

# FIU Foundation

## Fiscal Year 2026-27 Budget Kick-Off

February 10, 2026

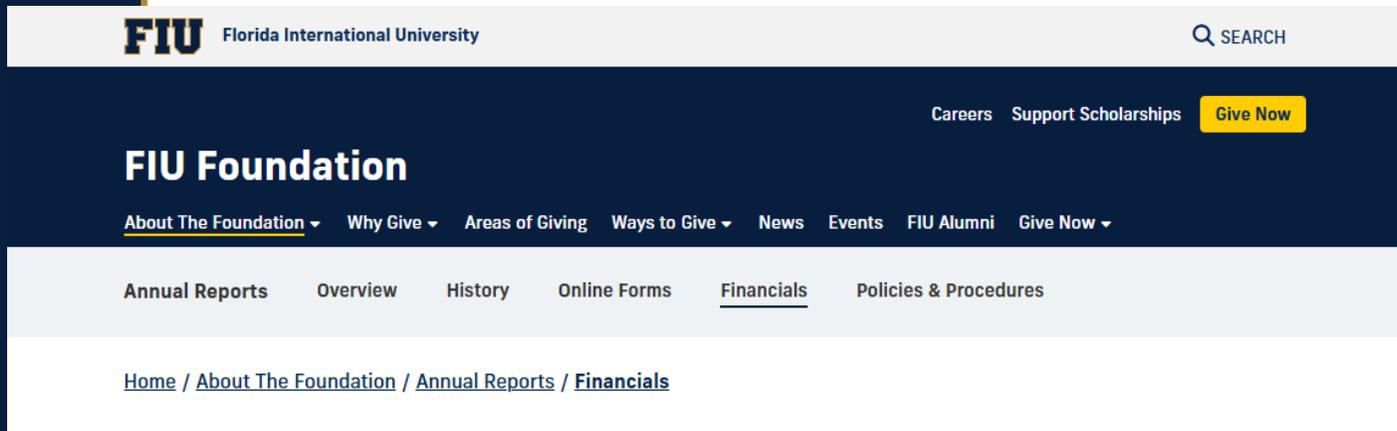
**FIU**



# Foundation Website

## NAVIGATION:

- Visit Foundation website:  
<http://give.fiu.edu>
- Click on “About the Foundation”, then “Annual Reports”
- Then click on “Financials”
- Across the top of the page, click on “Financials” tab and the Operating Budget information is located at the bottom of the page



# Highlights

- ✓ Work with your Deans and Development Officers when forecasting and budgeting New Cash gifts
- ✓ Do not include expected pledge payments from signed pledged/gift agreements in Raiser's Edge as of January 31, 2026, that are due between March 1, 2026, and June 30, 2027
  - Amounts will be pre-populated for you in the Actual and Requested ledgers using budgetary account R14001
- ✓ As of 12/31/25, the investment returns were 7.5%. There are no endowments underwater. All endowments that have met the minimum requirements will receive a spending distribution at 7/1/2026.
  - Our office will provide endowment spend estimates.

# Highlights

- ✓ Use budgetary account R14000 to forecast and budget revenues
- ✓ Use the following “Transfers Out” budgetary accounts to forecast and budget expenses to be reimbursed to FIU by Foundation:

- E57000 – All Other Expenses
- E57001 – Equipment Expenses
- E57002 – Scholarship Expenses
- E57003 – Construction Expenses
- E57004 – Salary Expenses
- E57006 – Events
- E57007 – Subscriptions and Memberships
- E57008 – Postage
- E57009 – Travel
- E57010 – Insurance
- E57011 – Rental
- E57012 – Repairs & Maint
- E57013 – Professional Services
- E57014 – Advertising and Promotion
- E57015 – Materials & Supplies

- ✓ All other expenses: Use the University Budgetary Accounts

# Budget Tools

## Queries and Reports

- Review FY 2025-26 Forecast (ACTUAL) and FY 2026-27 Budget (REQUESTED) through one of three ways:
  - Query — FIU02\_BUDGET\_DATA
  - nVision report — FIU02\_BUDGET\_BX\_BY\_PROJECT
  - nVision report -- FIU02\_R2\_Foundation

# Budget Tools

## 3% Gift Fee Allocation

- Runs nightly from 7:15pm – 8:00pm, please do not run reports or make entries into the budget tool during this 45-minute window
- Automatically reduces all forecasted and budgeted revenues (exceptions built in)
- Run the query or BX nVision report to obtain final NET revenue amounts for both your forecast and requested budget

# Deadlines

## Deliverables

## Due Date

FORECAST: 4-Month FY 2025-26 Forecast in ACTUAL Ledger	Wednesday, April 15, 2026
REQUESTED BUDGET: 12-Month FY 2026-27 Budget for Colleges, Schools, Units, and Building Funds	Wednesday, April 15, 2026
Budget materials presented to management and Board leadership	Friday, May 15, 2026
Budget materials distributed to Board of Directors	Friday, May 29, 2026
Board of Directors Finance meeting (to approve budget)	Friday, June 5, 2026
Annual Board of Directors meeting (to approve budget)	Saturday, June 6, 2026
Board of Trustees Finance & Facilities Committee meeting (to approve preliminary budget)	Thursday, June 18, 2026

# Questions & Answers