



**NEWEA ANNUAL BUDGET PREPARATION INSTRUCTIONS AND
GUIDELINES for FISCAL YEAR 2021:
OCTOBER 1, 2020 – SEPTEMBER 30, 2021**

All Standing and Ad Hoc Committees must meet periodically. How often depends on the committee responsibility and charge. At a minimum, committees are encouraged to meet during the Annual Conference and Spring Meetings. Committees may choose other venues, including the NEWEA Office in Woburn, MA. In lieu of meeting “in person”, conference calls or net meetings can be arranged through the NEWEA Office.

Committee meetings at host hotels during the General Meetings (Annual Conference and Spring Meeting) must be coordinated with the NEWEA Program Director, Janice Moran. Standing and Ad Hoc Committee Chairs will receive a meeting accommodation request form from the NEWEA Office.

Budget Request Instructions:

These instructions and guidelines are intended to assist each Committee Chair to budget for the upcoming year’s committee meetings and activities.

1. Please read over the Guidelines for Annual Budget Preparation (below) before preparing your committee or activity budget for review. If you have any questions or comments, please contact the Finance Committee Chair (Mac Richardson), or the Executive Director (Mary Barry). They will be able to answer your questions or offer suggestions.
2. Committee expenses are to be divided into the categories shown on the COMMITTEE BUDGET REQUEST FORM. Typically, committee expenses fall into the General category. List anticipated expenses and revenues associated with the Annual and Spring Meetings under the appropriate column. Please provide sufficient backup to support all anticipated expenditures.
3. Budgeted expenses relate to the programs and activities carried out by your committee. To support your committee’s budget request to the Finance Committee, the COMMITTEE BUDGET REQUEST FORM–NARRATIVE section should explain how your committee intends to use its budget.
4. The COMMITTEE BUDGET REQUEST FORM should NOT be used to budget a scheduled or planned Specialty Seminar. Instead, NEWEA staff will contact you regarding Specialty Seminar planning and budget preparations.
5. The Committee Budget Request Form should NOT be used to budget committee member travel expenses. All travel expenses must be requested separately through NEWEA’s “Extraordinary Officer/Program” budget.

Guidelines for Annual Budget Preparation:



When preparing your committee budget, keep in mind that the NEWEA is a not-for-profit organization that depends upon its Committee Chairs and members to provide volunteer services. Before deciding on a budget category or item request, be sure to ask yourself whether the expenditure is necessary and if the costs are reasonable for the purpose intended. Fundraising is encouraged to offset committee costs. This should also be shown on your form.

Committee Meetings and Refreshments:

Committee Meetings held during the Annual Conference - Review the list of estimated costs associated with food and beverage for the 2021 Annual Conference below. Consider the number of committee members that might attend and decide whether it is more economical to hold the meeting at the host hotel or whether it may be less expensive to have your meeting in one of the area restaurants.

Host Hotel provided refreshment costs the 2021 Annual Conference:

1. Continental breakfast = \$42.00 per person
2. Pasta buffet = \$43.50 per person
3. Coffee, soda, water, juice = \$18.00 per person
4. Coffee, soda w/light snack = \$25.00 per person

Committee Meetings held during the Spring Meeting – The food and beverage costs may be different for the Spring Meeting, but the same logic as for the Annual Conference can be applied when considering costs for refreshments.

General Committee Meeting - As discussed above, your Committee may request a budget for meetings held outside of the Annual and Spring Meetings.

Conference Arrangements Committees - Exhibit, Program, Sponsor, Conference Arrangements, and Registration Committee budgets should be coordinated with Kate Biedron, Meeting Management Director (also a member of the Finance Committee) prior to submitting to the NEWEA office.

Other Expenses:

- Conference Calls/Net Meetings: Call or email the NEWEA Office for estimates. We have shifted to using FreeConferenceCall.com, which is a fee service. As Committee Chair we encourage you to sign up for free to establish your own conference call number.
- Mailings/Postage – Large mailings (over 250 pieces) can be managed by NEWEA staff, using NEWEA's bulk mail permit. When possible, mailings should be planned to arrive at the printers in time to use bulk rate mail – which can take up to 3-4 weeks for delivery. Always consider using email instead of direct mailings, to reduce costs and environmental impact.



- Copy/Printing - NEWEA's printer can be used for large copying or printing activities. Call the NEWEA office for estimates for budgeting purposes.

For More Assistance:

If you have additional questions while preparing your budgets, please feel free to contact your Council Director, Mary Barry, NEWEA Executive Director, Mac Richardson, Treasurer, and/or Janice Moran, NEWEA Programs Director.

Click on the link below to fill out the Budget Request Form