**Budget and Finance Annual Report**

**September 1, 2023 – August 31, 2024**

**Goals:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Goal/Metric** | **Accomplished** | **In Progress** | **Not Accomplished** |
| Educate the campus community on the difference between carryover and surplus. |  |  | x |
| Develop guidelines/policies/process for units to possibly access budget carryover. | x |  |  |
| Review topic submissions referred by UCEC and other requests related to budget matters. |  | x |  |
|  |  |  |  |

What were your top two successes?

1.

2.

What were your top two challenges?

1. Changing administration.

2.

Please list the dates of your meetings:

August 31, 2023; September 21, 2023; October 26, 2023; November 30, 2023; December 28, 2023; January 25, 2024; February 22, 2024; April 11, 2024; May 9, 2024; May 23, 2024; June 27, 2024; July 25; 2024; August 22, 2024

Please submit the report to Heather Loughney ([hl@uakron.edu](mailto:hl@uakron.edu)) by September 18, 2024.