



# Why Do We Budget?

- Maintaining control of finances is vital
  - We utilize the budget as a road map
    - To meet our goals
    - To support decision making
    - To plan for the future
  - Budgeting allows us to
    - Optimize resource allocation
    - Manage overspending
    - Identify a clear spending pattern
  - We are stewards of these funds and our ultimate responsibility to increase the member and programmatic impact





# Budget Considerations

- Budgets are our best estimates based on historical data or future expectations
- Your budget should be supported by assumptions
  - Revenues
    - Use last year membership numbers as a starting point
    - Consider the impact of a possible decrease and what impact it would have on your operations
      - For example, what would a 10% to 15% drop in members or revenue look like? How will it impact your ability to run your DPG/MIG?
  - Expenses
    - Lay out clear assumptions used for programmatic expense (fixed costs vs. variable costs)
    - What would unexpected or planned expense look like for you?
- Goal is to be operating within revenue sources



# Confirm Your Budget Goal

- FY27 budget goal: 20% reduction in budgeted deficit for FY26 less any special projects
  - Example: DPG ABC budgeted for a **\$25,000** loss in FY26.
    - FY27 goal =  $\$25,000 \times 0.8 = \text{\textcolor{red}{\$20,000}}$  deficit (or less)
  - Example: DPG DEF budgeted for a **\$55,000** deficit in FY26, but included a \$15,000 update to their SOP
    - Subtract the special project from the budgeted deficit:  $\$55,000 - \$15,000 = \text{\textcolor{red}{\$40,000}}$  deficit
    - FY27 goal =  $0.8 * \$40,000 = \text{\textcolor{red}{\$32,000}}$  deficit (or better)
  - Example: DPG GHI budgeted to break even in FY26
    - FY27 goal: continue to break even
- Your budget template worksheet will include for FY27 budget goal

	BudgetFY26	Forecast FY26	Difference	Budget FY27	Notes
FY Total Revenue	\$70,300.00	\$58,528.38	<b>(\\$271.62)</b>	\$60,750.00	
FY Total Expenses	\$113,943.13	\$96,974.52	\$16,968.61	\$92,839.00	
FY Net Revenue Expenses	<b>(\\$43,643.13)</b>	<b>(\\$38,446.14)</b>	\$5,196.99	<b>(\\$32,089.00)</b>	
Goal				<b>(\\$34,914.00)</b>	

# Projects with DPG/MIG Budgets

- 4 Projects
  - Executive Committee and Administration
    - Revenue: Membership Dues, General Sponsorship
    - Expenses: Credit card fees, EC-specific expenses (travel to annual meeting), Administrative Support
  - Website and Communications
    - Revenue: Eblast sponsorship
    - Expenses: Higher Logic, Zoom, SurveyMonkey, Canva, newsletter-related expenses
  - Professional Development/Member Resources
    - Revenue: Symposium sponsorship
    - Expense: Webinar speaker honoraria, symposium fees (honoraria, technology expense, etc.)
  - FNCE Member Initiatives
    - Revenue: FNCE sponsorship, event registration fees
    - Expense: FNCE travel/lodging/subsistence/registration, showcase fees and giveaways
- Overall, consider which items provide the greatest benefit to the overall membership of your DPG/MIG

# Add Revenue and Expenses

- Select ONLY from drop down choices in revenue and expenses. Do not type in categories manually to help align budgets across all groups
- Revenue
  - 40350 Grants/contracts: sponsorship funds
    - Should not be increased year-over-year unless significant change planned (symposium, new event, etc.)
  - 40150 Meeting Registration Fees: symposium registration fees, FNCE event registration fees
  - 40010 Membership Dues: membership dues annualized
    - This field will be pre-filled on your worksheet
  - 60130 Royalties: continued payments on existing merchandise (books)
  - 40200 Merchandise Sales: sales of items through the EatRight Store (toolkits, symposium recordings, etc.)

# Adding Expenses

- Expenses
  - 60135 Lodging-hotel fees, short-term rental for lodging at meetings/conferences
  - 60140 Subsistence-meals for individuals, daily limit applies
  - 60145 Transportation-airfare, mileage, local transportation, baggage fees
  - 60150 Professional/Consulting-professional support, DPG manager fees, ongoing support with an associate contract (newsletter editor, website coordinator, etc.)
  - 60170 Postage-mailing/shipping fees
  - 60185 Office Supplies-paper, other miscellaneous supplies
  - 60240 Telephone-communication fees
  - 60255 Website Hosting-Higher Logic
  - 60270 Outside IT Services-Zoom, Canva, SurveyMonkey
  - 60280 Advertising/Promotion-showcase items, etc.
  - 60300 Other Expense-items unable to fit into other categories, USE SPARINGLY
  - 60305 Books/Subscriptions-Examine, Natural Medicines Database
  - 60307 Annual Meeting Complimentary-FNCE® registration, registration for other conferences/meetings
  - 60345 Credit Card Processing Fees-fees for credit card payments
  - 60365 Honorariums/Awards-one-time fees associated with completing a specific task (webinar speaker, newsletter article author)
  - 60380 Audio Visual-A/V at FNCE® or other DPG event
  - 60390 Expo/Meeting Services-showcase fees
  - 60400 Food Service-meals for more than one individual (one individual should be subsistence), EC meetings, FNCE member events
  - 60415-Printing/Copying

# Standard Costs

- Credit Card Processing Fee: \$35/month of \$420/year
- Transportation:
  - Mileage: \$0.725/mile (note-when driving, only mileage will be reimbursed, not fuel)
  - Airfare: \$450 average; includes booking fee through Deem
    - Fare upgrades are not covered
    - Volunteers must book through Deem unless otherwise approved by Academy staff
  - Baggage: \$80/roundtrip
  - Ground transportation: \$100/trip
- Lodging
  - San Antonio, TX (FNCE): \$310/night
  - Washington DC: \$300/night
  - Chicago/all other cities: \$250/night
- Subsistence-groups may budget anything *up to* this amount; amounts do not roll over daily; adjustments should be made for days with group meals; per meal breakdown available on Standard Cost Sheet.
  - Chicago/Washington, DC: \$92/day
  - San Antonio: \$74/day
  - All other cities: \$68/day



# Standard Costs

- Zoom: \$325/year
- Examine Database: DPGs will discontinue offering Examine subscriptions as a member benefit. Academy members will now have the ability to purchase Examine+ or ExaminePro subscriptions at a discounted price.
- Higher Logic/Informz-charges based on membership as of May 30<sup>th</sup> of the current program year.
- DPG/MIG Staff Management
  - Level 1: \$0
  - Level 2: \$2,145/month
  - Level 3: \$6,435/month
- FNCE
  - Registration: \$415/person
  - Showcase: \$350/group
  - Internet and A/V: FNCE 2025 + 20%

Category	Membership Size	Monthly	Annually
F	5,000 plus members	\$ 700	\$ 8,400
E	3,000 - 4,999 members	\$ 550	\$ 6,600
D	2,000 - 2,999 members	\$ 430	\$ 5,160
C	1,500 - 1,999 members	\$ 360	\$ 4,320
B	1,000 - 1,499 members	\$ 270	\$ 3,240
A	1 - 999 members	\$ 175	\$ 2,100

# FNCE

- Registration: \$415/person
- Showcase: \$350/group
- Internet and A/V: FNCE 2025 + 20%
- Events
  - Up to 2 total events (in addition to showcase); in-person EC meetings count as one event
  - Encouraged to consider joint member receptions or collaborative events
  - Fall 2026 menus are available here: Fall 2026 menus are available here:
    - Grand Hyatt Menus: <https://satgh.hyattmenusandexperiences.com/>
    - Marriott Menus: <https://mi.bookmarriott.com/e-menus/118441/view>
  - Offsite events should:
    - Offer a unique experience or opportunity that cannot be facilitated within the hotel or convention center, and
    - Be financially self-sustaining, meaning they must either break even or generate a small profit.
    - All approved offsite events are subject to a \$300 fee to cover extensive contract review by the Academy's Meetings and Events Services teams.
    - The Academy retains the first right to all offsite event space. Before any external venue outreach, contracts, or commitments are made, the Academy must review and approve the proposed location. This ensures alignment with FNCE® logistics, attendee experience, and existing contractual obligations with our hotel and convention partners.
    - Submit proposals for offsite events to your DPG manager by February 9th

# Reserves

- Reserves should not be used to routinely cover operational costs.
- Reserves are intended to support projects or initiatives aimed at improving member experience, providing a new or improved member benefit, supporting scholarships, or other Academy-support research or Scope and Standards update.
  - Details on timing/cost of Scope and Standards updates located in the Standard Cost Sheet
- Items intended to pull from reserves are not utilized as part of the calculation of the annual operating budget.
  - Please work directly with your DPG manager to identify projects/initiatives/budget line items that fall under this category.
- Reserves will continue to be updated based on the monthly financial performance of individual groups (reduced for deficit, increased if revenue present)

		BudgetFY26	Forecast FY26	Difference	Budget FY27	Notes
	FY Total Revenue	\$33,012.50	\$30,222.28	\$10,209.78	\$29,900.00	
	FY Total Expenses	\$41,596.18	\$42,335.52	\$37,366.66	\$33,919.52	
	FY Net Revenue Expenses	(\$8,583.68)	(\$12,113.24)	(\$3,529.56)	(\$4,019.52)	
	Goal				\$0.00	
<b>RESERVES ITEMS</b>						
60150-Professional/Consulting	SOP- Additions Revision	\$7,500.00	\$7,500.00	\$7,500.00	\$7,500.00	(\$15,000 / 2 yrs) - Payment 1 of 2 - SOP Eating Disorders
60365-Honorariums/Awards	FNCE Student Stipend (1 x \$195 donation)	\$195.00	\$195.00	\$195.00	\$195.00	
<b>LESS RESERVES ITEMS</b>						
	FY Total Revenue				\$29,900.00	
	FY Total Expenses				\$26,224.52	
	FY Net Revenue Expenses				\$3,675.48	
	Goal				\$0.00	

# Process/Final Notes

- Budget worksheets and standard cost sheets distributed by your DPG managers in next 48 hours
- Draft budgets are due to your DPG manager no later than Monday, February 16<sup>th</sup>
  - Budgets must be approved by the EC via a vote (either during EC meeting or via virtual vote)
- DPG Managers, Sr. Managers, and Sr. Director will conduct first line review
- Any questions/discrepancies/recommendations will be provided via email with availability for a meeting the week of February 23<sup>rd</sup> through February 27<sup>th</sup>
- Budgets entered into Academy finance portal by February 28<sup>th</sup>
- Finance team review-questions may be sent via email in March
- Review by the Finance and Audit Committee (FAC) in April
- Final Board approval in May
  
- **Failure to meet deadlines and/or requests from staff, the FAC, and/or the Board may result in a groups' inability to utilize funding for events, member benefits, etc.**

Questions?



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