FINANCE COMMITTEE REPORT – May 2026

During the month of May 2026, the members of the Finance Committee met three times and continued their focus on financial oversight, long-term financial stability, data protection, and improving contribution accessibility for ACA groups and members.

Monthly Financial Reports

Jonathan Bryson from JBCAS, ACA WSO's new accounting firm, joined the Finance Committee meeting to review the April 2026 financial reports. The Committee received and reviewed the reports and discussed current financial activity and reporting processes. The Treasurer has posted the March 2026 financial statements on acawso.org, along with a written Treasurer's Report.

Budget Forecast, Literature Sales, and Financial Sustainability

The Finance Committee reviewed current budget projections and discussed factors affecting revenue performance. The Finance Controller reported that forecasts were being updated based on year-to-date results and current trends.

The Committee members discussed literature sales performance and several factors that may be affecting revenues, including foreign exchange rate fluctuations, pricing changes, and evolving purchasing patterns.

The Committee also discussed the importance of monitoring literature sales across various distribution channels and understanding how changes in purchasing behavior may affect overall revenue. Members emphasized the importance of maintaining the long-term financial health of ACA WSO while continuing to support the fellowship's mission. Discussion focused on identifying practical opportunities to improve revenues, recover costs more effectively, and ensure that financial decisions support organizational stability. The Committee agreed that ongoing monitoring, analysis, and planning would be necessary to address emerging financial challenges and support long-term sustainability.

Shipping and Handling Fee Review and Cost Recovery

The Finance Committee reviewed shipping cost recovery and the growing gap between fulfillment expenses and shipping charges collected through the ACA online store. Current shipping and fulfillment costs are not fully recovered through existing shipping charges.

The IT Manager presented an analysis showing that many organizations recover fulfillment expenses through handling fees. The Committee reviewed several options, including flat-fee increases, percentage-based adjustments, and tiered charges based on order size.

Based on the analysis and current shipping volumes, the Committee concluded that the proposed handling fee structure would support cost recovery while remaining competitive.

A motion was made and seconded to recommend implementation of the following handling fee structure:

Order Type	Handling Fee
Small shipments, such as medallions and similar small orders	$1.00
Orders up to $150	$2.50
Orders over $150	$3.50

The motion passed unanimously.

The Committee also discussed implementation considerations, including customer communication and ongoing monitoring. The Committee further recommended periodically reviewing shipping and handling fees to ensure continued alignment with actual fulfillment costs and customer purchasing behavior.

Literature Pricing and Inflationary Cost Recovery Adjustments

The Finance Committee reviewed literature pricing and discussed the impact of inflation and rising operating costs on ACA WSO's financial position. Members noted increases in printing, paper, inbound shipping, platform fees, and other operating expenses. The Committee discussed the importance of conducting regular annual pricing reviews, as well as periodic reviews, to ensure literature pricing remains aligned with actual costs and to avoid, if possible, larger price increases.

Following review and discussion, the Committee unanimously approved an inflationary cost recovery adjustment effective July 1, 2026. The approved pricing changes included:

- Increase the price of the Big Red Book by $1.00 across all sales platforms.
- Increase the price of most other books by $0.75.
- Exclude *New Hope* and *Connections* from the increase.
- Adjust bundle pricing to reflect revised literature prices.
- Increase recovery chips from $1.50 to $1.75.
- Increase metal medallions from $2.70 to $2.95.

The motion passed unanimously and was forwarded to the Board for review and implementation.***

Intergroup Discount Review and Member Contributions

The Committee reviewed the current Intergroup discount structure and discussed whether the longstanding 30% discount remains appropriate given changing financial conditions. Members acknowledged that the discount serves as an important benefit to Intergroups, Areas, and other service bodies while also reducing the margin available to support ACA WSO operations.

During the discussion, members reviewed data indicating that approximately 70% of Intergroups receiving the discount are not currently making financial contributions to ACA WSO. Committee members expressed concern about the long-term financial implications of this imbalance and discussed whether the current discount program appropriately aligns benefits received with support provided.

The Committee acknowledged the value of encouraging literature distribution and supporting local service structures but expressed interest in further analysis of the financial impact of the discount program, including contribution patterns, literature purchasing activity, and potential alternatives that could better balance support for Intergroups with ACA WSO's financial sustainability.

No action was taken on the discount structure at this time. Members requested additional information and analysis before considering future recommendations.

How to Get Involved

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If you have a finance or business background—or simply an interest in learning—consider joining the Finance Committee. You do not need to be a CPA to participate. To learn more, email finance@acawso.org or treasurer@acawso.org, or message any Finance Committee member on Slack.

Due to the confidential nature of Committee proceedings, a signed Non-Disclosure Agreement (NDA) is required for full participation.

Finance Committee Members

- Al E., IL — Treasurer and Chair
- Sylvia M., CA — Vice Chair
- Bill D., CA — Member
- Brad L., MD — Member
- Channen S., CO — Member

*** The WSO Board reviewed and accepted the Literature Pricing and Inflationary Cost Recovery Adjustments, at its June 18, 2026 meeting. Implementation of the adjusted pricing is likely to begin on July 15, 2026.