

# Alpha Chi Sigma Fraternity

Professional in the Chemical Sciences

Office of the  
GRAND RECORDER



John N. Stipp  
5538 Brook Run Drive  
Medina, OH 44256  
gr@alphachisigma.org

## 2025 Annual Report of the Grand Recorder January 13, 2026

*“To be like the rock that the waves keep crashing over. It stands unmoved  
and the raging of the sea falls still around it.”  
-Marcus Aurelius*

### Overview

The Grand Recorder is the Grand Chapter officer appointed by the Supreme Council who is responsible for the Grand Chapter Records, National Office Operations, Grand Chapter Finances, Federal / State Compliance activities, as well as any other items assigned by the Supreme Council or the Grand Chapter. The following is a summary of those activities for 2025 broken down into various sections by each of the aforementioned areas of responsibility.

### Grand Chapter Records

#### Chapter and Membership Numbers

As of this writing the Fraternity has initiated 81,659 members since its founding in 1902. The Fraternity currently has 57,725 living members. The breakdown of the Active Chapters and Groups are as follows:

53 Active Collegiate Chapters  
3 Active Collegiate Groups

6 Active Professional Chapters  
5 Active Professional Groups

Delta Delta was moved from a Chapter to a Group in 2025 with Beta Psi acting as the parent chapter. Slippery Rock University in Slippery Rock, PA was added as a new Collegiate Group with Gamma Upsilon acting as the parent chapter.

The Central Virginia Professional Group was recognized in March 2025. Several Professional Groups were unresponsive to GPA Yarberry's multiple attempts at contacting them this year, and are no longer recognized as active Professional Groups. This is troubling for the Professional Branch as there are very few requirements for maintaining a Professional Group.

In 2025 the Fraternity pledged 1097 and initiated 1050. The numbers of pledges and initiates have been relatively flat since 2022.

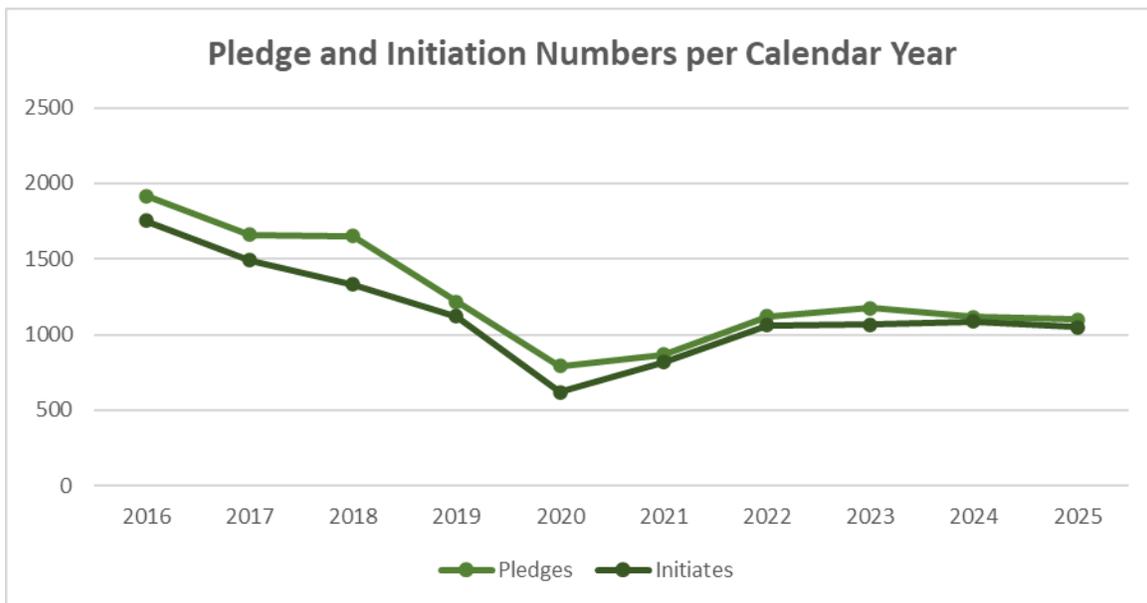
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## Professional Representative Election

Part of the annual solicitation involves the election of the Professional Representatives. The candidates and the vote tally for the 2026-2027 Professional Representative election were as follows:

Eric Puhlmann, *Delta Delta* 2017 – 101  
Oliver Penrose, *Gamma Theta* 2003 – 100  
Robert Duff, *Gamma Iota* 1996 – 98  
Nichole Pawlowski, *Gamma Psi* 2011 – 98  
Randi Ress, *Gamma Nu* 2008 – 85  
Heidi Sabatini, *Gamma Delta* 2019 - 82  
Olivia Hathaway, *Alpha Kappa* 2021 – 77  
Caitlin (Cat) Nimmo, *Beta Psi* 2023 – 63  
Jordan Levi, *Rho* 2021 – 52

Brothers Puhlmann, Penrose, Duff, Pawlowski, and Ress will serve as Professional Representatives from January 1, 2026 to December 31, 2027. The Fraternity is grateful to all the candidates for their willingness to serve the Fraternity.

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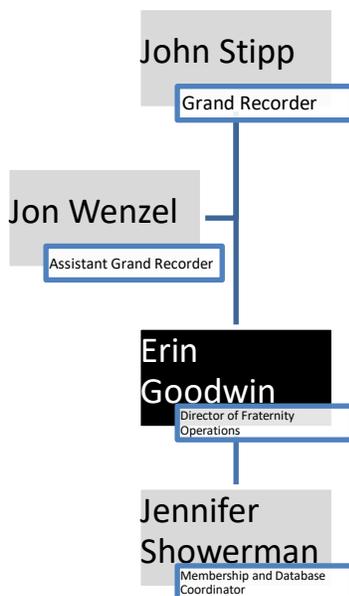
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## National Office Operations

The National Office continues to be staffed with Erin Goodwin working full-time and Jennifer Showerman, *Zeta 1992*, OA working part-time. Allison Wisner's full-time job and other pursuits have taken up more of her time, and as such, she stepped away from her freelance consultant work with the Fraternity in September 2025. Allison was a great resource for the Fraternity, and we are grateful for all the help and support she was able to provide the National Office over the past ten years.

With a small staff size, some services and functions are outsourced. This ensures that we have these functions managed in a cost-efficient manner while maintaining the appropriate level of expertise in the various subject matter areas. Our IT hardware and backup services continue to be managed by Byte Café. The Fraternity changed service providers for our bookkeeping and accounting services from inDinero to Milestone in August 2025. The conversion from inDinero to Milestone should result in an annual savings to the Fraternity of \$13,300.

## National Office Organization Chart – January 2026



Employees Located at 6296 Rucker Road, Indianapolis, IN  
Employees or Consultants (Working Fully Remotely)

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## Fraternity Webpage and CRM Database Modernization

There is never a shortage of work at the National Office. As expected, Conclave years are extremely busy for the National Office. I have typically viewed non-Conclave years as opportunities for major projects, special projects, and continuous improvement activities.

In 2025, Erin and Jen transitioned the Fraternity to a new webpage, implemented a new CRM (Customer Relationship Management) database, and switched our bookkeeping / accounting service provider. This was a tremendous amount of extra work for Erin and Jen; however, the results of those efforts are:

- Modernizing our IT infrastructure
- Streamlining the data entry activities required by the staff
- Reducing the number of software programs and licenses that are needed
- Reducing the annual cost of software and licenses
- Reducing the amount of hardware needed at the National Office
- Reducing the amount of external support (Byte Café) to support the IT infrastructure

The costs of these conversion efforts were essentially covered from the CAPEX funds\* that have been saved since 2018, with only \$1,550 for these efforts being paid out of the General Fund.

*\*Many corporations, including the Alpha Chi Sigma Fraternity will budget or set aside funds designated for Capital Expenses, or CAPEX. This is to ensure that funds are available for large purchases that the corporation needs for expanding or upgrading their operational activities. The Fraternity began setting aside funds in a Morgan Stanley Money Market account for CAPEX expenses in 2018. That was done to pay for expected future large purchases out of the CAPEX funds instead of having to use funds from the Reserve Fund or the General Fund.*

Comparing the annual IT costs between 2024 and 2026, the Fraternity should realize a \$9,700 annual cost reduction in 2026 compared to the 2024 costs. That cost savings only includes the cost of software / licenses, mainly from not having to have other software to interface with Blackbaud / RE7. That \$9,700 in savings does not include related items such as reduced Byte Cafe support costs and reduced electricity costs. Reduced support costs from Byte Café should amount to around \$3,900 per year. Not counting electricity savings, Erin and Jen's efforts on this should save the Fraternity around \$13,600 annually.

Additional background information can be found in the 2024 Annual Report of the Grand Recorder.

Additional details on our software and licenses are shown in the following tables, along with the costs to the Grand Chapter per year.

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## 2024 Software and Licenses

|  | Software / License   | Function                                | Annual Cost             | Location        | Backup    |
|--|----------------------|---|-------------------------|-----------------|-----------|
| Database /<br>Information Storage        | Raiser's Edge        | Membership Database                     | \$9,096                 | N.O. Hard Drive | Carbonite |
|  | BB Net Community     | Payment Processing for online donations | \$10,920                | N.O. Hard Drive | Carbonite |
|  | Omatic               | Tool to import data into RE             | \$4,130                 | Cloud           | Cloud     |
|  | Shared Drive (P:)    | National Office Data Storage            | None                    | N.O. Hard Drive | Carbonite |
|  | Formsite             | Tool for data collection                | \$780                   | Cloud           | Cloud     |
| Accounting /<br>Bookkeeping /<br>Payroll | Quickbooks Online    | Bookeeping / Accounting                 | \$540                   | Cloud           | Cloud     |
|  | Gusto                | Payroll                                 | Transaction Based       | Cloud           | Cloud     |
|  | Bill.com             | Payment Services / Financial Control    | Transaction Based       | Cloud           | Cloud     |
|  | Venmo                | Digital Payment Services                | Transaction Based       | Cloud           | Cloud     |
|  | Eventbrite           | Conclave Planning                       | \$3,610                 | Cloud           | Cloud     |
| Communications                           | Microsoft 365        | Word, Excel, PowerPoint, etc.           | Covered under Byte Café | N.O. Hard Drive | Carbonite |
|  | G Suite              | E-Mail, Shared Documents and Files      | None                    | Cloud           | Cloud     |
|  | Website              | Website                                 | Covered Under BBNC      | Cloud           | Cloud     |
|  | Zoom                 | Conference Call Services                | \$1,000                 | Cloud           | Cloud     |
| Marketing / Graphic<br>Design            | EMMA                 | Newsletter Publishing / Tracking        | \$2,190                 | Cloud           | Cloud     |
|  | Adobe Creative Cloud | Graphics / Document / Publishing        | \$636                   | Cloud           | Cloud     |
| <b>TOTAL ANNUAL COST 2024</b>            |                      |   | <b>\$32,902</b>         |                 |           |

## 2025 Software and Licenses

|  | Software / License   | Function                                | Annual Cost             | Location        | Backup    |
|--|----------------------|---|-------------------------|-----------------|-----------|
| Database /<br>Information Storage        | Raiser's Edge        | Membership Database                     | \$9,096                 | N.O. Hard Drive | Carbonite |
|  | BB Net Community     | Payment Processing for online donations | \$10,920                | N.O. Hard Drive | Carbonite |
|  | Omatic               | Tool to import data into RE             | \$4,130                 | Cloud           | Cloud     |
|  | Shared Drive (P:)    | National Office Data Storage            | None                    | N.O. Hard Drive | Carbonite |
|  | Formsite             | Tool for data collection                | \$780                   | Cloud           | Cloud     |
|  | Bloomerang           | Membership Database                     | \$6,000                 | Cloud           | Cloud     |
| Accounting /<br>Bookkeeping /<br>Payroll | Quickbooks Online    | Bookeeping / Accounting                 | \$540                   | Cloud           | Cloud     |
|  | Gusto                | Payroll                                 | Transaction Based       | Cloud           | Cloud     |
|  | Bill.com             | Payment Services / Financial Control    | Transaction Based       | Cloud           | Cloud     |
|  | Venmo                | Digital Payment Services                | Transaction Based       | Cloud           | Cloud     |
|  | Eventbrite           | Conclave Planning                       | \$3,610                 | Cloud           | Cloud     |
| Communications                           | Microsoft 365        | Word, Excel, PowerPoint, etc.           | Covered under Byte Café | N.O. Hard Drive | Carbonite |
|  | G Suite              | E-Mail, Shared Documents and Files      | None                    | Cloud           | Cloud     |
|  | Website - BBNC       | Website                                 | Covered Under BBNC      | Cloud           | Cloud     |
|  | Zoom                 | Conference Call Services                | \$1,000                 | Cloud           | Cloud     |
|  | Website - Angel Oak  | Website Development                     | \$25,550                | Cloud           | Cloud     |
| Marketing / Graphic<br>Design            | EMMA                 | Newsletter Publishing / Tracking        | \$2,190                 | Cloud           | Cloud     |
|  | Adobe Creative Cloud | Graphics / Document / Publishing        | \$636                   | Cloud           | Cloud     |
| <b>TOTAL ANNUAL COST 2025</b>            |                      |   | <b>\$64,452</b>         |                 |           |

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## 2026 Software and Licenses

|                                    | Software / License   | Function                             | Annual Cost             | Location    | Backup |
|------------------------------------|----------------------|--------------------------------------|-------------------------|-------------|--------|
| Database / Information Storage     | Bloomerang           | Membership Database                  | \$20,162                | Cloud       | Cloud  |
|                                    | Sharepoint           | National Office Data Storage         | None                    | Cloud       | Cloud  |
|                                    | Formsite             | Tool for data collection             | \$840                   | Cloud       | Cloud  |
| Accounting / Bookkeeping / Payroll | Quickbooks Online    | Bookeeping / Accounting              | \$1,380                 | Cloud       | Cloud  |
|                                    | Gusto                | Payroll                              | Transaction Based       | Cloud       | Cloud  |
|                                    | Bill.com             | Payment Services / Financial Control | Transaction Based       | Cloud       | Cloud  |
|                                    | Venmo                | Digital Payment Services             | Transaction Based       | Cloud       | Cloud  |
| Communications                     | Microsoft 365        | Word, Excel, PowerPoint, etc.        | Covered under Byte Café | Remote comp |        |
|                                    | G Suite              | E-Mail, Shared Documents and Files   | None                    | Cloud       | Cloud  |
|                                    | Website - Angel Oak  | Website                              | \$555                   | Cloud       | Cloud  |
|                                    | Zoom                 | Conference Call Services             | \$1,000                 | Cloud       | Cloud  |
| Marketing / Graphic Design         | Adobe Creative Cloud | Graphics / Document / Publishing     | \$636                   | Cloud       | Cloud  |
| <b>TOTAL ANNUAL COST 2026</b>      |                      |                                      | <b>\$23,193</b>         |             |        |

## Budget and Finances

### Fraternity Fund Overview

The Fraternity has three funds where money is held.

- The General Operating Fund is the account used in day-to-day operations of the Grand Chapter. These funds are held at the National Bank of Indianapolis.
- The Reserve Fund is required in the Constitution Article II Section B.1.g. The Reserve Fund is held in a managed investment account at Morgan Stanley. The funds in the Reserve Fund are available for use in emergencies, or to supplement the General Operating Fund if needed.
- The Short-Term Savings Fund was established by SC Proposition 4682. The Short-Term Savings Fund is held in a money market account at Morgan Stanley and can be used as a bridge account between the Reserve Fund and the General Operating Fund allowing quick transfer of funds into the General Fund. It also holds monies set aside for Capital Expenses (CAPEX).

The popularity of Digital Payment Services continues to grow. Increasing numbers of our members and chapters are using these services to easily send money to the Grand Chapter for payments and donations. Additionally, these types of services are being used by the Grand Chapter for payments to our members for travel reimbursement and for 5% payments to chapters from the solicitation. The Grand Chapter has a Venmo account managed through the National Office for Digital Payment Service transactions.

A breakdown of the Fraternity's fund structure, accounts, and balances as of December 31, 2025 are illustrated in the following diagram:

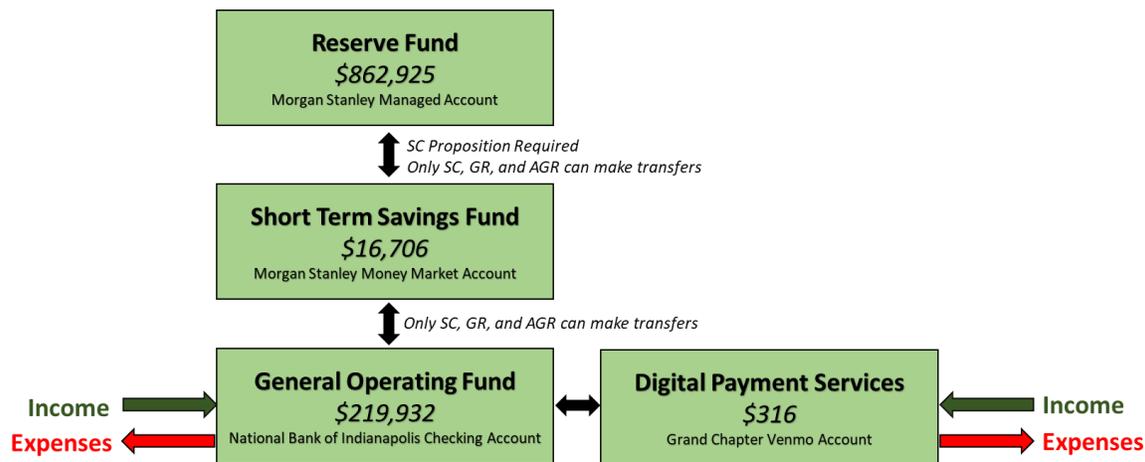
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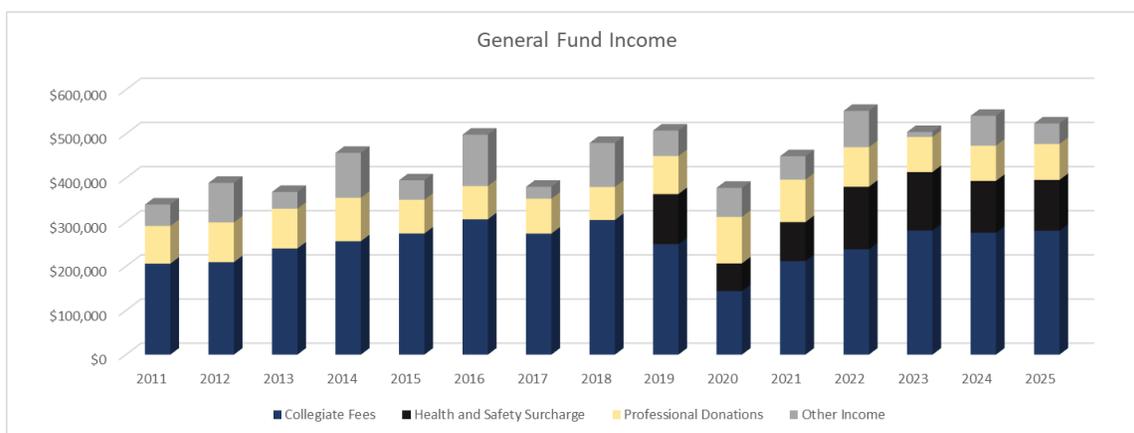
\*All balances as of December 31, 2025. Balances are unaudited.

## General Operating Fund Income Summary

The Fraternity obtains income from multiple sources. The primary source of income for the Fraternity comes from fees and surcharges for new members. The Fraternity also regularly receives income from Professional Donations, and sales of Fraternity merchandise from the online store.

In 2025, the Grand Chapter received \$17,380 from the remains of Beta Tau Chapter's treasury. Beta Tau went inactive in 2022.

A breakdown of the various sources of income for the Fraternity is illustrated below:



- Collegiate Fees consist of the Pledge Fees and Lifetime Membership Fees
- Health and Safety Surcharge was implemented in 2019 and covers the cost of the Fraternity's Insurance
- Professional Donations are donations received from Professional Members to the General Fund
- Other Income includes Conclave Receipts, CAPEX Withdrawals, Affinity Programs, and PPP Forgivable Loans

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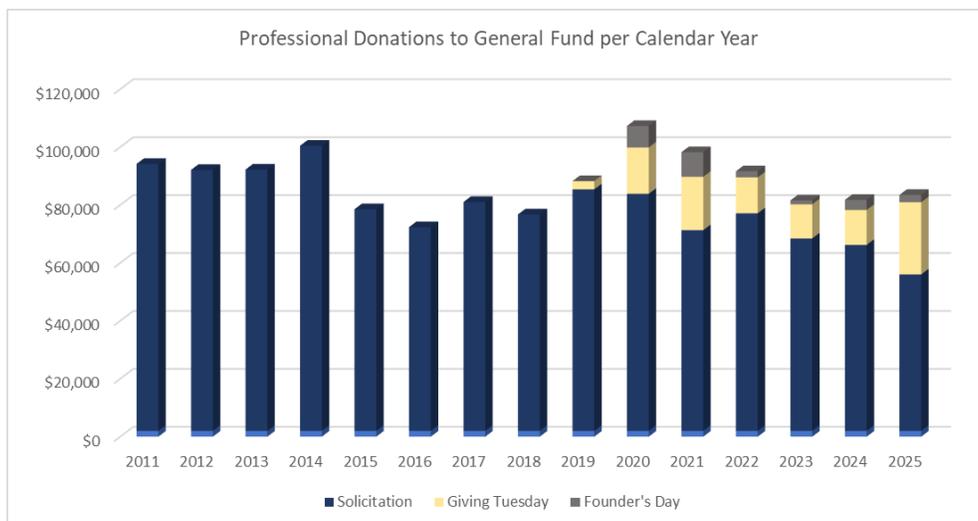
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Professional donations to the Fraternity General Fund for the past fifteen years are shown in the following chart:



- Donations include monetary donations only. Gifts-in-Kind donations from members are not included.

Total monetary donations from Professional members totaled \$81,450 to the General Fund in 2025 and \$14,096 to the Reserve Fund.

Giving Tuesday efforts yielded \$27,700 in donations (\$26,050 for the Fraternity and \$1,650 for the Educational Foundation), which is a marked increase in donations from prior years. Erin and Jen utilized Bloomerang this year to e-mail video messages to potential donors prior to the event, with follow up messages thanking donors for their contributions at certain donation amounts. A limited-edition pin was offered to donors with a \$150 contribution, and a limited-edition t-shirt was offered to donors with a \$250 contribution.

Founder's Day efforts yielded \$2,530 in donations to the Fraternity.

## General Operating Fund Expense Summary

The Fraternity has a variety of expenses required to operate and serve its members. Those expenses have been categorized into six main categories for comparison. Member Services, National Office Operations, The *Hexagon*, Conclave, Insurance, and Programs. Conclave is a costly event for the Fraternity, so expenses for even numbered years are higher than odd numbered years.

A breakdown of the Fraternity's expenses by these categories is shown below:

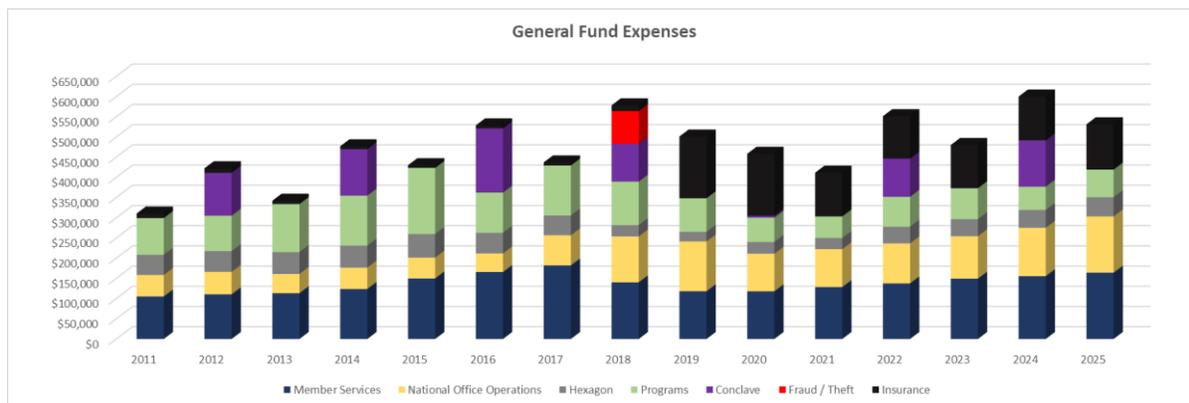
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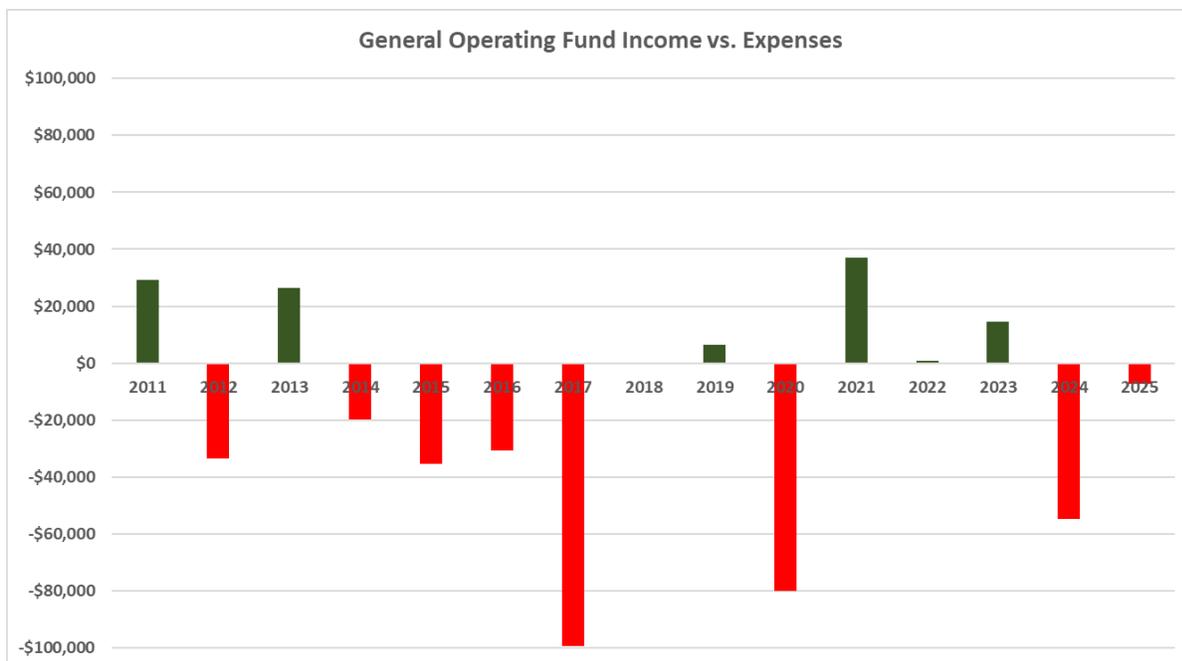
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- Member Services includes salaries, consultant fees, GR and AGR stipends, FICA, Social Security, and State Payroll Taxes
- National Office Operations includes outsourced services, utilities, postage, software licenses, and bank fees
- Hexagon includes printing / mailing costs and the GE stipend
- Programs include ritual / regalia, expansion, awards, travel, DC's, PR's, SC expenses, and legal expenses, and programs
- Conclave includes all Conclave related expenses
- Fraud / Theft includes embezzled funds from former staff and related legal expenses for identity and data theft in 2017
- Insurance includes cost for all insurance policies (GL, D&O, Workman's Comp., and Property / Building)

## General Operating Fund Income vs. Expense Summary

The following figure illustrates the difference between income and expenses for the General Operating Fund. From a financial perspective, this is the most important chart in this report.



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Although the Fraternity is a nonprofit corporation, it still needs to have sufficient funds available to pay for its' expenses. As with other nonprofit (and for profit) corporations, if the Fraternity runs out of money, it will go out of business and cease to exist. Expenses in even numbered years are typically higher than odd numbered years due to Conclave costs. Ideally, the Fraternity should break even during even numbered years and earn a profit in odd numbered years to help increase reserves for unexpected financial stresses, such as large unplanned expenses, pandemic outbreaks, etc. With limited income streams, this pattern needs to be monitored, and fees and expenses adjusted as needed to ensure that we are not using up our reserves on operating expenses.

Based on the (unaudited) numbers available as of this writing, the Fraternity had \$7,151 more in expenses compared to income for 2025. The Fraternity had actually budgeted for a \$38,315 loss for 2025, largely due to the cost of the Summer SC Meeting where the District Counselors were invited for training purposes. Many of our members generously donated their travel costs for this meeting (Gifts in Kind), thus offsetting much of the expenses for the meeting. The Grand Chapter also received \$17,380 from the Beta Tau Chapter treasury (Beta Tau was declared inactive in 2022). Some other expenses were less than planned which helped the actual loss in 2025 be less than expected.

## Reserve Fund Summary

The Reserve Fund is held in the managed account at Morgan Stanley. The Fraternity withdrew \$50,000 from the Reserve Fund in 2025 (SC Proposition # 5085 on September 10, 2025). This was needed as the General Fund (NBOI Checking) balance was becoming depleted due to 2024 Conclave expenses and the Fraternity's typical annual cycle of income and expenses. (The Fraternity generally brings in most income during the pledge / initiation cycles and the solicitation in non-Conclave years, as such, our General Fund balance tends to reach its' lowest balances in the late Summer / early Fall). The Fraternity had not withdrawn any funds from the Reserve Fund since 2020. \$6,257 was transferred into the Reserve Fund in 2025 from donations received in 2024 designated for the Reserve Fund. Investment performance was good in 2025 with the Reserve Fund increasing \$66,265 in 2025 net after a \$50,000 transfer to the General Fund.

The balance of the Morgan Stanley managed account over the past ten years is shown below:

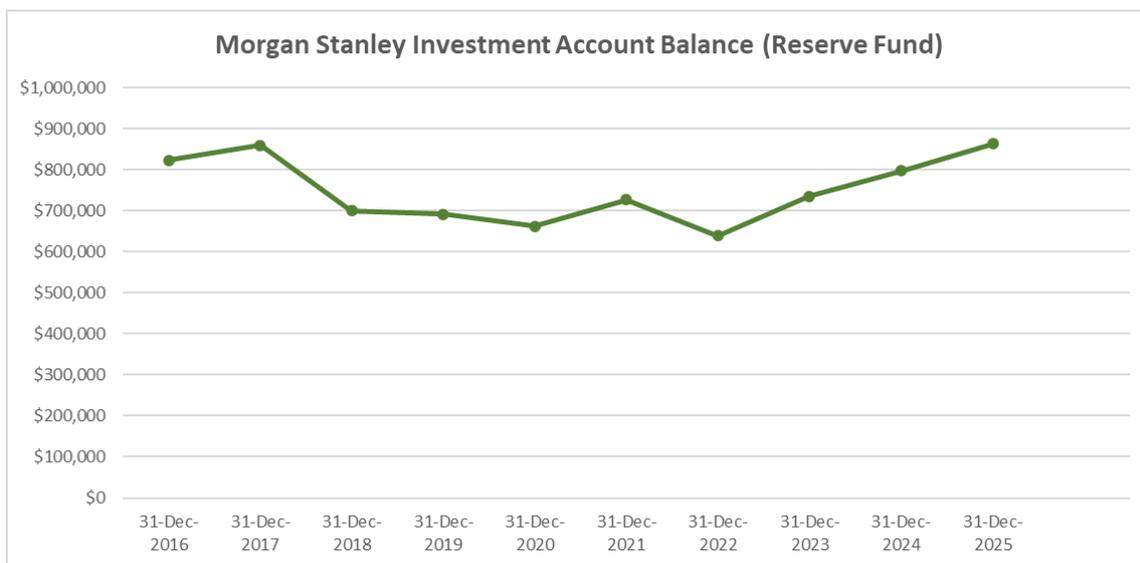
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Ideally, a nonprofit corporation should have one to two years of operating expenses in reserves. Assuming annual operating expenses of \$550,000, we currently have 1.5 years of operating expenses in reserves. As such, we should continue to do our best not to use the Reserve Fund for operating expenses so that those investments can continue to grow.

\$14,096 was received from donors in 2025 designated for the Reserve Fund and that \$14,096 will be transferred into the Reserve Fund in 2026.

## Pledge and Lifetime Membership Fees

The Pledge and Lifetime Membership fees were increased at the 2024 Conclave to a \$65 Pledge Fee and a \$200 Lifetime Membership Fee to keep pace with inflation and rising costs. The rate of inflation is reducing; however, some fee increases should be expected to be recommended at the 2026 Conclave.

## Health and Safety Surcharge

The Health and Safety Surcharges remained unchanged from 2023 at \$20 (Pledge) and \$90 (Lifetime) to cover the costs of the Fraternity's insurance coverage. Those surcharges are sufficient to cover the cost of the Grand Chapter's insurance.

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|  | 2022      | 2023                     | 2024      | 2025      | 2026<br>Projected* |
|--|-----------|--------------------------|-----------|-----------|--------------------|
| Health and Safety Surcharge (Pledge)           | \$35      | \$35 Spring<br>\$20 Fall | \$20      | \$20      | \$20               |
| Health and Safety Surcharge (Initiate)         | \$95      | \$95 Spring<br>\$90 Fall | \$90      | \$90      | \$90               |
| Total Income from Health and Safety Surcharges | \$141,545 | \$132,378                | \$122,364 | \$114,870 | \$118,700          |
| Total Insurance Cost                           | \$104,912 | \$106,709                | \$108,618 | \$112,168 | \$127,862          |
| Difference                                     | \$36,633  | \$25,669                 | \$13,746  | \$2,702   | -\$9,162           |

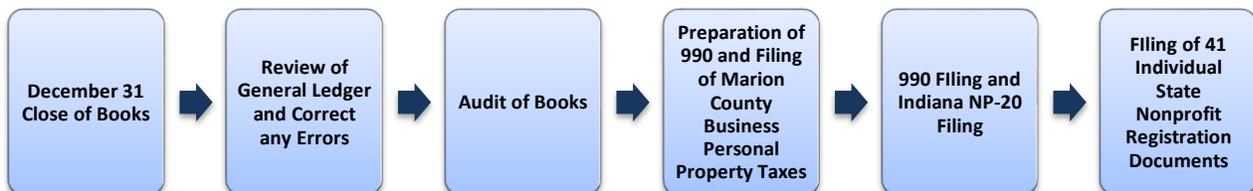
\*2026 Projection based on 1129 Pledges and 1068 Initiates (Rolling Three Year Averages)

The Fraternity’s insurance costs are increasing in 2026 primarily due to the number of active members in the Fraternity. This is calculated by adding the sum of active collegiate members (as reported on their Chapter Registers) and the active professional members (Reserve Fund Members included in this count). For the 2025 insurance coverage, the Fraternity reported 2,845 active members, compared to 2026 where we are reporting 3,280 active members. A larger number of members to insure equates to a higher insurance cost on the Fraternity’s General Liability Policy, thus leading to the increase from 2025 to 2026.

## Compliance Activities

As a 501c3 not-for-profit corporation, Alpha Chi Sigma is required to maintain compliance with Federal and State laws and regulations. Those activities consist of filing Federal and State Tax forms (IRS 990, Indiana NP-20, and Marion County Business Personal Property Taxes), compliance with various employment laws and regulations (Federal, Indiana, and Illinois), implementation of various policies required by law, and filing State Nonprofit Registrations.

A simplified flowchart of the annual compliance activities required for the Grand Chapter is shown below:



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The audit and 990 filings were completed in 2025 by Agresta, Storms, and O'Leary. We continue to work with Clearly Compliant for our State Registrations. We intend to use these same service providers in 2026 as both companies have been very responsive, thorough, and easy to work with.

## **Action on 57<sup>th</sup> Biennial Conclave Grand Chapter Motions**

At the 57<sup>th</sup> Biennial Conclave, the Grand Chapter passed the following Motions that fall under the Grand Recorder's office.

### **Motion 16 – Standardized Contact Method for Members**

AGR Wenzel explored this in detail and his analysis and findings can be found in the AGR 2024 Annual Report.

### **Motion 34 – Socially Responsible Investment Options**

I explored this in detail and presented my analysis and findings in a separate report presented to the Supreme Council on July 12, 2025.

### **Motion 38 – Virtual Career Fairs**

AGR Wenzel explored this in detail and his analysis and findings can be found in the AGR 2024 Annual Report.

## **Conclusions**

Based on the information available as of this writing, the General Fund closed out 2025 with \$7,151 more in expenses than in income. Ideally, the Fraternity should have had more income than expenses in a non-Conclave year. Taking losses year after year will erode the Reserve Fund as that is where the difference eventually comes from. Readers should expect fee recommendation increases at Conclave to help bring this back into balance. The Professional Members need to contribute more to the Fraternity to help remove some of the burden from the Collegiates. Other income sources need to be identified. There has been much talk about this off and on over the years; however, as an organization, we have no shortage of generating ideas. Execution is where we typically fall short.

As a Conclave year, 2026 will be a busy time for the National Office. Special projects and non-essential tasks that require significant staff time will need to be prioritized and could be delayed until after Conclave. I would strongly recommend that if any members need anything before Conclave, or for Conclave from the National Office that is out of the ordinary, that those requests be made early. Waiting until the last minute before Conclave and asking for special requests from the National Office, the AGR or myself may not provide the deliverable as intended.

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I continue to be impressed with the efforts of my team. The extra effort that Erin and Jen put forth this year to update our webpage, convert to a new CRM database, and switch our accounting / bookkeeping services could not have been executed better. Those efforts should yield an annual savings to the Fraternity of \$26,900. This was a tremendous accomplishment for the Fraternity. Those efforts were made easier by the Supreme Council, myself, and Jon, leaving Erin and Jen to run the project without micromanaging them. Our membership is drawn from people who are very detail oriented. Being used to details makes it easy to want to micromanage; however, that is not how you build trust and develop people. If you employ talented, hardworking people and give them the tools that they need, they will always impress you with their results. I am looking forward to another successful year working with our team and am looking forward to seeing everyone at Conclave in July 2026.

Yours in the Double Bond,

A handwritten signature in black ink, appearing to read 'J. Stipp'.

John N. Stipp, *Epsilon 1989, OA*  
Grand Recorder