

Report of the Ways and Means Committee

Members of the Committee:

Ryan Swierczek, Epsilon Omega, Committee Chair

Dr. Anthony Walker, Eta Phi, District Governor, Advisor

Spencer Knight, Epsilon Omega, Vice President for Finance and Records, Advisor

Nathaniel Heitzman, Kappa Alpha

Sophie Hynes, Eta Upsilon

Travis Dodd, Eta Pi

The 2025 Ways and Means Committee was charged with the following:

1. Review the report of the 2024 Ways and Means Committee.
2. Charge the 2026 Committee and District Officers as necessary.
3. Evaluate and determine further action on officer expenses
 - a. Particularly the Secretary/Treasurer
4. Evaluate success of fundraising efforts for the past year
 - a. Determine the frequencies of future fundraising
5. Consider increasing the discretionary fund
6. Increase amount in the investment fund due to National Convention

The 2025 Ways and Means Committee Summary

The meeting began with a review of the 2024 Ways and Means Committee Report.

The Committee then discussed the District's fundraising efforts. The District is currently running one fundraiser, which is selling Kappa merchandise through an online store. This is the first time the Council has set something like this up, and they hope that after laying the groundwork this year, this could be a recurring fundraiser that is done several times throughout the year. The Committee charges the next Council with putting on the clothing store fundraiser at least twice a year (once per semester) with timing up to their discretion. The Committee also charges the district council with a higher fundraising goal of \$1,000 as an incentive to continue the merch store. The 2026 Ways and Means committee is charged with evaluating the district's fundraising efforts over the year.

Last year's Committee lowered the budget allotments for each District Officer, as they were not fully utilized. This year's District Council set a goal for each officer to attend at least two district days, and some officers had a hard time reaching this goal due to uneven budget allotments. Some officers also chose to pay out-of-pocket for some items to save money for Convention due to the lack of funds in the budget for their traveling. With this in mind, the Committee agreed on leveling out the budget for the next Council, allotting \$350 for every Officer. The Committee agrees that District Officer involvement across the district is paramount, and thus charges the next District Officers to continue to set a goal to travel to at least two district days.

The Committee then discussed the utilization of the discretionary fund. Last year's Committee increased the fund to \$150 to allow for an additional honorary member to be selected. This year's Council did choose to select two honoraries. However, this leaves nothing left in the fund to be used for its intended purpose. The Committee discussed the possibility of increasing the amount in the fund for incidentals. With the assumption that having two honorary members is not something that happens every year, the discretionary fund was raised to \$200. This way, the fund will have enough money to cover an additional honorary member if necessary, but also provides a cushion for anything else that may be needed.

The Committee then looked through the expense line items for District Programs, starting with district awards. The amount utilized varies year-to-year, so the Committee decided to leave it at \$100. Honorary members will always cost \$150 per person, so in tandem with the discussion about the discretionary fund, this will remain at \$150. Last year's Committee set the budget for district scholarships to \$0; rather than increase this amount immediately, the Committee charges the next District Council to consider working on developing a plan to reinstate the scholarship. In addition, the Committee charges the 2026 Ways and Means committee to evaluate the progress made in this regard and consider raising the budget. The district website is now on Google Sites, which does not charge a fee for the website domain. For this reason, the Committee decided to remove this line item from future budgets. Lastly, the Committee discussed the fundraising and capital investment line item. The Vice President for Finance and Records (VPFR) explained that this line item is to be used by chapters to effectively take out a loan from the District to start fundraisers, after which the 'loan' is paid back. Since it is not frequently used, the Committee decided to leave it at \$50, and charge the next Vice President for Programs and Outreach to advertise its existence to chapters on the 'Brother Resources' page. The 2026 Ways and Means Committee is charged with evaluating the usage of this line item at the end of the next Officer term.

In preparation for National Convention, last year's Committee recommended raising the travel and capital investment budget. To ensure that money is available for both National Convention this summer and District Convention next spring, the Committee has raised this item to \$1,500. However, the Committee charges the next VPFR to assist chapters across the district in fundraising for themselves to help fund travel throughout the year. The Committee agrees that the end goal should be for all chapters to be able to pay for their own travel without having to rely on the district budget, but the opportunity for district assistance is a good resource to have. As such, the Committee recommends that this line item be used as a need-based financial aid for chapters. The budget will include an additional line item, 'National Convention Officers', to assist District Officers with National Convention related travel expenses. Previous budgets from convention years have allotted \$680; to adjust slightly for inflation and other higher costs, the Committee has raised this to \$700.

Lastly, the Committee reviewed revenue expectations for the next year. All donation and interest line items have been set to \$0. The District cannot rely on donations as a revenue stream, as they are variable, and having a goal set may cause chapters to feel obligated to donate, which is undesirable. Allocations have been reorganized to align with the Officer terms; this will ensure that both Spring and Fall allocations occur during the term of the next VPFR. While the reorganization may cause 'double-counting' in our budgets, these will be rectified upon receiving an updated balance from NHQ this summer. Based on the projected amounts for Spring '25 and Fall '25, these items have been set to \$750 and \$2,500, respectively. As previously mentioned, the district fundraising goal has been increased to \$1,000 with the expectation that the district clothing store be continued.

Proposed Budget:

Line Item	'25 Proposed Amount
Allocations from Nationals - Spring '25	\$750.00
Allocations from Nationals - Fall '25	\$2,500.00
Interest	\$0.00
Grants, Donations	\$0.00
Fundraisers	\$1,000.00
Chapter District Donation	\$0.00
TOTAL REVENUE	\$4,250.00
Awards (8 or 9 given)	\$100.00
Honorary Members (\$150/member)	\$150.00
District Scholarship Fund (Given to awardees)	\$0.00
Fundraising Capital Investment	\$50.00
President	\$350.00
Vice President for Membership Education	\$350.00
Vice President for Finance and Records	\$350.00
Vice President for Programs and Outreach	\$350.00
Discretionary Fund	\$200.00
Travel and Capital Investment Fund	\$1,500.00
National Convention Officers	\$700.00
TOTAL EXPENSES	\$4,100.00

*District Programs and Officer Expenses

The Committee charges the 2026 Ways and Means Committee with the following:

1. Review the 2025 Ways and Means committee report.
2. Evaluate the district's fundraising efforts from the past year.
3. Consider raising the district scholarship line item based on the progress of the 25-26 District Council in developing a plan to reinstate this program.
4. Review the utilization of the Fundraising Capital Investment line item and adjust the budget accordingly.
5. Charge the 2027 Ways and Means committee as needed.
6. Charge the 2027 district council as needed.

The Committee charges the 2025-26 District Council with the following:

1. Continue the clothing store fundraiser; open it at least two times this year (preferably once a semester)
2. Raise \$1,000 dollars through fundraisers.
3. Each officer should make an effort to travel to at least two district days.
4. Develop a plan to reinstate a district scholarship.

The Committee charges the Vice President for Finance and Records with the following:

1. Push chapters to fundraise and create line items in their budget to send their delegates to national and district conventions.

The Committee charges the Vice President for Programs and Outreach with the following:

1. Advertise the Fundraising Capital Investment on the Brother Resources tab of the district website.

Respectfully submitted,

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