FY2025 CEAR Reviewer Training

Dec. 9, 2025 | 2 – 4 PM ET

2 CPEs | FOS: AUDG

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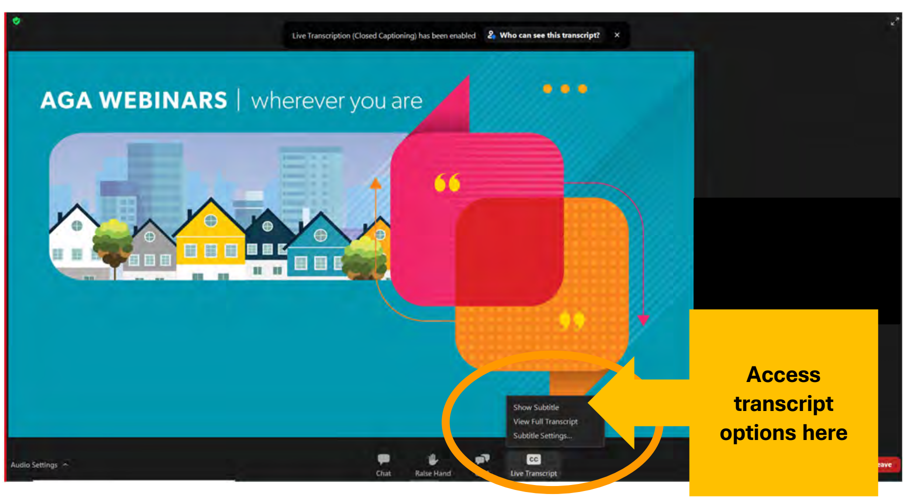

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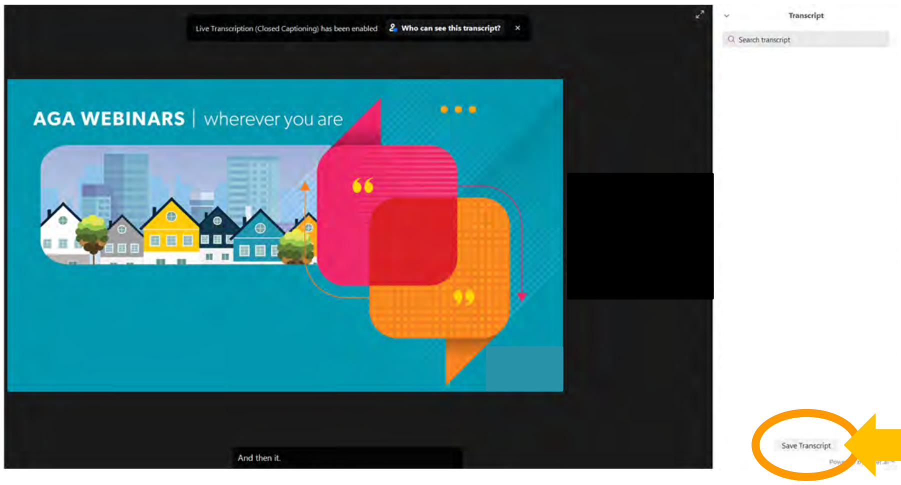

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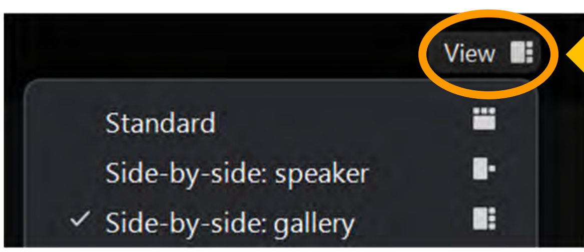

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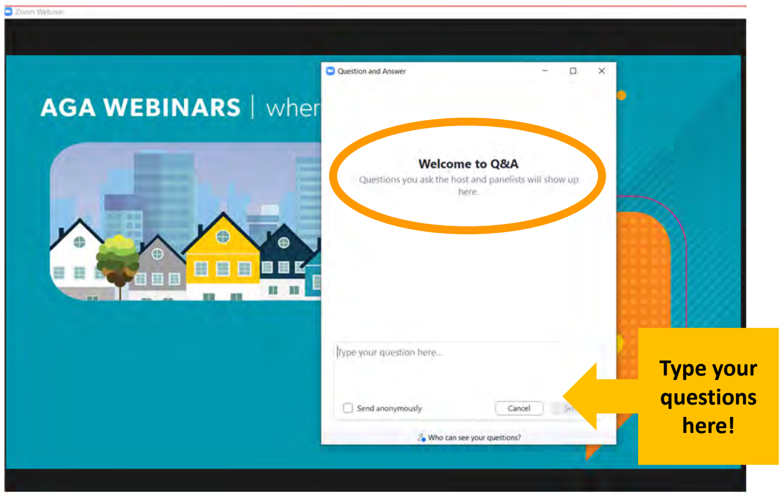

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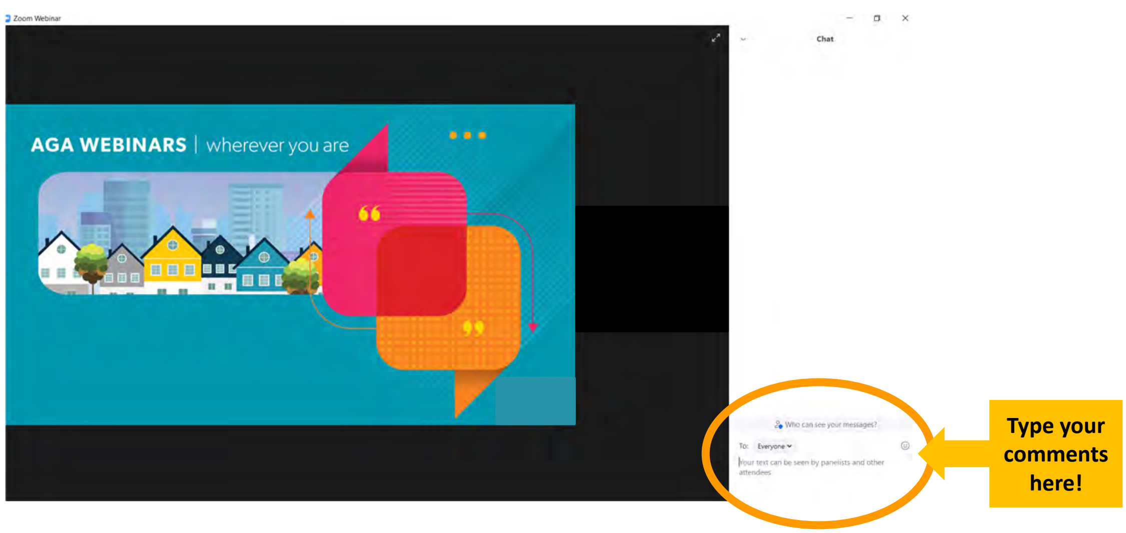
Want to Chat?



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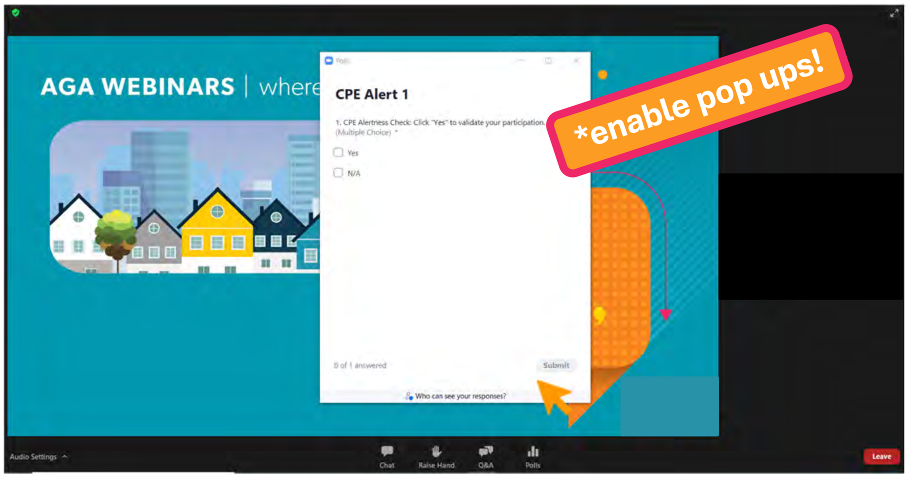

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7

8

Ann Ebberts, PMP
Chief Executive Officer
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CEAR Reviewer Training Agenda

- **2:00 PM – Welcome**
  - **Ann Ebberts, PMP –** AGA CEO
- **2:10 PM – CEAR Program Overview**
  - **Andrew Lewis, CGFM, CPA, PMP –** Chair, CEAR Board
- **2:45 PM – How Agencies are Presenting MD&A in FY2025**
  - **Diane Dudley, CGFM, CPA –** Lead Reviewer
- **2:55 PM – Lead Reviewer Role and Best Practices**
  - **Diane Dudley, CGFM, CPA –** Lead Reviewer
- **3:05 PM – Insights from "Experienced" Reviewers Panel**
  - **Karen Brown, CGFM, CPA, CGMA –** Project Manager, Dept. of Housing and Urban Development
  - **Lisa Hemmer, CGFM,** Accountant, National Credit Union Administration
  - **Lauren Sipple, CPA –** Managing Director, KPMG
- **3:50 PM – Timeline/Logistics**
  - **Stephanie Shaer, PMP –** AGA Meetings & Programs Manager

CEAR Board Members

Andrew Lewis, CGFM, CPA, PMP, Partner, KPMG LLP – Board Chair

Tim Gribben, CPA, Commissioner, Bureau of the Fiscal Service – Vice Chair

Sarah Cunningham, CGFM, Director, Summit Consulting – Board Member

Dawn Simpson, CPA, Director, GAO – Board Member

Alan Perry, CPA, CGFM, Senior Analyst, FASAB – Board Member

Dave Zavada, CPA, Senior Partner, Kearney & Company – Board Member

Ann Ebberts, PMP, AGA CEO (without vote)

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11

AGA's Lead/Expert Reviewers

- Diane Dudley – Overall Lead Reviewer
- Gloria Jarmon
- Wendy Payne

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12

CEAR Program

- Overview of the CEAR Program
- Highlights of Changes to CEAR Guidelines
- How to Perform the CEAR Review
- CEAR Reviewer Submission Form
- Reviewer's Letter to Supervisor
- Harold "Hal" Steinberg Award

Speaker:
Andrew Lewis

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13

Polling:
How many years have you been a CEAR Reviewer?

A. 0

B. 1-5

C. 5-10

D. More than 10 years

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14

Overview of the CEAR Program

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Certificate of Excellence In
Accountability Reporting®
(CEAR) Program

GUIDELINES©
for preparing and evaluating
Fiscal Year 2025 Agency Financial Reports or
Performance and
Accountability Reports

and

Summaries of Performance and
Financial Information

Prepared initially as a public service by KPMG LLP
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15

How to Perform the CEAR Review

What **To** Do:

- Each Reviewer has up to three weeks to review the agency report
- Allow at least an average of 16-24 hours to review
- Take your time, spread out the effort for a thoughtful review
- Type your comments in the CEAR Reviewer Submission Form
- Email the completed MSWord document as an attachment to: cear@agacgfm.org

What **NOT** To Do:

- Procrastinate, wait until the last week and rush the review
- Handwrite your notes in CEAR Guidelines, then scan it as PDF
- Mark each item in the Guidelines and return it to AGA

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16

CEAR Reviewer Submission Form

REVIEWER SUBMISSION FORM
CERTIFICATE OF EXCELLENCE IN ACCOUNTABILITY REPORTING
FY 2025

AGENCY REVIEWED - ____________________
REVIEWER NAME - ____________________

IF QUESTIONS ARISE REGARDING YOUR COMMENTS, PLEASE PROVIDE YOUR PREFERRED CONTACT INFORMATION:
REVIEWER E-MAIL ADDRESS - ______________
REVIEWER PHONE NUMBER - ______________

GENERAL INSTRUCTIONS

This document provides guidance for reviewers and should be reviewed prior to beginning the assigned AFR/PAR review.

Reviewers should make note of noteworthy features (positive attributes) and recommendations for improvement as they review the assigned AFR/PAR. The template below can be used to document the noteworthy features and recommendations, or the reviewer can provide this information in a separate Word document.

Please note that verbatim compliance with OMB and other guidance is not always required. For example, agencies have some flexibility in the language used, such as the titles of accounts and order of presentation in the financial statements. Unless a particular presentation is clearly incorrect or causes the user to potentially be misled, the fact that an agency did not use the exact language provided by OMB should not be cited as a finding/recommendation. Nevertheless, it is important that the financial statements are fairly presented and supported by footnotes and other explanatory information (which is a judgement call). If in doubt, please propose a recommendation and the lead reviewer will consider it and may bring it up for discussion during the review team meeting.

After identifying noteworthy features and recommendations, reviewers should consider whether (1) any noteworthy features should be nominated for a "Special Award", and (2) whether the report merits receiving the CEAR Award. A separate section of this reviewer submission form is provided for submitting these award recommendations.

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17

Components of a Recommendation

- The deficient/improvable condition;
- The page number of the condition;
- The specific change recommended; and
- The reason why change would be an improvement.

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18

Examples of Excellent Reviewer Comments

Components:
- The deficient/improvable condition;
- The page number of the condition;
- The specific change recommended; and
- The reason why change would be an improvement.

Eliminate Reporting or Disclosure Weaknesses:

The MD&A section (pages 19-46) does not disclose x's mission, as required by OMB A-136, Section II.2.2. Specifying x's mission would help readers understand the relationship between x's goals and objectives and its mission. Stating the mission either at the beginning of the "Organization" discussion on page 19 or the "Performance Goals, Objectives, & Results" discussion on page 24 would satisfy this requirement. (This comment is similar to a prior year comment.)

Improve the Report Presentation or Usefulness:

1. Within the Performance subsection, the discussion of goals (pages 16-17) provides a clear and compelling overview of the priority goals but could be enhanced by adding budget or cost information with the narrative to increase the reader's understanding of their financial impact.

2. The agency switches between the use of thousands, millions, and billions throughout the MD&A narrative and financial charts. For example, most financial figures within the MD&A are presented in millions, but Pages 24 and 36 disclose some in billions, and Page 31 has one figure in thousands. Using a consistent metric for reporting financial information would avoid reader confusion.

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19

Examples of Excellent Reviewer Comments

Components:
- The deficient/improvable condition;
- The page number of the condition;
- The specific change recommended; and
- The reason why change would be an improvement.

Address editorial matters:

We noted instances in the FY 2024 AFR where acronyms were spelled out multiple times, were not defined when first used, or were not used when defined. For example:
- X is not defined on page 73, when first used in the Notes to the Financial Statements, but is defined two pages later (page 75).
- Anti-Deficiency Act (ADA), page 41, does not use the ADA acronym in the first paragraph, but it was defined on the prior page.
- Note 19, page 117, defines x at the top of the page. However, x was previously defined in Note 10 on page 98. Then, on page 119, in Note 19, the acronym was not used in three cases.

Acronyms should be spelled out when first used, then consistently used, to improve the document's readability. (A similar comment was made last year.)

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20

Examples of What Not-To-Do:

Reviewer comments lack required elements, and as such cannot be included

Eliminate reporting or disclosure deficiencies:

1. None

2. None

3. None

(Add additional recommendation numbers/comments, as necessary)

Improve the report presentation or usefulness:

1. Graphics are great for non-financial people but sometimes the overuse of graphics can cause the report to look busy. Lessen some of the graphics so the reader can focus on the data at hand

2. None

3. None

(Add additional recommendation numbers/comments, as necessary)

Address editorial matters:

1. The location of the Table of Contents

2. None

3. None

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21

Examples of What Not-To-Do:

Reviewer did not use the required reviewer submission template. Further, not all required elements are included, and the comments are incomplete.

My comments are very minimal.

Mainly the head of the agency's letter does not highlight any of the agency's challenges, as noted by their FMFIA review, the auditors or the OIG. Should make some note if it's challenges.

Positive feedback -- Report uses graphics in a very effective manner.

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22

Examples of What Not-To-Do: Reviewer Comments

- Handwritten comments, without examples or reasons for the recommendations.
- Comments submitted in a pdf file (not Word)
- Comments that are not submitted using the CEAR Reviewer Submission form

AGA Letter to Reviewer’s Supervisor

- Reviewers who significantly contributed to improving the reports by providing useful, meaningful comments as defined by the criteria.
- Not everyone will receive a letter to supervisor

Harold I. Steinberg Excellence in Accountability Reporting Award Eligibility

Current or recently retired federal career employee, political appointee, or contractor who is recognized by his/her peers to have demonstrated evidence of serving as a champion of integrated financial reporting, as a role model for others, and has helped to set standards that further performance and accountability reporting.

Eligible nominees are not required to be AGA members. Self-nomination is allowed.

- Nomination portal will be posted on AGA Website.
- Deadline: March 2026

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25

MD&A Reporting Options for FY 2025

Speaker:

Diane Dudley

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26

FASAB Disclaimer

- Information presented in this presentation is not authoritative. Therefore, it does not reflect authoritative views of the Board.
- Official positions of the FASAB are determined only after extensive due process and deliberations.

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27

27

Three Options for Reporting MD&A in FY2025

1. Report according to SFFAS 15
2. Hybrid - Report according to SFFAS 15 with some SFFAS 64 practices
3. Report according to SFFAS 64 [Effective for FY26; early implementation is permitted]

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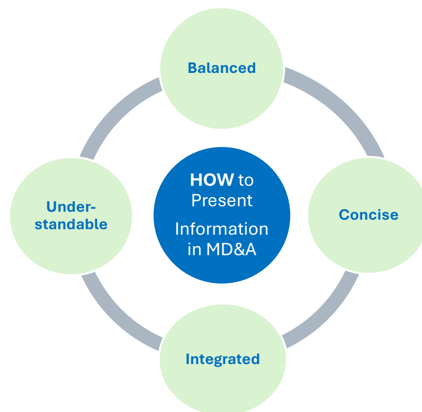
Differences between SFFAS 15 & SFFAS 64

- SFFAS 64 is intended to reduce agency reporting burden
- SFFAS 15 is prescriptive – sections
  - Causing duplicative and dense information
- SFFAS 64 is principle based with four characteristics to guide management in how to tell a streamlined story by focusing on:
  - **summarizing** information &
  - linking to details, such as to the Annual Performance Report

SFFAS 16, pars 8-11



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29

Information about Mission and Organization

Differences between SFFAS 15 and SFFAS 64

SFFAS 15 requires

- A separate *Mission and Organization Structure* section
- Organizational charts

SFFAS 64, par 12.a requires

A brief description of:

- KEY organizational components (*recommend referring to your Statement of Net Costs for a concise break out*)
- and related missions

Links

- to detailed information such as history, org charts, and management information

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30

Financial Information

Differences between SFFAS 15 and SFFAS 64

SFFAS 15 requires

- A separate *Financial Statements section*
- A discussion and analysis of each financial statement

SFFAS 64, pars 12.b. & c.

Focuses on concisely explaining **causes of significant changes and trends in:**

- **Financial Position** i.e. for assets, liabilities, net position, costs, revenues, budgetary resources and financing sources
- **Financial Condition** i.e. for business type activity, social insurance, long-term fiscal projections, and RSI

Includes

- References (links) to detailed information such as financial reports or RSI

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31

Information about Performance

Differences between SFFAS 15 and SFFAS 64

SFFAS 15 requires

- A separate *Performance Goals, Objectives, and Results* section
- Detailed Strategic Goals
- Detailed Government Performance and Results Modernization Act (GPRA-MA) reporting
- Detailed % percentage-based information

SFFAS 64, par 12.d. requires

- Performance results key to the reporting entity
- $$$ Actual costs incurred to accomplish key performance results
- Any cost savings with the accomplishment of key performance results
- Link to GPRA-MA/strategic goal details (APR)

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32

Information about Internal Controls

Differences between SFFAS 15 and SFFAS 64

SFFAS 15 requires

- A separate systems, controls, and legal compliance section
- A discussion of compliance requirements (often resulting in a detailed list that repeats compliance content, for example, from laws, acts, regulations)

SFFAS 64, par 13 requires

- A **summary assessment** of compliance with applicable laws, regulations, contracts, and grant agreements that **are relevant to financial reporting**.
- **Address**
  - internal control weaknesses,
  - systems deficiencies, and
  - instances of noncompliance
- **Include**
  - What has a significant effect on the reporting entity's financial and performance reporting, and
  - Management's plans to address them.
- **Link** to detailed information, such as FFMIA and FMFIA

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33

33

Role of the Lead Reviewers

- Serve as the team leader for the four-person review team
- Receive team member comments/recommendations from the CEAR Reviewer Submission Form
- Consolidate recommendations in draft letter format
- Circulate the draft letter to review team in advance of team meeting
- Organize team meeting to discuss and finalize comment letter (including award decision)
- Collaborate with other Lead Reviewers on significant technical matters
- Identify "best practices" to recommend to the CEAR Board for consideration

Speaker: Diane Dudley

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34

Teams Should Recognize Extraordinary or Innovative Report Components!

We cite Noteworthy Features in front of every letter. Consider the best features of each report.

- Certain parts of a PAR/AFR may be new; or perhaps you find attractive or innovative descriptions of a report element (e.g., org. structure, processes, outcomes, efficiencies, goals achieved, or relevant vignettes). We laud the agencies (and reviewers) for providing and separately identifying these.
- Certain features provide organization within the AFR. These are long documents. Internal links help, as do footers, headers, and colors, if possible.

Special Awards:

- Best practice features - awards in any report area. Maximum one per year per agency.
- For FY 2025 reports – focus more special awards on integrated accountability – including financial and performance information (these are identified on a subsequent slide).

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35

Noteworthy Features Examples

Commendable Practices

- Transparent and objective performance/financial Information
- Inspector General's Summary of Management and Performance Challenges
- Photos of the Agency's mission or goals in action
- Navigation features (e.g., links in the Table of Contents, use of color tabs for sections)
- Graphics showing the sources and uses of funding and links to strategic goals
- Links to additional information/videos
- Performance at a glance tables (see example)

PERFORMANCE AT A GLANCE

The following table summarizes the status of the SEC's performance—as measured by each individual performance goal (PG)—in support of the agency's 3 strategic goals and 10 strategic initiatives.

STRATEGIC GOAL 1

Protect the investing public against fraud, manipulation, and misconduct

Performance Goal	Measurement	FY 2023
PG 1. Percentage of enforcement actions in which the Commission obtained relief on one or more claims	Percentage	✗
PG 2. Percentage of Fair Fund and disgorgement fund plans that have distributed 80 percent of the available funds for distribution within 24 months of the approval of the distribution plan	Percentage	✓
PG 3. Percentage of investment advisers and broker-dealers examined during the year	Investment advisers	✓
	Broker-dealers	✓
PG 4. Number of regulatory initiatives to improve investor disclosure	Division of Corporation Finance	✗
	Division of Investment Management	✗
	Division of Trading and Markets	✓
PG 5. Percentage of disclosure-based regulatory initiatives that consider whether it would be appropriate to include a provision to structure disclosures (to the extent that the benefits justify the economic costs) to enhance comparability	Division of Corporation Finance	✓
	Division of Investment Management	✓
	Division of Trading and Markets	✓
PG 6. Investor Engagement Activities	Activities	✓

STRATEGIC GOAL 2

Develop and implement a robust regulatory framework that keeps pace with evolving markets, business models, and technologies

Performance Goal	Measurement	FY 2023
PG 7. Number of regulatory initiatives that enhance transparency in private markets or update the disclosure framework to reflect evolving technologies, business models, and capital markets	Division of Corporation Finance	✓
	Division of Investment Management	✗
	Division of Trading and Markets	✓
PG 8. Number of supervisory cooperation requests from foreign authorities for SEC assistance and SEC requests for assistance on supervisory cooperation from foreign authorities	Requests from foreign authorities	✓
	SEC requests for assistance	✓
PG 9. Percentage of supervisory engagements with broker-dealers and clearing agencies to address systemic and infrastructure risks	Percentage	✓
PG 10. Number of examinations that request information related to an entity's information security	Examinations	✗
PG 11. Percentage of Systemically Important Financial Market Utilities examined by the examinations program	Percentage	✓
PG 12. Number of new investor education materials on emerging and popular investment topics	New investor education materials issued	✓
	Users indicating a positive change	✓

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36

Special Award Examples

- The MD&A tells a story
- Inspiring photos and captions
- Informative financial highlights
- Conveying performance in a clear and insightful way
- Graphic display of complex matter of interest
- Outstanding agency head or CFO's message
- IG summary of challenges

Considerations:

- "Super" noteworthy features
- Should be best practices useful for other agencies
- Reviewers must state why
- No mandatory categories – could be something relatively new (e.g., lease disclosures)

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37

FY 2025 Reports - Special Award Focus

- Informative introductory material for the agency's mission, organization, and structure
- Innovative presentation of a matter of wide public interest
- Effective presentation of performance in a PAR/AFR
- Conveying performance information in a creative and inspiring way
- Impressive integration of cost and performance data
- Clear and insightful analysis of financial statements
- Clear and concise financial and performance highlights section
- Informative analysis of systems, controls, and legal compliance

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38

FY 2025 Special Award Focus (Continued)

- Effective integration of risk into the MD&A
- Comprehensive or insightful Agency Head or Chief Financial Officer's message
- Excellence in required note disclosures
- Outstanding Inspector General's summary of management and performance challenges, and management's response
- Informative payment integrity disclosures

39

Special Award Process

1) Reviewer identifies these areas for consideration, and provides bulleted support in review submission
2) Team discusses and provides additional comments
3) Team makes recommendation to the CEAR Board
4) CEAR Board discusses each award and makes the decision

40

Panel of Experienced Reviewers

- **Karen Brown, CGFM, CPA, CGMA,** Project Manager, Dept of Housing and Urban Development
- **Lisa Hemmer, CGFM,** Accountant, National Credit Union Administration
- **Lauren Sipple, CPA,** Managing Director, KPMG

41

Experienced Reviewer 1

As a CEAR Reviewer *(once CEAR reviewer application has been accepted)*, I perform the following steps to complete and submit my CEAR submission in a timely manner.

STEP 1: Review AGA's CEAR Reviewer Agency assignment email notification ***[very important]***.

STEP 2: Review current AGA timeline (as provided in the Agency assignment email notification) – this will be helpful in setting up a personal (realistic) schedule for completing the CEAR review (e.g., a schedule can consists of begin/end dates; dedicated times for completion of each section – a good starting point can be based on review of Agency's Table of Contents in the financial report & FY 2025 CEAR Program Guidelines; wrap-up review – few days prior to submission to re-check responses for clarity and accuracy, and usefulness).

STEP 3: Respond timely to AGA contact communications (e.g., Team availability request using Team meeting poll to select available times and dates for the upcoming CEAR Team meeting).

Speaker: **Karen Brown, CGFM, CPA, CGMA**

42

Experienced Reviewer 1

STEP 4: Gather key CEAR Reviewer documents & keep on hand/in front of CEAR Reviewer during CEAR review period:

- FY 2025 CEAR Program Guidelines
- FY 2025 CEAR Reviewer submission form
- [PY] FY 2024 AGA CEAR Comments (to the Agency)
- [PY] FY 2024 Agency's responses to AGA's [PY] FY 2024 CEAR comments

STEP 5: Perform key attributes during the CEAR review period:

- Key Attributes for review
  - Create an understandable formatted/organized structure for submission [check the FY 2025 CEAR Program Guidelines]
  - Cross-check key documents/available from website references/authoritative resources (OMB guidance A-136, FASAB, etc.) & your draft working response document to ensure clarity & accuracy - *Goal:* To ensure submission to AGA contact for the Lead Reviewer's review is clear, consistent, & accurate
  - Prepare the Noteworthy Features [in submission] (for example - add a lead-in paragraph with an overall point of view which supports intent of the Agency's Financial Report/Performance Accountability Report & briefly outline why this report is interesting and key contributions of the agency that supports public interests/wise stewardship of taxpayer's dollars).
    - Format of submission can include page number, section of report, brief description of key contribution of Agency, etc.

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43

Experienced Reviewer 1

- Outline in your notes - Complete recommendations proposed – identified during your review (review FY 2025 CEAR Program Guidelines)
  - *Recommendation 1:* Eliminate reporting or disclosure deficiencies
  - *Recommendation 2:* Improve the report presentation of usefulness
  - *Recommendation 3:* Address editorial matters
    - Format of submission (list points below under each of the above recommendations):
      - Weak or deficient practices
      - Page number on which the weak of deficient practices exist
      - the recommendation
      - rationale for why the recommendation would result in an improvement
- Special Awards Consideration
  - As identified during the review, list selected Special Award(s) [e.g., Excellence in Required Footnote Disclosures; Insightful Agency Head of Chief Financial Officer's Message, etc.) & provide a brief explanation/justification (e.g., briefly explain how the Agency demonstrated fiscal responsibility to American Public; briefly explain how agency improvements continue to meet mission critical needs and public interests, etc.)

STEP 6: Prepare and forward completed CEAR submission in a timely manner [***NLT the AGA deadline***] – *please note:* If additional time is needed, please let AGA contact know ahead of time, if possible. Each CEAR Reviewer's completed submission affects the timing of the CEAR review period, Team meeting date requests, Lead Reviewer review time, etc.

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44

Experienced Reviewer 1

Please be mindful of the following:

Upcoming CEAR team meeting – *What to expect* -
CEAR Reviewers are expected to attend the virtual CEAR session and participate in the discussion. AGA contact selects the date that works best for the Team.

The Team meeting consists of a group dialog based on the Lead Reviewer's consolidated input/Team comments (from the CEAR Reviewers) in the draft Recommendations document & any other inquiries from Team (e.g., information included or not included in draft); the Team will:

- Vote (decide) on whether the Agency Report met criteria to receive a Certificate of Excellence in Accountability Reporting;
- Finalize (decide on) the draft Agency letter & Recommendations document;
- Finalize (decide on) any Special Awards nominations; and
- Discuss/highlight related feedback from the Summary Performance & Financial Information (SPFI) report (if provided by Agency).

After Team Meeting (Close-Out) – *What is needed* - Review and submit any comments to the updated draft AGA CEAR recommendations prepared for Agency & submit comments on Special Award Candidates – for these documents, a *quick turnaround time is expected [within 1 day]*.

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Experienced Reviewer 2

Speaker: Lisa Hemmer, CGFM

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How I Prepare for an Effective CEAR Review

Gather materials

- AFR/PAR
- CEAR Guidelines
- Prior year CEAR comments
- Agency website
- OMB Circular A-136

Set Aside Time

- Block 2+ hour slots
- Plan a two-week review period

Favorable Environment

- Choose a quiet, distraction-free space to stay focused

47

My CEAR Review Strategy

Start with a Cold Read

Read the full document without any preconceptions

Flag any noteworthy visual or narrative features

Flag any obvious observations or deficiencies

Compare with Prior Year Feedback

Check if previous CEAR recommendations were addressed

Reiterate recommendations, if needed

Cross-Check with CEAR Guidelines

Identify any gaps or inconsistencies

If using a hard copy, also review the digital version

Document recommendations

48

How I Manage My Review Time

3-4 hours – Initial cold read of AFR/PAR → 2-3 hours – Review prior year CEAR comments → 6-8 hours – Analyze current year CEAR guidelines and agency website → 2-3 hours – Draft recommendations and noteworthy items → 1-2 hours – Refine and finalize recommendations → 1-2 hours – Actively participate in CEAR team meeting & follow up

49

Why CEAR Reviewing Matters to Me

- Reviewing different agencies each year has broadened my understanding of their missions - beyond what's typically visible
- It's a great opportunity to connect with peers and gain new insights from their perspectives on the AFR/PAR
- It's a great way to stay involved with AGA and the CEAR Awards Ceremony is a good time to catch up in person

50

Experienced Reviewer 3

Before the review

- Please ***do not share the name of the agency*** you are reviewing!
  - *I plan to be at home or in a private space for the review*
- Visit the Agency website and press releases to refresh on hot topic areas
- Ensure you have received the Agency AFR or PAR, prior year recommendations and the Agency's responses to those recommendations
- Read last year's recommendations and agency responses
- Read the CEAR Guidelines so you are familiar with new provisions and requirements

Speaker: Lauren Sipple

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51

How I Perform My Review

Total Est. Time: 18 hours

Step	Tips	Est. Time
Read through the Report	• Get started ASAP, to avoid a deadline crunch • Make notes about items that "stuck out" as yo … numbers • Remember to identify areas the Agency did we…	4 hours
Read last year's recommendations and agency responses	• Go through and mark if the agency sufficiently addressed the PY comment. If not, add a comment.	3 hours
Go through each step of the CEAR Guidelines to verify agency addressed the topics covered	• Specifically consider pages 12-14, Report Elements Not to Overlook • We are NOT auditing the AFR/PAR	4 hours
Give the report another fresh read	• Oftentimes, I may resolve my own question or comment with fresh sets of eyes • Include all open comments – let the lead reviewer weigh in on whether or not to include	2 hours
Check Online AFR	• Don't forget to check the online AFR, including location on the Agency's website • Review hyperlinks and other CEAR guidelines on the online copy such as bookmark features	1 hour
Type up comments and noteworthy features	• Ensure all four elements of the finding are included • Be creative with noteworthy features!	3 hours
Review comments and noteworthy features &Submit comments to Lead reviewer	• Wait at least a day in between typing up the comments and reviewing • Don't forget to run spell check and grammar check!	1 hour

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52

Preparing for Review Meetings

- Review the Lead Reviewer comments prior to the meeting
- Be sure to flag any items for discussion you believe were excluded!
- Be prepared to discuss whether you agree with the draft recommendations and whether you have any edits
- There is no attribution of comments; no agency will know that you (by name) reviewed their submission
- Embrace Healthy Conflict
- Be a Sponge!

53

Additional Tips

- ✓ **Do not discuss your Reviews, the agency you reviewed, or any of the items identified outside of your team!**
- ✓ Stay in contact with the Lead Reviewer as they finalize the letter of recommendations, and provide a timely review of the final letter
- ✓ Stay in touch with the members on your team
- ✓ Make sure to mark your calendar for the Awards Ceremony!
- ✓ Encourage others to participate as a CEAR Reviewer

54

Questions for Experienced Reviewers?

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55

Reviewer Timeline and Deliverables

January/February:

- Agency assignment notices sent
    - Your agency assignment **email** will include:
        - o FY2025 CEAR Guidelines
        - o FY2025 CEAR Reviewer Submission form
        - o Agency name and link to its AFR/PAR
        - o Prior comments in MSWord document format
        - o Agency's response to prior year comments

Upon receipt of your assignment email, reply to Stephanie to acknowledge receipt

- Teams will receive report packets via email
- All reviews (i.e., completed CEAR Reviewer Submission Forms) are due **February 27, 2026** (or 3 weeks from receipt of their package if your assigned agency receives an extension)

Speaker: **Stephanie Shaer**

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56

Reviewer Assignments/Packets Include:

1) A copy of the FY2025 CEAR guidelines for reference
2) Agency's AFR or PAR
3) FY2025 CEAR Guidelines completed by agency – (optional)
4) Prior year recommendations sent by AGA to the agency
5) Agency's responses to prior year recommendations
6) Optional for agencies – Summary of Performance and Financial Information (SPFI) – **If** agency indicates that it plans to prepare a SPFI, the team will be notified and a weblink provided, when the SPFI is available
7) FY2025 CEAR Reviewer Submission Form

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57

Reviewer Timeline and Deliverables

April/May
- Teams meet (via Zoom) as scheduled (up to 2 hours of CPEs)

May
- Special Award selection by CEAR Board
- AGA will send comments letters to the agencies

June
- CEAR Award Ceremony invitations will be distributed

July 2026 (TBD)
- CEAR Award Ceremony – Time to celebrate and have fun!

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58

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59

Become a Reviewer!

Link –

https://www.agacgfm.org/get-involved/awards-scholarships-recognition/cear-program/for-reviewers/

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60

Your CPE Certificate

- Notifications will be sent within five business days
- Access your CPE certificate from your AGA account
- Questions? Contact: Stephanie Shaer – sshaer@agacgfm.org

61

Advance. Grow. Accelerate.

Thank You!

62