatory:** The document shall describe major revenue sources, explain the underlying assumptions for the revenue estimates, and discuss significant revenue trends. **Proficient. The charts and graphs are helpful to see the trends, but a discussion of revenue trends and assumptions should be added to provide a complete picture of major revenues**
- F7: The document should explain long-range financial plans and its affect upon the budget and the budget process. **Proficient.**

## **Capital and Debt**

- F8. **Mandatory:** The document shall include budgeted capital expenditures, whether authorized in the operating budget or in a separate capital budget. **Proficient. Consider adding maps and photos that show the location of various capital projects to give the reader a better understanding of where projects are occurring in the village.**
- F9. **Mandatory:** The document shall include financial data on current debt obligations, describe the relationship between current debt levels and legal debt limits, and explain the effects of existing debt levels on current operations. **Proficient.**

## **Departmental Information**

- O3. **Mandatory:** A schedule or summary table of personnel or position counts for prior, current and budgeted years shall be provided. **Proficient.**
- O4. **Mandatory:** The document shall include department/program descriptions. **Proficient.**
- O5. The document should include clearly stated goals and objectives of departments or programs. **Proficient.**
- O6. **Mandatory:** The document shall provide objective measures of progress toward accomplishing the government's mission as well as goals and objectives for specific units and programs. **Proficient. The information does not include targets, so the data does not tell the reader what your goal is and if you are achieving it.**



### **Document-wide Criteria**

- C3. The document should include statistical and supplemental data that describe the organization, its community, and population. It should also furnish other pertinent background information related to the services provided. **Proficient.**
- C4. A glossary should be included for any terminology (including abbreviations and acronyms) that is not readily understandable to a reasonably informed lay reader. **Proficient.**
- C5. Charts and graphs should be used, where appropriate, to highlight financial and statistical information. Narrative interpretation should be provided when the messages conveyed by the graphs are not self-evident. **Proficient.**
- C6. The document should be produced and formatted in such a way as to enhance its understanding by the average reader. It should be attractive, consistent, and oriented to the reader's needs. **Proficient.**