



Annual Business Meeting
Meeting Agenda
January 12, 2026 – 5:15 p.m. to 6 p.m.

Oakland Marriott City Center
1000 Broadway Ave., Oakland, CA
West Hall

- A. CALL TO ORDER and APPROVAL OF AGENDA– Cecilia Ortiz, President
- B. PRESIDENT’S ANNUAL REPORT TO THE MEMBERSHIP – Cecilia Ortiz, Northridge (pg. 2-4)
- C. AOA STANDING COMMITTEE REPORTS BY COMMITTEE CHAIRS
 - 1. Long Range Planning Committee– Heather Cairns, Northridge (pg. 5)
 - 2. ASI/Student Union/Recreation Committee – Alejandro Rios, San Francisco (pg. 6-7)
 - 3. Commercial Services Liaison – Michael Lennon, Northridge (pg. 8-10)
 - 4. Business and Financial Services Committee – Jaime Leal, Dominguez Hills (pg. 11-12)
 - 5. Human Resources Committee – Ranjit Kaur, San Jose (pg. 13-14)
 - 6. Information Technology Committee – Calvin Yun, Northridge (pg. 15-18)
 - 7. Research Administration Committee – Julie Wessel, San Bernardino (pg. 19-21)
 - 8. Past Presidents Committee – Kacie Flynn, Humboldt (pg. 22)
 - 9. Philanthropic Committee – Nicole Forest-Boggs, Long Beach (23-25)
 - 10. Property Development Committee – Patrice Griffith, Sacramento (pg 26)
 - 11. Risk Management & Insurance Programs –Chuck Kissel, Fullerton (pg. 27-29)
- D. BUSINESS ITEMS
 - 1. Financial Report for FY Ending 6/30/25 – Dwayne Brummett
 - 2. Legislative & Compliance Annual Update by Robert Griffin (Posted on the Conference App and AOA Website) (pg. 26-31)
 - 3. Election of 2026 Officers and Executive Committee Members – Cecilia Ortiz **ACTION ITEM** (pg. 32)
- E. INTRODUCTION OF 2026 AOA PRESIDENT – Cecilia Ortiz
- F. REMARKS BY INCOMING AOA PRESIDENT– Andrew Singletary, Sacramento
- G. ADJOURNMENT

Future AOA Executive Committee Meetings

April 17, 2026 – TBD

June 12, 2026 – via Zoom

August 14, 2026 - TBD

November 20, 2026 – via Zoom

January 9, 2027 – Sheraton, San Diego (AOA Conference 1/10/27 – 1/12/27)



2025 PRESIDENTIAL REPORT

This year required steady leadership through significant transition while maintaining the credibility and continuity of AOA. My focus was on guiding the Association through change with transparency, fiscal responsibility, and a clear view toward long-term stability and relevance within the CSU system.

Governance and Meetings

The EC met regularly throughout the year and convened a special meeting to address pressing operational needs tied to service provider transitions. Meetings were held on April 18, June 27, August 8, and November 21, 2025, with a special meeting on May 16, 2025. An additional regular meeting is anticipated on January 10, 2026.

The special meeting was called to maintain continuity and provide training ahead of the conclusion of service by long-standing service providers. Acting early allowed the Association to appoint and onboard new partners while institutional knowledge was still available.

Policy and Resolutions

Several important resolutions were adopted this year, each reflecting both responsible governance and preparation for the future.

On April 18, 2025, the Executive Committee (EC) adopted updated presidential track criteria that expands eligibility to include one year of Leadership Academy experience. This change reinforces the Leadership Academy's intended role as a sustainable pipeline to the presidency. The Property Development and Management Committee was also reactivated on that date, and a revised AOA Membership Dues Policy was adopted.

Updated bank account authorizations were approved to support operational continuity. The assignment of hotel credits to the AOA email address was adopted on August 8, 2025. On November 21, 2025, the EC adopted amendments to Accounting and Administrative Business Practices and Transparency Policies and approved integration of Mailchimp with the AOA website.

Decisions regarding the future direction of member education and conference programming are expected to be taken at the January 2026 meeting.

Operational and Financial Stewardship

To reduce operating costs, meetings were held virtually after the first meeting of the year, and committee budget allocations were suspended. These decisions were made deliberately to preserve resources during a period of organizational transition.

The Association undertook a major operational shift as long-term service providers concluded their service and new providers were onboarded. Kim Clark joined AOA as Operations Manager, Dwayne Brummet as Financial Manager, Debra Hammond as Educational Content Coordinator, and later Richard Chester as Business Partners Manager. Managing these transitions required updating mailing addresses, signatories, banking relationships, technology platforms, and database ownership. The scope of this work required careful reconciliation of historical records and systems, an effort that remains ongoing.

As a result of the timing and complexity of these transitions, the Association will be unable to complete an audit this year. This reflects the scale of the operational changes underway rather than a lapse in oversight. My priority was to stabilize systems and position the Association to return to a regular audit cycle.

To address short-term cash flow pressures related to the transition and slower conference registrations, the EC authorized a proactive transfer of \$50,000 from Vanguard reserves to the local operating bank account. This temporary measure ensured continuity of operations, with the expectation that reserves will be replenished as conference revenues are realized.

Communications, Marketing, and Technology

A new engagement partner was established to support marketing efforts, and AOA contracted with Intersect LA (IXLA), a CSUN nonprofit organization that provides employment experience to student designers. This partnership supported immediate communications needs while aligning with CSU values around student opportunity and workforce development.

Four ad hoc committees were established to address time-sensitive priorities related to Association positioning, policy and advocacy, collaborative technology tools, and education and conference programming. In cases where committee leaders learned that Leadership Academy participants were already advancing similar work, the committees elected to defer deliverables to the Leadership Academy to avoid duplication and support alignment.

Advocacy and System Engagement

Advocacy remained a central focus of the EC. The Board successfully advocated for auxiliary input in CSU Strategic Planning through an auxiliary-only focus group session held on March 20, 2025. This session was scheduled by special arrangement after advocating for auxiliary voices to be heard meaningfully in system planning. Sixty-eight auxiliary representatives participated.

The EC also advocated for auxiliary inclusion in the CSU ChatGPT agreement and engaged with the Chancellor's Office regarding revisions to the Auxiliary Organizations policy. These efforts resulted in further revisions and an ongoing, constructive dialogue.

In response to member requests for guidance related to bargaining activity, Association Officers have arranged educational programming with employment law experts. Two preconference sessions are

scheduled for the January 2026 conference, focused on California employment law developments and best practices for responding to union organizing.

Community Engagement

A membership survey was conducted on March 26, 2025, to gather insights on priorities for educational programming. A total of 128 members responded. Six virtual conference programming focus groups were held on September 24, 25, and 30, 2025, engaging both Executive Directors and general members. The feedback gathered during these sessions will inform future conference planning and educational offerings.

Carry Forward Priorities

I recommend that the incoming 2026 President and Executive Committee prioritize strengthening AOA's position with the Chancellor's Office and CABO, and continuing efforts to stabilize and modernize the Association for the advancement of auxiliaries across the CSU.

Leadership Development

I provided a leadership pathways presentation to the Leadership Academy on September 26, 2025, reinforcing AOA's commitment to developing future leaders.

Acknowledgements

Andrew Singletary's leadership this year merits special recognition. His work chairing the conference planning committee and contributing across multiple initiatives demonstrated a rare combination of institutional knowledge, strategic thinking, and execution. I am confident in his ability to lead AOA in 2026 and to continue the modernization work that began this year.

I extend my sincere thanks to the Executive Committee and our service providers for their commitment during a demanding year. Special appreciation is due to the members of the Education and Conference Programming Ad Hoc Committee for their diligence, creativity, and sustained commitment.

I also recognize Heather Cairns, Kacie Flynn, and Aaron Moore for their steady support during a year defined by transition and complexity.

Respectfully submitted,

Cecilia Ortiz
2025 AOA President



Long-Range & Strategic Planning Committee Annual Report

The committee met to discuss AOA finances and succession planning of AOA service providers. Much of the work overlapped with other committee work in response to the critical situation the organization was faced with to replace most service providers quickly to allow for continuity in business operations and ongoing conference planning.

The committee made recommendations based on existing cash flow and reserves balances and agreed to continue plans and move forward with the 2026 conference in an effort to avoid contractual penalties.

Succession Planning for Conference Service Providers

All service provider positions were filled during the year. The position descriptions were re-shaped and edited to ensure the critical facets of the organization's business were covered. Due to the long-term history and institutional knowledge of the past incumbents, the officers and new service provider team were faced with re-building and learning past practices. The team spent the year learning its roles and responsibilities and was dedicated to planning and executing this year's conference successfully both from a financial and operational perspective. The goal remained how best to serve the AOA membership.

Future Planning

The committee will continue to review and monitor the financial situation of the organization and monitor the scope and focus of service providers. Additionally, the committee will support the ongoing work of the future conference planning committee as it focuses on the best approach to plan activities that support the membership while remaining fiscally responsible.

Now that the service provider bench has stabilized, the committee will review specific policies and procedures that support the changing environment in which AOA operates. Additional focus will be spent on system-wide and industry-wide issues that affect auxiliaries.

Special thanks to Janelle Temnick, Chuck Kissel and the Officers for their LRP subcommittee work.

Respectfully Submitted,
Heather Cairns, 2025 EC Past President



**Auxiliary Organization Association
Associated Students/Student Union/Recreation Committee
Annual Report 2025**

Submitted by Alejandro Rios, Chair
Executive Director, Associated Students, San Francisco State University

AS/SU/RE Leadership 2024

Alejandro Rios (San Francisco State University)

AS/SU/RE Chair: January 2025-December 2025

Taylor Buhler-Scott (CSU Long Beach)

AS/SU/RE Vice-Chair: January 2025-December 2025

Michelle Crawford (Cal Poly San Luis Obispo)

AS/SU/RE, Executive Directors sub-committee: January 2025-December 2025

Ashley Fennell (CSU San Marcos)

AS/SU/RE, AS Advisors sub-committee: January 2025-December 2025

Sean Kinnally (CSU, San Bernardino)

Recreation Directors

Joe Nino (California State Student Association - CSSA)

2025 AS/SU/RE Re-cap

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

The Committee held the Annual Meeting at the AOA conference in January 2025 at the Sheraton Hotel & Marina in San Diego. The committee reviewed the purpose of the standing committee and discussed the conference. Elections were held to select new positions for the committee for the upcoming year, which included the Chair and Vice-Chair roles for 2025, and sub-committee chairs to lead monthly meetings and serve as liaisons. Updates were given by the designated subcommittees including the AS/SU/REC Executive Directors sub-committee, AS Advisors group, and an update from CSSA. The committee also voted and approved to make updates to the Standing Committee Operating Guidelines to match the existing structure of the committee. All members were encouraged to participate in the various sub-committees and other AOA offerings throughout the year.

This year a lot of information was shared throughout the various subcommittees. Although the AS/SU/REC Committee could not hold its summer meeting, a variety of topics were shared at the subcommittee monthly meetings. Such topics included, feedback on the revised CSU Auxiliary Policy, processes on ASI elections throughout the different campuses as well as Category II Fees structures. Other topics included the continued collaboration with CSSA supporting our students during the CHESS Conference in Sacramento, CSUnity event in August, and monthly plenary meetings. Additionally, Slack was introduced in order to enhance communication across AOA's membership and the different committees. as a way to communicate across AOA. Finally, the various meetings addressed budget concerns, student assistant pay rates, letters from the US Department of Education and various executive orders signed at the federal level that could potentially affect the CSU system and Auxiliaries.

AS/SU/REC Executive Directors Sub-Committee

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

CSU Advisors or AS Advisors

The Student Government/CSU Advisors or AS Advisors subcommittee chaired by Ashley Fennell hosted monthly meetings throughout the entire year. This subcommittee, which is a connection of all the professional staff throughout the CSU Campuses who work directly with respective government structures, continued to have robust conversations at each meeting. The meetings provided networking opportunities, training, and best practices related to student government. An AS Advisors Subcommittee coordinator will be appointed during the upcoming AOA Annual Conference for the 2026 year. The CSU Advisors group will continue to meet monthly via Zoom.

Recreation Directors

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

CSSA

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

Associated Students/Student Union/Recreation Standing Committee Annual Meeting

The next meeting of the Associated Students/Student Union/Recreation Standing Committee is the Annual meeting and it will be held at the AOA Annual Conference in Oakland, on **Sunday, Jan.11, 2026 in the Junior Ballroom 2/3 from 1:00 - 3:00pm.**

**Commercial Services Committee Report
AOA Executive Committee Meeting- Annual 2025**

2025 Commercial Services Leadership Team –

-Mike Lennon, Chair

Associate Director – Operations
The University Corporation
California State University Northridge

-Brenda Hovis, Vice Chair

Commercial Services Manager
CSUSM Corporation
California State University, San Marcos

As we transition into 2026, the chair and vice chair will remain the same as this is a 2 year appointment.

2025 Meetings

In 2025, the committee had three meetings:

AOA Conference Commercial Services Standing Committee Meeting- January 12, 2025
April 9, 2025 via Zoom
November 12, 2025 via Zoom

2025 Meeting topics of discussion

1. Meal Plan rate increases
2. EBT Implementation
3. CSUEU Public records act request
4. Discontinuing of pennies
 - a. Cashless?
5. Equitable access
6. Legislative updates

2025 Updates Membership-

The Commercial Services Committee has had some success in increasing its membership, but still trying to get more members and more engagement. We had a good number of members at the annual conference meeting and many of them joined the committee

2025 Updates Legislations

AB 473 (Wilson) – Product and Packaging Recyclability. This bill, as introduced, would require producers of covered material products or packaging considered recyclable to:

- By January 1, 2027, be approved to participate in a producers-responsibility

organization; and

- On or after January 1, 2027, and before January 1, 2032, comply with the Plastic Pollution Prevention and Packaging Producer Responsibility Act.

This bill, if enacted as introduced, would likely have limited application to or impact upon any campus auxiliary organizations engaged in “producer” functions, as defined. Before Assembly Natural Resources Committee (2/18/25).

AB 483 (Irwin) – Fixed-Term Installment Contracts: Early Termination Fees. This bill, as amended, would, effective January 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. Before Assembly P&CP Committee (3/25/25).

AB 592 (Gabriel) – Business: Retail Food. This amended bill would make indefinite , with conforming changes, three temporary retail food business relief measures enacted as a COVID-19 pandemic response:

- permit ABC alcoholic beverage licensees to exercise license privileges in expanded license area, and for to-go and delivery services.
- relief from local jurisdiction parking restrictions for expanded outdoor dining areas.
- operate temporary satellite food service without obtaining a separate local permit or submitting written operating procedures.

These relaxed requirements if enacted would likely have limited application to food/ABC licensed services provided by campus commercial auxiliary organizations, and of no cost consequence. Before Assembly GO Committee (3/4/25).

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 ortho⁵ 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.

Referred to Assembly Committees. on E.S & T.M. and JUD.(3/28/25)

SB 68 (Menjivar) – Major Food Allergen Notice Requirement Expanded to Include Sesame. This Bill, as introduced, would add the ingredient herb sesame to the list of “major food allergens” requiring food facilities serving or selling “restaurant-type” food to the consumer to include on all of menus an expanded written notification of listed major food allergens contained as an ingredient in each menu item, as specified.

Application of the Bill, if enacted, would, commencing July 1, 2026, appear to include campus restaurant-type food facilities operated by or through auxiliary organizations. Associated compliance costs are uncertain but would likely not be significant over time. Before Senate Health Committee (3/26/25).

Respectfully Submitted by Commercial Services Chair,

Mike Lennon
Associate Director of Operations
The University Corporation, California State University,
Northridge
Michael.lennon@csun.edu

Business & Financial Services Committee

Annual Report to the Executive Committee

Chair	Jaime Leal, CSU Dominguez Hills
Vice Chair	Tony Lynch, CSU Fullerton
Secretary	Vacant
Conference Coordinator	Lizzette Landeros, CSU Los Angeles

Monthly committee meetings cover topics relating to current Business and Financial services updates. The steering committee brought forth agenda items experienced on each members' respective campus. The committee also raised questions related to evaluating the committee's bylaws and committee meeting structure. The following items were discussed at various meetings throughout the year.

Annual Auxiliary review requirements: The committee discussed the update to the CSU Auxiliary Policy and the new auxiliary review requirements. The updates included addressing performing the following:

1. **Operating agreement review** – Verification of written operating agreements ensuring they are current and that auxiliary activities comply with authorized functions.
2. **Financial reserve evaluation** – Analysis of working capital needs, current operations, and capital replacement reserves
3. **Future operations planning** – Documentation of planned future operations and new business requirements recognized by the university and auxiliary
4. **Controls Self-Assessment** – Completing the standardized template with all sections certified by the Auxiliary Executive Director and CFO

The committee discussed some of the challenges experienced with the new reporting requirements primarily the condensed timeline and need for guidance related to the financial review reports requested. The committee members shared the approach taken by their respective campus to ensure compliance with the June 30th submissions deadline.

Audit Timeline: The committee discussed the Financial Audit completion timeline as prescribed by Chancellor's Office (CO). Auxiliary members shared the challenges experienced with closing the year, preparing for the Audit, and completing the audit to meet the CO deadline. There was interest by the committee to better understand the CO timeline. Former Chair of the Business and Financial services committee Shailendra Bagel raised this topic at the AOA Executive committee and invited Sherry Pickering to go over the audit timeline and the CO deadline. Sherry Pickering went over the audit timeline in length and clarified the need for the deadline date and how it ties to the Systemwide audit process.

Mini-Conference: the steering committee kicked off the year with plans to put on a mini-conference for its membership as requested at the January meeting. Plans were initiated for an in-person experience and possible venues where explored. Conversation regarding budgetary constraints for the Association along with campus travel restrictions brought on by the economic climate affecting auxiliaries across the system then led to rethinking into possible providing a virtual experience. With additional changes and timing challenges, the steering committee decided to postpone the Mini conference to the following year.

Other Topic Discussed

Hospitality Policy - The committee discussed the CSU Hospitality policy and its applicability to programming and clubs and organizations activities.

Business & Financial Services Committee

Audit Firm feedback – Steering committee members shared and provided feedback related to their experience with their respective external auditors. Some of the common themes included highlighting value add services, communication, and audit timelines.

CSU Buy P2P – Discussion around implementation challenges related to the California State University system's online Procure-to-Pay platform were shared. The platform aims at streamlining the buying goods and services, from requesting and ordering through electronic catalogs to payment and invoice submission. The platform offers centralized purchasing, spending visibility, and efficiency across all 23 campuses and the Chancellor's Office.

AOA Tech updates – The committee invited AOA President Elect/Conference Planning Chair Andrew Singletary to discuss some of the technology updated coming to AOA and for a sneak peak at what to expect at the conference. Andrew went over some of the platforms that the AOA Administration is considering to help improve communication amongst the membership. The platforms introduced included SLACK which would improve communication and create space for project collaboration Google Workspace to help streamline and simplify information sharing and MailChimp which would improve the ability to send emails to various groups within AOA.

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

- 1) **GASB 87:** Under this Statement, a lessee is required to recognize a lease liability and an intangible right-to-use lease asset, and a lessor is required to identify a lease receivable and a deferred inflow of resources, thereby enhancing the relevance and consistency of information about governments' leasing activities.
- 2) **GASB 101:** This Statement requires that liabilities for compensated absences be recognized for (1) leave that has not been used and (2) leave that has been used but not yet paid in cash or settled through noncash means.

AOA Annual Conference Session Topics: the committee finalized the following session topics for the 2026 AOA conference:

1. Funding Projects, Managing Reserves and Unlocking Flexibility
Floyd Simpson, Natasha Lee
U.S Bancorp Asset Management Inc.
2. Changes in Tax Law and their impact on CSU Auxiliaries
Russlee Armstrong, Carlos Carreaga
Grant Thornton, Associated Students, San Diego State University
3. Can We Build Housing for Less? Into the ON-vs.-Off campus Market Scopes and Prices
Samuel Jung, Gil Rocca, Carl Vizcarra, Matt Bohannon
Balfour Beatty Campus Solutions, AC Martin, Bernards, Brailsford and Dunlavey
4. Check Out, Cards In: Payment Innovation Across the Higher Ed. Ecosystem
Mike Watercott, Malisa Day
US Bank
5. Navigating CSUBUY Procure-to-Pay: A Peer Exchange on Processes, Staffing, and User Experience
Peter Zerkel, Sam Caudill
Cal Poly Humboldt Sponsored Programs Foundation

The committee was scheduled to meet every month on the last Wednesday from 3:00 pm to 4:00 pm.

Sincerely,

Jaime Leal,
AOA Business and Financial Services

AOA HR Committee Report

Overview

The AOA HR Committee met on a monthly basis to support auxiliaries and AOA through information-sharing, education, and discussion of emerging workforce and compliance issues. The Committee serves as a collaborative forum for HR leaders to align on best practices and regulatory developments.

Key Activities and Engagement

- **Breakout Sessions:** Meetings included breakout discussions by auxiliary type, allowing members to address operational challenges and share solutions relevant to their specific environments.
- **Open Forum:** An open forum was held to discuss the use of ChatGPT and other AI tools in the HR field, focusing on potential applications, benefits, and responsible use considerations.
- **Panel Discussion:** A panel discussion featuring **John Doebler** and **Christia Williams** provided background and education on auxiliaries and AOA, including the rationale for their creation and their role within the organization.

Educational Presentations

The Committee hosted the following presentations to enhance HR knowledge and readiness:

- **Rolling Out a New HRIS System** – Implementation planning, change management, and adoption strategies presented by Ranjit Kaur.
- **Handling Union Conversations** – Guidance on lawful, effective communication and proactive labor relations presented by Mary Stuart King from MaynardNexsen.
- **Performance Management** – Approaches to support employee performance, accountability, and development presented by Prof. Meg Virick.

Key Topics Discussed

In addition to scheduled programming, members discussed several high-impact and timely topics:

- Unionization trends
- Minimum wage changes
- Government shutdown impacts
- Stop work orders and the WARN Act
- CalSavers legislation and implications for auxiliaries

Governance Update

At the December meeting, new HR Committee officers were **unanimously selected**, reflecting strong engagement and consensus among members:

- The Chair for HR committee effective January 1, 2026 is Andrea Bozant, Director, Human Resources & Payroll Services at The University Corporation at CSU Monterey Bay.
- The Chair-elect is Natalie Tapia, HR Generalist, Loker Student Union at CSUDH.
- The secretary is Cindy Cerna, HR Coordinator, ASI, CSUN

Takeaways

- The HR Committee continues to provide a structured forum for addressing regulatory, labor, and workforce challenges.
- Educational programming supports compliance, operational readiness, and consistent HR practices across auxiliaries.
- Ongoing discussion of legislative and economic developments helps auxiliaries proactively manage risk.

AOA IT Committee

2025 End of Year Report

Respectfully submitted by Calvin Yun, 2025 AOA IT Committee Chair
Reporting Period: January to December 2025

1. Annual Summary

2025 was a transitional year for the AOA IT Committee. While the Committee experienced limited direct participation, meaningful activities and structural improvements were accomplished. These included strengthening alignment between the auxiliaries and systemwide IT initiatives discussed through the CSU Information Security Advisory Committee (ISAC) and migrating historical committee documentation to the updated Google Workspaces environment.

The year also highlighted several organizational opportunities including the need for improved continuity during leadership transitions and stronger engagement from auxiliary corporations. These insights establish a solid foundation for an improved and more active committee in 2026.

2. Committee Meetings and Activities

The AOA IT Committee held one formal meeting during the reporting period, on August 25th, 2025, conducted via Zoom. Although attendance from the general members of the IT Committee was limited, the Chair and the Vice Chair reviewed the agenda, completed the session, and documented the discussion for future committee continuity and reference.

Agenda topics of the August meeting included operational updates, communication modalities, planning for the IT Track at the 2026 AOA Annual Conference, and a review of systemwide IT activities relevant to the auxiliaries. These topics were drawn from ongoing ISAC discussions and systemwide initiatives, ensuring that the auxiliaries remain informed even in periods of low committee attendance.

In addition to this meeting, Pat Speers with CSU Northridge Associated Students, Vice Chair of the AOA IT Committee for 2025, who self-nominated without fully knowing the extent of the role's responsibilities, rose to the occasion and provided exceptional support throughout the year. His contributions were especially critical as AOA faced a transition period marked by the departure of long-standing AOA service providers, resulting in the loss of valuable institutional knowledge.

Despite these circumstances, the Vice Chair played a key role on the Conference Planning Committee as the representative for the IT Track, helping to organize and shape the IT Track for the 2026 Annual Conference. He collaborated with planning teams to solicit for and review session proposals, ensure topic variety from years prior, and balance IT-focused sessions with emerging trends and needs of the membership. This work significantly strengthened AOA's IT

programming for 2026 and demonstrated great leadership initiative in a year with limited structural support.

3. Participation in ISAC Discussions

Throughout 2025, the Chair attended monthly meetings of the CSU Information Security Advisory Committee (ISAC) as an observer. These meetings provided valuable insight into CSU-wide IT initiatives, risks, and policy developments that can directly impact the auxiliaries. Key themes included:

Cybersecurity Initiatives

- Ongoing development of the Cyber Fusion Center, systemwide logging enhancements, and coordinated efforts across the CSU to address cyber security threats.
- Updates on Pathlock and A360 implementations, enhancements to identity governance, and integration timelines that may affect PeopleSoft access.

Fraudulent Applications for Admission and Identity Security

- Multiple discussions focused on coordinated fraud affecting Cal State Apply and community college admissions systems, including mitigation strategies and identity verification concerns.

NIST-Based Policy Framework and Updates

- ISAC's Policy and Standards Group (PSG) continued its work to restructure the CSU Information Security Policies and Standards using the NIST framework, particularly with regard to systems that store, process, or access Level 1 or Level 2 data.

Privacy, Data Retention, and AI Governance

- Recurrent discussions on data masking, data retention expectations, cookie consent, privacy frameworks, and the emerging need for additional AI governance, particularly around handling sensitive or FERPA-protected data.

Operational and CMS Topics

- There were several recurrent discussions on systemwide efforts regarding firewall rules, VPN review processes, identity and access management (IAM), and CMS security configurations.

4. Committee Infrastructure and Knowledge Management

A major behind-the-scenes accomplishment this year was the effort to migrate historical documents, including prior agendas, notes, and working files, into the new AOA Google

Workspace environment that is owned by AOA. This work was done in partnership with Andrew Singletary with CSU Sacramento Union Well, 2025 AOA President-Elect.

This migration will help to:

- Preserve committee history
- Improve long-term accessibility
- Reduce the risk of information loss during turnover of Committee chairs
- Support future Chairs and Vice Chairs with clearer documentation and records

The migration process also highlighted a key recommendation for the upcoming year: to establish a formalized transition report that could be presented at the 2027 AOA IT Standing Committee Meeting so that potential vice chairs have an understanding of the role and responsibilities and may incentivize them to nominate themselves.

The Vice Chair's involvement on the Conference Planning Committee highlighted the importance of preserving Committee and organizational knowledge. His efforts reinforced the need for improved documentation and continuity procedures.

5. Challenges Identified in 2025

Lack of Leadership Transition Materials

Upon assuming the role of Chair, no transition report, onboarding notes, or guidance was provided. This contributed to avoidable delays and uncertainty. A structured onboarding process would ensure leadership continuity and preserve institutional knowledge.

Low Committee Engagement

The committee struggled with low attendance, affecting its ability to fulfill its role as an information-sharing and collaborative body. New staff at auxiliaries may be unaware of the committee's existence, purpose, or relevance.

6. Recommendations for 2026

Strengthen Committee Visibility and Participation

The Chair recommends inviting Executive Directors of each auxiliary corporation to promote the AOA IT Committee internally, encourage and appropriate time for staff to attend quarterly meetings, and reinforce the Committee's role in supporting the operational efficiency, security, and compliance with our stateside partners. More consistent participation will, without a doubt, improve collaboration and information flow.

Formally Define and Communicate the Roles of Chair and Vice Chair

Formally defining and communicating the roles of Chair and Vice Chair will serve as a refresher to those that have not served in a while, as well as serve as a foundation for members new to AOA to consider the opportunity to serve. This will ensure that incoming leaders have clarity on

expectations, particularly since this year's Vice Chair stepped into the role with limited guidance but ultimately delivered excellent support to AOA during a period of organizational change.

Implement a Formal Leadership Transition Process

Create a committee transition packet including the roles and responsibilities of the Chair and Vice Chair, meeting templates and communication modalities, prior year reports and documentation, and a summary of ongoing systemwide IT themes. This will ensure that future Chairs can begin their term equipped with the necessary tools and context.

Establish a Predictable Meeting Cadence

Setting standard quarterly dates and providing structured agendas in advance may help to increase attendance. Leveraging the new AOA Slack and Google Workspace will improve continuity, transparency, and instant communication, as discussed in the August meeting.

7. Conclusion

Despite limited activity and structural changes, 2025 served as a critical foundation for the AOA IT Committee. Observational engagement with ISAC, improvements to documentation and communication infrastructure, and a clearer understanding of systemwide expectations have positioned the Committee for renewed effectiveness in 2026. The Chair recommends prioritizing Committee continuity and participation to ensure that the Committee can continue to fulfill its mission of supporting the auxiliaries in navigating an increasingly complex cybersecurity and information technology landscape.

AOA Research Administrators Committee (RAC)

AOA Annual 2026 Chair report to the Executive Committee

Our **2025 Subcommittee Leadership** consist of **Julie Wessel** from **San Bernardino** as **Chair**, **Trina Beckwith** from **San Marcos** as **Vice Chair** and **Dorian Davis** from **Monterey Bay** as **Secretary**.

In January at the AOA meeting, the RAC group met and announced the new RAC Leadership: Trina Beckwith for Vice Chair (San Marcos) and Dorian Davis for Secretary (Monterey Bay). The outgoing Chair, Chantal Ebarly and Melissa Mullen met with Julie Wessel (RAC Chair), Trina Beckwith (incoming Vice Chair), and Dorian Davis (incoming Secretary) to debrief on responsibilities for RAC Leadership.

In collaboration with the Chancellor's Office, we have formed a long-term strategic planning focus group that will carry on, past this leadership's term, to address historical issues plaguing Sponsored Programs Administration. The Power of 23 group, set its purpose as "to reduce redundancy and share and centralize administrative effort to utilize the resources and expertise to serve our customers and protect our institutions".

The spring meeting will be held in Sacramento, May 5 & 6, with a joint RAC and the Chief Council of Research Officers (CCRO) meeting on day 2. One goal of the Power of 23 is to help standardize the data reports the Chancellors Office requests. This will be one of the topics at the meeting.

While collaborating on the Spring meeting, the CCRO Chair Binod Tiwari (Fullerton), invited RAC to Joint them in their next workshop "**Best Practices for Student Payments: Scholarships, Wages, and Stipends**" to be held April 18, 2025. The two groups also decided that campuses can extend the invitation to their Financial Aid and Financial Services that administer student payments.

Additionally, RAC will attend CCRO's regular meetings on the last Thursday of each month. This will open a channel of communication between the groups that will enable the Power of 23 to address and resolve complex issues.

In an effort to maintain connectivity with the larger AOA group, RAC is posting meetings and workshop information on the AOA website. CCRO and RAC are also trying to establish a communal calendar.

RAC leadership will need to finalize the dates and location of the fall meeting.

The Spring meeting was a joint mtg with the Council of Chief Research Officers (CCRO) and help on May 5&6 in Sacramento. Day one was RAC only and covered topics such as current examples of Chancellor Office audits and what to expect, A

AOA Research Administrators Committee (RAC)

AOA Annual 2026 Chair report to the Executive Committee

projections/forecasting model tool that was shared out, a review of the new requirements coming for Cyber Security training, a session on how to calculate release time and additional compensation, and a discussion on termination notices to subs and contractors.

Day two was joint with CCRO and included sessions and workshops on CCRO/RAC relationship building, the importance of CSU-wide data collection, issuing payments between campuses, the current federal grant funding environment, and change management for potential reduction of sponsored funding.

Statement on Recent Impacts of Executive Orders on Sponsored Projects

Over the past several months, our campus community has faced extraordinary challenges due to multiple executive orders resulting in the termination of funding for a number of sponsored projects. These abrupt funding cancellations have had a profound effect on our research and academic programs, leading to: **Program and research shutdowns**, interrupting critical work across multiple disciplines; **Termination of staff and student positions**, including the loss of experiential learning opportunities for students; **Administrative and financial strain**, including the need for urgent invoicing and reconciliations with sponsors; And most importantly, **emotional and professional tolls** on our Principal Investigators, faculty, staff, and students who have invested considerable time, effort, and hope into these endeavors.

The impact of these orders extends far beyond operational inconvenience, it threatens the core mission of research, innovation, and education that we uphold. We recognize the tremendous loss experienced by all affected and are committed to advocating for stability, supporting transitions, and preserving as many opportunities as possible under these challenging circumstances.

RAC has been highly invested in monitoring JAG (Joint Association Group), which is a group of individuals from institutes of higher education, Federal agencies, and 10 agencies that represent higher education such as COGR and NACUBO. They have been working to present a new model for collection of IDC called the FAIR model (Financial Accountability in Research) to be presented to Congress as an alternative to the current methodology. RAC and CCRO are currently working on setting up a task group to review and run the models to provide feedback to JAG and to determine what impact this would have on our campuses. RAC hosted a RAC Chat on 7/16 to review the latest version of the model.

The fall RAC meeting will be hosted by San Bernardino October 1&2 and planning is well under way!

THE CALIFORNIA STATE UNIVERSITY

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AOA Research Administrators Committee (RAC)

AOA Annual 2026 Chair report to the Executive Committee

The FAIR Model workgroups have completed their goals. Group #1 developed a tool to help differentiate costs that may be able to be included into a direct cost category and demonstrates the impacts of applying different indirect rates. Group #2 developed a sample draft comment letter to be submitted to the Federal Register, once the Revisions to the Uniform Guidance is issued. This sample letter is to be used as a suggestion on how to write the formal letter that is to be submitted by each campus president.

The fall RAC meeting was held October 1 & 2 at the San Bernardino campus and sessions included the announcement of the reactivation of the Sponsored Programs User Group (SPUG) who oversees issues with system-wide software/updates, an update on the JAG Steering Committee and the FAIR Model working groups, updates from the Federal Relations office in D.C., discussion on contingency plans in preparation for the upcoming IDC rate reduction, and updates and how to comply with “Terms of Concern” requirements enacted by federal agencies.

The RAC Chair and Vice Chair have been continuously attending AOA executive meeting and participating in the preparation of the annual 2026 AOA conference.

AOA Past Presidents Committee 2025 Annual Report

Presented: January 12, 2026

Submitted by: Kacie Flynn, Chair

The Past Presidents' Committee remained highly engaged throughout 2025, providing counsel, historical context, and strategic support to AOA leadership during a year of significant transition, operational reassessment, and systemwide change. The committee convened multiple times, in person at the Annual 2025 Conference and through virtual meetings in January, February, and November, to advise on issues central to AOA's mission, sustainability, and relevance.

Focus on Organizational Structure, Leadership Continuity, and Advocacy

A recurring theme in our discussions was the need for clearer defined roles and responsibilities across AOA leadership/service providers, and stronger, more consistent engagement with the Chancellor's Office. As several long-standing service providers began transitioning out of their roles, the committee emphasized the importance of continuity through updated scopes of work, succession planning, and, where feasible, consideration of full-time staffing to support the organization's operational stability and year-round advocacy efforts.

We highlighted gaps in high-level strategy and encouraged AOA to re-establish relationships with system leadership, particularly in the context of ongoing CSU systemwide strategic planning, to ensure auxiliaries' interests remain visible and represented.

Emerging Labor Landscape and Systemwide Communication

One of the most significant developments of the year was the rapid rise in unionization activity across CSU auxiliaries. The committee monitored this trend, noting confirmed union votes at multiple campuses and growing interest elsewhere. Members expressed concern about the uneven capacity of auxiliaries to navigate organizing efforts and underscored the vital role AOA can play in strengthening communication channels, sharing resources, and coordinating guidance to support campuses.

We encouraged AOA leadership to continue elevating this issue and were supportive of external educational efforts, including webinars and conference sessions led by labor and employment experts.

Committee Support and Strategic Advising

Throughout the year, the Past Presidents offered targeted support to Officers and task forces, providing historical perspective, participating in discussions about staffing and budgeting models, and helping frame the organization's long-term planning needs. These contributions aimed to reinforce AOA's strategic direction and ensure stability during a period of operational restructuring.

Conclusion

The committee remains committed to serving as a resource to AOA leadership and membership. We are optimistic about the direction of the organization and stand ready to continue offering experience-based insight and collaborative support as AOA adapts to evolving challenges and opportunities in the auxiliary environment.



AOA Philanthropy Committee Annual Report

December 2025

2025 Overview

The AOA Philanthropy Committee continued to serve as an active forum for collaboration, professional development, and information sharing among CSU philanthropy, foundation, and advancement professionals in 2025. Building on momentum from prior years, the committee maintained strong participation across campuses and the Chancellor's Office, with engagement from advancement operations, finance, compliance, board relations, and endowment management professionals.

Committee leadership and the planning working group continued efforts to broaden participation through expanded communications, targeted invitations to affiliated CSU groups, and the development of improved infrastructure for information sharing, including progress toward a CSU-specific listserv and shared resource platforms. The committee met multiple times throughout the year, addressing timely operational, financial, governance, and compliance issues impacting CSU auxiliaries and philanthropic foundations.

Officers & Leadership (2025 Term)

Chair: Nicole Forrest Boggs, CSU Long Beach

Vice Chair & Conference Session Planner: Monica Alejandre, CSU San Bernardino

Past Chair: Ian Hannah, Sonoma State University

Planning & Advisory Working Group:

Caroline Johansson; Aaron Moore; Sam Camarena; Melissa Watkins; Donna Day; Jassica Gauna; Ray Watts; Valerie Nguyen; Ira Unterman; and other systemwide and campus partners.

Leadership transitions were confirmed during the January 2025 in-person meeting, with appreciation expressed for outgoing leadership and continued service from planning group members.

2025 Committee Meeting Schedule

January 12, 2025 – In-person committee meeting at the AOA Conference (San Diego, CA)

May 14, 2025 – Virtual committee meeting

September 17, 2025 – Virtual committee meeting

Meetings averaged strong attendance, with representation from campuses across the CSU

system, systemwide advancement and board staff, as well as and Chancellor's Office colleagues.

Key Topics & Discussion Areas

Governance, Compliance & Audit

- Audit firm selection practices and RFP timelines
- Form 990 extension challenges and grant impacts
- Board education regarding auxiliary compliance
- Brown Act applicability and public meeting requirements
- Contract signature authority and delegation models

Budgeting, Fund Management & Operations

- Cost-containment strategies amid budget pressures
- Shifting expenses between state and foundation operations
- Vendor negotiations and software contract limitations
- Procurement challenges with third-party vendors
- Encouraging timely use of donor-designated funds and distributions

Donor-Advised Funds (DAFs) & Gift Documentation

- Evolving donor sophistication and DAF practices
- Documentation of multi-year commitments
- IRS guidance and public comment activity
- Conditional gift approaches

Foundation Board Engagement & Management

- Board recruitment and engagement strategies
- Role clarity and participation reporting
- Virtual and hybrid engagement models

Endowment Management & Finance

- Systemwide endowment performance
- Distribution pressures
- Unspent endowment distributions

DEIA & Foundation Support

- Campus-supported DEIA initiatives
- Sharing emerging models

Chancellor's Office & Systemwide Updates

Chancellor's Office colleagues provided updates throughout the year, including systemwide endowment performance data, leadership appointments, organizational changes, procurement and cybersecurity initiatives, and broader budget considerations. Members also received updates related to auxiliary compliance guidance and systemwide coordination efforts.

Conference & Program Coordination

The committee supported planning and delivery of Philanthropy Track sessions at the AOA 2025 Conference, including advocacy, public records requests, artificial intelligence, and ESG/mission-aligned investing.

Upcoming In-Person Committee Meeting – AOA Conference (January 2026)

The Philanthropy Committee will convene for its annual in-person meeting on January 11, 2026, from 1:00–3:00 p.m., at the AOA Conference in Oakland, California.

Planned agenda items include annual report review, listserv implementation, Chancellor's Office updates, AOA Executive Committee updates, and facilitated discussion of audit focus areas, leadership transitions, AI use in public meetings, workforce retention, DAF/RMD gift coding, and impacts of CSU centralized systems.

Looking Ahead

Topics discussed throughout 2025 and planned for the January 2026 meeting will continue to inform future committee agendas, presentations, and professional development offerings. Anticipated focus areas include audit and compliance practices, procurement and software challenges, board engagement, fund management, endowment stewardship, workforce issues, and evolving regulatory considerations.

Respectfully submitted by:

Nicole Forrest Boggs
Chair, AOA Philanthropy Committee (2025)
California State University, Long Beach
AVP, University Relations & Development Operations
Email – nicole.forrestboggs@csulb.edu

AOA Property Management & Development Committee

Annual 2025 Chair report to the Executive Committee

Committee Chair: Patrice Griffith - Sacramento State **Vice Chair: Arnecia Bryant** - Long Beach

The Property Management & Development Committee was proud to form in 2025 and approved by the AOA Executive Committee at the April 2025 Board meeting. As a committee, we focused on informing AOA members of the committee's formation, solidifying 2025-2026 meeting and events, collaborating with various campus facility departments and cultivating relationships with those at the Chancellor Office's Real Estate and Facilities units.

The Chair and Vice Chair met several times prior to the first committee meeting held in September. Feedback was given by attendees stating they would like an informational webinar. A webinar with the topic of Strategic Facility Stewardship was held in November. At the end of the webinar AOA Conference presenters in the field of Property Management and Development introduced themselves and provided a sneak peek into their presentation topics. All were encouraged to attend the AOA Conference.

2025 Overview:

The committee was proud to host its first virtual meeting and webinar in 2025. The goal of the first meeting was to introduce the committee, make connections in our field of work and gather membership feedback on what they would like to see in this newly formed committee. Representatives from the Chancellor Office's Real Estate Services unit were invited and in attendance. Future collaborations were discussed as we prepare for the 2025 AOA conference. Out of these discussions, Eric Anderson, Executive Director of Real Estate Services at the Chancellor's Office, agreed to present at the 2026 Conference and attend the in-person committee meeting.

The topic of the webinar was Strategic Facility Stewardship. We dove into the importance of preventative maintenance, collaborative campus relationships and the longevity of facilities as a direct result of preventative maintenance. The chair continues to send out important communications via email as they work to introduce AOA's preferred communication platform, Slack.

Officers/Leadership (2025 and 2026 Term):

- Patrice Griffith, Sacramento State – Chair
- Arnecia Bryant, CSU Long Beach – Vice-Chair

2025 AOA Meeting Schedule (all via Zoom):

- **9/23/25** – Committee Meeting
- **11/4/25** – Strategic Facility Stewardship Webinar

Key Topics:

- Encourage participation within AOA and 2026 conference attendance
- Committee input for future meeting topics, lunch and learns/webinars
- Chancellor's Office collaboration for meetings and the 2026 AOA Conference

Respectfully submitted by:

*Patrice Griffith, AOA Property Management & Development Committee Chair
Director of Real Estate Services, Sacramento State
University Enterprises, Inc. - p.griffith@csus.edu.*

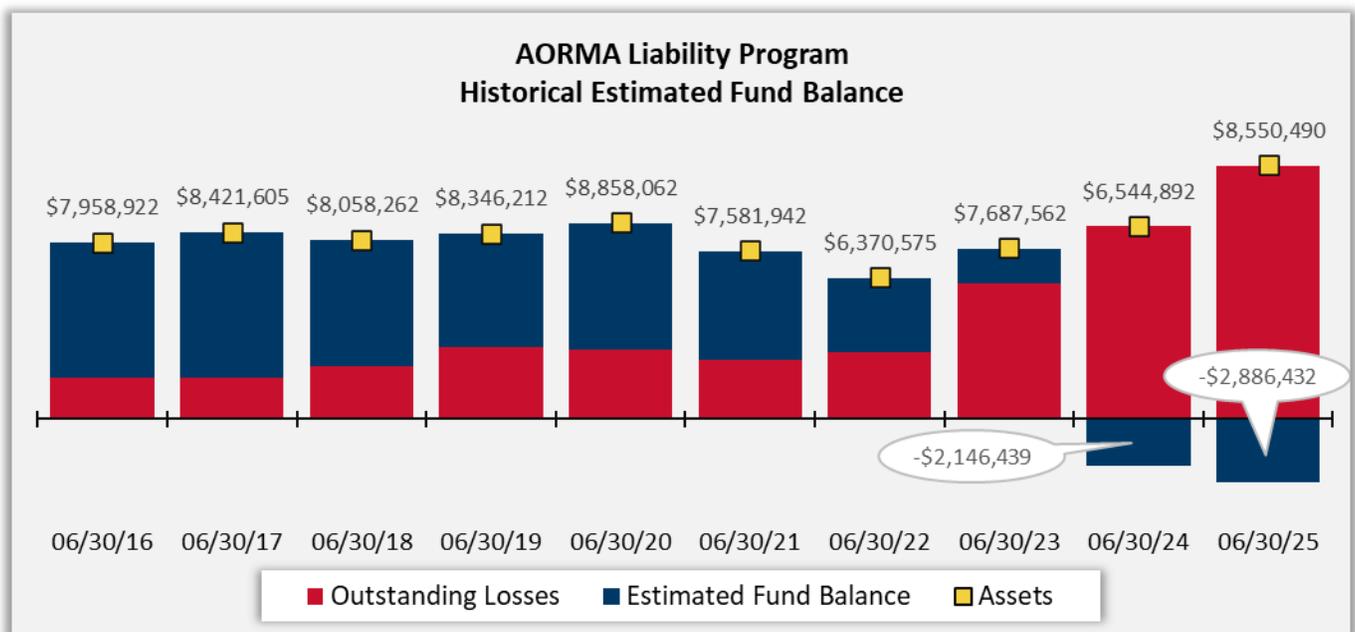
CSURMA AORMA UPDATE FOR AOA – 2026

Major Exposure and Operational Changes – The Program Administrator will be meeting with the Auxiliary Organizations to conduct an in-depth review of any significant operational or programmatic changes that could materially affect AORMA’s coverage programs. These discussions are critical to identifying new or emerging exposures that may not be fully contemplated in the annual marketing process with excess insurers and reinsurers. Early identification and communication of such changes are essential to ensuring appropriate coverage, underwriting transparency, and long-term program stability.

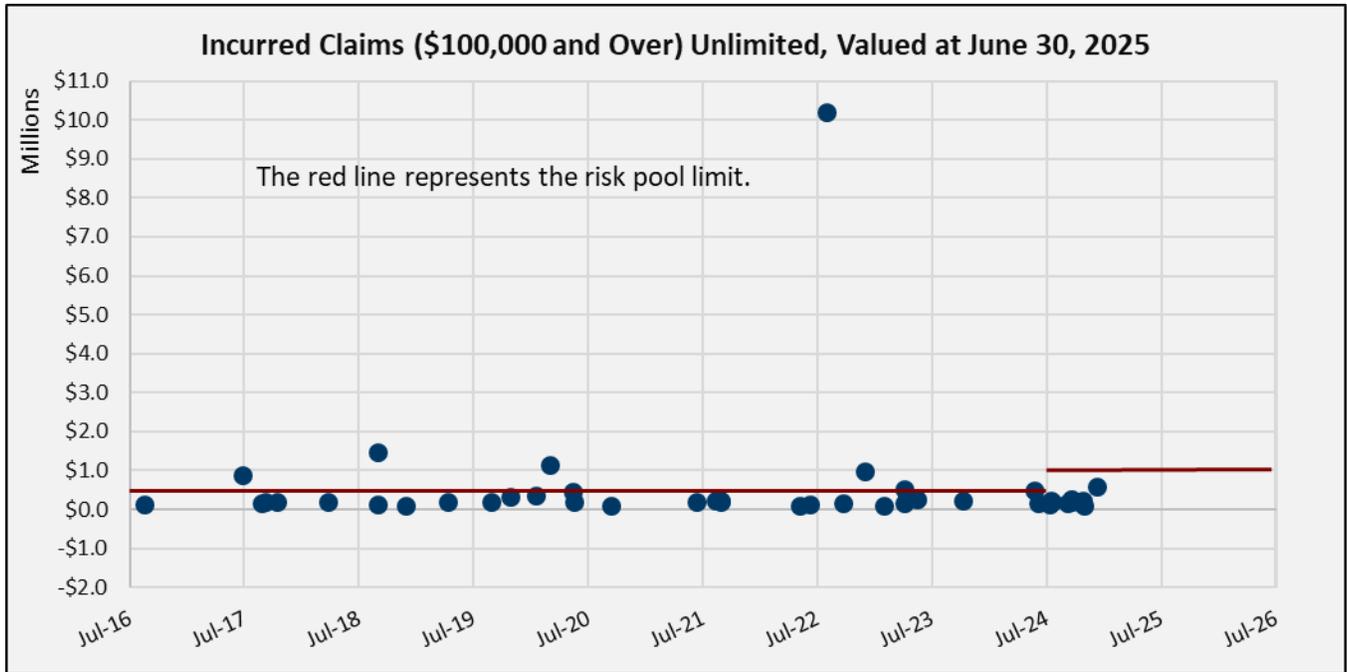
AORMA Liability Program Assessment – On September 3, 2025, the AORMA Committee approved a \$962,144 assessment to the AORMA Liability Program. This amount represents one-third of the current fund balance deficit. The assessment will be allocated among Members based on each Member’s proportionate share of premiums paid into the program over the past five (5) fiscal years (FY 2020/21 through FY 2024/25). Invoices for the total assessment will be issued to Members in July 2025.

As illustrated in the chart below, the AORMA Liability Program fund balance (depicted by the blue bar) has steadily declined over the past several years, with the balance again turning negative as of June 30, 2025. This negative fund balance is primarily the result of increased claims activity. The Program has experienced a notable rise in large claims exceeding the self-insured risk pool limit, which has significantly contributed to the current deficit.

AORMA Liability Program - Fund Balance Exhibit on June 30, 2025



Liability Claims Valued Over \$100,000



Overall FY 2026/27 Liability Funding – Total program costs for FY 2026/27 projected to increase by approximately 14%. Please note that each Auxiliary Organization’s percentage change may vary depending on the specific rating factors applicable within each program.

AORMA Workers’ Compensation Program Dividend – To help offset the Liability Program assessment, the AORMA Committee approved a \$500,000 **dividend** from the Workers’ Compensation Program at its meeting on September 3, 2025. This dividend will be distributed to Members during FY 2026/27.

AORMA Programs – Total Funding for FY 2026/27 – The AORMA Committee also approved FY 2026/27 program funding levels, as summarized below. Please note that each Auxiliary Organization’s percentage change may vary based on its individual rating factors within each program.

Program	FY 25/26	FY 26/27	Diff
Liability	\$11,836,611	\$13,551,086	14%
Workers' Compensation	\$3,588,256	\$3,984,450	11%
Property	\$10,125,811	\$9,625,296	-5%
Crime	\$498,498	\$526,202	6%
Total:	\$26,049,176	\$27,687,035	6%

AORMA Property Program – Values Limitation Clause – CSURMA’s Property Insurance Programs have been adversely affected by catastrophic losses occurring at remote locations, with all members sharing in the resulting costs. Rather than exclude these higher-risk properties, underwriters have agreed to continue providing coverage subject to a limitation equal to the reported property values. Although this limitation has been in effect since July 1, 2023, the AORMA Committee has now formally adopted an endorsement to the Memorandum of Coverage to clearly document the intent of the Program and its underwriters. Members subject to the limitation clause have been asked to acknowledge receipt of the endorsement.

AORMA Committee – On November 4, 2025, Jenny Puccinelli, Human Resources and Risk Manager at Santos Manuel Student Union of CSU, San Bernardino, and Ian Hannah, AVP for Advancement Operations at Sonoma State University Foundation were appointed to the AORMA Committee.

The following are the AORMA committee members. AORMA anticipates seat vacancies beginning in Spring 2026. Interested individuals and nominations for future seat vacancy consideration should be directed to AORMA Committee Chair, Chuck Kissel at ckissel@fullerton.edu.

Seat	Member	Position	Campus
Chair	Chuck Kissel	Executive Director	Fullerton
First Vice Chair	Bill Olmsted	Executive Director	Sacramento
Second Vice Chair	Leslie Levinson	Chief Financial Officer	San Diego
Seat 1	Ian Hannah	AVP for Advancement Operations	Sonoma
Seat 2	Jenny Puccinelli	Human Resources and Risk Manager	San Bernardino
Seat 3	Cecilia Ortiz	Executive Director	Dominguez Hills
Seat 4	Raven Tyson	Associate Director of Business Ops	San Diego
Seat 5	Barnaby Peake	Executive Director	Los Angeles
Seat 6	Rosa Hernandez	Associate Executive Director	Long Beach
Seat 7	Keith Crawford	Risk Manager	Chico

A brief overview of AORMA – AORMA (Auxiliary Organizations Risk Management Alliance) is a subcommittee of CSURMA (California State University Risk Alliance, a California joint powers authority). Together securing coverage across liability, workers compensation, property, crime, and unemployment. AORMA committee members are appointed by the Chair as seats become vacant. Members serve two (2) year terms and must be associated with a member auxiliary in good standing. An auxiliary cannot have more than one (1) committee member. Additionally, no more than two (2) auxiliaries from the same campus should serve on the committee at the same time. Members are appointed based on their representative skillset, value add, and years of experience, Executive Director, Legal, Human Resources, etc. along with auxiliary type, size, and geographic location. AORMA strives to have a committee representative of its members. AORMA committee provides governance and direction with regards to policy, procedures, and legal matters.

2025 LEGISLATIVE & COMPLIANCE REPORT

For 2026 Annual AOA Conference

Robert E. Griffin

I. California Legislation

Assembly:

AB 414 (Pellerin) – Residential Tenancies: Return of Security Balance. This bill, as amended in Senate, requires 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. **Enacted** (10/6/25).

AB 483 (Irwin) – Fixed-Term Installment Contracts: Early Termination Fees. Effective July 1, 2026, this bill, as amended, requires, 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. **Enacted** (10/10/25).

2025 LEGISLATIVE & COMPLIANCE REPORT

AB 495 (C. Rodriguez) – Family Preparedness Plan Act of 2025; Child Care Center Records Effective January 1, 2026, CDSS licensed child day care facilities (including employees), would be:

- Prohibited from collecting information or documents regarding citizenship or immigration status of pupils or their family members, except as required by state or federal law or as required to administer a state or federally supported educational program.
- Required to report to CDSS and the Attorney General any requests for information or access to the facility by an officer or employee of a law enforcement agency for the purpose of enforcing the immigration laws in a manner that ensures the confidentiality and privacy of any potentially identifying information.
- Required to exhaust emergency contact information when known that pupil care is not available.
- Required adopt, maintain and publish to enrollee parents model policies developed by the Attorney General, or equivalent policies, as soon as possible, but no later than July 1, 2026, along with facility safety plans and need to keep emergency contact information current.

This bill applies to all campus licensed childcare centers licensed to and/or operated by auxiliary organizations. Strict compliance will require unknown but likely significant administrative cost. **Enacted** (10/12/25).

AB 720 (Rogers) – Winegrowers and Brandy Manufacturers: Privileges Off-premises. This bill permits 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 bill would likely have little or no impact on campus wine production through auxiliary organizations. Application would be advantageous. **Enacted** (10/10/25).

AB 878 (Kalra) – Victims of Abuse or Violence: Landlord Reasonable Accommodations. This bill, as amended, requires landlords or their agents to make best efforts 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 also specifies 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,

2025 LEGISLATIVE & COMPLIANCE REPORT

except to further prescribe a more detailed landlord-tenant relationship under the law. Passed Assembly. Held under submission in Senate Appropriations Committee (8/29/25).

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 (6/27/25).

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, and each campus therein, to issue a notification to specified individuals when the presence of immigration enforcement is confirmed on their respective campuses or school sites. **Enacted as Urgency Matter effective 9/20/25.**

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. **Enacted (9/26/25).**

Two-Year Bills of Interest to Auxiliary Organizations:

A few pending bills that may impact auxiliary organizations will be tracked and reported in periodic summary updates to the Executive Committee and member-organizations.

2025 LEGISLATIVE & COMPLIANCE REPORT

II. California Regulations & Compliance Issues

A. Attorney General – Public Charities (including registered auxiliary organizations)

Online Filing Service. The Registry of Charities and Fundraisers is developing a new Online Filing Service that allows all registrants to submit filings and payments electronically. In 2026, the Online Filing Service will be available for all existing registrants and submission types, and existing systems, including the Registry Search Tool, will be replaced. Check for updates on this new system roll out. In the meantime, charities registered before October 2025 will not be able to use the Online Filing Service. Go to: <https://oag.ca.gov/charities/renewals>.

IRS Filing Extensions Honored for Registration Renewals. The Registry of Charities and Fundraisers honors all IRS extensions for annual renewal filing deadlines for charities, including the filing of Forms RRF-1, CT-TR-1, and IRS Forms 990, 990-PF and 990-EZ. Also, in advance of launching a new Online Filing Service for all existing registrants and submission types in 2026, the Registry of Charities and Fundraisers announces filing deadline relief for **all** charities. For charities whose renewal filings were due between January 7, 2025 and April 30, 2026, the deadline to file is extended to April 30, 2026. Charities do not need to contact the Registry to obtain this relief.

Proposed Regulations: AG Waiver Process for Dissolving Registered Charities.

Pursuant to Corporations Code sections 6615, 6716, 8716, and 9680, a nonprofit corporation that seeks to dissolve voluntarily must obtain from the Attorney General either a written waiver of objections to its proposed disposition of charitable assets or a written confirmation that the nonprofit corporation has no asserts. After obtaining a waiver of objections from the Attorney General, the nonprofit corporation must submit a copy of the waiver letter with a Certificate of Dissolution to the Secretary of State to finalize the dissolution.

The proposed regulations establish the process for nonprofit entities holding charitable assets to obtain a waiver of objections from the Attorney General, providing the Attorney General with the opportunity to review and audit entities holding charitable assets before they are dissolved or removed from the supervision of the Registry of Charities and Fundraisers. The regulations also establish the process for foreign nonprofit corporations to withdraw their registration with the Registry of Charities and Fundraisers, and for charitable trusts to terminate their registration.

See: <https://oag.ca.gov/charities/dissolution-of-charitable-entities>

B. Secretary of State

Corporate Naming. Choosing a new auxiliary organization corporate name or changing the name of an existing or merged entity requires attention to Secretary of State regulations to avoid unnecessary filing delays. See: <https://www.sos.ca.gov/administration/regulations/current-regulations/business/business-entity-names>

2025 LEGISLATIVE & COMPLIANCE REPORT

C. CSU System Policies and Procedures

Board of Trustees Regulations – CCR Title 5. There were no amendments in 2024 to sections (41400-42667) pertaining to auxiliary organizations, student body organizations or student organizations.

CSU Systemwide Policy Reviews Undertaken Relating to Auxiliary Organizations. Designated CO staff reviewed a *bakers-dozen* system-wide policy statements in 2025 affecting auxiliary organizations. Go to CSU website/Resources/CSU Policy Library. Enter: *Auxiliary Organizations*. Trace through entries for 2025 review dates.

While some of the listed 2025 policy reviews may not include changes, others – like EO 1059, *CSU Auxiliary Organizations* – deserve close attention. It is recommended that they, along with any new policies, be downloaded, reviewed, and made ready-references, as appropriate. See *CSU Policy Library* at: <https://calstate.policystat.com/> or <https://www2.calstate.edu/policies>

CSU’s California Nonprofit Integrity Act of 2004 Manual

The CSU’s *Nonprofit Integrity Act and Charitable Solicitation Manual 2023*, needs an update to address recent legislation and resulting DoJ implementing regulations. Check *Manual* citations for currency.

D. Other

Workplace Violence Prevention Planning. **REMINDER:** Employers in California must have a Workplace Violence Prevention Plan in place by July 1, 2024 (except for limited and narrow exceptions found in [Labor Code section 6401.9\(b\)\(2\)](#))

III. Federal Affairs

A. Federal Legislation

Corporate Transparency Act (CTA). **REMINDER:** The CTA, enacted in 2021 as part of the *National Defense Authorization Act*, requires certain types of businesses, including corporations, limited liability companies, and limited partnerships, to report information, beginning January 1, 2024, about their beneficial owners.

While the CTA applies to both domestic and foreign businesses that are registered or operate in the United States, statutory exemptions are broad: businesses with more than 20 employees; more than \$5 million in annual revenue; or that are already regulated by certain federal agencies, including tax-exempt entities under IRS oversight. **Auxiliary organizations are exempt from CTA reporting requirements.** See [31 CFR 1010.380\(C\)\(2\)](#).

B. Federal Regulations

Federal Funding by Executive Order! The chaotic posture of federal grants, research, indirect cost recovery makes impossible summary through this report. Online reference/resources abound. to. See, for example: <https://www.calstate.edu/Pages/Federal-Updates.aspx>

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Automatic Exempt-Status Revocation for Non-filing. Under Internal Revenue Code Section 6033(j), the tax-exempt status of an organization that does not file a required return or notice for three consecutive years will be automatically revoked as of the due date of the third unfiled return. See details at: <https://www.irs.gov/charities-non-profits/automatic-revocation-of-exemption>

IRS Regulations on Supporting Organizations. Reminder: The *Pension Protection Act of 2006* (PPA) made numerous changes to IRC Section 509(a)(3) supporting organizations, prompting a series of guidance projects over the past 17 years.

The IRS has finally issued final regulations that mostly adopt the 2016 proposed regulations on prohibited gifts to Type I and Type III supporting organizations from persons who control the organization it supports. The final regulations also adopt, with minor modifications, the proposed regulations on when a Type III supporting organization qualifies as functionally integrated by supporting a governmental organization, such as a public university.

Treasury Decision 9981, contains an excellent overview preamble, as well as the final regulations at <https://www.govinfo.gov/content/pkg/FR-2023-10-16/pdf/2023-22286.pdf>

Auxiliary organizations are (or should be) for the most part classified as section 509(a)(3)(Type III) supporting organizations. See *Issue Brief* on classifications in Resources webpage of AOA website.

IRS Issues Technical Guidance for Section 501(c) Organizations. IRS *TG-3-1: Overview, Applications, Exemption Requirements – IRC Section 501(c)* offers a current and comprehensive guide to many the oversight requirements that apply to auxiliary organizations. See: <https://www.irs.gov/pub/irs-pdf/p5859.pdf>

IRS Final Regulations on Electronic Filing. The IRS has issued final regulations on electronic filing of returns including Forms 990 and 990-T.

The final regulations largely adopt the proposed regulations, with explanations provided in the preamble. The final regulations are generally effective for returns required to be filed during the 2024 calendar year, except that the e-filing requirements with respect to Forms 990 and 990-T continue to be governed by section 3101 of the *Taxpayer First Act*, which generally applied to taxable years beginning after July 1, 2019.

A copy of the final regulations at: <https://www.govinfo.gov/content/pkg/FR-2023-02-23/pdf/2023-03710.pdf>

Report Resources include:

CSU Office of Advocacy & State Relations; CSU Office of Federal Relations; CSU Legal Reporting & Tax; National Association of University Business Officers; College & University Tax Report; Independent Sector; California Legislative Information Website.



2026 AOA EXECUTIVE COMMITTEE ROSTER

ELECTED OFFICERS¹

Andrew Singletary	President	Union WELL, CSU Sacramento
Cecilia Ortiz	Past President	Student Union/Rec, CSU Northridge
Maddison Burton	President-Elect	University Corporation, CSU Monterey Bay
Annie Macias	Secretary/Treasurer	Associated Students, CSU San Marcos

ELECTED REPRESENTATIVES²

Janelle Temnick	Term Expires 1/27	Aztec Shops, San Diego State
Shailendra Baghel	Term Expires 1/27	Research Foundation, San Jose State
Vilayat Del Rossi	Term Expires 1/27	Santos Manuel St. Union, CSU San Bernardino
Kevin Mojaradi	Term Expires 1/27	Associated Students, CSU Northridge
Alejandro Rios	Term Expires 1/28	ASI, San Francisco State
Russell Monteath	Term Expires 1/28	Cal Poly Corporation, San Luis Obispo
Athena Quarles	Term Expires 1/28	SDSU Research Foundation
John Doeblor	Term Expires 1/28	Associated Students, CSU Northridge

STANDING COMMITTEE CHAIRS³

Taylor Buhler-Scott	AS/SU/REC	Associated Students, CSU Long Beach
Michael Lennon	Commercial Services Business & Fin Services	University Corporation, CSU Northridge
Andrea Bozant	Human Resources	University Corporation, CSU Northridge
Patrick Speers	Information Technology	ASI, CSU Northridge
Cecilia Ortiz	LR Planning/Nominations	Student Union/Rec, CSU Northridge
Trina Beckwith	Research Administration	UCorp, CSU San Marcos
Monica Alejandre	Philanthropy	Philanthropic Foundation, CSU San Bernardino
Patrice Griffith	Property Development & Management	University Enterprises, CSU Sacramento
Chuck Kissel	Risk Management & Insurance Programs	Auxiliary Services Corp., CSU Fullerton
Dave Edwards	Past Presidents	ASI, CSU Fullerton

SERVICE PROVIDERS⁴

Kim Clark	Operations Manager	
Dwayne Brummett	Business Manager	PO Box 249 Arroyo Grande, CA. 93421

DESIGNATED LIAISONS⁵

Rose Mcauliffe	CABO Liaison	CSU Sacramento
Robyn Pennington	Business & Finance Liaison	CSU Chancellor's Office
Aaron Moore	Advancement Liaison	CSU Chancellor's Office
Carrie Reith	General Counsel Liaison	CSU Chancellor's Office
Dave Grant	Human Resources Liaison	CSU Chancellor's Office

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- 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 selected by their respective committees and are designated voting members of the Executive Committee.
 - 4) Appointed by Executive Committee to one-year service contracts – non-voting.
 - 5) Appointed by Executive Committee, these are designated liaisons (subject to change) and standing attendees – non-voting.