

July 17, 2023

Dear Center Director,

Please note that your UNI Center, Advance Iowa, is scheduled for a 7-Year review, to be conducted by the UNI Centers and Institutes Review Committee, as part of the review process established by the Iowa Board of Regents.

**Report Due Date**

Reports will be accepted between the following dates: **October 16, 2023 - November 17, 2023**

**Documents and Forms needed to Complete 7-Year Report**

Please use these documents, which will be attached to a transmittal email, to complete the reporting process:

- 01\_7-Year Report Form\_FY23
- 02\_7-Year Review -Year Projection Budget Form\_FY23
- 03\_7-Year Review Previous 3 Closed Fiscal Years Report \_FY23\*

*\*RSP will send this report to you when it is available.* This report will generate financials based on your Center's Organization Number going back 7-years. You may also use this report to complete the required budget forms. Once received, if you have questions about the financials appearing on this report, please contact Tonya Gerbracht, UNI Controller & Treasurer, at 3.6520 or at [tonya.gerbracht@uni.edu](mailto:tonya.gerbracht@uni.edu).

Review the report carefully and contact Tonya or myself for help interpreting the data, if needed. Please understand that there may be some details missing in the report. For example, "available" grant funds in a UNI Foundation account will not show up in this report; only the exact revenue and expenses for the Foundation account during the reporting period will show up. Remember that this report is a 12-month "snapshot" that does not correspond with the grant/contract cycles, so do not be alarmed if something seems "off" at first glance. Ask questions, seek clarification, and use the financial narrative section of the Annual Activities Report to fill in the details as needed.

**7-Year Review Information Meetings:**

If you would like to attend an information meeting to review the reporting requirements, please contact Lisa Ahern at [lisa.ahern@uni.edu](mailto:lisa.ahern@uni.edu) to request a meeting.

Thank you for everything that you and your Center does for UNI and beyond! If you have any questions please contact me at [Lisa.Ahern@uni.edu](mailto:Lisa.Ahern@uni.edu) or 3-6148.

Sincerely,  
Lisa Ahern, Centers Review Committee Chairperson