



**EXECUTIVE COMMITTEE
MEETING AGENDA
June 27 2025 – 9:00 am – 2:00 pm
Virtual Meeting via Zoom**

<https://csun.zoom.us/j/81776364438?pwd=784ukDfHXZx3Sgg6lfJbJQUOHFC3Ea.1>

Meeting ID: 817 7636 4438 Passcode: 789673

- A. CALL TO ORDER and ANNOUNCEMENTS – *Cecilia Ortiz*
- B. APPROVAL OF AGENDA **Action Item**
- C. REVIEW and APPROVAL OF 4/18/25 and 5/16/25 MEETING MINUTES **Action** (pgs. 3-5)
- D. OLD BUSINESS FOLLOW-UP (None)
 - 1. Status Report on Pending Items – *Richard Jackson*
- E. PRESIDENT’S REPORT – *Cecilia Ortiz*
 - 1. 2025 AOA Leadership Roster (pgs. 6-7)
 - 2. August and November EC Meetings are Virtual
 - 3. Updated Service Provider Scope of Work Descriptions – w/*Heather Cairns/Kacie Flynn*
Action (email coming from Heather)
 - 4. Service Provider Contracts (for Dwayne Brummett, Kim Clark) *Heather Cairns* **Action**
(email coming from Heather)
 - 5. Current Issues Affecting Auxiliaries (with CO Liaisons)
 - a. CSU Policy Changes Under Consideration
 - 6. Chat GPT Auxiliary Employee Access
- F. SECRETARY-TREASURER’S/BUSINESS MANAGER’S REPORT – *Annie Macias/Richard Jackson*
 - 1. AOA Financial Report (emailed))
 - a. Transactions Report: 4/1/25 – 6/20/25 (pgs. 8-13)
 - 2. Budget for FY 2025-26 (emailed) **Action Item**
- G. PRESIDENT-ELECT’S REPORT – *Andrew Singletary*
 - 1. 2025-2026 Conference Planning Committee Report (pgs. 14-22)
- H. MEMBER RESOURCES
 - 1. AOA Leadership Academy – *Heather Cairns* **Time Certain: 10:30 am**
 - 2. Updates on Website Membership Directory and Website Content – *Dixie Johnson* (pgs. 23-34)
 - 3. AOA Monograph Writing & Publishing Guide –*Robert Griffin/Richard Jackson* (pgs. 35-42)
 - 4. Review AOA Compliance & Legislative Program Guide – *Robert Griffin/Richard Jackson*

(pgs. 43-44)

5. CA Legislative Summary Update (*by Robert Griffin*) – (pgs. 45-47)

I. NEW AND RETURNING BUSINESS ITEMS (May Include Consent Items)

1. Bank Accounts Authorization Resolution – Heather Cairns/Robert Griffin (pg. 48) **Action Item**
2. Resolution for AOA Credit Card Holder – *Annie Macias/Heather Cairns*
3. Review of AOA Membership Dues Policy – *Robert Griffin/Richard Jackson* (pgs. 49-51) **Action Item**
4. Marketing Proposal – *Heather Cairns* (pgs. 52-57)
5. Reports from Ad Hoc Committees
 - a. AOA Marketing Fact Sheet – Heather Cairns
 - b. AOA Policy/Advocacy Agenda – Annie Macias
 - c. Collaborative Technology Tools and Storage – Andrew Singletary
 - d. Education & Conference Programming 2028 & Beyond – Cecilia Ortiz

II. BUILDING RELATIONSHIPS AND PARTNERS

No formal reports from the CABO or Chancellor's Office Liaisons at this abbreviated meeting. The Chair will ask if there are any matters of timely import to be reported to the Board.

III. REPORTS

No formal reports from the AOA Standing Committee Chairs at this abbreviated meeting. The Chair will ask if there are any matters of timely import to be reported to the Board.

IV. INFORMATION AND ANNOUNCEMENTS

Next EC Meeting: August 8, 2025, 9:00 a.m. to 2:00 p.m. (Virtual)

V. ADJOURNMENT

FUTURE MEETINGS

August 8, 2025 – Virtual via Zoom

November 21, 2025 – Virtual via Zoom

January 10, 2026 – Oakland Marriott City Center

BUSINESS MANAGER (Until June 30)

Richard Jackson

Auxiliary Organizations Association

P.O. Box 2177

Chico, CA 95927-2177

Phone: (530) 345-2009

OPERATIONS MANAGER (Anticipated Start July 1)

Kim Clark

Auxiliary Organizations Association

Address TBD

Kdclark.csuaoa@gmail.com

NOTE TO MINUTES: *The materials and reports briefly referenced in the following minutes are included in the meeting's Agenda Packet, available on the AOA website at the indicated page numbers.*

AUXILIARY ORGANIZATIONS ASSOCIATION OF THE CALIFORNIA STATE UNIVERSITY

Draft Minutes of the Executive Committee Virtual

May 16, 2025

OFFICERS

Cecilia Ortiz	President	CSU, Dominguez Hills	Present
Heather Cairns	Past President,	CSU, Northridge	Yes
Andrew Singletary	President-Elect	CSU, Sacramento	Yes
Annie Macias	Secretary/Treasurer	CSU, San Marcos	Yes

REPRESENTATIVES

Andrea Burns	Elected Representative	Cal Poly, San Luis Obispo	Yes
John Doebler	Elected Representative	CSU, Northridge	Yes
Melinda Swearinger	Elected Representative	San Diego State University	Yes
Janelle Temnick	Elected Representative	San Diego State University	No
Shailendra Baghel	Elected Representative	San Jose State University	No
Vilayat Del Rossi	Elected Representative	CSU, San Bernardino	Yes
Cyndi Farrington	Elected Representative	CSU, Long Beach	YES
Kevin Mojaradi	Elected Representative	CSU, Northridge	No

STANDING COMMITTEE CHAIRS

Alejandro Rios	Chair - AS/Student Union/Rec	San Francisco State	Yes
Michael Lennon	Chair - Commercial Services	CSU, Northridge	
Jaime Leal	Chair -Bus. & Financial services	CSU, Dominguez Hills	Yes
Ranjit Kaur	Chair - Human Resources	San Jose State	
Calvin Yun	Chair - Information Technology	CSU, Northridge	
Heather Cairns	Chair - LR Planning/Nominations	CSU, Northridge	Yes
Julie Wessel	Chair - Research Administration	CSU, San Bernardino	
Nicole Forrest Boggs,	Chair - Philanthropy Committee	CSU, Long Beach	Yes
Chuck Kissel	Chair - Risk Management/Insurance	CSU, Fullerton	Yes
Kacie Flynn,	Chair - Past Presidents,	Cal Poly Humboldt	No

APPOINTED STAFF (Non-Voting)

Richard Jackson	Business Manager/CFO	AOA Executive Office	Yes
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DESIGNATED LIAISONS (Non-Voting)

Colin Donahue	CABO Liaison	CSU, Northridge	No
Robyn Pennington,	Business & Finance Liaison	CSU Chancellor's Office	No
Aaron Moore	Advancement Liaison	CSU Chancellor's Office	No
Carrie Rieth	General Counsel Liaison	Chancellor's Office	No
Beth Ryan	Human Resources Liaison	CSU Chancellor's Office	No

A. CALL TO ORDER and ANNOUNCEMENTS – Cecilia Ortiz

Ortiz called the EC meeting to order at 10:04am.

B. APPROVAL OF AGENDA - **Action Item**

Ortiz requested a motion to approve the agenda with the following changes. Adjust EC meetings to virtual, and edit the title for the secretary/treasurer.

Motion to approve the agenda. (M/Doebler, S/Burns, no discussion, passed unanimously)

C. APPROVAL OF MINUTES OF THE APRIL 18, 2025 MEETING (to be emailed) **Action Item**

Motion to table the minutes to the next EC meeting. (M/Doebler, S/Swearinger, motion carries)

D. PROPOSAL FOR COVERING THE TASKS OF RETIRING SERVICE PROVIDERS (to be emailed) **Action Item**

Ortiz acknowledged the leadership provided by Singletary for the Annual AOA conference planning, stating that, given the uncertainty of travel for the membership and the state of the AOA budget, this year is a critical time for planning to reduce costs and re-engage members.

Ortiz shared that a call for Service Providers was sent via email to all AOA members, and no additional candidates surfaced. The call was left open for two weeks.

Cairns presented the edited versions of the bridge contracts for the operations manager and financial support service providers' roles. The main items to highlight included an hourly rate as requested by EC in the April 18 meeting and a total number of hours.

Doebler – thank the officers for making the adjustments and providing an hourly wage.

Burns – ask what is the priority items that Kim and Dwayne will be focusing on? And whether other candidates would be considered after June 30?

Cairns – explained that since no other individuals came forward for the roles, the hope is to have Kim and Dwayne serve in their capacities with the bridge contacts until June 30 and bring to EC an annual agreement for the June 20 meeting.

Rios – provided clarification that EC wanted to see if other people would be interested in applying for service providers, and this was the reason this item came back to this special meeting.

Swearinger– requested clarification on the number of hours, considering an overlap with current service providers?

Kissel – asked about the language in the bridge agreements, seems too closed to an employee relationship rather than an independent contractor relationship.

Swearinger – agreed with Kissel

Wessel stated she sees Independent Contractors agreements with this language often.

Ortiz called for a motion to approve the amended contracts for the operations manager and financial support services.

Kissel – asked to include cash flow reporting to the quarterly reports for the financial support services role.

Forrest Boggs entered the meeting, asked for a briefing, and Cecilia provided a quick overview of the discussion.

(Motion/Doebler, Second/ Swearinger, Vote: 7 yes /0 no / 1 abstain. Motion carries.)

E. INFORMATION

Farrington asked about whether AOA still has the NACAS waiver. Ortiz mentioned that they can discuss after the meeting.

Ortiz reminded EC that the next meeting will be June 20. Forrest Boggs pointed out that June 19 is a holiday, and folks might be taking that Friday off. Ortiz asked EC to review their calendar and save the date for June 27.

F. ADJOURNMENT

Ortiz adjourned the Meeting at 10:36 am.



2025 AOA EXECUTIVE COMMITTEE ROSTER

ELECTED OFFICERS ¹

Cecilia Ortiz	President	University Student Union, CSU Northridge
Heather Cairns	Past President	University Corporation, CSU, Northridge
Andrew Singletary	President-Elect	Union WELL, CSU, Sacramento
Annie Macias	Secretary/Treasurer	Associated Students, CSU, 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 University
Janelle Temnick	Term expires 1/26	Aztec Shops, San Diego State University
Shailendra Baghel	Term expires 1/27	Research Foundation, San Jose State University
Vilayat Del Rossi	Term expires 1/27	Santos Manuel Student Union, CSU, San Bernardino
Cyndi Farrington	Term expires 1/27	Forty-Niner Shops, CSU, Long Beach
Kevin Mojaradi	Term expires 1/27	Associated Students, CSU, Northridge

STANDING COMMITTEE CHAIRS

Alejandro Rios	AS/Student Union/Rec	Associated Students, San Francisco State
Michael Lennon	Commercial Services	University Corporation, CSU, Northridge
Jaime Leal	Business & Financial Services	Loker Student 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 Programs CSU, San Bernardino
Nicole Forrest Boggs	Philanthropy Committee	49er Foundation, CSU, Long Beach
Chuck Kissel	Risk Management & Insurance Programs	Auxiliary Services Corporation, CSU, Fullerton
Patrice Griffith	Property Management & Development	University Enterprises Inc., CSU, East Bay
Kacie Flynn	Past Presidents	Sponsored Programs Fdn, Cal Poly Humboldt

APPOINTED STAFF ⁴

Richard Jackson	Business Manager/CFO	AOA Executive Office
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DESIGNATED LIAISONS

Colin Donahue	CABO Liaison	CSU, Northridge
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.

Auxiliary Organizations Association (AOA)
Custom Transaction Detail Report
 July 2024 through June 2025

Type	Date	Num	Name	Memo	Account	Class	Clr	Split	Debit	Credit	Balance
Income											
80350 — Debra Hammond Contract											
Check	04/30/25	3140	Debra L. Hammond	Inv #006 4/30/...	80350 — Debra Hammo...	January Co...		10000 — Checki...	5,625.00		-5,625.00
Total 80350 — Debra Hammond Contract									5,625.00	0.00	-5,625.00
49500 — Extraordinary Income											
Sales Receipt	07/30/24	123		BofA Merchant S...	49500 — Extraordinary ...	General Op...		10000 — Checki...		50.45	50.45
Total 49500 — Extraordinary Income									0.00	50.45	50.45
52000 — Business Partner Income											
52100 — Business Partner Reg Fee											
Sales Receipt	07/30/24	122		PayPal Deposit f...	52100 — Business Part...	January Co...		10000 — Checki...		5,000.00	5,000.00
Total 52100 — Business Partner Reg Fee									0.00	5,000.00	5,000.00
Total 52000 — Business Partner Income									0.00	5,000.00	5,000.00
50000 — Conference Registration Fees											
Sales Receipt	07/30/24	122		PayPal Deposit f...	50000 — Conference R...	January Co...		10000 — Checki...		40,800.00	40,800.00
Total 50000 — Conference Registration Fees									0.00	40,800.00	40,800.00
45000 — Interest Income											
Deposit	07/31/24			Interest	45000 — Interest Income	General Op...		10300 — Money ...		0.01	0.01
Total 45000 — Interest Income									0.00	0.01	0.01
Total Income									5,625.00	45,850.46	40,225.46
Expense											
80470 — Cnf Contract Srv-Patrick Bailey											
Check	07/13/24	3050	Patrick Bailey	2nd Qtr 2024 c...	80470 — Cnf Contract S...	January Co...		10000 — Checki...	10,000.00		10,000.00
Check	10/14/24	3082	Patrick Bailey	Pat Bailey 3rd Q...	80470 — Cnf Contract S...	January Co...		10000 — Checki...	10,000.00		20,000.00
Check	11/12/24	3093	Patrick Bailey	PB Reimb for Au...	80470 — Cnf Contract S...	January Co...		10000 — Checki...	921.76		20,921.76
General Journal	11/12/24	Recode...			80470 — Cnf Contract S...			80500 — Service ...		921.76	20,000.00
Check	01/17/25	3112	Patrick Bailey	PBailey 4th Qtr c...	80470 — Cnf Contract S...	January Co...		10000 — Checki...	10,000.00		30,000.00
Check	05/12/25	3144	Patrick Bailey	PBailey 1st Qtr c...	80470 — Cnf Contract S...	January Co...		10000 — Checki...	10,000.00		40,000.00
Total 80470 — Cnf Contract Srv-Patrick Bailey									40,921.76	921.76	40,000.00
80460 — Bella Newberg											
Check	08/18/24	3061	Isabel Newberg	2nd Qtr (May, Ju...	80460 — Bella Newberg	January Co...		10000 — Checki...	9,270.00		9,270.00
Check	11/12/24	3090	Isabel Newberg	3rd Qtr (8/1-10...	80460 — Bella Newberg	January Co...		10000 — Checki...	9,270.00		18,540.00
Check	03/21/25	3117	Isabel Newberg	BNewberg 4th Q...	80460 — Bella Newberg	January Co...		10000 — Checki...	9,270.00		27,810.00
Check	04/30/25	3141	Isabel Newberg	BNewberg 1st Q...	80460 — Bella Newberg	January Co...		10000 — Checki...	9,245.45		37,055.45
Total 80460 — Bella Newberg									37,055.45	0.00	37,055.45
77900 — Philanthropy Committee Expenses											
Check	03/21/25	3127	CSU Northridge Foundat...	5 Presenters at ...	77900 — Philanthropy ...	January Co...		10000 — Checki...	2,000.00		2,000.00
Total 77900 — Philanthropy Committee Expenses									2,000.00	0.00	2,000.00
80700 — Registration Area Support											
Check	01/17/25	3112	Patrick Bailey	PBailey Cnf Offic...	80700 — Registration A...	January Co...		10000 — Checki...	166.35		166.35
Total 80700 — Registration Area Support									166.35	0.00	166.35
78500 — Website Content/Dir Managemt DJ											
Check	09/12/24	3067	Dixie L. Johnson	Cnf Consulting ...	78500 — Website Conte...	General Op...		10000 — Checki...	1,660.36		1,660.36
General Journal	09/12/24	recode ...			78500 — Website Conte...			80200 — Conf C...		1,660.36	0.00

Auxiliary Organizations Association (AOA)
Custom Transaction Detail Report
 July 2024 through June 2025

Type	Date	Num	Name	Memo	Account	Class	Clr	Split	Debit	Credit	Balance
Check	10/14/24	3079	Dent Agency LLC	Website maint O...	78500 — Website Conte...	General Op...		10000 — Checki...	3,096.60		3,096.60
General Journal	10/14/24	Recode...			78500 — Website Conte...			78000 — Web Ho...		3,096.60	0.00
Check	04/01/25	3132	Dixie L. Johnson	April invoice per...	78500 — Website Conte...	General Op...		10000 — Checki...	4,000.00		4,000.00
Check	05/12/25	3145	Dixie L. Johnson	May invoice per ...	78500 — Website Conte...			10000 — Checki...	4,000.00		8,000.00
Check	06/03/25	3151	Dixie L. Johnson	Contract Srv Jun...	78500 — Website Conte...	General Op...		10000 — Checki...	4,000.00		12,000.00
Total 78500 — Website Content/Dir Managemt DJ									16,756.96	4,756.96	12,000.00
80500 — Service Provider Travel Expense											
Check	08/18/24	3060	Taren Mulhause	TM, Aug 2024 C...	80500 — Service Provid...	January Co...		10000 — Checki...	660.82		660.82
Check	08/18/24	3061	Isabel Newberg	BellaN Aug '24 ...	80500 — Service Provid...	January Co...		10000 — Checki...	393.16		1,053.98
General Journal	11/12/24	Recode...			80500 — Service Provid...			80470 — Cnf Co...	921.76		1,975.74
Check	01/01/25	3103	Taren Mulhause	TarenM Nov CP...	80500 — Service Provid...	January Co...		10000 — Checki...	660.82		2,636.56
Check	01/01/25	3104	Patrick Bailey	PBailey CPC trav...	80500 — Service Provid...	January Co...		10000 — Checki...	930.50		3,567.06
Check	01/17/25	3112	Patrick Bailey	PBailey Conf tra...	80500 — Service Provid...	January Co...		10000 — Checki...	301.73		3,868.79
Check	03/21/25	3117	Isabel Newberg	BNewberg Jan 2...	80500 — Service Provid...	January Co...		10000 — Checki...	167.42		4,036.21
Check	05/12/25	3148	Dwayne Brummett	DBrummett Apri...	80500 — Service Provid...	January Co...		10000 — Checki...	815.47		4,851.68
Total 80500 — Service Provider Travel Expense									4,851.68	0.00	4,851.68
80300 — Conf Contract Service-Taren M											
Check	10/14/24	3083	Taren Mulhause	TarenM 3rd Qtr ...	80300 — Conf Contract...	January Co...		10000 — Checki...	4,250.00		4,250.00
Check	01/17/25	3111	Taren Mulhause	TarenM 4th Q4 ...	80300 — Conf Contract...	January Co...		10000 — Checki...	4,250.00		8,500.00
Check	04/30/25	3142	Taren Mulhause	TarenM 2025 C...	80300 — Conf Contract...	January Co...		10000 — Checki...	498.92		8,998.92
Total 80300 — Conf Contract Service-Taren M									8,998.92	0.00	8,998.92
80100 — Conf Contract Service-R Jackson											
Check	08/16/24	3057	Richard Jackson	Conference sup...	80100 — Conf Contract...	January Co...		10000 — Checki...	3,000.00		3,000.00
Check	01/17/25	3116	Richard Jackson	RJ cnf support p...	80100 — Conf Contract...	January Co...		10000 — Checki...	7,751.00		10,751.00
Total 80100 — Conf Contract Service-R Jackson									10,751.00	0.00	10,751.00
86000 — CPC Expenses											
86100 — CPC Travel Expense											
Check	08/18/24	3062	CSU Northridge Foundat...	Ira Unterman Au...	86100 — CPC Travel Ex...	January Co...		10000 — Checki...	340.90		340.90
Check	09/13/24	3071	Patrick Bailey	Pat Bailey Aug 2...	86100 — CPC Travel Ex...	January Co...		10000 — Checki...	0.00		340.90
Check	10/14/24	3081	CSU Northridge Universi...	Reimb Mike Len...	86100 — CPC Travel Ex...	January Co...		10000 — Checki...	340.90		681.80
Check	03/21/25	3120	University Enterprises C...	Conf Plan meet ...	86100 — CPC Travel Ex...	January Co...		10000 — Checki...	532.67		1,214.47
Check	03/21/25	3120	University Enterprises C...	Conf Plan meet ...	86100 — CPC Travel Ex...	January Co...		10000 — Checki...	525.67		1,740.14
Check	03/21/25	3120	University Enterprises C...	Conf Plan meet ...	86100 — CPC Travel Ex...	January Co...		10000 — Checki...	306.90		2,047.04
Check	03/21/25	3125	CSU Northridge, Univ St...	Jeremy Hamlett ...	86100 — CPC Travel Ex...	January Co...		10000 — Checki...	483.19		2,530.23
Check	05/12/25	3147	CSU, Sacramento Univer...	ASingletary Apri...	86100 — CPC Travel Ex...	January Co...		10000 — Checki...	461.26		2,991.49
Total 86100 — CPC Travel Expense									2,991.49	0.00	2,991.49
86500 — CPC Meeting Expenses											
Check	08/16/24	3057	Richard Jackson	Sheraton deposi...	86500 — CPC Meeting E...	January Co...		10000 — Checki...	3,000.00		3,000.00
Check	08/16/24	3057	Richard Jackson	Sheraton deposi...	86500 — CPC Meeting E...	January Co...		10000 — Checki...	6,000.00		9,000.00
Check	09/10/24	3066	Richard Jackson	Sheraton deposi...	86500 — CPC Meeting E...	January Co...		10000 — Checki...	6,049.53		15,049.53
Check	09/10/24	3066	Richard Jackson	Sheraton deposi...	86500 — CPC Meeting E...	January Co...		10000 — Checki...		981.14	14,068.39
Check	09/10/24	3066	Richard Jackson	CPC dinner with...	86500 — CPC Meeting E...	January Co...		10000 — Checki...	241.70		14,310.09
Total 86500 — CPC Meeting Expenses									15,291.23	981.14	14,310.09
Total 86000 — CPC Expenses									18,282.72	981.14	17,301.58
80200 — Conf Contract Service-D Johnson											
Check	09/12/24	3067	Dixie L. Johnson	Sept qtr invoice ...	80200 — Conf Contract...	January Co...		10000 — Checki...	3,090.00		3,090.00
General Journal	09/12/24	recode ...			80200 — Conf Contract...			78500 — Website...	1,660.36		4,750.36

Auxiliary Organizations Association (AOA)
Custom Transaction Detail Report
 July 2024 through June 2025

Type	Date	Num	Name	Memo	Account	Class	Clr	Split	Debit	Credit	Balance
Check	12/09/24	3094	Dixie L. Johnson	Dec qtr invoice ...	80200 — Conf Contract...	January Co...		10000 — Checki...	3,090.00		7,840.36
General Journal	12/09/24	Recode...			80200 — Conf Contract...			80900 — Other C...	432.60		8,272.96
Check	03/21/25	3118	Dixie L. Johnson	Mar invoice per ...	80200 — Conf Contract...	January Co...		10000 — Checki...	4,000.00		12,272.96
Check	03/21/25	3130	Dixie L. Johnson	Feb invoice per ...	80200 — Conf Contract...	January Co...		10000 — Checki...	4,000.00		16,272.96
Check	03/21/25	3130	Dixie L. Johnson	Conf hourly pay...	80200 — Conf Contract...	January Co...		10000 — Checki...	1,483.20		17,756.16
Check	04/01/25	3132	Dixie L. Johnson	Conf hourly pay...	80200 — Conf Contract...	January Co...		10000 — Checki...	2,010.56		19,766.72
Check	06/03/25	3151	Dixie L. Johnson	Consulting Apr...	80200 — Conf Contract...	January Co...		10000 — Checki...	317.24		20,083.96
Total 80200 — Conf Contract Service-D Johnson									20,083.96	0.00	20,083.96
88000 — Web/AV Tech/ E Air Expense											
General Journal	10/04/24	Recode...			88000 — Web/AV Tech...			84000 — Marketi...	5,760.00		5,760.00
General Journal	11/12/24	Recode...			88000 — Web/AV Tech...			78000 — Web Ho...	1,450.00		7,210.00
Check	03/21/25	3129	Centium Software, Inc.	EventsAir Inv-0...	88000 — Web/AV Tech...	January Co...		10000 — Checki...	167.75		7,377.75
Check	04/09/25	3133	Centium Software, Inc.	EventsAir Inv-0...	88000 — Web/AV Tech...	January Co...		10000 — Checki...	365.75		7,743.50
Check	05/12/25	3146	Centium Software, Inc.	EventsAir Inv-0...	88000 — Web/AV Tech...	January Co...		10000 — Checki...	10,125.00		17,868.50
Check	05/30/25	3150	Centium Software, Inc.	EventsAir Inv-0...	88000 — Web/AV Tech...	January Co...		10000 — Checki...	175.00		18,043.50
Total 88000 — Web/AV Tech/ E Air Expense									18,043.50	0.00	18,043.50
87000 — Speaker Contract Expenses											
Check	04/10/25	3134	Richard Jackson	Sunnie Giles cnf...	87000 — Speaker Contr...	January Co...		10000 — Checki...	11,975.90		11,975.90
Total 87000 — Speaker Contract Expenses									11,975.90	0.00	11,975.90
84000 — Marketing/Communication Exp											
Check	10/04/24	3075	Centium Software, Inc.	Void \$5562 Eve...	84000 — Marketing/Co...	January Co...		10000 — Checki...			0.00
General Journal	10/04/24	Recode...			84000 — Marketing/Co...			88000 — Web/A...		5,760.00	-5,760.00
Check	10/14/24	3084	Centium Software, Inc.	EventsAir New E...	84000 — Marketing/Co...	January Co...		10000 — Checki...	5,760.00		0.00
Check	11/12/24	3089	Bamko	Lapel pins 2024...	84000 — Marketing/Co...	January Co...		10000 — Checki...	1,233.93		1,233.93
Check	03/21/25	3121	CSU, Long Beach Associ...	25 Conf service...	84000 — Marketing/Co...	General Op...		10000 — Checki...	16,426.09		17,660.02
Total 84000 — Marketing/Communication Exp									23,420.02	5,760.00	17,660.02
83000 — Hotel Function & Meal Expense											
Check	07/13/24	3054	Richard Jackson	Reimb Deposit f...	83000 — Hotel Functio...	January Co...		10000 — Checki...	53,000.00		53,000.00
Check	08/16/24	3057	Richard Jackson	Sheraton deposi...	83000 — Hotel Functio...	January Co...		10000 — Checki...	53,000.00		106,000.00
Check	10/03/24	3074	Richard Jackson	Sheraton 4th de...	83000 — Hotel Functio...	January Co...		10000 — Checki...	53,000.00		159,000.00
Check	12/09/24	3096	Richard Jackson	Reimb from She...	83000 — Hotel Functio...	January Co...		10000 — Checki...		203.44	158,796.56
Check	01/17/25	3116	Richard Jackson	Deposit Oaklan...	83000 — Hotel Functio...	January Co...		10000 — Checki...	42,500.00		201,296.56
Check	01/17/25	3116	Richard Jackson	Deposit Oaklan...	83000 — Hotel Functio...	General Op...		10000 — Checki...	5,000.00		206,296.56
Check	04/10/25	3134	Richard Jackson	LB Hyatt Reg pr...	83000 — Hotel Functio...	January Co...		10000 — Checki...	6,582.91		212,879.47
Check	04/10/25	3134	Richard Jackson	LB Hyatt Reg de...	83000 — Hotel Functio...	January Co...		10000 — Checki...	3,021.45		215,900.92
Total 83000 — Hotel Function & Meal Expense									216,104.36	203.44	215,900.92
82000 — Cnf Gifts and Awards Expense											
Check	11/12/24	3087	I.D. Me Promotions	Notebooks,cabl...	82000 — Cnf Gifts and ...	January Co...		10000 — Checki...	5,791.30		5,791.30
General Journal	01/17/25	Recode...			82000 — Cnf Gifts and ...			79000 — Gifts an...	2,397.07		8,188.37
Check	03/21/25	3119	I.D. Me Promotions	Tote bags, Myla...	82000 — Cnf Gifts and ...	January Co...		10000 — Checki...	378.86		8,567.23
Total 82000 — Cnf Gifts and Awards Expense									8,567.23	0.00	8,567.23
80900 — Other Conference Support Exp											
Check	12/09/24	3094	Dixie L. Johnson	Dixie J hourly co...	80900 — Other Confere...	January Co...		10000 — Checki...	432.60		432.60
General Journal	12/09/24	Recode...			80900 — Other Confere...			80200 — Conf C...		432.60	0.00
Check	01/17/25	3116	Richard Jackson	Ballon Guru for ...	80900 — Other Confere...	January Co...		10000 — Checki...	646.39		646.39
Check	01/17/25	3116	Richard Jackson	Ballon Guru for ...	80900 — Other Confere...	January Co...		10000 — Checki...	43.10		689.49
Total 80900 — Other Conference Support Exp									1,122.09	432.60	689.49

Auxiliary Organizations Association (AOA)
Custom Transaction Detail Report
 July 2024 through June 2025

Type	Date	Num	Name	Memo	Account	Class	Clr	Split	Debit	Credit	Balance
80800 — Bank Credit Card Fees											
Check	07/31/24			Service Charge	80800 — Bank Credit C...	January Co...		10000 — Checki...	2,668.87		2,668.87
Total 80800 — Bank Credit Card Fees									2,668.87	0.00	2,668.87
79500 — Miscellaneous Expenses											
General Journal	07/16/24	AG An...		CA AG Annual R...	79500 — Miscellaneous...	General Op...		10000 — Checki...	100.00		100.00
Check	08/16/24	3057	Richard Jackson	PayPal fees 7/3/...	79500 — Miscellaneous...	General Op...		10000 — Checki...	19.95		119.95
Check	08/16/24	3057	Richard Jackson	AmazonWebSrv ...	79500 — Miscellaneous...	General Op...		10000 — Checki...	86.09		206.04
Check	09/10/24	3066	Richard Jackson	PayPal fees 8/2/...	79500 — Miscellaneous...	General Op...		10000 — Checki...	19.95		225.99
Check	09/10/24	3066	Richard Jackson	AmazonWebSrv ...	79500 — Miscellaneous...	General Op...		10000 — Checki...	88.96		314.95
Check	09/10/24	3066	Richard Jackson	Annual PO Box ...	79500 — Miscellaneous...	General Op...		10000 — Checki...	90.00		404.95
Check	10/03/24	3074	Richard Jackson	PayPal fees 9/3/...	79500 — Miscellaneous...	General Op...		10000 — Checki...	19.95		424.90
Check	10/03/24	3074	Richard Jackson	AmazonWebSrv ...	79500 — Miscellaneous...	General Op...		10000 — Checki...	89.14		514.04
Check	11/12/24	3093	Patrick Bailey	Bank charge - r...	79500 — Miscellaneous...	General Op...		10000 — Checki...	2.00		516.04
Check	12/09/24	3096	Richard Jackson	PayPal fees 10/...	79500 — Miscellaneous...	General Op...		10000 — Checki...	19.95		535.99
Check	12/09/24	3096	Richard Jackson	PayPal fees 11/...	79500 — Miscellaneous...	General Op...		10000 — Checki...	19.95		555.94
Check	12/09/24	3096	Richard Jackson	AmazonWebSrv ...	79500 — Miscellaneous...	General Op...		10000 — Checki...	86.88		642.82
Check	12/09/24	3096	Richard Jackson	AmazonWebSrv ...	79500 — Miscellaneous...	General Op...		10000 — Checki...	89.26		732.08
Check	01/17/25	3116	Richard Jackson	PayPal fees Dec ...	79500 — Miscellaneous...	General Op...		10000 — Checki...	19.95		752.03
Check	01/17/25	3116	Richard Jackson	AmazonWebSrv ...	79500 — Miscellaneous...	General Op...		10000 — Checki...	86.97		839.00
Check	03/21/25	3126	CSU, Los Angeles Assoc...	Reimb travel Ya...	79500 — Miscellaneous...	January Co...		10000 — Checki...	282.57		1,121.57
Check	03/21/25	3128	Cal State University Los ...	z	79500 — Miscellaneous...	General Op...		10000 — Checki...	5,000.00		6,121.57
Check	04/10/25	3134	Richard Jackson	PayPal April fees	79500 — Miscellaneous...	General Op...		10000 — Checki...	19.95		6,141.52
Check	04/10/25	3134	Richard Jackson	AWS (cloud for ...	79500 — Miscellaneous...	General Op...		10000 — Checki...	81.63		6,223.15
Check	04/10/25	3134	Richard Jackson	Annual Zoom lic...	79500 — Miscellaneous...	General Op...		10000 — Checki...	892.40		7,115.55
Check	04/10/25	3134	Richard Jackson	Annual Survey ...	79500 — Miscellaneous...	General Op...		10000 — Checki...	468.00		7,583.55
Total 79500 — Miscellaneous Expenses									7,583.55	0.00	7,583.55
79000 — Gifts and Awards Expense											
Check	01/17/25	3113	Isabel Newberg	Reimb BellaN for...	79000 — Gifts and Awa...	January Co...		10000 — Checki...	2,397.07		2,397.07
Check	01/17/25	3116	Richard Jackson	RC Awards plaq...	79000 — Gifts and Awa...	General Op...		10000 — Checki...	170.16		2,567.23
General Journal	01/17/25	Recode...			79000 — Gifts and Awa...			82000 — Cnf Gift...		2,397.07	170.16
Check	04/28/25	3137	CSU Northridge Universi...	Reimb HCairns ...	79000 — Gifts and Awa...	General Op...		10000 — Checki...	85.75		255.91
Check	04/30/25	3139	Erin Pruitt	2025 AOA Schol...	79000 — Gifts and Awa...	General Op...		10000 — Checki...	5,000.00		5,255.91
Total 79000 — Gifts and Awards Expense									7,652.98	2,397.07	5,255.91
78000 — Web Hosting/Maintenance Exp											
Check	07/13/24	3053	Dent Agency LLC	Website maint J...	78000 — Web Hosting/...	General Op...		10000 — Checki...	3,096.60		3,096.60
Check	08/12/24	3055	Dent Agency LLC	Website maint A...	78000 — Web Hosting/...	General Op...		10000 — Checki...	3,096.60		6,193.20
Check	10/14/24	3079	Dent Agency LLC	Website maint S...	78000 — Web Hosting/...	General Op...		10000 — Checki...	3,096.60		9,289.80
General Journal	10/14/24	Recode...			78000 — Web Hosting/...			78500 — Website...	3,096.60		12,386.40
Check	11/12/24	3085	Dent Agency LLC	Website maint N...	78000 — Web Hosting/...	General Op...		10000 — Checki...	3,096.60		15,483.00
Check	11/12/24	3092	Centium Software, Inc.	EAir Temp Prem...	78000 — Web Hosting/...	January Co...		10000 — Checki...	1,450.00		16,933.00
General Journal	11/12/24	Recode...			78000 — Web Hosting/...			88000 — Web/A...		1,450.00	15,483.00
Check	01/17/25	3115	Dent Agency LLC	Website maint D...	78000 — Web Hosting/...	General Op...		10000 — Checki...	3,096.60		18,579.60
Check	01/17/25	3115	Dent Agency LLC	Website maint J...	78000 — Web Hosting/...	General Op...		10000 — Checki...	3,096.60		21,676.20
Check	03/21/25	3123	Dent Agency LLC	Website maint F...	78000 — Web Hosting/...	General Op...		10000 — Checki...	3,096.60		24,772.80
Check	03/21/25	3123	Dent Agency LLC	Website maint ...	78000 — Web Hosting/...	General Op...		10000 — Checki...	3,096.60		27,869.40
Check	04/28/25	3138	Dent Agency LLC	Website maint A...	78000 — Web Hosting/...	General Op...		10000 — Checki...	3,096.60		30,966.00
Total 78000 — Web Hosting/Maintenance Exp									32,416.00	1,450.00	30,966.00
77400 — Research Admin Com Expenses											
Check	10/14/24	3076	Bessie Strategos	B Strategos RAC...	77400 — Research Adm...	General Op...		10000 — Checki...	761.39		761.39
Check	12/21/24	3099	Chantal Ebarle	RAC Summer M...	77400 — Research Adm...	General Op...		10000 — Checki...	1,116.94		1,878.33

Auxiliary Organizations Association (AOA)
Custom Transaction Detail Report
 July 2024 through June 2025

Type	Date	Num	Name	Memo	Account	Class	Clr	Split	Debit	Credit	Balance
Check	06/03/25	3152	Cal Maritime Corporation	9/17-19, 2024 ...	77400 — Research Adm...	General Op...		10000 — Checki...	2,781.50		4,659.83
Total 77400 — Research Admin Com Expenses									4,659.83	0.00	4,659.83
77200 — HR Committee Expenses											
Check	07/13/24	3051	Beach Shops, CSU Long ...	HR Conf June in ...	77200 — HR Committe...	General Op...		10000 — Checki...	8,109.72		8,109.72
Check	07/13/24	3052	SJSU Research Foundation	Reimb HR Conf ...	77200 — HR Committe...	General Op...		10000 — Checki...	6,042.99		14,152.71
Check	08/18/24	3063	Ranjit Kaur	June Conference...	77200 — HR Committe...	General Op...		10000 — Checki...	114.93		14,267.64
Check	08/18/24	3064	Andrea Bozant	Reimb HR Jun C...	77200 — HR Committe...	General Op...		10000 — Checki...	205.09		14,472.73
Check	10/14/24	3078	Shaw HR Consulting, Inc.	Half of \$2500 f...	77200 — HR Committe...	General Op...		10000 — Checki...	1,250.00		15,722.73
Total 77200 — HR Committee Expenses									15,722.73	0.00	15,722.73
77000 — AS/SU Committee Expenses											
Check	08/12/24	3056	Brandon M Tsubaki	Gloria Romano t...	77000 — AS/SU Commi...	General Op...		10000 — Checki...	300.00		300.00
Total 77000 — AS/SU Committee Expenses									300.00	0.00	300.00
76500 — Executive Committee Meeting Exp											
Check	08/16/24	3057	Richard Jackson	Sheraton deposi...	76500 — Executive Co...	General Op...		10000 — Checki...	3,000.00		3,000.00
Check	09/10/24	3066	Richard Jackson	Sheraton deposi...	76500 — Executive Co...	General Op...		10000 — Checki...	6,049.53		9,049.53
Check	09/10/24	3066	Richard Jackson	Sheraton deposi...	76500 — Executive Co...	General Op...		10000 — Checki...		981.14	8,068.39
Check	09/10/24	3066	Richard Jackson	Officers dinner ...	76500 — Executive Co...	General Op...		10000 — Checki...	52.76		8,121.15
Total 76500 — Executive Committee Meeting Exp									9,102.29	981.14	8,121.15
76000 — Executive Committee Travel Exp											
Check	07/13/24	3049	CSU Northridge Universi...	Reimb HCairns J...	76000 — Executive Co...	January Co...		10000 — Checki...	131.00		131.00
Check	08/18/24	3065	Cal Poly Partners	Andrea Burns A...	76000 — Executive Co...	General Op...		10000 — Checki...	772.25		903.25
Check	09/13/24	3070	CSU, Sacramento Univer...	ASingletary Aug...	76000 — Executive Co...	General Op...		10000 — Checki...	686.72		1,589.97
Check	09/26/24	3072	CSU Northridge Universi...	Reimb GSlavik A...	76000 — Executive Co...	General Op...		10000 — Checki...	381.67		1,971.64
Check	10/14/24	3081	CSU Northridge Universi...	Reimb HCairns ...	76000 — Executive Co...	General Op...		10000 — Checki...	789.41		2,761.05
Check	12/09/24	3095	CSU Northridge Universi...	Reimb HCairns ...	76000 — Executive Co...	General Op...		10000 — Checki...	98.00		2,859.05
Check	03/21/25	3122	CSU, Sacramento Univer...	ASingletary hote...	76000 — Executive Co...	General Op...		10000 — Checki...	291.90		3,150.95
Check	03/21/25	3122	CSU, Sacramento Univer...	ASingletary trav...	76000 — Executive Co...	General Op...		10000 — Checki...	320.40		3,471.35
Check	03/21/25	3124	AS Inc., Cal Poly San Lui...	MCrawford Jan ...	76000 — Executive Co...	General Op...		10000 — Checki...	189.00		3,660.35
Check	03/21/25	3124	AS Inc., Cal Poly San Lui...	MCrawford Jan ...	76000 — Executive Co...	General Op...		10000 — Checki...	291.90		3,952.25
Check	04/30/25	3143	Kacie Flynn	Reimb EC travel ...	76000 — Executive Co...	General Op...		10000 — Checki...	1,004.60		4,956.85
Check	05/12/25	3147	CSU, Sacramento Univer...	ASingletary Apri...	76000 — Executive Co...	General Op...		10000 — Checki...	461.26		5,418.11
Check	05/12/25	3149	Ranjit Kaur	Ranjit Kaur April...	76000 — Executive Co...	General Op...		10000 — Checki...	682.61		6,100.72
Check	06/03/25	3153	CSU San Marcos Associa...	Annie Macias EC...	76000 — Executive Co...	General Op...		10000 — Checki...	604.63		6,705.35
Total 76000 — Executive Committee Travel Exp									6,705.35	0.00	6,705.35
75300 — Insurance Expense											
Check	08/18/24	3059	CSURMA	24-25 Liabiity/...	75300 — Insurance Exp...	General Op...		10000 — Checki...	7,835.00		7,835.00
Total 75300 — Insurance Expense									7,835.00	0.00	7,835.00
75000 — Audit/Tax Prep Expenses											
Check	09/13/24	3069	KCoe Isom, LLP	Partial 6/30/24 ...	75000 — Audit/Tax Pre...	General Op...		10000 — Checki...	8,250.00		8,250.00
Check	09/26/24	3073	KCoe Isom, LLP	AOA Audit 23-2...	75000 — Audit/Tax Pre...	General Op...		10000 — Checki...	8,250.00		16,500.00
Check	11/12/24	3088	Pinion, LLC	FY2023-4Finan...	75000 — Audit/Tax Pre...	General Op...		10000 — Checki...	2,750.00		19,250.00
Total 75000 — Audit/Tax Prep Expenses									19,250.00	0.00	19,250.00
73000 — Retainer- HR Counsel											
Check	11/12/24	3086	Constangy, Brooks, Smi...	Legal consult 23...	73000 — Retainer- HR ...	General Op...		10000 — Checki...	29,042.74		29,042.74
Check	11/12/24	3086	Constangy, Brooks, Smi...	Legal consult 24...	73000 — Retainer- HR ...	General Op...		10000 — Checki...	595.00		29,637.74
Check	11/12/24	3091	Constangy, Brooks, Smi...	Legal consult 7/...	73000 — Retainer- HR ...	General Op...		10000 — Checki...	11,690.00		41,327.74
Check	01/01/25	3101	Constangy, Brooks, Smi...	Legal consult th...	73000 — Retainer- HR ...	General Op...		10000 — Checki...	2,835.00		44,162.74

Auxiliary Organizations Association (AOA)
Custom Transaction Detail Report
 July 2024 through June 2025

Type	Date	Num	Name	Memo	Account	Class	Clr	Split	Debit	Credit	Balance
Check	04/28/25	3136	Constangy, Brooks, Smi...	Legal consult N...	73000 — Retainer- HR ...	General Op...		10000 — Checki...	18,075.09		62,237.83
Total 73000 — Retainer- HR Counsel									62,237.83	0.00	62,237.83
72500 — AOA General Counsel Expenses											
Check	11/12/24	3091	Constangy, Brooks, Smi...	Legal consult 7/...	72500 — AOA General ...	General Op...		10000 — Checki...	799.37		799.37
Total 72500 — AOA General Counsel Expenses									799.37	0.00	799.37
71000 — Retainer – Legislative Liaison											
Check	07/13/24	3048	Robert E. Griffin	RGriffin Leg/co...	71000 — Retainer – Leg...	General Op...		10000 — Checki...	5,025.00		5,025.00
Check	10/14/24	3080	Robert E. Griffin	RGriffin Leg/co...	71000 — Retainer – Leg...	General Op...		10000 — Checki...	3,975.00		9,000.00
Check	01/01/25	3102	Robert E. Griffin	RGriffin Leg/co...	71000 — Retainer – Leg...	General Op...		10000 — Checki...	2,850.00		11,850.00
Check	04/28/25	3135	Robert E. Griffin	RGriffin Leg/co...	71000 — Retainer – Leg...	General Op...		10000 — Checki...	4,725.00		16,575.00
Total 71000 — Retainer – Legislative Liaison									16,575.00	0.00	16,575.00
70500 — S/T Travel & AOA Office Expense											
Check	07/13/24	3047	AT&T Mobility	7/4/24 – 8/3/24	70500 — S/T Travel & A...	General Op...		10000 — Checki...	91.72		91.72
Check	07/13/24	3054	Richard Jackson	Reimb for Shera...	70500 — S/T Travel & A...			10000 — Checki...			91.72
Check	08/16/24	3057	Richard Jackson	July pay and rei...	70500 — S/T Travel & A...			10000 — Checki...			91.72
Check	08/18/24	3058	AT&T Mobility	8/4/24 – 9/3/24	70500 — S/T Travel & A...	General Op...		10000 — Checki...	98.72		190.44
Check	09/10/24	3066	Richard Jackson	RJ Travel Claim ...	70500 — S/T Travel & A...	General Op...		10000 — Checki...	1,109.76		1,300.20
Check	09/13/24	3068	AT&T Mobility	8/4/24 – 9/3/24	70500 — S/T Travel & A...	General Op...		10000 — Checki...	98.72		1,398.92
Check	10/14/24	3077	AT&T Mobility	10/4/24 – 11/3...	70500 — S/T Travel & A...	General Op...		10000 — Checki...	91.74		1,490.66
Check	12/09/24	3097	AT&T Mobility	11/4/24 – 1/3/...	70500 — S/T Travel & A...	General Op...		10000 — Checki...	191.48		1,682.14
Check	12/21/24	3098	AT&T Mobility	11/4/24 – 1/3/...	70500 — S/T Travel & A...	General Op...		10000 — Checki...	199.48		1,881.62
Check	01/01/25	3100	AT&T Mobility	1/4/25– 3/3/25	70500 — S/T Travel & A...	General Op...		10000 — Checki...	183.48		2,065.10
Check	01/17/25	3114	AT&T Mobility	1/4/25– 2/3/25	70500 — S/T Travel & A...	General Op...		10000 — Checki...	91.88		2,156.98
Total 70500 — S/T Travel & AOA Office Expense									2,156.98	0.00	2,156.98
70000 — Contacted Services-AOA Bus Mngr											
Check	08/16/24	3057	Richard Jackson	RJ July pay/reim...	70000 — Contacted Ser...	General Op...		10000 — Checki...	4,031.75		4,031.75
Check	09/10/24	3066	Richard Jackson	RJ Aug pay/reim...	70000 — Contacted Ser...	General Op...		10000 — Checki...	4,031.75		8,063.50
Check	10/03/24	3074	Richard Jackson	RJ Sept pay/rei...	70000 — Contacted Ser...	General Op...		10000 — Checki...	4,031.75		12,095.25
Check	12/09/24	3096	Richard Jackson	RJ Oct pay/reim...	70000 — Contacted Ser...	General Op...		10000 — Checki...	4,031.75		16,127.00
Check	12/09/24	3096	Richard Jackson	RJ Nov pay/reim...	70000 — Contacted Ser...	General Op...		10000 — Checki...	4,031.75		20,158.75
Check	01/17/25	3116	Richard Jackson	RJ Dec pay/reim...	70000 — Contacted Ser...	General Op...		10000 — Checki...	4,031.75		24,190.50
Check	03/29/25	3131	Richard Jackson	RJ Jan 2025 Con...	70000 — Contacted Ser...	General Op...		10000 — Checki...	4,031.75		28,222.25
Check	03/29/25	3131	Richard Jackson	RJ Feb 2025 Co...	70000 — Contacted Ser...	General Op...		10000 — Checki...	4,031.75		32,254.00
Check	03/29/25	3131	Richard Jackson	RJ Mar 2025 Co...	70000 — Contacted Ser...	General Op...		10000 — Checki...	4,031.75		36,285.75
Total 70000 — Contacted Services-AOA Bus Mngr									36,285.75	0.00	36,285.75
Total Expense									671,053.43	17,884.11	653,169.32
Net Income									676,678.43	63,734.57	-612,943.86

Conference Planning Committee

June 2025 Chair Report



AOA 2026 Conference Updates:

- Theme: The Next Era of Auxiliaries: Shaping Tomorrow
- Conference Location: Oakland Marriott City Center
- Service Providers:

Name	Title
Andrew Singletary	CPC Chair
Patrick Bailey	Conference Administration
Richard Jackson	Logistics Manager
<Vacant>	Marketing, Conference Graphics, Social Media/Mobile Apps Manager
Bella Newberg (Until 12/31/25)	Business Partner Support Manager
Dixie Johnson (Until 6/30/25)	Conference Website Content and Special Projects Manager
Debra Hammond	Session Planning Manager

- Conference Communication:
 - Reminders: Call for Sessions, Business Partner Communication
 - Conference registration to open before end of June.
- Conference Schedule (Draft attached for reference)
 - Moving to program until 4pm on Tuesday, adding super sessions.
 - Moving Chancellor Garcia to 3pm – 4:30pm on Sunday.
 - Moving banquet from Sunday dinner to Tuesday lunch.
 - Sunday social night activities at hotel.
 - Monday night dinner on your own.
- Budget/Financial:
 - 2026 Conference Registration Fee \$775 / Daily \$350
 - Two revenue cut scenarios: 10% and 20% based on 2025 conference revenue. Conference budget attached for reference. Proceed with 20% as a conservative approach.
 - Budget Adjustments/Downsizing/Cuts:
 - Travel/hospitality for CPC Meetings
 - AV – Internet Access, Business Partner Sponsor
 - AV – Breakout Session Projector(s)
- Chancelor Garcia – Request submitted to speak Sunday, January 11th 3pm – 4:30pm.
 - Awaiting Liz Horta’s confirmation from CO.
- Keynote Speaker: Ricardo Lara, California State Insurance Commissioner (SDSU Alumni)

- Mr. Lara's office will not be able to confirm his availability until September.
- Super Sessions
 - Inquiring with Improve Your Tomorrow (IYT)
 - Possible AOA 101

AOA Technology Updates:

- CSU AOA Slack: Plan to invite committee chairs to invite their committees to Slack over summer.
- Establish 1Password team for AOA service providers and officers to share passwords and other secure information.

DRAFT 2026 AOA Conference schedule

Friday, January 9

1:00 – 5:00 Registration Organization and Set-up
 1:00 – 3:00 Conference Planning Committee Meeting
 3:00 – 5:00 Pre-Con meeting with Marriott Staff

Saturday, January 10

12:00 – 12:00 Conference Office and Storage
 9:00 – 11:00 Registration Organization and Set-up
 12:00 – 5:00 Registration Open
 1:00 – 3:00 Pre-Conference Meeting with Session Coordinators
 1:00 – 5:00 Pre-Conference Sessions or optional tours

Sunday, January 11

12:00 – 12:00 Conference Office and Storage
 8:30 – 10:00 Appreciation Reception/breakfast/event for Volunteers
 9:00 – 12:45 Pre-Conference Sessions or optional tours
 9:00 – 5:00 Registration Open
 9:00 – 3:00 Business Partner Expo set-up
 10:00 – 12:00 AOA Executive Committee Meeting
 10:00 – 12:00 AOA Leadership Academy
 10:00 – 2:00 FOA Delegates Lunch & meeting
 10:30 – 1:00 Executive Directors Sunday Brunch (other timing options to consider if this is a conflict)
 1:00 – 2:00 Conference Opening/Welcome/Overview/EC-LA-CPC Intros
 1:00 – 3:00 Standing Committee Meetings (eight breakouts)

Philanthropy

AS/Student Union/Recreation

Business and Financial Services

Research Administration

Human Resources

Commercial Services

Information Technology

Risk

3:00 – 4:30 Conference Opening/Welcome/Overview/EC-LA-CPC Intros Chancellor's Remarks
 4:30 – 6:30 Expo Grand Opening, Sponsored by
 6:30 – 8:30 Welcome Reception could be programmed into Sunday Dinner & Games could also be billed as the BP Networking Night Sponsored by
 BP Receptions **TBD**

Monday, January 12

12:00 – 12:00 Conference Office and Storage

7:30 – 8:45 Breakfast, Sponsored by

8:00 – 5:00 Registration Open

8:00 – 8:45 VEBA Trustees Meeting

8:00 – 9:00 CSURMA/AORMA Breakfast Meeting

9:00 – 10:15 General Session/Keynote

10:30 – 12:00 Expo Open, Sponsored by

10:45 – 11:30 BP Spotlight/refreshment break, Sponsored by

11:00 – 12:00 **Session Block 1**

Risk

Commercial Services

HR

Philanthropic

Financial Services

AS/Union/Rec

Research

IT

Keynote follow-up session* (optional)

12:00 – 1:15 Business Partner Luncheon, Sponsored by

1:30 – 2:30 **Session Block 2**

Risk

Commercial Services

HR

Philanthropic

Financial Services

AS/Union/Rec

Research

IT

2:30 – 4:00 Expo Open, Sponsored by

3:00 – 3:30 BP Spotlight/refreshment break, final closing drawing at 3:45

3:00 – 5:00 CSURMA EC meeting

4:00 – 7:00 Expo Breakdown

4:00 – 5:00 **Session Block 3**

Risk

Commercial Services

HR

Philanthropic

Financial Services

AS/Union/Rec

Research

IT

5:15- 6:00 AOA Annual Business Meeting

Monday Night is Dinner/Night on your own. CPC can provide some options and do sign-ups

Tuesday, January 13

12:00 – 12:00 Conference Office and Storage

8:00 – 11:00 Registration Open

7:30 – 8:45 Breakfast Roundtables, Sponsored by

8:30 – 5:00 CABO Meeting

9:00 – 10:15 General Session/Chancellor's Office Updates

10:30 – 11:30 Session Block 4

Risk

Commercial Services

HR

Philanthropic

Financial Services

AS/Union/Rec

Research

IT

11:30 – 12:30 Session Block 5

Risk

Commercial Services

HR

Philanthropic

Financial Services

AS/Union/Rec

Research

IT

12:30 - 2:00 AOA Annual Banquet, Sponsored by

2:00 – 4:00 Super Session or two Super Sessions

3:00 Break (served in the Super Sessions) sponsored by

4:00 Conference adjourns. See you in San Diego!

Items that would still need to find a new time/place

Past President's Meeting (has been a breakfast in the past years but last year was at 10:00 on Tuesday. Allow the Past Presidents to select)

President's Reception (Could be on Monday after the Business Meeting...kind of a pre-dinner cocktail hour)

Campus Gifts Drawing (what if they all became silent auction donated items that are displayed/located in the EXPO (provided there is room)...the bidding closing time could become part of EXPO programming. Funds raised could be directed to AOA somehow. Could also ask if others have silent auction items to include in the program (someone might have a hobby/craft, second home, tickets, signed ball/jersey, etc.)

INCOME		2026			Registration Fee	Registration Fee		
Account Cod	Revenue	Notes	Amount					
52000	Business Partner (BP) Income Other(Sponsorships)		0.00		234,000.00	208,000.00		
52300	Business Partner In-Kind Revenue		0.00		0.00	0.00		
50000	Conf. Registration Fees (AOA, CSU, CO Members)	Includes Guest Registrations	0.00		271,025.00	241,575.00		
52100	Business Partner Registration Fees	Additional BP Attendee Fees	0.00		21,750.00	19,500.00		
	Reimbursed Meals - Billed to FOA/CABO/CSURMA				13,540.10	12,035.64		
								\$58,579.70 \$117,159.40
	TOTAL INCOME:		0.00		540,315.10	481,110.64		527,217.30 468,637.60
EXPENSES								
	AOA Service Provider - Contractual Services							
80100	R Jackson							
80200	D Johnson	Refer to 2026 CPC Consulta	111,241.00					
80300	D Hammond							
80460	B Newberg							
80470	P Bailey							
84000	Service Provider Marketing and Graphics	5/23/25 Needs a dollar amount assignment			9,960.00	9,960.00		
	Subtotal		111,241.00		111,241.00	111,241.00		
80500	AOA Service Provider Travel Expense (airfare, mileage and per diem)							
	April 2025 CPC Meeting-in person: Bailey, Hammond, Jackson, Newberg, Singletary		2,600.00					
	August 2025 CPC Meeting - in person: Bailey, Hammond, Jackson, Newberg, Singletary	One day trip - only 1 overnight stay	2,700.00					
	November 2025 CPC Meeting: Bailey, Hammond, Jackson, Newberg, Singletary	One day trip - only 1 overnight stay	2,700.00					
	January 2026 CPC Meeting: Bailey, Hammond, Jackson, Newberg, Singletary		0.00					
	NACAS CX3							
	Subtotal		8,000.00		5,300.00	5,300.00		
80700	Conference Registration Area Support							
	Supplies/Printing		300.00					
	Services							
	Subtotal		300.00		300.00	300.00		
80800	Bank Credit Card Fees:							
			23,000.00					
	Subtotal		23,000.00		23,000.00	23,000.00		
80900	Other Conference Support Expenses							
	supplies		1,500.00					
	Subtotal		1,500.00		1,500.00	1,500.00		
82000	Conference Gifts							
	BP Drawing (gift cards)	Should awards come out of the AOA budget not the conference budget?	2,500.00					
			0.00					
			0.00					
	Subtotal		2,500.00		2,500.00	2,500.00		
83000	Hotel Contract - Meeting Space, Food and Beverage, Group Room - Per Marriott							
	Oakland City Center Contract							
	Facility Fees - Function Space Fees							
	Reduced Meeting Space Fee (Based upon room night commitment)		15,500.00					
	Add/Calculate Various Taxes 10.25%		1,588.75					
	Add/Calculate House Charge for Meeting Room Rental 25%		3,875.00					
	Subtotal		20,963.75		20,963.75	20,963.75		

Hotel Food & Beverage Expenses					
for Budget Calculation - Per hotel Contract Minimum		175,000.00			
Add / Calculate Service Fee 14.50% F&B Staff Chg.		25,375.00			
Add / Calculate Service Fee 10.5% F&B House Chg		2,664.38			
Add / Calculate Various Taxes 10.25%		273.10			
Add/Calculate Corkage Fees		0.00			
Add/Calculate Labor (Bartenders)		0.00			
Subtotal			203,312.47	203,312.47	203,312.47
Room Commitment Costs and Earned Room Nights					
Contracted Room Rate=\$239.00/night plus 14% Occupancy Tax, \$1.40 CA Tourism Tax, \$1.50 Oakland Tourism Tax Total Room Rate=\$275.36					
Maximum Room Commitment 1095 room nights X Room Rate					
Minimum Room Commitment 930 room nights X Room Rate 15% Attrition = \$256,084.80					
AOA Service Providers, CPC Staff - 27 room nights X Room Rate		7,434.72			
CO-Chancellor and Executive Vice Chancellors 4 room nights X Room Rate		1,101.44			
General Session - Keynote Presenters (two presenters) 2 room nights X Room Rate		550.72			
AOA Scholarship Of Excellence & Other Awardees 6 room nights X Room Rate		1,652.16			
Exceptions - Additional Room Charges Approved by CPC Chair and AOA Business Manager		0.00			
Deduct: Earned Room Nights Per Oakland Contract 1 room for every 45 guest rooms = 20 rooms X \$275.36		-5,507.20			
Subtotal			5,231.84	5,231.84	5,231.84
Audio Visual Costs (Encore) Estimate based on 2025 Actual Plus 5% increase					
Internet-Daily Bandwidth (10Mbps)		9,553.00			
Internet-Boost to Daily Bandwidth (50Mbps)		0.00			
Equip. Rental		67,002.00			
Labor (strike/set)		34,167.00			
Service Fee		12,517.00			
Sales Tax		12,632.00			
Subtotal			135,871.00	135,871.00	135,871.00
Shaded Section Below to be Used to Record Actual Expenses per Hotel Bill					
Audio Visual Costs (Encore)					
Internet-Daily Bandwidth (10Mbps)		0.00			
Internet-Boost to Daily Bandwidth (50Mbps)		0.00			
Equip. Rental		0.00			
Labor (strike/set)		0.00			
Service Fee		0.00			
Sales Tax		0.00			
Subtotal			0.00		
Receptions and Refreshment Breaks					
Sunday Welcome Grand Opening BP Expo		0.00			
Monday Morning Refreshment Break		0.00			
Monday Afternoon Refreshment Break		0.00			
Monday Pre-Banquet Reception		0.00			
Monday AOA President's Reception		0.00			
Tuesday Morning Refreshment Break		0.00			
Subtotal			0.00		
Meetings					
Saturday CPC Meeting		0.00			
Saturday Executive Committee Meeting		0.00			
Saturday Leadership Academy Meeting		0.00			
Subtotal			0.00		
Dinners					
Sunday Night Social Reception Programming					
Saturday CPC & EC Appreciation Dinner		0.00			
Monday-AOA Annual Banquet		0.00			
Subtotal			0.00		
Breakfasts					
Monday Morning		0.00			
Tuesday Morning		0.00			
Wednesday Morning		0.00			
Subtotal			0.00		
Lunches					
Saturday & Sunday CPC		0.00			
Sunday Executive Director's Luncheon		0.00			
Monday Business Partners Luncheon		0.00			
Tuesday Closing Luncheon		0.00			
Subtotal			0.00		
Penalty Fees Minimum F&B/Meeting Room/Hotel Room Block		0.00			
Other Misc. Costs Included in Hotel Final Bill		0.00			
Subtotal			0.00		
Meal Costs FOA/CABO/CSURMA			0.00		

	Sunday-FOA Meeting Buffet Lunch	0.00			
	Monday CSURMA/AORMA Benefits Breakfast	0.00			
	Monday CSURMA EC Meeting	0.00			
	Tuesday - CABO Meeting	0.00			
	Subtotal		0.00		
	Hotel Room Costs and Earned Room Nights				
	Includes Room/Taxes & Parking				
	AOA Service Providers and Conference AV and Registration Staff	0.00			
	CSU Office of the Chancellor and Executive Vice Chancellor	0.00			
	AOA Scholarship Of Excellence Awardees	0.00			
	Exceptions - Additional Room Charges Approved by CPC Chair and AOA Business Manager	0.00			
	Deduct: Earned Room Nights Per Oakland Contract	0.00			
	Subtotal		0.00		
84000	Marketing/Communications Expense (DO NOT Include Service Provider Contract Here) Refer to AOA Service Provider Contractual Above				
	Conference bags	1,800.00			
	Lanyards	300.00			
	Name Tags/Badges	400.00			
	Lapel Pins	1,300.00			
	Programs/posters printing/signs	3,500.00			
	Photography	0.00			
	Services: Graphic/App/Social Med/Photo	0.00			
	Graphics,Script,banner,staff trvl	0.00			
	EXPO materials/supplies (Balloons, ribbon, bags, etc.)	1,000.00			
	Subtotal		8,300.00	6,640.00	6,640.00
85000	Non-Hotel Function/M meal Expense				
		0.00			
	Subtotal		0.00		
86000	CPC Expenses - Other				
		0.00			
		0.00			
	Subtotal		0.00		
86100	CPC Travel Expense & Hotel				
	April 2025 CPC Meeting: Session Coordinator Olmsted Airfare	150.00			
	April 2025 CPC Meeting: Session Coordinator Olmsted Hotel	266.00			
	August 2025 CPC Meeting: 7 Session Coordinators Airfare from LA Area to Oakland	1,505.00			
	August 2025 CPC Meeting: 7 Session Coordinators Hotel	1,927.52			
	November 2025 CPC Meeting: 7 Session Coordinators Airfare from LA Area to Oakland	1,505.00			
	November 2025 CPC Meeting: 7 Session Coordinators Hotel	1,927.52			
	General Session Presenter Travel Airfare, mileage, parking, per diem 2 Presenters @1,200.00	2,400.00			
		0.00			
		0.00			
	Subtotal		9,681.04	4,000.00	4,000.00
86500	CPC Meeting Expenses Based on Prior Year Estimates				
	April Meeting Expenses - AV/Meeting Room Rental/Breakfast and Lunch	8,700.00			
	August Meeting Expenses - AV/Meeting Room Rental/Breakfast and Lunch	8,700.00			
	November Meeting Expenses - AV/Meeting Room Rental/Breakfast and Lunch	8,700.00			
	April CPC dinner	450.00			
	August CPC dinner	450.00			
	November CPC dinner	450.00			
		0.00			
	Subtotal		27,450.00	8,700.00	8,700.00
87000	CPC Speaker Contract Expense				
	General Session Speaker Fees - 2 speakers estimated at \$10,000.00 for each speaker	20,000.00			
	speaker travel costs to be listed under travel expense	0.00			
	Subtotal		20,000.00	20,000.00	20,000.00
88000	Web/AV Technicians/Eair App				
	Centium Eventsair-Upgrade Subscription - Premium 5-1-25 to 4-30-26	1,450.00			
	Centium EventsAir Annual Subscription - 5 Licenses 5-1-25 to 4-30-26	8,625.00			
	Centium EventsAir Conference Software On-site support January 2026	5,766.00			
		0.00			
	Subtotal		15,841.00	15,841.00	15,841.00

89000	Donated Goods and Services Based on 2025 Actual					
	Business Partner In-Kind Donationss (NACAS and I.D. Me Promotions)			6,500.00		
				0.00		
	Subtotal			6,500.00	0.00	0.00
	TOTAL EXPENSES:					
				599,692.10	574,361.06	574,361.06
	NET Surplus/Loss :			-599,692.10	-34,045.97	-93,250.42
TOTAL NET				10% Cut Revenue \$775 / \$350 Reg	20% Cut Revenue \$775 / \$350 Reg	

Special Project -- Update to Website Member Directory Information

Final Progress Report June 1, 2025 Yearly Tasks Completed

1. Identify Those Individuals Responsible For The Role:
 - Primary Contact Person for the Auxiliary (Executive Director/CEO or Other as designated by the Executive Director/CEO)
 - Chief Financial Officer
 - Human Resources Director
 - AOA Auxiliary Administrator
 - Confirm current protocols and credentials for an AOA member User Account:
 - ✓ Individual must be currently employed or affiliated with an AOA Member Auxiliary In Good Standing, CSU Campus Employee, or Staff affiliated with the CSU, Office of the Chancellor
 - ✓ Email used in submitting a member user account application MUST be have a valid and current AOA/CSU/CO email ending in “.edu”
 - ✓ Track, review, approve and activate ALL valid AOA Member User Account requests on a daily basis. (Refer to item #5 Below)
 - ✓ Track and record on a regular basis all AOA member users that have left the service or are no longer employed by a CSU, Campus, AOA Member Auxiliary or Chancellor’s Office. Submit to the Executive Committee a yearly report that lists all deleted member user accounts (refer to Item #4 Below)
 - ✓ Review and analyze activity status for all AOA members (those members that regularly access the AOA website by using their user’s name and password)
2. Review and Research Current Data Using the Following Resources:
 - AOA Website – Connect/Member User Accounts
 - Auxiliary Organizations of The CSU - Utilizing each CSU Website – Campus Links – Reviewed and Identify Contact Information for those individuals with titles of Executive Director, Chief Executive Officer, Human Resources Director and Chief Financial Officer.
 - AOA 2025 Conference Registration Database - Reviewed and Identified all Attendees with Titles of Executive Director, Chief

Executive Officer, Human Resources Director, Chief Financial Officer

3. Researched, Identified, Contacted and Confirmed Those Individuals Performing the Roles of:
 - Primary AOA Contact for the Auxiliary
 - Executive Director/Chief Executive Officer/OR Other As Designated by AOA Auxiliary Administrator
 - Chief Financial Officer or Other Designated by AOA Auxiliary Administrator
 - Human Resources Director or Other Designated by AOA Auxiliary Administrator
 - AOA Auxiliary Administrator
4. Identify, de-activate and delete from member directories and list serves members that are no longer affiliated with an AOA auxiliary, CSU campus or Chancellor's Office:
 - January – June 1, 2025: 56 AOA members deleted
 - January – December 2024: 91 AOA members deleted
 - January – December 2023: 88 AOA members deleted
 - January – December 2022: 87 AOA members deleted
 - January – December 2021: 85 AOA members deleted
 - January – December 2020: 75 AOA members deleted
 - January – December 2019: 88 AOA members deleted
5. Review, approve and activate new member requests that are affiliated with an AOA Auxiliary, CSU Campus, or Chancellors Office (Email must end in .edu):
 - January – June 1, 2025: There are currently 44 members that submitted a new member request
 - January – December 2024: There were 104 members that submitted a new member request
 - January – December 2023: There were 110 current members that submitted a new member request
 - January – December 2022: There were 64 members that have submitted a new member request
 - January – December 2021: There are 79 members that submitted a new member request
 - January – December 2020: There are 118 members that submitted a new member request
 - January – December 2019: There are 150 members that submitted a new member request

- January – December 2018: There were 3 members that submitted a new member request
 - January – December 2017: Andrew Singletary assisted with the development of the current website and member database, and was the first AOA member to create and then test a new member request
6. Review Total Number of Members That Have Logged on to the Website (Active Users) From January 1, 2019 through June 1, 2025. Of the **676 AOA Member Users** that have an AOA member user account, the following counts reflect the number of users that have been active users during the stated time frames below:
- January – June 4, 2025: There are currently 238 members that have logged on and used the AOA website
 - January – December, 2024: 154 members logged on and last used the AOA website
 - January – December, 2023: 64 members logged on and last used the AOA website
 - January – December, 2022: 33 members logged on and last used the AOA website
 - January – December 2021: 51 members logged on and last accessed the AOA website
 - January – December 2020: 30 members logged on and last accessed the AOA website
 - January – December 2019: 14 members logged on and last accessed the AOA website
 - Of the current 676 AOA members that have active accounts, 92 have never logged on and accessed the AOA website
- Recommend that in future, protocols be set to review, inform and then delete All AOA member user accounts that have been inactive for 48 months or longer
7. Record Updated Information (Working spreadsheet Entitled ***AOA Contact Information Auxiliary CEO's, CFO's, HR Directors, Auxiliary Administrator***). Spreadsheet Contains Four Tabs (Auxiliary ED's and CEO's, Auxiliary CFO's, Auxiliary HR Director and Auxiliary Administrator) with each Tab Containing The Following:
- Name of Auxiliary
 - Campus
 - Email of Contact

- Phone Number of Contact
 - Name of Contact
 - Title of Contact
 - Misc. Notes (if applicable)
8. Contacted All Auxiliary Executive Officers and Auxiliary Administrators:
Annual Review and outreach completed, Spring, 2025
- Provided Current Member Directory for their Review
 - Provided Instructions for Members/Auxiliary Administrators
 - Assisted with creating new member profiles
 - Provided follow up reminders and additional assistance as needed
 - Received responses from all AOA Member Auxiliaries with the following exceptions:
 - ✓ CSU Bakersfield Auxiliary Sponsored Programs
 - ✓ CSU Bakersfield Foundation
 - ✓ Cal Poly Pomona Philanthropic Foundation
 - ✓ San Jose State University Associated Students
9. Reviewed Member Profiles that had NO Auxiliary Affiliation (100 members) and NO Campus/University Affiliation (8)
- Researched campus directories for current campus email
 - Contact/Provide Information to Auxiliary Administrators and Members
 - Provided follow up inquiries as needed
10. Reviewed Website Directory for Duplicate Member/Email Accounts:
- Researched AOA Member Directory. No individuals were identified as Holding Duplicate Member Profiles
 - Created Instructions For Members Including:
 - ✓ Create and Send Member Communications
 - ✓ Create Member User Accounts
 - ✓ Join Group Communications Portal
 - ✓ Make Changes to Member User Profile
 - ✓ Send Group Communications and Post Documents
11. Total Number of AOA Member Auxiliaries Reviewed To Date: 89
(Average number of Auxiliaries at each campus = 3.71)
- Chancellor's Office - 2 auxiliaries
 - CSU Bakersfield – 4 auxiliaries
 - Channel Islands – 3 auxiliaries
 - Chico – 3 auxiliaries
 - Dominguez Hills – 4 auxiliaries

- East Bay – 3 auxiliaries
- Fresno – 6 auxiliaries
- Fullerton – 3 auxiliaries
- Humboldt – 4 auxiliaries
- Long Beach – 4 auxiliaries
- Los Angeles – 4 auxiliaries
- Maritime Academy – 3 auxiliaries
- Monterey Bay – 3 auxiliaries
- Northridge – 5 auxiliaries
- Pomona – 3 auxiliaries
- Sacramento – 5 auxiliaries
- San Bernardino – 4 auxiliaries
- San Diego – 5 auxiliaries
- San Francisco – 3 auxiliaries
- San Jose – 5 auxiliaries
- San Luis Obispo – 3 auxiliaries
- San Marcos – 3 auxiliaries
- Sonoma – 3 auxiliaries
- Stanislaus – 4 auxiliaries

12. Assisted CSU Chancellor's Office with review of AOA Auxiliary data located on the CSU Website:

- Auxiliary Legal Name
- Auxiliary website URL/Link
- Auxiliary address
- Auxiliary Contact
- Auxiliary Documents

Most Recent Update completed and forwarded April 1, 2025 to Chancellor's Office - Business and Finance (Brad Wells and Eric Anderson)

Website: <https://www.calstate.edu/csu-system/auxiliary-organizations>

**Special Project – Implementation and Maintenance of Content for
AOA Website
YEARLY PROGRESS REPORT AS OF June 1, 2025**

New Tasks Completed Spring 2025

1. Reviewed and updated content on ALL website pages and sub-pages related to re-activated AOA Standing Committee-Property Development and Management:
 - ✓ Updated all references to *Standing Committee in the Standing Committee Operating Guidelines* and *AOA Policy and Practices Manual*
 - ✓ Updated AOA member forms to include re-activated committee
 - ✓ Created New Group Communications Portal
 - ✓ Created and Organized Folders within Website for Committee meeting agendas, other documents, and presentations
 - ✓ Communicated and provided instructions to Chair and Vice-Chair background of website, member directories and how to use the group communications portal

2. Assist the Chancellor's Office by providing updated data to the CO website for: ***Home/The CSU System/Auxiliary Organization/Find an Auxiliary.***
 URL: <https://www.calstate.edu/csu-system/auxiliary-organizations>
 Status: Completed April 2025 Next Update: Winter 2025

3. Website Page – Jobs Listings: Implemented enhanced jobs manager feature in website to collect anonymous website visitor data for each job listing. Included in enhanced feature is the ability to view/display on the jobs dashboard data regarding page views and search impressions.

Ongoing Tasks To Ensure Website Content Is Accurate:

1. Current Website Content - Identify and confirm content that is currently available to general public and membership
 - Content available to general public to be posted to website in .pdf format
 - Content available to members can be viewed via an active AOA member account
 - Status: Reviewed website and completed updates during January-April, 2025.

2. Content Available to General Public

Home Page

- Conference – Update with 2025 information and links. Added additional links for conference presentations and business partner options – Update by June 15, 2025.
- Business Partners – Updated section with 2025 Premier, Diamond, Platinum and Gold Partners. Content displayed shows embedded BP links that direct user to BP's individual website
- News – Reviewed March 2025. Currently 2 news blog posts. This section on the home page has been renamed “News” and is located under the “About” link
- Why Have an AOA Membership? (Information Only)
 - ✓ AOA Membership Directory
 - ✓ Legislative and Compliance Updates
 - ✓ Professional Advisory Resources
 - ✓ Auxiliary Professional Affiliates and Certifications
 - ✓ Career Opportunities
 - ✓ Professional Monograph Series
 - ✓ Group Insurance Programs
 - ✓ Annual Conference

Status: Reviewed February 2025 – No updates needed

General Information

- About AOA
 - ✓ What is the Auxiliary Organizations Association?
 - ✓ AOA Mission Statement
 - ✓ Past Presidents of AOA (Update yearly)

Status: Reviewed/Updated February, 2025
- List Of Auxiliaries (89 Auxiliaries)

This document contains:

 - ✓ Name of Campus/University
 - ✓ Name of Auxiliary
 - ✓ Address of Auxiliary
 - ✓ Auxiliary URL (active link that will go to individual auxiliary website)

Status: Reviewed/Updated February, 2025
- Public Records
 - ✓ Content introducing public records
 - ✓ Governing Board/Executive Committee (Updated Yearly)

Status: Updated January 2025, March and April, 2025

- ✓ Articles of Incorporation (permanent)
- ✓ Bylaws (permanent-updated only if there are changes)
- ✓ Exempt Organization Letter of Determination (Permanent)
- ✓ Policy and Practices Manual (Updated Yearly) Updated June, 2025
- ✓ Standing Committee Operating Guidelines (Updated as changes are made) Updated May, 2025
- ✓ Audited Financial Statements (Post most recent 5 years) Archive immediate prior year. Updated February, 2025
- ✓ IRS Form 990 (Post most recent 5 years) Archive immediate prior year. Updated February, 2025
- ✓ Annual Budget – Approved 2025-2026 annual budget updated when finalized in June, 2025 – awaiting final approved version passed by the EC in June, 2025

- Contact US

This document contains contact information for

- ✓ AOA Business Manager/CFO
- ✓ AOA President
- ✓ AOA President Elect
- ✓ AOA Immediate Past President
- ✓ AOA Secretary-Treasurer

Status: Updated February, 2025 and March 2025

- Membership – How to Become a Member

- ✓ Review and updates to Instructions for How to Become a Member
- ✓ New Member Signup Form (Instructions and Link to Form)

Status: Reviewed February, 2025, Updated in May, 2025

3. Content Available to Members - Only AOA members that have an approved/active member profile can view this information

Connect

- Members (content describing directory and link to membership data) As June 5, 2025 there are 676 active member accounts, compared to August, 2024 when there were 677 active member accounts
- Executive Committee Roster – Updated February and May, 2025

- The Committees of AOA – Updated February, April, and May 2025
 - ✓ Associated Students/Student Unions/Recreation Centers
 - ✓ Business and Financial Services
 - ✓ Commercial Services
 - ✓ Conference Planning Committee
 - ✓ Executive Committee
 - ✓ Human Resources
 - ✓ Information Technology
 - ✓ Long Range Planning Committee
 - ✓ Nominations Committee
 - ✓ Past Presidents
 - ✓ Philanthropy Committee
 - ✓ Property Development and Management (Re-Activated April, 2025)
 - ✓ Research Administration
 - ✓ Risk Management and Insurance Programs
- Group Communication Portals - Current Standing Committee Chairs and Vice Chairs are assigned the credentials of “Moderators.” The moderator role allows for the posting of any document to the group communication portal such as meeting agendas, minutes, and power point presentations. Moderator(s) assigned to the *All-AOA Members* group communications link will be limited to the AOA Business Manager, and as back up, the AOA Service Provider(s) assigned with oversight of the AOA website. **It is current protocol that all standing committee chairs use the group communications portal for standing committee announcements and communications.** As of 6-1-2025 the number of members and number of documents listed for each of the Standing Committees are:
 - ✓ ASI/Student Unions/Recreation Centers
 - 2025: 67 members/21 documents
 - 2024: 66 members/18 documents
 - ✓ Business and Financial Services
 - 2025: 70 members/12 documents
 - 2024: 66 members/11 documents
 - ✓ Commercial Services
 - 2025: 30 members/14 documents
 - 2024: 28 members/14 documents
 - ✓ Human Resources

- 2025: 79 members/30 documents
- 2024: 71 members/18 documents
- ✓ Information Technology
 - 2025: 33 members/22 documents
 - 2024: 31 members/22 documents
- ✓ Past Presidents
 - 2025: 10 members/1 document
 - 2024: 11 members/1 document
- ✓ Philanthropy Committee
 - 2025: 34 members/41 documents
 - 2024: 37 members/35 documents
- ✓ Property Development and Management
- ✓ 2025: 4 Members/1 document
- ✓ 2024: 0 Members In-Active Status
- ✓ Research Administration
 - 2024: 56 members/49 documents
 - 2024: 52 members/45 documents
- ✓ Risk Management
 - 2025: 36 members/0 documents
 - 2024: 31 members/0 documents
- ✓ All AOA Members – All subscribed/active members (676) have been linked/joined this group communications
- Support Services – Webpage content includes a description of the service, primary contact information and links to support provider(s) website. Status: Updated March, 2025
 - ✓ California State University Risk Management Authority (CSURMA)
 - ✓ Auxiliary Organization Risk Management Alliance (AORMA)
 - ✓ CSURMA/AORMA Benefits Program and Committee Contact Information
 - ✓ AORMA Human Resources Consulting
 - ✓ AORMA Unemployment Insurance Program
 - ✓ AORMA Workers' Compensation Program
 - ✓ AOA Compliance Consultant
 - ✓ AOA Labor and Employment Legal Counsel
 - ✓ AOA Legal Counsel
 - ✓ AOA Website Content Management
 - ✓ AOA Website Design and Development and Support

- ✓ CSU Auxiliaries Multiemployer Voluntary Employees' Beneficiary Association (VEBA)
- ✓ AOA Service Providers
- Calendar of Events, Status: Updated with 2025 meeting dates, times, venue for AOA committee meetings, CSU Board of Trustees meetings, and AORMA meetings. As of June 1, 2025 there are 65 events listed - **Require all standing committee chairs submit to AOA Business Manager and AOA Website Content Manager, all 2025 and 2026 meeting dates, times, locations, agendas and minutes**

Resources

- Reports – Reviewed and updated May, 2025
 - ✓ Management Entries: 22 documents listed
 - ✓ Governance Entries: 19 documents listed
 - ✓ Compliance Entries: 12 documents listed
 - ✓ Legislative Reports: 24 documents listed
- Chancellors Office
 - ✓ Links added for CO Website and CSU Policy Library

Conference

Content for the 2026 conference website to be activated June, 2025, when registration opens

About

- Awards and Achievements (Updated Yearly) – Award processes are fully automated and all forms for present and past award cycles reside permanently on AOA website storage platform

- ✓ Lifetime Honorary AOA Member Award
- ✓ Outstanding Accomplishment Award
- ✓ Scholarship of Excellence Award – Automated processes and forms created in prior years. Updated for Fall 2026 award cycle

Status: All award processes, automated forms and links are updated and current and all processes have been tested in May, 2025 and are ready to be activated for Fall award cycle

- ✓ Form - Lifetime Nomination Electronic Submission
- ✓ Form - Outstanding Accomplishment Award Submission
- ✓ Form – Scholarship of Excellence Award Submission

Status: All automated forms updated and tested in May, 2025 and are ready to be activated for Fall award cycle

Careers

As of June 1, 2025, there are 34 active job postings residing on the website.

The average number of views is 27 views per job. The average number of impressions (How many times the job listing was seen in search results) is 362 impressions per job. If a job posting does not have a close or expiration date, it shall remain on the site for a designated period of time (currently six months), then the job posting will be deleted from the site. Reviewed on a monthly basis. Last review was June, 2025

4. Word Press – Administrative Tasks - Written Instructions for AOA Word Press Administrators:
 - ✓ Instructions To Review and Print Nomination and Award Forms from AOA Website
 - ✓ Instructions How to Post a job
 - ✓ Status: Reviewed June, 2025
5. Word Press - Affiliated Auxiliaries and Campus Drop Down Lists created in Word Press. Reviewed/Updated/Alphabetized, Feb, 2025. Lists appear in the following forms:
 - ✓ Member Sign Up Form
 - ✓ Careers – Submit A Job Form
 - ✓ AOA Executive Committee Nomination Form
 - ✓ Scholarship of Excellence Form
 - ✓ AOA Outstanding Accomplishment Form
 - ✓ Lifetime Honorary AOA Member Form
 - ✓ AOA Leadership Academy Application Form
6. Word Press –Media-Library Folders created and organized by website page to categorize and manage 409 media files. Created a delete folder to manage and track outdated media files. **Recommend that in the coming year, current stock Website images and banners be reviewed and refreshed/updated by purchasing stock images relative to category/page topic.**
7. Interact and communicate with DENT Agency website managers. Maintain and utilize DENT Agency Basecamp Application for ALL AOA content updates.

AOA Monograph Writing and Publishing Guide

I. Background and Purpose

The mission and purpose statement for the Auxiliary Organizations Association (AOA) includes:

Professional development: access to information, leadership skills, and organizational management through a variety of mechanisms, ... [including] timely auxiliary information and resources.

For five decades AOA has published a commissioned professional monograph series for its members on governance, compliance and management.

AOA monographs are important for disseminating timely, specialized knowledge within the auxiliary organization community and beyond. Authored by experienced auxiliary professionals, these papers offer well researched, cogent analysis on specific topics – advancing knowledge, and fostering awareness, dialogue and common understandings.

Issue Briefs are salient primers, cutting to the heart of compliance matters in clear, concise plain language – backed by annotations.

This guide outlines the nature of the AOA monograph series, offers guidance on the publishing process, together with resources to support authors. Through planning, topic focus, and research, the monograph series will continue to contribute significantly to the AOA mission.

II. Nature of The AOA Monograph

A professional monograph should be a closely researched and well-reasoned work of academic proportions written by an experienced author or an author-group focused on a specific subject area or narrow topic of immediate or sustaining interest to member-organizations. Such papers are customarily brief, yet may be extensive depending on the topic. They are unlike textbooks or reference books, yet commonly rely on and cite authoritative book-works and resources.

Key characteristics of the professional AOA monograph include:

Focus: Scope should be carefully evaluated to delve thoroughly into a particular subject, often presenting new or restated research, theories or methodologies. They aim to advance knowledge in a specific subject area.

Authorship: By knowledgeable professionals who have conducted research on the topic, the work should reflect the author's relevant expertise and contributions to the auxiliary organization community.

Length: Length varies depending on the study, focus, the complexity of the topic, and specific AOA requirements. However, typical monographs range between 2 to 20 pages. Some monographs might be shortened to concisely restate a timely area of concern. In contrast, others on more data-intensive, technical, or expansive areas could be longer.

Peer Reviewed: These works should undergo peer-review processes to ensure the validity and reliability of the research and analysis. Volunteer colleagues with practical experience with the topic make good peer-reviewers. Authors should acknowledge contributions to the work.

Intended Audience: Primarily aimed at auxiliary boards and management, as well as university officials, and those charged with auxiliary organization interaction and oversight, the monograph should contribute to policy development, compliance, and more effective operations – a reference tool for evaluation and possible action, or reflection.

Value: Monographs should contribute to auxiliary leadership and management development, offering reliable analysis, insights, perspectives or data.

III. The Monograph Project Concept

Before considering a monograph project, several factors should be grasped to help ensure that planning efforts are well-directed and that the final product has positive impact and value.

Estimate Project Time and Effort

Writing a monograph requires substantial time and effort. It may involve extensive research and reading, as well as consultation on the chosen topic. An early, practical time and schedule estimate is crucial.

Proper Focus

Crafting a compelling proposal starts with a well-conceived topic suitable for monograph treatment. Subject matter treatment should be concise, yet thorough and presented in an organized fashion. Don't replicate information easily found elsewhere.

Audience Identification: The intended audience should be clearly understood, helping to tailor content, style and presentation.

Resources at Hand: Ensure that necessary research and peer-support resources will be available during the writing/editing phase.

Project Schedule: Refine the realistic schedule for research, outlining, drafting, peer review, revising, submission, additional editing and publishing the monograph – including possible delays.

Peer Feedback on Project Concept: Seek feedback from peers and mentors throughout the writing process, but particularly at the project concept phase to refine analysis and improve the overall quality of the work.

IV. Publishing the Monograph

Publishing an AOA monograph involves several steps after the concept phase to reach final distribution online.

A. Proposal and Submission

Understanding the Publisher: AOA is a member-organization governed by the Executive Committee as Publisher. Written proposals are judged on a cost-benefit basis through a review and acceptance process that may vary depending on the nature and scope of the project.

Preparing a Proposal: A monograph proposal should be written to include a brief statement of the project, a topic coverage-outline, target readership, project schedule, planned peer-review, and a cost estimate (usually expressed in hours/rate).

Explain how your work contributes to the AOA mission.

Submission: Submit the proposal in memorandum form (with attachments) to the AOA Business Manager on behalf of the Publisher.

B. Proposal Reviews and Approvals

Edit and Peer Preview: The AOA Publisher proposal-review process may involve editing and/or peer previewing with consultations involving the author. This stage ensures the scholarly value and quality of the work.

Revisions: Based peer previews, the proposal may need revision.

Funding Approval: If the Publisher is satisfied with the reviews and revisions, funding is authorized, and a publishing agreement offered outlining the terms and conditions, including deadlines and rights.

C. Manuscript Preparation

Writing: Complete the manuscript according to the agreed timeline and scope of work, involving thorough research, outlining, drafting text, initial self-editing, and peer-reviews. Monograph form and style should follow **Appendix** standards.

Submission: Submit the complete manuscript in WORD and PDF to the Business Manager for review, proofreading, and acceptance process.

D. Production

Copyediting: The Publisher will designate a copyeditor to review the manuscript for grammar, style, consistency and clarity. This stage involves close collaboration between the author and the copyeditor to address any queries or changes.

Design and Proofreading: The manuscript is evaluated according to the Publisher's standards. This includes layout, fonts, headings and any illustrations or tables. See **Appendix**.

E. Distribution

The monograph manuscript is then posted in PDF format on the *Resources-Reports* page of the AOA website once the final proof is approved. AOA members are free to read and download these posted papers.

F. Feedback and Reviews: On a coordinated basis, the author and Publisher collect and respond to feedback and reviews on posted monographs.

V. Support Resources for Authors

Writing a professional monograph can be a challenging as well as a rewarding experience requiring close planning, careful research, meticulous writing, and support. Here are some resources that can help through the writing stages:

A. Books and Guides

- [*The Craft of Research*](#) by Wayne C. Booth, Gregory G. Colomb and Joseph M. Williams provides insights into research methods and writing techniques essential for academic writing.
- [*The Dissertation-to-Book Workbook*](#) by Katelyn E. Knox and Allison Van Deventer offers a series of manageable, concrete steps with exercises to help revise an academic manuscript into publishable book form.
- [*How to Write a Book Proposal*](#) by Jody Rein and Michael Larsen is a comprehensive guide on writing compelling proposals.
- [*Writing Successful Academic Books*](#) by Anthony Haynes, Charles B. Harris and Ben Jonson is a practical guide that covers various aspects of writing and publishing.

B. Online Resources

- [Academic Book Titles: How to title your monograph titles](#) based on the quantitative data extrapolates more accessible monograph title suggestions.
- [Cambridge University Press Author Hub](#) offers resources for authors preparing, writing and publishing academic works.

- [Purdue Online Writing Lab](#) (OWL) offers a wealth of resources on academic writing, including grammar, style and formatting guidelines.
- [The Scholarly Kitchen](#) is a blog by the Society for Scholarly Publishing offering insights into the academic publishing industry.
- [Writing Center at the University of North Carolina at Chapel Hill](#) provides handouts and videos on various aspects of academic writing and publishing.

C. Software Tools

- [EndNote](#) is a reference management software that simplifies referencing and creating bibliographies.
- [Grammarly](#) is a writing assistant that helps with grammar, style and punctuation.
- [Hemingway](#) is a powerful writing software that helps organize and manage large writing projects like monographs.
- [Zotero](#) is a free reference management tool to help you collect, organize, cite and share research.

D. Academic Networks and Communities

- [Academia.edu](#) is a platform for academics to share research papers and follow the work of others in their field.
- [ResearchGate](#) is a social networking site for scientists and researchers to share papers, ask and answer questions and find collaborators.

E. Workshops and Courses

[Coursera](#) offers various courses on academic writing and research methods.

[edX](#) provides online courses on writing and publishing in academia.

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Appendix

Professional Monograph Format and Style Standards

Each professional AOA monograph should follow a consistent format and style throughout. A modest number of format requirements are described below. Authors should follow accepted stylistic practices (“style guides”), consistent with the below standards.

Examples of widely used style guides include:

- *MLA Handbook for Writers of Research Papers, Theses and Dissertations*
- Kate L. Turabian, *A Manual for Writers of Term Papers, Theses, and Dissertations*.
- *The Chicago Manual of Style*
- *The Redbook, A Manual on Legal Style*

Format Standards

Monograph Elements

Monographs elements are typically presented in this order:

Collectively, elements numbers 1-7 are referred to as “Front Matter;” element number 8 is the “Body” or “Main Text” (which is usually divided into separate sections); and the remaining elements, numbers 9 and 10, are the “Back Matter.”

“REQUIRED” means the element must be included in every paper; while optional means the author can elect to exclude that particular element. If an optional element is excluded, omit it entirely and arrange the remaining elements in the order indicated.

Front Matter

1. **Title** page (optional)—the date must be the month and year in which the paper is planned for publication. Do not number this page.
2. **Abstract** page which must be double-spaced (optional)—this page is typically numbered Roman numeral ii)
3. **Copyright** page (optional)
4. **Acknowledgments** page (optional)
5. **Dedication** page (optional)
6. **Table of Contents** (optional)
7. **List of Tables, List of Figures, List of Abbreviations**, etc. (optional—only consider if one or more of these lists appear in the monograph). Use a separate page at the start of each type of list.

Body or Main Text (REQUIRED)

8. **Body of monograph.** Begin page numbering with Arabic numerals and number each page consecutively to the end of the paper. Do not skip any pages within the main body. At the heading on the first page: **Title, Author’s Name, Date**, and followed by this inset:

Monographs are published for AOA member-organizations in support of authorized functions as auxiliary organizations in good standing. They are not intended to address specific circumstances of any particular entity, transaction, relationship, individual, or circumstance. They should not be relied upon as legal advice or as a substitute for it. Qualified professionals should be consulted if specific advice or information is sought. Regular governing board legal counsel briefings are encouraged and would include the topic of this paper. *CSU Auxiliary Organizations Compliance Guide §7.6.1* (current revision)

Back Matter

9. References/Resources/Works-Cited, (REQUIRED)--however, it is optional if provided at the end of Main Body as endnotes or separate section, or as an appendix in Back Matter. If used, see standards below.
10. Appendix (optional).

Style Standards

Regardless of the appropriate style guide chosen, monographs submitted for publication by AOA should meet the following basic style standards.

Page Size: pages must be equivalent to 8 1/2 x 11-inches (letter size). Pages with figures and tables that do not fit optimally in “portrait” position may be set in “landscape” position (11” x 8.5”).

Text: When creating the PDF file, make certain all fonts and symbols are embedded.

Line Spacing: The text should be single-spaced (1.0), or for short papers (up to four pages), space+one-half (1.5). The same line spacing must be used throughout the document except in the following situations where authors may choose to use either single or double spacing. The decision to single or double space must be followed when these situations reoccur:

- *Block quotations:* lists in text, and table and figure titles can be single-spaced.
- *Appendices:* Spacing in appendices will depend upon the nature of the material. Line spacing in appendices may differ from the spacing in the text and may also differ across different appendices.
- *Footnotes:* Single-spaced and a single space should separate each footnote on a page.
- *Endnotes:* Single-spaced with single spacing of text between the notes.
- *References Section:* may use the same spacing of the text throughout or single space.
- *Figure and Table Titles:* It is recommended that they be single-spaced to help differentiate them from text.

Margins: All margins must be a minimum of 1-inch. Any of the approved manuals of style will give rules for setting margins that fall within these limits. Margins must be the same size throughout. Charts, maps, and other illustrative material must fit within the selected margins.

Font: Arial 12-point – one font size and use it throughout the paper Main Text. Smaller font sizes may be used in footnotes, endnotes, figure captions, large tables, and appendices if legible (Fonts smaller than 7 are never considered legible). 14-point should be used titles; 16-point for page top headers. The top center of each page is a catalogue identifying in Arial 16 Bold [number will be assigned with project approval].

Page Numbering: Page numbering begins with the first page of the Main Text, ALL pages, and continuing to the last page of the Main Text numbered consecutively with Arabic numbers (1,2,3,4...etc.). Pages prior to the first page of the Main Text need not be numbered. If so, enter with Roman numerals (I, II, III, IV...etc.).

Placement of Page Numbers: Page numbers must be placed in the bottom center on all numbered pages. Only the appropriately styled number is to be placed in the required location. Page numbers must not contain text or other symbols.

Placement of Page Numbers on Landscape Pages: Page numbers on landscape pages must appear in the same location as portrait pages.

Figures and Tables: Illustrations, diagrams, drawings, paintings, photographs, graphs are labeled as figures. Tables list information in an organized array of rows and columns.

- Material presented in figures or tables MUST fit within the required margins. They must not extend past the left, right, top, or bottom margins.
- Tables or figures which are too long or too wide for a single page should be continued on the next page. The continued material should be labeled with the word Table or Figure, followed by the table or figure number and the abbreviation (Cont.) All column and row headings for tables must be repeated on each continued page.

Location of Figures and Tables in Text: Figures and Tables are often inserted into the body of text near to the text that refers to them. If included in the Main Text, a figure should be placed as close as possible to the first reference made to it. However, inserting figures or tables into the body of the text is NOT required. Figures and tables may be grouped at the end of each section or at the end of the Main Body.

The following requirements must be met if Figures and Tables are presented as in grouped format.

- Do not insert some figures and/or tables into the text and group others at the end of chapters. Group all figures and tables or do not group any of them.
- Do not use figure or table “call outs” (e.g., <Place Figure 1.3 about here> or <Place Table 3.2 about here> anywhere.
- If figures and tables are presented at the end of the section, they must be grouped in the order they occur in the text. Do not group together by type. If the figure is followed by a table in the text the figure should be followed by the table when presented at the end of the chapter.
- When figures and tables are grouped at the end of a section within the main text, they are considered a section of that chapter and should be given the appropriate section heading, such as “Figures,” “Tables,” “Figures and Tables.”
- If figures and tables are grouped at the end of the main text instead of at the end of chapters within the text, they are to be collected in a separate section or appendix which is numbered and given an appropriate title, such as “Figures,” “Tables,” or “Figures and Tables.”
- Each figure or table may be placed on a separate page.
- Several figures or tables may be placed on a single page as long as they remain legible.

Headers/ Headings: Headings (i.e., section and subsection headings, etc.) must be formatted consistently. Section headings (titles) are always presented may be at left margin or at the top center of the page. The use of subheadings is generally up to the author. Subheadings may be numbered or lettered. Follow disciplinary practices, regarding the format of section headings and subheadings (especially regarding bolding, capitalizing, and numbering) and make sure that these practices are followed throughout the monograph. It is not necessary to list subsections in the Table of Contents.

Resources, References or Bibliography: Present these at the end of the Main Text.

- The list of sources presented should begin with the section heading centered on the last page if list fits, or as a separate page. While its heading is listed like a section title in the Table of Contents, the citation list should not be given a section number.
- Page numbers on the list of sources continue the sequence followed in the Main Text.
- Follow disciplinary rules for formatting citations.
- Citations must be preceded by a subheading or heading. Examples of common headings include “Literature Cited,” “Resources,” “References,” or “Bibliography.”

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AOA Compliance and Legislative Program Guide

I. Background and Purpose

The mission and purpose statement for the Auxiliary Organizations Association (AOA) includes:

Professional development: access to information, leadership skills, and organizational management through a variety of mechanisms, ... [including] timely auxiliary information and resources.

The *Compliance and Legislative Program*, a long-standing, integral part of this organizational purpose, is overseen by Executive Committee under written policy,¹ managed under a Service-Provider agreement² by an Advisor, and includes several support and special program elements.

This Guide helps to oversee and facilitate program administration, and as an aid to an interim or successor program Advisor.

II. Program Elements

A. Support Services

Current Compliance Developments. The Advisor identifies, analyzes, tracks, updates, and reports to the Executive Committee and member-organizations on key compliance and policy development issues affecting auxiliary organizations, including Federal and California laws, CSU regulations and policy. Reports include periodic *California Legislation Updates*³ and an *Annual Legislative and Compliance Report* as a timely resource for the annual conference.⁴

Primary reference- resources for this program element include:

- *CA Legislative Information* – <https://leginfo.legislature.ca.gov/>
- *CSU Policy Library* – <https://calstate.policystat.com/>
- *CA Attorney General, Charities* – <https://oag.ca.gov/charities/>
- *CA Secretary of State* – <https://www.sos.ca.gov/business-programs/>
- *NACUBO* – <https://www.nacubo.org/Advocacy/Issues>
- *Independent Sector* – <https://independentsector.org/policy/nonprofit-policy-issues/>

¹ *AOA Policy and Procedures Manual, pages 17-18.*

² Standard form agreement, renewed each year at the Spring Executive Committee meeting for a term beginning July 1.

³ *Updates* are typically included in Executive Committee meeting agendas, and posted in the Resources section of the AOA website.

⁴ The Advisor serves as an Annuitant Advocate for the CSU Office of Advocacy & State Relations, in providing requested summary analysis of bills that may affect auxiliary organizations.

AOA Leadership Consultation. In coordination with the designated officer or manager, the Advisor's support services are requested to review, analyze and report on governance, management, policy development, compliance matters, and business transactions affecting the organization.

Member-Organization Initial Consultation. Designated staff of member-organizations may seek *initial* consultation with the Advisor without charge on legislation or oversight issues, governance, compliance, policy development and management practices, exemption status, corporate formation, restructurings and dissolution, or related matters. This service element contemplates up to a one-hour limit per matter charged to AOA. NB: Member-organizations may, by separate contract, obtain Advisor consultation beyond this support service limit.

B. Special Project Services

Professional Monograph Series. For five decades AOA has published a commissioned professional monograph series for member-organizations on salient governance, compliance and management issues.

AOA monographs are important for disseminating timely, specialized knowledge within the auxiliary organization community and beyond. Authored by the Advisor or experienced auxiliary professionals, these papers offer well researched, cogent analysis on specific topics – advancing knowledge, and fostering awareness, dialogue and common understandings.

Monographs are commissioned at the request of the Advisor or by the Executive Committee to the Advisor. AOA may commission others to author monographs.

See *Writing and Publishing Monographs Guide* on AOA website.

III. Advocacy

To advocate for or against legislation, a law, or regulation requires the consideration and authority of the Executive Committee. The program Advisor's role is limited to analysis and assistance with forming and expressing the organization's position.⁵

IV. Invoicing for Services

The Advisor maintains close records on program services and invoices AOA (attention: Business Manager) on a calendar year quarterly basis.

Invoices describe the support and special services provided the previous quarter by date, client, matter, authorized hourly rate, and time charged.

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⁵ See *AOA Policy & Procedures Manual*, page 17.

2024 CALIFORNIA LEGISLATIVE BILL SUMMARY UPDATE

Bills of Interest to Auxiliary Organizations

June 27, 2025

Deadlines: The last day to introduce bills this calendar year of the 2025-26 California Legislative Session was February 21. “Spot bills” only hint at author’s intent. After 31 days in print, they can be substantially amended. June 6th is the last day for each house to pass bills introduced in that house. *Only tracked bills passed in the originating house appear in this update. “Gut and amended” tracked bills no longer of interest have been delated from this Update.* September 12th is the last day to pass bills in the Session, and the Governor has until October 12 to sign or veto bills across his desk by September 30.

Bill status link:

<https://leginfo.legislature.ca.gov/faces/home.xhtml>

Assembly:

AB 414 (Pellerin) – Residential Tenancies: Return of Security Balance. This bill, as amended in Senate, would require a landlord who received the security deposit or rental payments from the tenant electronically shall furnish the remainder of the security deposit electronically to a bank account or other financial institution designated by the tenant, or by any electronic or virtual method available to the landlord. Alternatively, the landlord and tenant may, by written agreement, designate another method of return, including, but not limited to, by personal delivery or by a check made payable to the tenant and mailed to an address provided by tenant. Passed Assembly; in Senate JUD Committee (6/11/25).

AB 483 (Irwin) – Fixed-Term Installment Contracts: Early Termination Fees. This bill, as amended, would, effective July 1, 2026, require at the time of entering a new or modified retail goods or services fixed term installment consumer contracts to:

- Include either a clear and conspicuous written explanation of the total cost of contract early termination; or the formula by which the fee is calculated, with sample calculation demonstrating the highest possible early termination fee under the contract.
- Prohibit an early termination or any similar fee in an amount greater than 20 percent of the total contract cost.

The above requirements would not prohibit a contract from requiring the return of a good if such a contract is terminated.

The provider of broadband internet access service under federal broadband consumer requirements, as specified, would be deemed compliant.

If enacted as amended, such contract requirements would likely have a very narrow application to any retail arrangements involving campus auxiliary organization goods or services. Auxiliary organizations would need to be alert to these requirements when entering such contracts for goods or services. Passed Assembly. In Senate JUD Committee (6/12/25).

AB 720 (Rogers) – Winegrowers and Brandy Manufacturers: Privileges Off-premises.

This bill would permit specified ABC licensed winegrower and brandy manufacturer off-premises to use wine storage and barrel tipping-off as exercise of license privileges, not as a part of production or manufacture.

Enactment of this bills would likely have little or no impact on campus wine production through auxiliary organizations. Application would be advantageous. Passed Assembly. In Senate GO Committee (5/7/25).

AB 878 (Kalra) – Victims of Abuse or Violence: Landlord Reasonable Accommodations.

This bill, as amended, would require landlords or their agents to make reasonable accommodations at the request of a tenant who is a victim or whose family member is a victim of abuse or violence.

A formal notice and response process is specified. A landlord would be prohibited from retaliating or otherwise discriminating against a tenant for requesting a reasonable accommodation, as specified, and would provide that a landlord is liable to the tenant in a civil action for the same above-described damages, as provided.

The bill would also specify that it does not require a landlord to undertake an action that constitutes an undue hardship on the landlord, as defined, but engage in a thorough evaluation process.

If enacted, this bill would likely have little financial or administrative impact upon campus faculty/staff housing operations by or through an auxiliary organization as landlord, except to further prescribe a more detailed landlord-tenant relationship under the law. Passed Assembly. In Senate Rules Committee (6/5/25).

AB 1148 (Sharp-Collins) – Food Packaging – Hazardous Materials Product Safety. This bill, as amended, would enact the *Safer Food Packing Act of 2025* by expanding product safety precautions to authorize the Department of Toxic Substances Control to adopt regulations to restrict or prohibit the distribution, sale, or offering for sale in the state any of food packaging that contains intentionally added *antimony trioxide* or *specified ortho-phthalates* or *bisphenols*. *trioxide*, *bisphenols*, or *ortho-phthalates*, as specified. The department and the Attorney General, a city attorney, county counsel, or district attorney General would be authorized to enforce the restrictions or prohibition and would subject a person to stated administrative or civil penalties.

The likely impact of this prohibition upon food packaging used by campus auxiliary organizations – as manufacturers, food service providers, or as retailers – is difficult to assess. A reformulation of materials will be needed, along with compliance through the marketing chain when regulations are adopted.

Passed Assembly, In Senate Committees EQ & Health (6/11/25).

Senate:

SB 98 (Perez) – Elementary, secondary, and postsecondary education: immigration enforcement: notification. This bill, an urgency measure, requires the governing boards of local educational agencies (LEA), the California State University (CSU), each California Community College District (CCD), and each Cal Grant qualifying independent institution of higher education and requests the University of California (UC) Regents to issue a notification to specified individuals when the presence of immigration enforcement is confirmed on their respective campuses or school sites. Passed Senate. In Assembly for assignment (6/5/25).

SB 271 (Reyes) – Public postsecondary education: students with dependent children: childcare services, resources, and programs. This bill requires each California State University (CSU) and California Community College (CCC) and requests each University of California (UC) financial aid office, childcare development center, and basic needs center to refer their respective students with dependent children to local resource and referral agencies, and each other for purposes of connecting and informing students of existing childcare services and resources. Passed Senate. In Assembly for assignment (6/5/25).

6/17/25 REG

AUXILIARY ORGANIZATIONS ASSOCIATION

**CORPORATE RESOLUTION:
MASTER BANKING AND FINANCIAL ACCOUNTS
SIGNATURE AUTHORIZATIONS**

WHEREAS: The Auxiliary Organizations Association (AOA) is a California nonprofit public benefit corporation under the Executive Committee as the governing board; and

WHEREAS: The Executive Committee has the corporate authority to manage AOA affairs under California Corporations Code Section 5210 and Bylaws, Article IV, Section 1; and

WHEREAS: AOA has established and maintains a number of financial institution accounts in its corporate name to transact business of the corporation, including as the depository for the funds of this corporation, which may be withdrawn on checks, drafts, advice of debit, notes, or other orders for payments bearing authorized signatures; and

WHEREAS: Designated AOA officials and agents have been authorized by the Executive Committee as signatories to specific accounts; and

WHEREAS: The Executive Committee has determined to authorize to change AOA officials and agents as signatories thereto;

NOW, THEREFORE, BE IT RESOLVED THAT:

1. The following management officials are additional authorized accounts signatories:
Business Manager, Dwayne Brummett
Operations Manager, Kim Clark
2. The accounts signatory authority of Richard Jackson shall expire on [date].
3. The above additional signatory authorizations are effective [date].
4. The authority extended through this resolution includes corporate bank and credit card accounts, online payment systems, management platforms, and similar arrangements established under Executive Committee authority.
5. This resolution may be cited/provided to verify account-holder authorized signatories, or as authority for corporation officers to execute individual account signature cards.

* * *

CERTIFIED as duly adopted by the Executive Committee at its meeting of [date].

[Name], Secretary-Treasurer

AOA MEMBERSHIP DUES POLICY

I. Background and Perspective

In 2011, the Executive Committee restructured the basis for the assessment of member-organization annual dues from reported *revenues* to *operating expenditures*.¹ The rationale for this change was carefully developed by a task force analysis recommended by the Long Range Planning Committee:²

This revised policy reflects the authorized 2011 assessment basis change to *operating expenditures*, and in major part restates the 2009 policy.

The 2009 policy was a consolidation of the August 18, 2006, *Membership Dues Policy* and the January 11, 2003, *Membership Dues Schedule and Limited Delegation of Authority Policy*. Those statements included a summary of action by the Membership at its 2002 Business Meeting to increase the dues rate, and to delegate limited authority to the Executive Committee to adjust the annual dues rates.³ A number of years had elapsed since the last membership dues rate increase. The Executive Committee explored with some success ways to keep the Association fiscally viable without an increase to the dues rate.

The Membership approved limited delegate authority to the Executive Committee to adjust the Membership Dues as set forth below. The expressed reason for this delegation was to provide a more flexible way for the Association to make modest rate adjustments from year-to-year through its governing board, while keeping the membership informed and able to budget for the dues payments.

II. Policy Scope

The Membership Dues Policy is the framework for determining membership dues assessments upon *individuals*, *member-organizations*, *commercial organizations*, and for *recognized affiliate organizations* in accordance with the Bylaws and membership policy.

III. Member Dues Categories & Assessment Basis

¹ Executive Committee Minutes/Agenda Item: August 19, 2011/J5.

² Executive Committee Minutes/Agenda Items: August 20, 2010/J2 ; November 19, 2010/J5; January 8, 2011/J5; March 18, 2011/J6.

³ At its meeting of November 30, 2001, the Executive Committee authorized a proposal for submission to the Membership at its Business Meeting to be held in connection with the 2002 Annual Conference.

A. Individuals: No dues are charged for individuals of member-organizations participating in AOA programs, or through commercial or recognized affiliate member-organizations as approved by the Executive Committee.⁴

B. Member-Organizations: Membership dues for CSU auxiliary organization members in good standing shall be assessed in accordance with the approved and duly published indexed Rate Schedule and shall be based primarily on prior year operating expenditures of the auxiliary reported by the CSU Chancellor's Office. The calculation shall be based on the total of the Expenditure data for the prior June 30 fiscal year is be provided to AOA by the CSU Chancellor's Office each January.

C. Commercial Organizations: These organizations support the mission of AOA by participating via partnership as described in the Annual Conference Business Partnership Policy. These organizations are not subject to membership dues.

D. Recognized Affiliate Organizations: Nonprofit organizations engaged in work pertaining to higher education and/or student affairs that support the mission and activities of AOA are not subject to membership dues, will be listed on the AOA website and may attend the annual conference at the AOA member-organization fee rate. Qualifying nonprofit organizations requesting designation as Recognized Affiliate Organizations should submit a request for approval to the AOA Executive Committee.

IV. Membership Dues Rate Limited Delegated Authority

The Executive Committee has delegated authority from the Membership to adjust the annual member-organization rate of dues a maximum of ten percent (10%) per year commencing in 2003 in order to sustain the financial stability of the Association and to maintain the level of service.

V. Member-Organization Dues Rate Schedule

The Member-Organization Dues Rate Schedule is established annually for an ensuing fiscal year based upon formal Executive Committee action and prompt notification to the Membership no later than January 31 of a previous year. Any adjustment of annual dues beyond the above delegated authority limit shall be referred to the Membership in accordance with the Bylaws.⁵

⁴ Bylaws Article III, Section 2.

⁵ Bylaws Article III, Section 4.

VI. Policy Review

This policy will be reviewed periodically as part of the Long Range Financial Planning process.

Approved by the Executive Committee on , 2025.

DRAFT

1/16/25

Heather Cairns

AOA Immediate Past President

Associate Executive Director, Administrative Services
University Licensing - CSUN
18111 Nordhoff Street | Northridge, CA 91330-8310
P: (818) 677-2744 / heather.cairns@csun.edu

Thank you for your interest in collaborating with IntersectLA. Using established branding and design methods, the IntersectLA team will work closely with you to develop a strategic and creative approach that supports your goals and objectives for this project.

As part of our educational mission, IntersectLA provides an environment where CSUN students are mentored by professional faculty and staff to become job-ready in the creative industry while fostering an entrepreneurial mindset. We implement high-impact, innovative practices that encourage students to be creative in the design process, explore new ideas, and apply advanced techniques as they develop solutions to client challenges.

IntersectLA is a self-funded center within CSUN's Mike Curb College of Arts, Media, and Communication. All funding from completed projects directly supports our operations, including student wages, scholarships, and course credit for working on real-world projects. Our revenue model allows us to remain financially sustainable without relying on additional university funding. For more information, please visit our website.

Clients who work with IntersectLA fully understand that their project will be developed within a learn-by-doing environment by students under the guidance of faculty and staff. By signing the contract, clients acknowledge that their project serves as a professional learning experience for students and that their participation directly contributes to our educational mission.

The following proposal outlines the **Creative Support Services for the AOA Conference**. It includes the process and deliverables for visual design, project management, and coordination of communication materials leading up to and during the event. If certain items can be streamlined for greater cost efficiency, the budget will be adjusted accordingly.

Thank you again for the opportunity. We look forward to working with you and your team. Please don't hesitate to contact us with any questions.

Sincerely,
Prof. Joe Bautista and the **IntersectLA TEAM**

PROJECT OBJECTIVES

This proposal outlines a collaboration between IntersectLA (IXLA) and AOA. IXLA will work closely with AOA staff and stakeholders to develop an effective communication strategy and supporting media. Our team will assist with coordination, management, and production to ensure the program's values and objectives are clearly and accurately conveyed.

PROJECT TIMELINE & DELIVERY

IXLA aims to deliver communication touchpoints in alignment with AOA's provided timeline. Meeting deadlines will depend on timely approvals, consistent feedback, and ongoing collaboration between both teams.

Timeline Objective

The project is expected to span 6 months. Specific deliverables and milestones will be prioritized after the project kickoff. Delays in feedback may impact launch dates.

Service	Description	Fee
Project Coordination	Includes monthly board meeting attendance. Led by IXLA team lead and the Director.	\$1,600
Visual Design Template & Style Guide	Create a visual guide using existing brand ID; organize assets in a shared folder; revise the PowerPoint template.	\$600
Print Collateral Design	Design materials including conference bags, table tents, banners, event signage, pins, marketing documents, and game cards. Includes reasonable revisions and print prep.	\$2,200
Conference App Support	Setup, instructions, and general configuration support.	\$1,600
Social Media Support (6 months)	Design templates and post content as needed.	\$800
Photography/Videography	Edited content from event coverage.	\$600
Onsite Support	Four-person team including designers, a photographer, and general support.	\$2,560

TOTAL ESTIMATED FEES: \$9,960

SIGNATURES

The signatures that follow constitute confirmation by those signing that they have examined and understand the Proposal and/or Contract Documents and agree to be bound by the terms of these documents, including the terms and conditions (the "Agreement") that follow this signature page. Upon a fully executed Agreement, IntersectLA shall begin the project and will invoice according to the phases as they are completed, as identified in this proposal. The client is entitled to a fully executed copy of this Agreement, signed by both Client and IntersectLA.

Client

Heather Cairns

AOA Immediate Past President

 Date

Concur

 Joe Bautista

Associate Professor + Director of IntersectLA

 Date

 Natali Papazyan, DFO

Mike Curb College of Arts, Media, and Communication

 Date

 Dr. Daniel Hosken, Dean

Mike Curb College of Arts, Media, and Communication

 Date

IntersectLA/CSUN

 Deborah Flugum, Director

Purchasing & Contract Administration

 Date

TERMS & CONDITIONS

TERMS. The performance of the branding and design services and delivery of tangible property (collectively the "IXLA Services") described in the contract or invoice of which these terms and conditions are a part (or are on the face hereof) by IntersectLA to the client (the "Client") identified in the attached contract or invoice is governed by the following terms and conditions. Unless otherwise agreed to in writing, IntersectLA expressly rejects any additional or different terms or conditions proposed by the Client.

DESCRIPTION OF WORK. This Agreement (the "Agreement") for the project described herein (the "Project") to which these terms and conditions are attached shall consist of the final list of Phases (the "scope of work") and Timeline, these terms and conditions, and any change orders set forth in writing and executed by IntersectLA and the Client after the acceptance of the original scope of work. Changes to the Scope of Work may result in adjustments to the charges for the Project.

PAYMENT. Payment for IXLA Services will be made as follows: 30% of the estimated design and branding fees are due upon acceptance of the Proposal. The remaining balance (including any and all expenses for vendors, service providers, specialists or subcontractors engaged in accordance with the proposal ("Outside Expenses") not paid in advance by Client) will be due as follows: 50% upon completion of the development stage of each product, and 20% upon delivery of the finished Project. Except for the portions of invoices that are disputed in good faith by the Client for not being in accordance with the terms and conditions of this Agreement, any amounts not paid when due shall accrue interest at the rate of 1.5% per month from the date due until paid. IntersectLA reserves the right to withhold delivery of all deliverables until the undisputed portion(s) of overdue invoices are paid. All Outside Expenses, including but not limited to, Photography, Illustration, Copywriting, Printing, Mileage, Photocopies and Color Outputs will be billed with a surcharge of 20% of vendor costs. The surcharge will not be applied to deliveries and postage.

CHANGES TO THE SCOPE OF WORK. Revisions or client alterations to the Scope of Work shall obligate the Client to additional fees and costs after the 3rd set of changes. These may include but are not limited to: changes made to design after final design has been submitted; changes made to the design once the design has been approved; extensive alterations; a change in marketing objectives on the part of the Client and new work requested by the Client after the execution of the Agreement. All production costs are based on the assumption that any branding will be provided electronically. Change orders will be prepared by IntersectLA and provided to the Client outlining the changes to the Scope of Work, and any additional costs for those changes. The Client agrees to pay IntersectLA additional fees and costs for said revisions or alterations at a rate of \$20.00 per hour invoiced at 1/2 hour increments. If IntersectLA is unable to meet the delivery schedule set forth in the Agreement due to delays by Client or changes requested by Client in the Scope of Work, IntersectLA may, in its discretion, revise the production schedule as necessary and provide for adjustments in the costs for the Project.

OVERTIME/RUSH CHARGES. Estimates are based on normal and reasonable time schedules, and may have to be revised to take into consideration any "rush" requests requiring overtime or weekends. Knowledge of Client's deadline is essential to provide an accurate estimate of costs. IntersectLA overtime incurred at the Client's request will be billed at a rate of \$40.00 per hour invoiced at 1/2 hour increments. The Client will also be responsible for additional charges imposed by outside suppliers, such as pre-press or printers, to meet Client's "rush" requests. To the extent possible, IntersectLA will advise Clients of all situations that require overtime and/or rush charges, and the amount of additional compensation that will be charged to meet such overtime requirements or rush requests. Rush or overtime fees may be incurred if the Client does not meet approval or content deadlines which have been established to meet the Client's desired schedule.

OWNERSHIP AND USAGE RIGHTS. The rights to be granted by IntersectLA under this Agreement will be transferred to Client once full payment for services is made by Client to IntersectLA. Upon receipt of full payment, the Client is hereby granted exclusive and unlimited usage and reproduction rights to the final designs prepared for Client as part of the Project. Except for the foregoing license, all right, title and interest to all designs, and artwork developed as part of the Scope of Work (whether draft or final versions) remain with IntersectLA or its contractors or vendors, as applicable. This includes, but is not limited to, layouts, animations, and designs created by IntersectLA or its contractors or vendors, computer disks containing such layouts, photography or illustration created by independent photographers or illustrators commissioned by IntersectLA, and photography or other images purchased by IntersectLA from a stock agency on the Client's behalf. IntersectLA reserves the right to reproduce any and all designs created by IntersectLA in print and electronic media for IntersectLA's promotional purposes for an unlimited period of time. In developing any brand marks, IntersectLA will use reasonable commercial efforts, consistent with standards in the industry, to ensure that any such brand marks are original. IntersectLA's efforts shall not include a complete trademark clearance search. Should a higher level of assurance be required by Client, the services of a trademark firm and intellectual property attorney should be retained by Client.

NON-DISCLOSURE AND CONFIDENTIAL INFORMATION. Each Party will not, at any time, whether during or after the termination or expiration of this Agreement, for any reason whatsoever, disclose to any person or entity or use for any purpose other than fulfilling its obligations hereunder, the other Party's confidential information, as defined below. Any concepts, business strategies, trademarks, service marks, materials, outlines, etc., provided to a Party by the other Party constitute trade secrets and confidential information under this Agreement and shall not be used by the other Party for any other purpose than for the purpose of the Project.

CONFIDENTIAL INFORMATION. Confidential information means all confidential and proprietary information of either Party, including, without limitation, information relating to: the business; trade secret information; client, investor, customer and supplier lists and contracts or arrangements; financial information; market research and development procedures, processes, techniques,

plans and results; investment or acquisition opportunities, pricing information or policies; and all other business related information, whether such information is in written, graphic, recorded, electronic, photographic, data or any machine readable form or is orally conveyed to or developed by the other Party; provided that confidential information shall not include information which: (a) is in or hereafter enters the public domain through no fault of the receiving party; (b) is obtained by the receiving party from a third party having the legal right to use and disclose the same; (c) is in the possession of the receiving party prior to receipt from the disclosing party, as evidenced by the receiving party's written records pre-dating such receipt; (d) is independently developed by the receiving party as evidenced by written record proving such independence; or, (e) is required to be disclosed by governmental order or judicial subpoena, provided that prior to disclosure the receiving party shall give the disclosing party prior notice to allow the disclosing party an opportunity to obtain an appropriate protective order; or, (f) is required by law (i.e., the California Public Records Act).

RETURN OF CONFIDENTIAL INFORMATION. Each Party shall, upon the request of the other Party, return to the other Party all written or other descriptive materials containing confidential information or otherwise relating to the other Party, its business and its intellectual property, including, but not limited to, drawings, blueprints, descriptions, notes, analyses or other papers or documents which contain any such information. In any event, upon the completion or expiration of this Agreement, or if this Agreement is terminated for any reason, each Party shall, without request by the other Party, return all aforementioned confidential information; provided that each party may retain one archival copy of the confidential information, solely for the purpose of determining its obligations under this Agreement.

INDEMNIFICATION. Each Party shall indemnify, defend, and hold harmless the other and its affiliates, officers, agents, and employees, from any and all claims, suits, actions, demands, damages, liabilities, expenses (including reasonable fees and disbursements of counsel), judgments, settlements and penalties of every kind that may be asserted or incurred including but not limited to: (a) any breach by such Party of any trademark, tradename and/or copyright infringement, invasion of privacy, defamation, or other wrongful use of any pictures, photographs, images, copy or other materials; and/or (b) the negligent, intentionally wrongful or illegal acts or omissions of such Party, its employees, agents, subcontractors or other representatives and/or (c) violations of any federal, state, local and/or international laws, rules and/or regulations to which such Party is subject.

APPLICABLE LAW/DISPUTE RESOLUTION. This agreement shall be governed by, and construed under, the laws of the State of California. In the event of a dispute arising under this Agreement, Any dispute arising under the terms of this Agreement which is not resolved within a reasonable period of time by authorized representatives of the Client and The CSU shall be brought to the attention of the Chief Executive Officer (or designated representative) of the Client and the Chief Business Officer (or designee) of The CSU for joint resolution. At the request of either Party, The CSU shall provide a forum for discussion of the disputed item(s), at which time the Vice Chancellor, Business and Finance (or designated representative) of The CSU shall be available to assist in the resolution by providing advice to both Parties regarding The CSU contracting policies and procedures. If the resolution of the dispute through these means is pursued without success, either Party may seek resolution employing whatever remedies exist in law or equity beyond this Agreement. If a Party refuses to comply with the rendered award, and the other Party enters an application for judicial enforcement thereof, the refusing Party shall bear all of the expenses incurred in connection with the dispute. Nothing in this paragraph shall prevent either Party from resorting to judicial process if injunctive or other equitable relief from a court is necessary to prevent serious and irreparable injury to one Party or to others.

CANCELLATION. In the event the Client cancels this Agreement prior to the completion of the Project, within five (5) business days of such cancellation, Client shall pay (a) IntersectLA for all work performed by IntersectLA up to the date of termination, (b) for all contracted Outside Expenses and commitments that have been incurred and cannot be canceled and (c) a cancellation fee equal to 15% of the remaining fees that would otherwise have been paid to IntersectLA if the Agreement were to have been fully performed. The other Party which consent will not be unreasonably withheld.

WARRANTY. IntersectLA warrants for a period of 60 days following delivery of the agreed-upon deliverables that the IXL Services will perform substantially in accordance with this Agreement. This warranty does not cover any additional marketing or branding services requested by Client and which are outside of the original scope of the Project.

FORCE MAJEURE.

(a) Neither Party shall be liable for any failure to perform its obligations under this Agreement for the period of time that it is prevented, hindered, or delayed in performing those obligations by circumstances beyond its control, including, but not limited to, fire, strike, war, riots, acts of terrorism, disaster, acts of God, acts of any governmental authority, communicable disease outbreak, epidemic or pandemic, unavailability or shortages of labor, materials, or equipment, disruption of transportation, or any other comparable event beyond the control of the Party whose performance is affected (each, a "Force Majeure Event").

(b) The Party claiming Force Majeure shall, as soon as reasonably practicable after the occurrence of a Force Majeure Event, provide written notice to the other Party of the nature, extent, and expected duration of the Force Majeure Event and use its diligent efforts to mitigate the effects of the Force Majeure Event upon such Party's performance under this Agreement, it is understood that upon completion of the Force Majeure Event, the Party whose performance was affected must, as soon as reasonably practicable, recommence the performance of its obligations under this Agreement.

(c) Notwithstanding any other term in this Agreement, including, but not limited to, the foregoing subsections of this section, during the period of a Force Majeure Event affecting performance by Client, IntersectLA may elect to do all or any of the following:

- (i) suspend the Agreement for the duration of the Force Majeure Event and be relieved of any payment obligation for goods or services not delivered or accepted due to the Force Majeure Event;
- (ii) obtain elsewhere the goods or services not delivered or accepted due to the Force Majeure Event;
- (iii) extend the time for Client's performance by a period equal to the duration of the Force Majeure Event; and/or
- (iv) terminate the Agreement as to any goods or services not already received with no further financial obligation if the Force Majeure Event continues to exist for more than thirty (30) days.

COVID-19. In the event that IntersectLA considers it necessary or prudent to cancel this Agreement due to circumstances related to COVID-19, or to any reoccurrence of the COVID-19 outbreak, IntersectLA may do so and be relieved of any further financial obligation, risk, or other liability by providing seventy-two (72) hours prior written notice of cancellation to Client. IntersectLA's right to cancel the Agreement pursuant to this section shall not be limited or restricted in any manner by any other term or section of this Agreement.

MATERIAL CHANGE OF CIRCUMSTANCES. The terms of this Agreement are based on conditions in existence on the date that Client commences performance. In the event of a material change in the conditions that adversely affect the ability of Client to perform its obligations, Client shall reasonably cooperate with IntersectLA to minimize the impact from such change in conditions on Client's performance and shall, if requested by IntersectLA, negotiate in good faith to adjust the terms of this Agreement on a mutually agreeable basis to address the impact of such material change in conditions. This provision shall not limit IntersectLA's ability to avail itself of any rights or remedies provided to IntersectLA by law, equity or any other term of this Agreement.