

AOA Annual Membership Meeting
January 13, 2025, 5:15-6:00 pm in Seaglass Room

AOA ANNUAL REPORT TO THE MEMBERSHIP

At the end of each calendar year, AOA presents an Annual Report to its auxiliary members. The attached **Report to the AOA Membership** on activities in 2024 includes the following:

1. The AOA President's Report summarizing key AOA activities over the past year – *Heather Cairns, 2024 President* (pgs. 2-3):

2. An Annual Report by each of the ten Standing Committees of AOA:
 - ❑ AS/Student Union/Recreation Center Committee – *Jeffrey Rensel, Chair* (pgs. 4-5)
 - ❑ Commercial Services Committee – *Cyndi Farrington, Chair* (pgs. 6-7)
 - ❑ Business & Financial Services Committee – *Shailendra Baghel, Chair* (pg. 8-10)
 - ❑ Human Resources Committee – *Yvonne Bermudez, Chair* (pgs. 11-12)
 - ❑ Information Technology Committee – *Alexander Gonzales, Chair* (pg. 13-14)
 - ❑ Long Range Planning Committee – *Rasheedah Shakoore, Chair* (pg. 15-16)
 - ❑ Research Administration Committee – *Chantal Ebarle, Chair* (pg. 17)
 - ❑ Philanthropy Committee – *Ian Hannah, Chair* (pgs. 19-20)
 - ❑ Risk Management & Insurance Programs – *Chuck Kissel, Chair* (pgs. 21-25)
 - ❑ Past Presidents Committee – *Monica Kauppinen, Chair* (pg. 26-27)

3. The AOA Financial Report for the FY ending 6/30/24 – *Richard Jackson, Business Manager* (pgs. 28-31)

4. Robert Griffin's Annual Legislative and Compliance Update (pgs.). It is available on the AOAWeb site: go to <https://csuaoa.org>, select the "Reports" tab, then "Legislative Reports."

5. The draft AOA Executive Committee Leadership Roster for 2025 (pg. 32-33)

This report follows up on the in-person Annual Meeting of the AOA Member Organizations (that is, the Auxiliary Executive Directors/Chief Administrative Officers) on the first day of the 2025 Conference in San Diego. If you have questions or comments, please address them to me at rtjackson@csuchico.edu.

Richard
AOA Business Manager

AOA President's Report 2024 Annual Report

Below is an update on some of the key items AOA leadership and its Executive Committee discussed and made progress on.

January Board of Trustees Meeting

I had the pleasure of presenting on Auxiliaries to the Board of Trustees last January along with some of CSUN's Leadership---President Erika Beck and Vice President of Administration and Finance, Colin Donahue. The goal was to inform the incoming trustees about the purpose of auxiliaries as well as informing them of the crucial role of auxiliary organizations in supporting campus operations. Many campus examples were shared which demonstrated the important synergies between campus leadership and auxiliaries. The presentation was well received.

AOA & NACUS MOU

In an effort to enhance the relationship between AOA and NACUS---the annual MOU was updated to reflect better synergies with the western region. AOA received conference attendance and improved visibility at last summer's NACUS West conference. Both AOA's Business Partner Manager and I attended the conference and found it more effective in enhancing business partner relationships.

AOA Leadership Academy

This good work continues. The current academy worked diligently to enhance the program, and the call for applications for the upcoming year was a success. Eight candidates applied, with a diverse representation across various subcommittees, including research, purchasing, recreation, ASI operations, human resources, and finance. Each candidate brought strong credentials, positive letters of recommendation, and experience attending at least one AOA conference.

Due to the success, all eight applicants were considered more than sufficient for the program's needs. The new cohort will come together during this year's conference and then continue on track for the upcoming year. I look forward to meeting the new team and supporting their growth and success.

Revised Scholarship Policy

The existing scholarship policy was reviewed and revised. The awards were increased from one student to two, and the administrative process was simplified. We're excited to be extending two awards at the banquet this year.

Succession Planning for Conference Service Providers

A few new service providers have started in the past two years and two additional positions will need replacement during the coming year. These are key people to the AOA conference, AOA history, and AOA membership.

The long-range planning committees of 2021 and 2022 completed revised job descriptions to cover all the current services which were presented to the AOA Executive Committee in 2022 and approved for use with future RFPs for service providers.

With the need to plan for new service providers, and to find financial savings, both of those scopes of services and the RFP process need to be reviewed. Further consolidation in duties which may include the consideration to reduce the number of service providers will be discussed this year. This work began during the year but will continue with the long-range planning committee next year.

Budgetary Items

Revised Reserves Policy Draft

This past year a sub committee was formed to review AOA's reserves policy. The goal was to address potential financial exposures and better align the reserves with current operational needs. One key change was to create a separate reserve for general operations---with an additional focus on cost savings measures for the organization as a whole as well as to the conference itself.

Virtual Meetings

On an annual basis the Executive Committee will determine the feasibility of having two of the four annual meetings scheduled virtually. This will provide additional cost savings as the committee's business is achievable whether in person or virtually.

Next steps

As I transition into the role of Past President, I look forward to continuing to serve the organization by keeping the momentum going with the above items. Both the work of the Past President's Committee and Long-Range Planning will crossover in the coming year.

I want to thank all of the Chancellor's Office Liaisons who always support AOA and provide their insight and guidance at every Executive Committee meeting.

I also want to thank Colin Donahue, CSUN's CFO and Vice President for Admin and Finance for serving as the CABO representative on the Executive Committee. His budgetary guidance and strong support of auxiliaries to include sharing ideas to help our campuses is appreciated.

To the Executive Committee I really appreciate everyone's efforts and commitment to the success of AOA. To the Conference Planning Committee, thank you for the hard work you extend in making the conference a success. Thank you all for taking the extra time to volunteer for this important work.

It's been a pleasure serving you this past year and I look forward to serving as the next Past President in the coming year.

Best Regards,
Heather Cairns, AOA President
December 2024



**Auxiliary Organization Association
Associated Students/Student Union/Recreation Committee
Annual Report 2024**

Submitted by Jeff Rensel, Chair
Director, Otter Student Union, CSU-Monterey Bay

AS/SU/RE Leadership 2024

Jeff Rensel (Cal State Monterey Bay)

AS/SU/RE Chair: January 2024-December 2024

Alejandro Rios (San Francisco State University)

AS/SU/RE Vice-Chair: January 2023-December 2024

Ashley Fennell (CSU San Marcos)

AS/SU/RE, AS Advisors sub-committee: January 2023-December 2024

Vilayat Del Rossi (CSU, San Bernardino)

Recreation Directors

Joe Nino (CSSA) & Odalys Zamora (Associate Director, Government Affairs & Initiatives, CSULB)

CSSA Liaisons

2024 AS/SU/RE Re-cap

The AOA AS/SU/REC Standing Committee continued serve as a forum for the various professional staff within Associated Students, Student Union and Recreation organizations over the past year.

The Committee held the Annual Meeting at the AOA conference in January 2024 at the Hyatt Regency Indian Wells. The committee reviewed the purpose of the standing committee and discussed the conference. Elections were held to select new positions for the committee for the upcoming year, which included the continuation of the Chair and Vice-Chair roles from 2023 to 2024, and sub-committee chairs to lead monthly meetings and serve as liaisons. Updates were given by the designated subcommittees including the AS/SU/REC Executive Directors sub-committee, AS Advisors group, and an update from CSSA. The committee also voted and approved to make update to the Standing Committee Operating Guidelines to match existing structure of the committee. All members were encouraged to participate in the various sub-committees and other AOA offerings throughout the year.

The AS/SU/REC Committee held its summer meeting on July 29, 2024 and focused on communication, engagement within the AOA portal and upcoming events. The 2025 Annual Conference was a major topic, with a discussion on session selection (including tracks for AS/SU/REC) and leadership opportunities within the committee. Sub-committee reports highlighted ongoing activities, including announcements about each of the sub-committee monthly meetings and the upcoming CSUnity event in August. There were also discussions about preparing for demonstrations and the presidential election, including voter registration initiatives and staff training. Finally, the meeting addressed budget concerns and student assistant pay rates, with a potential fee increase to stay competitive. The meeting concluded with a promotion about attending the AOA Conference in January 2025 in San Diego.

AS/SU/REC Executive Directors Sub-Committee

The AS/SU/REC Executive Directors Subcommittee, chaired by Jeff Rensel hosted a total of 7 meetings between February and November, 2024. The AS/SU/REC Executive Directors sub-committee continues to meet monthly and is an outlet for Executive Directors to connect, network, share ideas, and facilitate communication, collaboration, and the sharing of timely and critical information among senior auxiliary leaders. Each meeting had a variety of topics of discussion, and continues to be a great outlet for Directors and Executive Directors. A new AS/SU/REC Directors Subcommittee coordinator will be appointed at the AOA Annual Conference. The AS/SU/REC Directors will continue to meet monthly via Zoom.

CSU Advisors or AS Advisors

The Student Government/CSU Advisors or AS Advisors subcommittee chaired by Ashley Fennell hosted monthly meetings throughout the entire year. This subcommittee which is a connection of all the professional staff throughout the CSU Campuses who work directly with respective government structures continued to have robust conversations at each meeting. The meetings provided networking opportunities, training, and best practices related to student government. An AS Advisors Subcommittee coordinator will be appointed during upcoming AOA Annual Conference for the 2025 year. The CSU Advisors group will continue to meet monthly via Zoom.

Recreation Directors

In an effort to connect with professionals within Recreation, a connection was made with the CSU Recreation Directors group, a group that meets monthly to discuss Campus Recreation programs. The Recreation Directors group currently coordinated by Vilayat Del Rossi and others, continues to meet monthly and is open to anyone who is interested. Information and reports are being shared with the AOA AS/SU/REC Standing Committee in an effort to make better connections with Recreation professionals. No formal AOA subcommittee exists, but the partnership and open communication has helped with communications and networking.

CSSA

CSSA continued its partnership with AOA through representation and participation in the AS/SU/REC Committee, and the subcommittees. CSSA provided important updates and shared information on the events and plenary meetings throughout the year. CSSA continues to host Plenary meetings throughout the year, the plenary meeting schedule is online: <https://calstatestudents.org/involvement/meetings/>. The point of contact and additional information regarding CSSA is available by contacting info@calstatestudents.org or Joe Nino at jnino@calstate.edu.

Associated Students/Student Union/Recreation Standing Committee Annual Meeting

The next meeting of the Associated Students/Student Union/Recreation Standing Committee is the Annual meeting and it will be held at the AOA Annual Conference in San Diego, on **Sunday, Jan.12, 2025 in the Tidepool 2 room from 2:00 - 4:00pm.**

Commercial Services Committee Report
AOA Executive Committee Meeting- Annual 2024

2024 Commercial Services Leadership Team –

-Cyndi Farrington, Chair

Director, Bookstore Services
California State University Long Beach

-Michael Lennon, Vice Chair

Associate Director, Facilities and Operations
California State University, Northridge

As we transition into 2025 Michael Lennon will assume the role of Chair. We are currently looking for a vice chair.

2024/2025 Meeting Schedule-

AOA Conference Commercial Services Standing Committee Meeting- January 12, 2024

2024 Updates Membership-

The Commercial Services Committee has struggled to increase its membership. Despite multiple discussions at the Executive Committee meetings, we have only had one additional member join the committee. We had a good number of members at the annual conference meeting, and I was hopeful that we would gather additional members but that did not happen.

2024 Updates Legislations

Although there was much discussion concerning IA and EA programs, no new guidelines have been introduced. This conversation was mostly driven by the Biden administration and with the change in political leadership it is unknown whether it will continue to be a focus.

AB 2066 (Reyes). Methylene Chloride for Decaffeinated Coffee. This bill, as now amended, would make a more expansive prohibition for a person or entity to use methylene chloride in processing decaffeinating coffee. or selling, delivering, distributing, holding, or offering for sale in commerce coffee that has been decaffeinated in a process using methylene chloride (effective January 1, 2027). Civil penalties for violations are prescribed. 12 of 75 This bill could apply directly to any campus food service auxiliary organization operations engaged in

described commercial uses, and indirectly when applied to outsourced food service vendors. Held in Assembly Appropriations Committee (5/16/24).

AB 2375 (Lowenthal). On-Sale Alcoholic Drink Lids. This bill, as amended in the Senate, would (commencing January 1, 2025, for existing holders and July 1, 2025, for new applicants), require specified eating places and on-sale general public premise alcoholic beverage licensees to provide a drinking lid (with posted notice of requirement) at customer request for additional reasonable charge (or without charge). Additionally, this bill now includes a January 1, 2027, sunset clause. **Bill Enacted (9/27/24).**

AB 2550 (Gabriel). Building Safety – Food Facility Health & Safety Standards Revised. This former spot bill, as now amended, would, as it relates directly to specified food facilities, require modification of existing building code standards to relax building requirements for small restaurants. If enacted as amended in Senate, the eventual regulations resulting from this bill may apply to some campus food services operated by and through auxiliary organizations. Passed Assembly. Held in Senate Appropriations Committee (8/15/24). AB 2567 (Mathis). Student Housing Data Info on Vets.

AB 2648 (Bennett). Public Agency Contracts – Purchase of Single-Use Plastic Bottles. This bill, as amended, would, with exceptions, prohibit state agencies from contracting (including renewing, amending, modifying) for the purchase of single-use plastic bottles (internal use or for resale). The bill includes additional implementing provisions intended replace the use of single-use plastic bottles at state facilities with use non-plastic, recyclable, and reusable alternatives. Application of these requirements to campus stores and food services operated by or through auxiliary organizations could occur through CSU policy direction. Ordered to Inactive File. Bill ordered to inactive file at author’s request. (5/24/24). AB 2747 (Haney).

Prop 32

Would have raised the minimum wage to \$17 for the remainder of 2024, and \$18 an hour starting in January 2025 — a bump from the current \$16. Small businesses with 25 or fewer employees would be required to start paying at least \$17 next year, and \$18 in 2026. If voters say “yes,” California will have the nation’s highest state minimum wage. This proposition did not pass.

Respectfully Submitted by Commercial Services Chair,

Cyndi Farrington
Director Bookstore Services
Beach Shops, California State University Long Beach
Cyndi.farrington@csulb.edu

Business & Financial Services Committee

Annual Report to the Executive Committee

Chair	Shailendra Baghel, San Jose State University Research Foundation
Vice Chair	Jaime Leal, CSU Dominguez Hills
Secretary	Cecilia Ortiz, CSU Dominguez Hills
Conference Coordinator	Morelia Patino, CSU Dominguez Hills

The monthly committee meetings covered topics relating to current Business and Financial services updates. The members were asked to send in their agenda items in advance: The following agenda items were discussed, and actions were taken during different meetings in the year. The monthly meetings cover topics relating to current Business and Financial services updates.

Year-End Support: The committee discussed the support we can provide to the members for closing the books and preparation of the Audit. It was decided to form a panel of experts from different auxiliaries.

Audit Timeline: The committee discussed the short Financial Audit completion timeline prescribed by CO. Many auxiliary business offices are finding it difficult to close the books, prepare for the Audit, and complete it quickly. When they rush to complete the audit, they deal with many discrepancies and findings from the auditors.

Mini-Conference: the committee plans to create a strategic plan for future mini-conferences, seeking help from the past committee members who have organized them in prior years. The plan is to organize a mini-conference in June next year. Unfortunately, given the busy timeline of the members and the fast-approaching holiday season, we could not organize a mini-conference this year.

Chancellor Office Internal Audit and Policies: The committee discussed various internal audits from the chancellor's office and how to prepare for them. We also discussed the implementation of different policies and guidelines.

FASB/GASB: we discussed the following latest FASB/GASB guidelines in different meetings:

- 1) **GASB 87:** Under this Statement, a lessee is required to recognize a lease liability and an intangible right-to-use lease asset, and a lessor is required to identify a lease receivable and a deferred inflow of resources, thereby enhancing the relevance and consistency of information about governments' leasing activities.

Business & Financial Services Committee

- 2) **GASB 94**: The primary objective of this Statement is to improve financial reporting by addressing issues related to public-private and public-public partnership arrangements (PPPs).
- 3) **GASB 96**: This Statement provides guidance on the accounting and financial reporting for subscription-based information technology arrangements (SBITAs) for government end users (governments). This Statement (1) defines a SBITA; (2) establishes that a SBITA results in a right-to-use subscription asset—an intangible asset—and a corresponding subscription liability; (3) provides the capitalization criteria for outlays other than subscription payments, including implementation costs of a SBITA; and (4) requires note disclosures regarding a SBITA. To the extent relevant, the standards for SBITAs are based on the standards established in Statement No. 87, *Leases*, as amended.
- 4) **GASB 101**: This Statement requires that liabilities for compensated absences be recognized for (1) leave that has not been used and (2) leave that has been used but not yet paid in cash or settled through noncash means.
- 5) **GASB 102**: State and local governments face a variety of risks that could negatively affect the level of service they provide or their ability to meet obligations as they come due. Although governments are required to disclose information about their exposure to some of those risks, essential information about other risks that are prevalent among state and local governments is not routinely disclosed because it is not explicitly required. The objective of this Statement is to provide users of government financial statements with essential information about risks related to a government’s vulnerabilities due to certain concentrations or constraints.
- 6) **GASB 103**: This Statement continues the requirement that the basic financial statements be preceded by management’s discussion and analysis (MD&A), which is presented as required supplementary information (RSI). MD&A provides an objective and easily readable analysis of the government’s financial activities based on currently known facts, decisions, or conditions and presents comparisons between the current year and the prior year. This Statement requires that the information presented in MD&A be limited to the related topics discussed in five sections: (1) Overview of the Financial Statements, (2) Financial Summary, (3) Detailed Analyses, (4) Significant Capital Asset and Long-Term Financing Activity, and (5) Currently Known Facts, Decisions, or Conditions.
- 7) **ASC Topic 718: ASU 2024-01- Compensation – Stock Compensation** (Topic 718): Scope Application of Profits Interest and Similar Awards. This standard provides new illustrative examples to help determine whether profits interest or similar awards should be accounted for in accordance with Topic 718. The additional examples include arrangements that would be accounted for by applying the guidance of 718 and an example where an award would not be accounted for using the guidance of Topic 718.
- 8) **Leases (Topic 842): Common Control Arrangements**: The ASU requires all entities, including public companies, to amortize leasehold improvements associated with common control leases over the useful life to the common control group.
- 9) **Accounting Standards Update No. 2016-13, Financial Instruments**—Credit Losses (Topic 326): Measurement of Credit Losses on Financial Instruments, which requires organizations to measure all expected credit losses for financial instruments held at the reporting date.

Business & Financial Services Committee

One of the changes made in this Update was intended to simplify the accounting for acquired financial assets that have experienced credit deterioration since origination.

AOA Annual Conference Session Topics: the committee finalized the following session topics for the 2025 AOA conference:

1. Meeting Financial Challenges and Creating Opportunities
Rosa Renaud
¹Chancellor's Office
2. Ahead of the Curve: Future Trends in Finance and Accounting for Higher Education
Mr. Roger Martinez¹, Ms. Elisa Stilwell¹, Ms. Regina Prince¹, Mr. Shailendra Baghel²
¹Vasquez and Company, LLP, ²San Jose State University Research Foundation
3. Transforming Procurement Processes with Generative AI
Dustin DeBrum¹, Darin Matthews², Darren Kraker³
¹Cal Poly, ²Cal Poly, ³Amazon Web Services
4. Getting Unstuck: Moving from Surviving and Reviving to....Arriving!
Julie Blank from Blank, Wolf, and Cord, LLC, along with Cal Poly Pomona

The committee was scheduled to meet every month on the last Thursday from 2.00 pm to 3.00 pm.

Sincerely,

Shailendra Baghel, CPA JD MBA

ANNUAL SUMMARY

The Human Resources (HR) Committee continues to be an active and engaged committee, with regular meetings occurring on the last Friday of each month. Several critical partners joined committee meetings throughout 2024, including Nestor Barrero and Kim Seten of Constangy, Richard Lane of Human Resources Strategies, and Chloe Smith & Heather McCarthy of Alliant.

Throughout Spring, a significant success for the HR Committee was completion of the AOA Salary Survey, conducted by Richard Lane of Human Resources Strategies, Inc. The final report was completed on April 8th, 2024 and was shared amongst the HR Committee. Additional topics discussed during the first quarter meetings included the requirements for implementing a Workplace Violence Prevention Program, 24/25 GSI/merit increases, onboarding plans, and attendance policies.

In the Summer, the committee met in person in Monterey Bay, CA for our annual mini-HR conference. The three-day conference offered the AOA HR Committee the opportunity to network with critical partners such as Alliant, Sedgwick, and Constangy, as well as foster connections with their fellow HR colleagues. Many topics of HR were covered: HRIS, recruitment, salary and compensation, employee benefits, leaves of absence and accommodations, training and development, and legal. The total cost of the conference was \$14,000, which covered the costs of speakers, Embassy Suites meeting room rental fees, supplies, and hosted meals. While the group has expressed they find value in a 3-day conference, cost-saving efforts are being implemented for 2025.

In the Fall, the committee began looking ahead to the new year. This included 2025 CSURMA-AORMA program premiums for medical benefits, Open Enrollment planning, and reviewing 2025 employment law and compliance changes. Nestor Barrero presented an Employment Law Update to the committee on Friday, December 6th. Notable legislative changes impacting auxiliaries include:

- CA minimum wage increases to \$16.50, effective 1/1/2025
- AB 2123: eliminates an employer's ability to require employees use up to two weeks of accrued vacation before receiving benefits under California's Paid Family Leave Program
- SB 1100: limits an employer's ability to require job applicants have a driver's license
- AB 2499: extends use of paid sick leave to victims of "qualifying acts of violence"; provides job-protected leave for jury duty, victims, and subpoenaed witnesses

Looking Forward to the New Year

Committee leadership elections were held at an ad-hoc committee meeting on Friday, December 6th, 2024. Ranjit Kaur has been elected into the role of Chair, with the first committee meeting occurring at the AOA Conference in San Diego. Ranjit Kaur is the sitting Vice Chair and is well experienced with AOA. The committee is set for a smooth transition and successful leadership.

As the committee continues grow, the goal is to build the membership and support network for new colleagues. The committee is comprised of many new members as auxiliary HR teams turnover and grow. The support network is instrumental to understanding human resources, compliance, and auxiliary functions.

COMMITTEE LEADERSHIP, 2025

HR Committee Officers for 2025 include the following:

- CHAIR: Ranjit Kaur, Director of Human Resources, San Jose State University Research Foundation
- VICE CHAIR: Andrea Bozant, Director of Human Resources, The University Corporation at Monterey Bay
- SECRETARY: Natalie Tapia, Human Resources Generalist & Executive Assistant, CSU Dominguez Hills Loker Student Union
- ANNUAL CONFERENCE HR SESSION PLANNER: Yvonne Bermudez, Sr. Human Resources Generalist, Beach Shops at CSU Long Beach

Respectfully submitted by:

Yvonne Bermudez
Chair, AOA HR Committee
Sr. Human Resources Generalist at The Beach Shops at CSU Long Beach

Annual Executive Report

AOA IT Committee

This report consolidates key updates, initiatives, and discussions from recent AOA IT Committee meetings, emphasizing cybersecurity, compliance, and IT strategy.

1. Cybersecurity and Compliance Update (ISAC Meeting Highlights)

- **Audit Requirements:** Focused on decentralized server locations, remote access protocols, and comprehensive data inventory of hardware and applications containing Level 1 (L1) and Level 2 (L2) data, with emphasis on web-accessible platforms.
- **GLBA Compliance:** Recommendations included periodic updates for procurement reviews, data retention schedules, and change control processes. Security measures for accessing protected data included:
 - Implementing Multi-Factor Authentication (MFA) for remote L1 data access.
 - Logging access activities and utilizing secure remote access methods (e.g., RDP/SSH behind VPNs).
 - Centralizing authentication for cloud services and managing administrative access.
- **Microsoft Tools:** Introduced Microsoft Copilot and Microsoft Purview for data governance, with privacy and testing considerations.
- **Financial Aid Security:**
 - Removal of Pell eligibility and FAFSA information from reports and dashboards by March 15, 2024.
 - Tightened security and compliance measures, addressing delays caused by necessary software upgrades.

2. AOA 2025 IT Sessions

- Members are encouraged to submit session topics to Calvin Yun, 2024 IT Committee Vice-Chair, for the AOA 2025 conference in San Diego. Discussions explored potential session topics to address challenges and share best practices.

3. Data Repository and Policy Centralization

- Plans are underway to establish a CSU-wide repository for IT policies, procedures, and software application inventories. This initiative aims to centralize resources for better accessibility.

4. Procurement and Accessibility Compliance

- **Accessible Technology Officer:** A new officer was hired to ensure procurement processes comply with accessibility standards.
- **ADA Revisions:**
 - Legal standards now include web, mobile, and social media compliance.

- Compliance deadlines are set for April 24, 2026, with specific examples like the FusionGO app undergoing web accessibility reviews.

5. Business Continuity and Disaster Recovery Planning

- **VEOCI Platform:**
 - CSUN audit requirements emphasized detailed documentation of applications, recovery processes, and testing schedules.
 - Other auxiliary schools expressed interest in adopting VEOCI for business continuity.
- **Business Impact Analysis (BIA):**
 - Developed a standardized methodology to identify essential functions, assess disruptions, and establish Recovery Time Objectives (RTOs).

6. SharePoint Intranet Development

- Efforts to create a centralized repository for policies and job descriptions face challenges, including limited access for auxiliary departments and delayed approvals for demo requests.
- Potential vendor support is under consideration to overcome resource limitations.

7. HR Training Modules Transition

- Transitioning to United Educators on the CSU-Learn platform for enhanced training content, with shorter, interactive modules planned over five years. Implementation will follow Chancellor's Office approval.

8. Cybersecurity Awareness Initiatives

- Resources and training were shared to promote participation during Cybersecurity Awareness Month, reinforcing best practices across campuses.

9. Leadership and Succession Planning

- Vice-Chair nominations for 2025 were opened, ensuring leadership continuity. The selected Vice-Chair will transition to Chair in 2026.

Auxiliary Organization Association
Long-Range & Strategic Planning Committee Annual Report

The committee met to discuss AOA finances, annual dues, and conference registration fees. In summary we recommend that improvements be made to the AOA financial structure.

A subcommittee was created to take a more in depth look at the financial position of AOA and make any recommendations on strategic long-term planning. The subcommittee recommended the following:

Annual Conference

Create a conference reserve account for future cancellation contingencies. Explore 3rd party cancellation insurance. Consider annual 5% vs 3% increases in dues. Analyze conference attendance data for more accurate budgeting.

Membership Dues

Consider shifting operations model to reduce hands on Executive committee leadership to an Executive Director model. Reduce the number of in-person EC meetings.

Reserve Policy

Revise reserves definition in policy to include its current purpose of managing cash flow. Revise language for conference contingency reserves to better reflect financial impacts. Review the loose language in the General reserve policy also.

Treasurer roles

Define the role more accurately for better recruitment. Include cash flow management and investing experience in position description.

Redefine asset definitions, objectives and strategies.

Define dollar thresholds and parties to cashflow decision making.

The subcommittee was further asked by the EC to review and make recommendations on the reserve policy. The subcommittee recommended:

1. A separate working capital reserve specific to general operations is proposed to address the exposure of the timing of when dues are received (seasonal) vs. when operating expenses are made (throughout the year).
2. A separate working capital reserve for the annual conference is proposed.
3. Event Cancellation Insurance to mitigate the required reserve balance. Preliminary research from Alliant suggests premium costs may be equal to 10% of total conference revenue (or 15% if pandemics are a covered peril).
4. Eliminate the current General Contingency Reserve
5. Priorities amongst all reserves be eliminated, as it is believed that all reserves are equally important.
6. Within the Annual Reserves Review section, a requirement is proposed to assure a written plan exists on how to fully fund any reserve that is below its required level. To create more flexibility when reserves are over-funded, the word “will” replaces

“may” as it relates to how excess reserves can be used as a source of funding.

A final meeting is scheduled to review the year and prepare the incoming chair.

Special thanks to Kieth Kompsi, Michelle Crawford and Chuck Kissel for their LRP subcommittee work.

Auxiliary Organizations Association
Nominations Committee Annual Report

We discussed the upcoming nomination process and timing. We had 4 open Executive Committee positions. We must also select a secretary treasurer and a president elect. The nominations committee is also charged with selecting awardees including Lifetime Honorary, and Outstanding Accomplishment.

The scholarship of excellence committee chaired by Cyndi Farrington met and awarded two scholarships for 2025. An update to the scholarship of excellence policy should be on the August EC agenda.

AOA Leadership Academy (This is not an annual program) lead by Caroline and Miles. There is no AOA policy for this program. Instead refer to 2019 Pilot Program Proposal and Updated 2024 Program Proposal – which is in April 2024 and June 2024 EC Meeting Agendas/Meeting Minutes.

Invitation To Participate in Program to be sent to the general AOA Membership Directory and signed by the AOA President

Respectfully Submitted,
Rasheedah Shakoor, 2024 EC Past President

AOA Research Administrators Committee (RAC)

Annual 2024 Chair report to the Executive Committee

Our **2024 Subcommittee Leadership** consist of **Chantal Ebarle** from **East Bay** as **Chair**, **Julie Wessel** from **San Bernardino** as **Vice Chair** and **Bessie Strategos** from **Long Beach** continuing in her role as **Secretary**.

Now that our 2024 year is coming to a close, we reflect on the growth and success of our subcommittee. As a group we have actively engaged in achieving improvement and efficiency for all campuses. We have met multiple times as a group to collaborate and network with counter parts across the system to strengthen our group. We met at Long Beach campus and the Maritime Academy.

We have actively advertised the need for all RAC members to sign up and become registered users of the AOA website and communication portal.

Our Spring meeting in Long Beach was a huge success with 50 in person attendees and over 30 virtual attendees. We introduced, integrated and completed the process of rolling out a new one- page document for systemwide subawards which replaces the subrecipient commitment form. This change is reducing the administrative burden on the research community and minimizing the time it takes for sister campuses to collaborate on projects together.

We designed and introduced our new RAC subcommittee logo which is displayed at the bottom of our page.

In collaboration with the Chancellor's Office, a long-term strategic planning group was formed that will carry on in future years to address historical issues plaguing Sponsored Programs Administration. These issues are long standing because of the complexities of the different campuses and finding solutions that can be applied 23 different ways. The same issues have repeated themselves for many years and the goal of this group is to focus and find a flexible resolution to them one at a time.

In February, RAC and the Chief Council of Research Officers (CCRO) held a joint virtual workshop covering the topic of large multi-campus multidisciplinary grants. The goal of both groups is to keep lines of communication open to aid in developing topics or issues at all campuses. We will continue to join forces with the CCRO to make research stronger.

We want to acknowledge the guidance and support we have received from AOA leadership and the Executive Committee. It has been incredibly helpful throughout the year.





2024 Overview:

The AOA Philanthropy Committee experienced modest member/participation growth, hosted a variety of presentations and provided informative meeting topics for discussion in 2024. The chair and vice-chair continued to lobby to increase participation by the membership, as well as encouraged committee membership on the group portal. Important communications, as well as invitations to committee meetings, were shared with a larger group of affiliated folks (over 100 individuals total). In addition, informational invites were sent to members of other CSU groups/listservs (ex. Adv Svcs, VP Adv, FDN Board Professionals, AVP Dev, Philanthropic Foundation CFOs) who may be interested in participating.

In 2024, following the annual meeting, held at the January 2024 AOA Conference in Indian Wells, the committee convened for two additional virtual standing committee meetings: in April and October. No summer meeting was held this year. These meetings had approximately 40 participants each and included the representatives from nearly all CSU campuses made up of those supporting philanthropic foundations, financial officers, board operations, advancement services, and systemwide advancement staff from the Chancellor's office. Policy and procedural updates were provided by the Chancellor's Office representative during these meetings. The Chair provided the committee with updates and information from the AOA Executive Committee meetings, including the announcement of the approval of the revised Operating Guidelines for the Philanthropy Committee by the Executive Committee.

Officers/Leadership (2024 Term):

- Ian Hannah, Sonoma State – Chair
- Nicole Forrest Boggs, CSU Long Beach – Vice-Chair
- Ira Unterman, CSUN – Conference Session Planner
- Working Group of other key identified folks for guidance/feedback

2024 AOA Philanthropy Committee Meeting Schedule (all via Zoom except annual in-person meeting in January at annual conference):

- **4/30/24** – AOA Philanthropy Committee Meeting (Virtual)
- **10/23/24** – AOA Philanthropy Committee Meeting (Virtual)
- **No summer meeting**
- **1/12/25** - AOA Philanthropy Committee Meeting in person at conference in San Diego, CA
- A working group of key folks (including CO systemwide Advancement staff, former Philanthropy Committee Chairs, and other identified folks) met periodically to plan content and prepare the agendas and supporting materials.

Key Topics:

The following hot topics that were identified throughout the year, based on feedback from participants, were presented to the committee during the 2024 meetings:

- **Revisions to Phil Com Operating Guidelines** as recommended by committee leadership to refine the committee's focus on three general functional areas – (1) operations and compliance; (2) foundation management, governance and board relations; and (3) endowment management, finance and accounting, was approved by Philanthropy Committee and then the Executive Committee.

- **Committee delegation of authority guidance/issue brief** provided to Executive Committee and Philanthropy Committee. Authored by Robert Griffin (AOA Compliance Consultant) provided guidance on Board sub-committee authority limitations (use of delegated or advisory vs. “on behalf of” the board language).
- **CSU Audit Team Presentation** – Led by Wendee Shinsato (CO) to highlight general issues in auxiliary governance, specific issues in audits related to philanthropy and endowment management, and share potential risks/concerns noted from some of our higher education peers.
- **Unspent distributions/accumulated balances/treasury management** – Discussion led by David Furhiman (SDSU) around strategies for highlighting and encouraging use of accumulated balances of donated funds and/or endowment distributions.
- **Strategic Planning for Boards** – Presentations by Monica Alejandre (CSUSB) and Caroline Johansson (SFSU) to provide examples of their processes at their respective campuses.
- **Public meeting protocols/public comments/minutes/recording meetings** – discussion and sharing of best practices in these areas.
- **AOA Executive Committee and Conference Planning Committee updates**
- **Chancellor’s Office/Systemwide Advancement Updates** – Included CO leadership changes, including new VC for External Relations and Communications and Greg Saks and new AVC for Systemwide Advancement, Melissa Watkins; takeaways from 9/27/24 CSU Foundation Investment Committee Chairs convening.

Annual In-Person Meeting at Conference

The Philanthropy Committee will also be meeting on January 12, 2025 from 2:00-4:00pm and plans to address the following topics:

- Confirmation of leadership/officer changes for 2025
- Review Committee Operating Guidelines & New Member Orientation Packet
- Systemwide Endowment data
- Hot topics or potential topics for 2025 committee meetings by area: (1) Foundation Board Engagement; (2) Operations; (3) Endowment Management/Finance

Sessions for Philanthropy track at 2024 AOA Conference:

In addition to the committee meetings, there were multiple planning meetings for the Philanthropy track sessions for the AOA 2024 Conference, January 12-14, 2024 in Indian Wells. Ultimately the following session topics were selected:

- **ESG/Mission Related Investments**
- **Public Records Requests for CSU Auxiliaries**
- **The Role of Advocacy and Community Relations for Foundation Boards**
- **AI Applications**

Respectfully submitted by:

Ian Hannah, AOA Philanthropy Committee Chair (2024 & 2023)

AVP for Advancement Operations, Sonoma State University

COO, Sonoma State University Foundation

Email- ian.hannah@sonoma.edu

CSURMA AORMA UPDATE FOR AOA - 2024

All major CSURMA AORMA (AORMA) coverage programs are renewed on July 1, 2023. Shown below is a summary of the AORMA Reinsurance and Excess Insurance renewal costs. Because the Member’s rates and premiums are finalized prior to Staff completing the marketing of the excess insurance policies, the year-over-year increases (excess of budget) are paid in arrears.

AORMA Excess Insurance Coverage				
Year-Over-Year Insurance Cost (as of July 1, 2023)				
Coverage	FY 22/23	FY 23/24	\$ Change	% Change
Liability Excess Insurance	3,549,547	4,236,814	687,267	19%
Property	5,635,210	9,271,779	3,636,569	65%
Workers' Compensation	2,583,138	2,488,482	-94,656	-4%
Cyber	185,700	207,600	21,900	12%
Aviation (Drone Liability)	62,436	62,450	14	0%
Fidelity	263,511	263,332	-179	0%
Total Cost:	\$12,279,542	\$16,530,457	\$4,250,915	35%

AORMA’s *excess liability* costs increased by 19% between FY 22/23 and FY 23/24. The commercial excess liability insurance market is expected to remain firm for California public entities and higher education as the effects of catastrophic jury verdicts, settlements, police misconduct, social inflation, and sexual abuse claims absorbed by insurers. As such, the AORMA committee did not declare dividends to members for Liability or Worker’s Compensation Programs for FY 24/25. The AORMA committee is currently monitoring 16 active cases.

Additionally, AORMA *property insurance* costs continue to increase. Property insurance costs increased by 65% between FY 22/23 and FY 23/24. Costs are increasing due to AORMA’s 10-year loss ratio of 159%, along with weather conditions across the United States and the globe. As storms and fires become more severe, the cost for property insurance will continue to rise. As continued increases to the AORMA Property Program are becoming unsustainable, the AORMA Committee along with Alliant Staff will begin the process of retooling the AORMA Property Program with the goal of minimizing year-over-year cost increases.

The AORMA Officers met in July and decided on three (3) long range action items for FY 23/24.

1. Redesign the AORMA Property Program to minimize future cost increases.
2. Coordinate with Alliant Risk Control Consulting to expand safety outreach.
3. Address the Auto Registration issue with DMV.

In September, Jared Ceja, Executive Director at The Cal Poly Pomona Foundation, Inc. was appointed to the AORMA Committee. In December, Rosa Hernandez, Associate Executive Director, Forty-Niner Shops, Inc. was appointed. Interested individuals and nominations for future seat vacancy consideration should be directed to the committee chair, Chuck Kissel at ckisse@fullerton.edu.

The following are the AORMA committee members:

Seat	Member	Position	Campus
Chair	Chuck Kissel	Executive Director	Fullerton
First Vice Chair	Bill Olmsted	Executive Director	Sacramento
Second Vice Chair	Leslie Levinson	Chief Financial Officer	San Diego
Seat 1	Nicole Lane	Director of Human Resources	Fresno
Seat 2	Jared Ceja	Executive Director	Pomona
Seat 3	Cecilia Ortiz	Executive Director	Dominguez Hills
Seat 4	Raven Tyson	Associate Director of Business Ops	San Diego
Seat 5	John Melikian	Executive Director	Sacramento
Seat 6	Rosa Hernandez	Associate Executive Director	Long Beach
Seat 7	Keith Crawford	Risk Manager	Chico

The committee reviewed and approved member allocation for Worker’s Compensation, Liability, Property, and Crime coverage programs for FY 24/25. Shown below is a summary of the AORMA coverage programs cost allocations. Due to the cost increases, dividends are unlikely for FY 24/25. As liability costs are anticipated to continue to rise, the committee has concerns of possible future assessments to members.

AORMA Coverage Programs – Year Over Year Comparison				
Coverage	FY 23/24	FY 24/25	\$ Change	% Change
Liability Program	6,993,086	8,437,452	1,444,366	21%
Workers’ Compensation Program	3,996,212	3,490,008	-505,772	-13%
Property Program	8,624,436	11,148,850	2,524,414	29%
Crime Program	504,810	477,981	-26,829	-5%
Total Cost:	\$20,118,544	\$23,554,291	\$3,435,747	35%

CSURMA AORMA UPDATE FOR AOA – 2025

AORMA Programs – Total Funding for FY 25/26. The AORMA Committee approved the following funding for FY 25/26. Please note that each auxiliary organization’s percentage change may vary depending on the rating factors within each program.

Program	FY 23/24	FY 24/25	FY 25/26	Diff
Liability	\$7,129,139	\$8,335,341	\$11,649,533	40%
Workers' Compensation	\$3,583,903	\$3,588,840	\$3,389,649	-6%
Property	\$10,609,698	\$11,891,046	\$10,169,115	-14%
Crime	\$400,871	\$467,714	\$497,437	6%
Total:	\$21,723,610	\$24,282,941	\$25,705,733	6%

Additionally, the AORMA Committee approved four (4) long range action items for FY 24/25.

1. Solve the evidence of auto liability insurance issue with DMV
2. Evaluate and/or Update the Liability Program Marketing Strategy for FY 25/26
3. Relaunch the Campus Visits to include Alliant Risk Control Consulting
4. Review the AORMA property schedule for “off-site / Remote” locations to be added to Endorsement No. 1 on the property program memorandum of coverage

The following are the AORMA committee members. AORMA anticipates seat vacancies beginning in Spring 2025. Interested individuals and nominations for future seat vacancy consideration should be directed to AORMA Committee Chair, Chuck Kissel at ckissel@fullerton.edu.

Seat	Member	Position	Campus
Chair	Chuck Kissel	Executive Director	Fullerton
First Vice Chair	Bill Olmsted	Executive Director	Sacramento
Second Vice Chair	Leslie Levinson	Chief Financial Officer	San Diego
Seat 1	Nicole Lane	Director of Human Resources	Fresno
Seat 2	Jared Ceja	Executive Director	Pomona
Seat 3	Cecilia Ortiz	Executive Director	Dominguez Hills
Seat 4	Raven Tyson	Associate Director of Business Ops	San Diego
Seat 5	John Melikian	Executive Director	Sacramento
Seat 6	Rosa Hernandez	Associate Executive Director	Long Beach
Seat 7	Keith Crawford	Risk Manager	Chico

AORMA Property Program Assessment:

On March 13, 2024, the AORMA Committee approved a \$3M assessment to the AORMA Property Program. The assessment was allocated to each Member based on its proportion of premiums paid into the program during the last five (5) fiscal years (FY 18/19 through FY 22/23).

AORMA Property Program Values Limitation Clause. CSURMA’s Property Insurance Program has been negatively impacted by catastrophic losses at remote locations. All members bear the cost of these losses and rather than exclude these high-risk remote locations, underwriters have agreed to

continue coverage subject to a limitation of coverage to the amount of reported values. While the limitation has been in effect since July 1, 2023, the AORMA Committee adopted an endorsement to the Memorandum of Coverage which more clearly reflects the intent of the property program and its underwriters.

The previously invoiced property assessment coupled with staff efforts to re-invent the property program (including the values limitation clause mentioned above) were successful in positioning the Property program.

AORMA Liability Program Assessment:

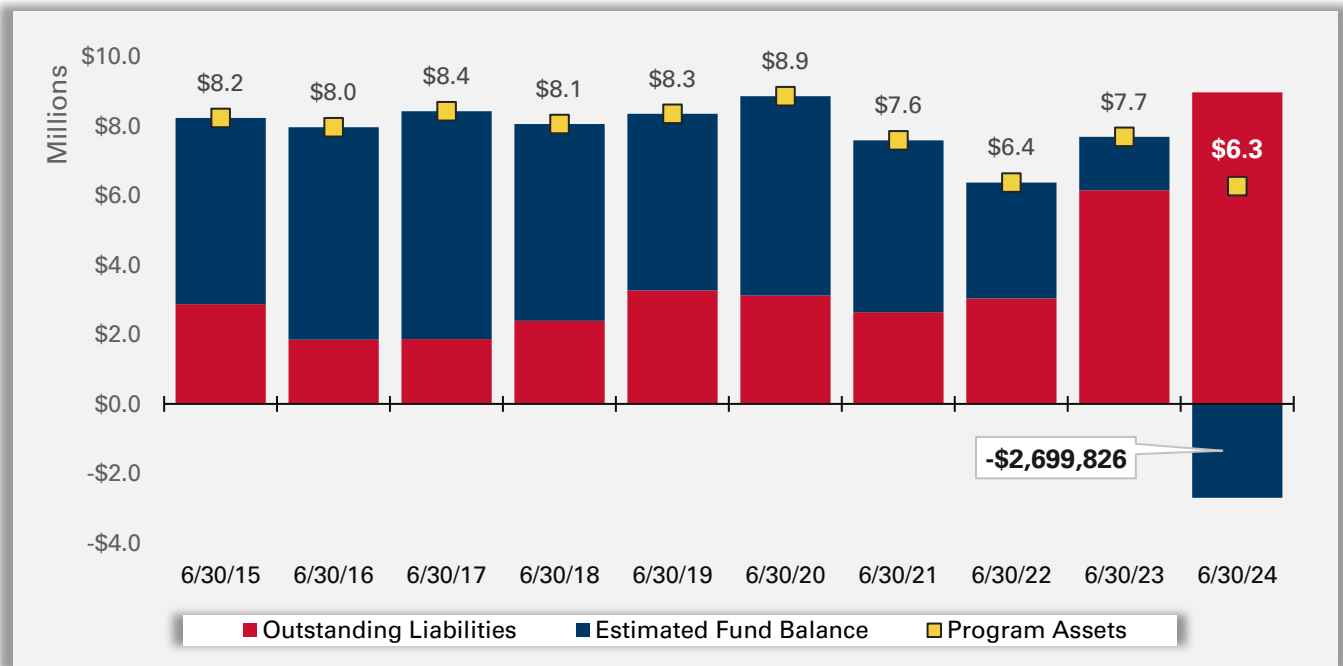
On September 4, 2024, the AORMA Committee approved a \$2.7M assessment to the AORMA Liability Program. The assessment is allocated to each Member based on the proportion of premiums paid into the program during the last five (5) fiscal years (FY 19/20 through FY 23/24). Members will receive an invoice in July 2025 for the total assessment unless they choose to pay the assessment in two (2) installments as shown in the payment options below.

Payment Options

1. One payment in FY 25/26
2. Two installments paid within FY 25/26 and FY 26/27

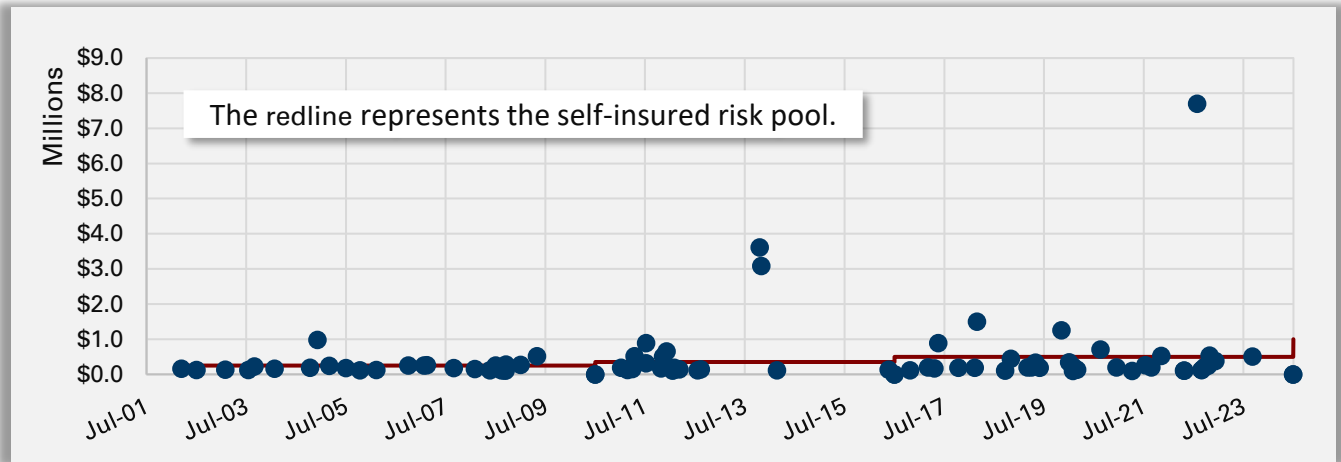
As shown in the chart below, the AORMA Liability Program fund balance (blue bar) has been decreasing over the past years. The fund balance on June 30, 2024, went negative for the first time since inception of the program. The negative (deficit) fund balance is a result of **increased claims activity**.

AORMA Liability Program - Fund Balance Exhibit on June 30, 2024

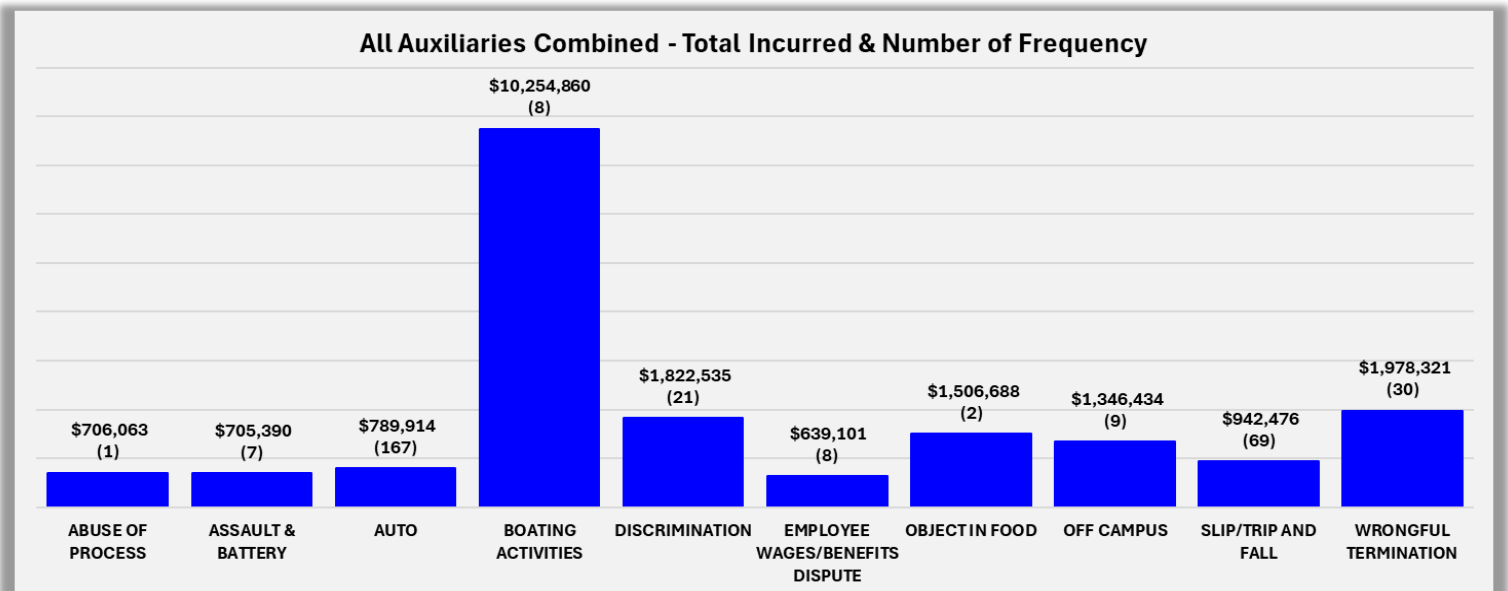


As shown in the following chart, the Liability Program is experiencing an increase in large claims above the Programs' self-insured risk pool limit.

Liability Claims Valued Over \$100,000



Due to claims activity, effective July 1, 2024, the Liability Program was forced to increase its risk pool from \$500,000 to \$1,000,000. Reinsurers/excess insurers necessitated this increase as no insurer was willing to provide coverage excess of a \$500,000 self-insured risk pool. This change will result in higher Liability Program costs for FY 25/26 which are expected to increase by 40%. The following chart provides an overview of the types and frequency (#) of claim types valued at June 30, 2024, to assist Members enhance auxiliary organizational efforts to mitigate future claims.



AORMA Workers' Compensation Program Dividend. On September 4, 2024, the AORMA Committee approved a dividend of \$2,138,275 from the Worker's Compensation Program which will be paid in FY 25/26.

AOA Past President Committee 2024 Annual Report

The purpose of the AOA Past President Committee is to actively engage previous presidents of AOA in ways that attempt to keep them connected the organization, while also allowing AOA to benefit from their expertise and leadership. The committee is intended to:

1. Serve in an advisory capacity to the President of AOA and Executive Committee and to provide historical context to current situations, challenges, and opportunities.
2. Advise and assist the AOA President, when requested, with special projects that contribute to the advancement of auxiliaries in the CSU.
3. Advocate on behalf of auxiliaries at the direction of the AOA President and the Executive Committee.

The AOA Past President Committee meets annually at the conference or more frequently as needed at the request of the AOA President. Membership is comprised of all AOA Past-Presidents *currently employed* in the CSU or by a CSU auxiliary. The active roster is comprised of the following individuals:

Monica Kauppinen, Sacramento (2021) – *Committee Chair*
Rasheedah Shakoor (2023)
Sharleen Lowry Krater (2022)
Kacie Flynn, Humboldt (2020)
Keith Kompsi, Fresno (2017)
Christina Brown, San Diego (2016)
Deborah Adishian-Astone, Fresno (2012)
Dave Edwards, Fullerton (2010)
Michele Goetz, San Diego (2008)
Leslie Levinson, San Diego (2005)
Richard Jackson, AOA (2003)

This year, AOA President Heather Cairns asked that we focus on succession planning for the AOA service providers along with some related administrative items.

Background

Several new service providers have started in the past two years – Patrick Bailey as conference administration manager and Bella Newberg as business partner support manager and we know of at least two other long-term providers leaving soon: Taren Mulhouse, conference sessions manager is transitioning after this conference and Debra Hammond will be taking on her role; Dixie Johnson, website content manager plus conference support and other activities, is leaving this summer; and Richard Jackson, AOA Business Manager has announced this is his last conference and will begin assisting with any transitions. These are key people to the AOA conference, AOA history, and AOA membership.

The long-range planning committees of 2021 and 2022 completed revised job descriptions to cover all the current services which were presented to the AOA Executive Committee in 2022 and approved for use with future RFPs for service providers. Time was spent looking at diverse options including hiring a full-time executive director for AOA – an idea that had been brought up for years - and outsourcing other functions.

Activities

With the need to plan for new service providers, and find financial savings, both those scopes of service and the RFP process needed to be reviewed. A small sub-group met – Heather Cairns, Kacie Flynn, Grace Slavik and Monica Kauppinen - this past fall to review the work that was finalized in 2022.

The group agreed to further consolidate the various service scopes, including consideration of reducing the number of service providers depending on what existing positions can absorb. Work started on finding a home for various tasks and talking to existing providers, but was not completed by the committee this year, and will continue with the long-range planning committee next year.

Other items that were discussed with the Committee Chair and AOA President included:

- Bringing back standing committee budgets – since implemented
- Backup for business manager (who, where do they live, access, etc.)
- Access to financial system and website files and other electronic materials
- Investigate acquisition of a ‘company credit card’ for AOA – in progress
- Frequency for RFPs for service providers; officer role in selection – Officers will be more involved in the review of the RFPs and interviewing candidates going forward.

Next steps

1. The next meeting of the past president committee is scheduled for January 14, 2025, at the AOA Annual Conference in San Diego and this topic will be on the agenda. This work will also crossover with Long Range Planning in the coming year.
2. AOA President is securing information from Richard Jackson on the list of potential service providers – a “bench” that has been gathered over the past several years – along with templates of the RFPs and contracts.
3. Review existing position descriptions for Richard Jackson and Dixie Johnson---determine which responsibilities can be reassigned to other existing service providers. Based on what duties remain, determine what type of position should be recruited.
4. Ensure the current position description for the Secretary/Treasurer is accurate, reflects the Bylaws, and executable for new incumbent.

Respectfully submitted,
Monica Kauppinen
December 2024

Annual Financial Report to the AOA Membership

Dear AOA Members –

Each year, I provide a report to the membership on the organization's financial position. The short version is:

- AOA received a clean audit report for FY 2023-24, and
- There has been a significant change the last couple years in the AOA's Total Net Assets (the accumulation of net income over the years), due to the some \$450K in expenses and penalties related to the pandemic-related cancellation of the scheduled January, 2022 Conference in Indian Wells, followed by the \$97K deficit last year when Conference expenses were in excess of Conference income. The main culprit was the unforeseen leap in hotel and meal costs -- up some \$227K!

Key take-aways:

- AOA had Net Income of (\$96,739) for 2023-24, which means that
- Following the decline AOA's Net Assets from \$766,783 to \$310,396 last year, it increased to \$329,261 in 2023-2024.
- The resulting Net Assets of \$232,522 are designated, per AOA policy, to cover three safety-net reserve commitments (for Working Capital, for Conference Contingencies, and for Special Projects), which means there are no funds available this coming year for spending for discretionary spending on strategic needs.

Attached are:

1. A listing of the year's Revenues, Expenses and Net Income (Change in Net Assets).
2. A detailed listing of the year's Expenses, grouped by functional area, compared to the prior year.

Richard Jackson
AOA Business Manager

Auxiliary Organizations Association

STATEMENTS OF ACTIVITIES AND CHANGES IN NET ASSETS

Years Ended June 30	2024	2023
NET ASSETS		
Revenues and Other Support		
Membership dues	\$ 279,205	\$ 233,255
Conference sponsorships	282,500	280,750
Annual conference fees	284,575	277,475
Interest and dividend income	5,761	11,919
Realized and unrealized gain on investments	19,229	14,608
In-kind contributions	7,500	5,500
Total Revenues and Other Support	878,770	823,507
Expenses		
Program services	889,286	722,557
Management and general	86,223	82,085
Total Expenses	975,509	804,642
Change in Net Assets	(96,739)	18,865
Net Assets Without Donor Restrictions - Beginning of Year	329,261	310,396
Net Assets Without Donor Restrictions - End of Year	\$ 232,522	\$ 329,261

The accompanying notes are an integral part of these financial statements.

Auxiliary Organizations Association
STATEMENTS OF FUNCTIONAL EXPENSES

Year Ended June 30, 2024	Program Services	Management and General	Total
Expenses			
Annual conference:			
Hotel and meals	\$ 485,298	\$ -	\$ 485,298
Speaker fees and other expenses	160,472	-	160,472
Preplanning	4,165	-	4,165
Executive committee:			
Meetings and travel	24,116	-	24,116
Committee meetings	41,049	-	41,049
Legislative liaison	11,925	-	11,925
Legal services:			
Personnel counsel	23,603	-	23,603
Audit fees	-	18,500	18,500
Accounting services	-	46,972	46,972
Insurance	-	6,706	6,706
Website maintenance expense	52,227	-	52,227
Survey expenses	12,500	-	12,500
Miscellaneous	-	14,045	14,045
Plaques and awards	7,484	-	7,484
Marketing and communications	39,709	-	39,709
Bank fees	19,238	-	19,238
Donated goods and services	7,500	-	7,500
Total Expenses	\$ 889,286	\$ 86,223	\$ 975,509

The accompanying notes are an integral part of these financial statements.

Auxiliary Organizations Association
STATEMENTS OF FUNCTIONAL EXPENSES
(Continued)

Year Ended June 30, 2023	Program Services	Management and General	Total
Expenses			
Annual conference:			
Hotel and meals	\$ 258,493	\$ -	\$ 258,493
Speaker fees and other expenses	270,341	-	270,341
Preplanning	18,531	-	18,531
Executive committee:			
Meetings and travel	30,474	-	30,474
Committee meetings	4,852	-	4,852
Legislative liaison	16,163	-	16,163
Legal services:			
Personnel counsel	27,350	-	27,350
Audit fees	-	16,700	16,700
Accounting services	-	45,604	45,604
Insurance	-	5,842	5,842
Council on Governmental Relation dues	5,500	-	5,500
Website maintenance expense	57,757	-	57,757
Miscellaneous	-	13,939	13,939
Plaques and awards	16,350	-	16,350
Marketing and communications	2,325	-	2,325
Bank fees	8,921	-	8,921
Donated goods and services	5,500	-	5,500
Total Expenses	\$ 722,557	\$ 82,085	\$ 804,642

The accompanying notes are an integral part of these financial statements.



2025 AOA EXECUTIVE COMMITTEE ROSTER

ELECTED OFFICERS ¹

Cecilia Ortiz	President	Loker St. Union, CSU Dominguez Hills
Heather Cairns	Past President	University Corporation, CSU Northridge
Andrew Singletary	President-Elect	Union WELL, CSU Sacramento
Annie Macias	Secretary/Treasurer	Associated Students, San Marcos

ELECTED REPRESENTATIVES ²

Andrea Burns	Term expires 1/26	Cal Poly Corporation, San Luis Obispo
John Doebler	Term expires 1/26	Associated Students, CSU Northridge
Melinda Swearingen	Term expires 1/26	Research Foundation, San Diego State
Janelle Temnick	Term expires 1/26	Aztec Shops, San Diego State
Shailendra Baghel	Term expires 1/27	Research Foundation, San Jose State
Vilayat Del Rossi	Term expires 1/27	Santos Manuel S Forty-Niner Shops, CSU
Cyndi Farrington	Term expires 1/27	Long Beach Student Un. San Bernardino
Kevin Mojaradi	Term expires 1/27	Associated Students, CSU Northridge

STANDING COMMITTEE CHAIR

Alejandro Rios	AS/Student Union/Rec	AS San Francisco State
Michael Lennon	Commercial Services	University Corporation, CSU Northridge
Jaime Leal	Business & Financial Services	Loker St..Union, CSU Dominguez Hills
Ranjit Kaur	Human Resources	Research Foundation, San Jose State
Calvin Yun	Information Technology	Associated Students, CSU Northridge
Heather Cairns	LR Planning/Nominations	University Corporation, CSU Northridge
Julie Wessel	Research Administration	Research & Sponsored Pgms, San Bernardino
Nicole Forrest Boggs	Philanthropy Committee	Asst. Vice President, CSU Long Beach
Chuck Kissel	Risk Management & Insurance Programs	Auxiliary Services Corporation, Fullerton
?	Past Presidents	University Corporation, CSU Northridge

APPOINTED STAFF ⁴

Richard Jackson	Business Manager/CFO	AOA Executive Office
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DESIGNATED LIAISONS

?	CABO Liaison	
Robyn Pennington	Business & Finance Liaison	CSU Chancellor's Office
Aaron Moore	Advancement Liaison	CSU Chancellor's Office
Carrie Rieth	General Counsel Liaison	CSU Chancellor's Office
Beth Ryan	Human Resources Liaison	CSU Chancellor's Office

- 1) Elected by membership to one-year terms.
- 2) Elected by membership to staggered two-year terms.
- 3) Standing Committees are represented on the Executive Committee by representatives who are selected by their respective committees and are designated voting members of the Executive Committee.
- 4) Appointed by Executive Committee to one-year service contract and is non-voting.
- 5) Appointed by Executive Committee, these are designated liaisons and standing attendees and are non-voting.