



EXECUTIVE COMMITTEE MEETNIG AGENDA

April 17, 2026 – 8:30am – 2pm

Long Beach Marriott – Lindbergh Room

Zoom Link:

<https://csus.zoom.us/j/82664524303?pwd=jLOvXlzJgALl1Uzv73dGjLXMGP8Rre.1&from=addon>

- A. CALL TO ORDER and ANNOUNCEMENTS – Andrew Singletary
- B. APPROVAL OF AGENDA – **Action Item**
- C. REVIEW AND APPROVAL OF 1/10/26 MEETING MINUTES – pg. 3 - 7 - **Action Item**
- D. PRESIDENT’S REPORT – Andrew Singletary
 - a. Updated Exec Committee Roster - pg. 8
 - b. AOA Org Chart - pg. 9
 - c. New Human Resources & Labor Counsel – Short term agreement approved by Officers for April 1 – June 30, 2026 - pg 10 - 12
 - d. Mailchimp Template Design – with IXLA - pg. 13 - 19
 - e. Scholarship Update
 - f. Sunsetting Website Groups – shift to SLACK
 - g. Service Provider Status - update
 - h. 2028 Site Proposal **Action Item**
 - i. Hyatt Indian Wells - pg. 20 - 33
 - ii. Oakland Marriott - pg. 34 - 44
- E. FINANCIAL REPORT – Dwayne Brummett and Annie Macias
 - a. Financial Status - update
 - b. Draft 2026/27 Budget Discussion - 45 - 48
- F. PRESIDENT-ELECT’S REPORT – Maddison Burton
 - a. 2027 Conference Planning Committee Report
 - b. Updated Business Partner Sponsorship Levels - pg. 49 - 52
- G. MEMBER RESOURCES
 - a. Melinda Latas, CO Chief Compliance Officer – Discussion on AOA’s Role in Pending Policy Changes – Time Certain 11:30am
 - b. Technology Support Service Provider – ASI CSUN Proposal – **Action Item**
 - c. Leadership Academy Re-Center - pg. 53 - 59 - **Action Item**
 - d. HR Attorney RFP (July 1 – June 30) – pg. 60 - 70 - **Action Item**
 - e. Events Air Renewal - pg. 71 - 75 - **Action Item**
 - f. Dent Website Hosting/Maintenance Agreement (July 1 – June 30) - pg. 76-77 **Action Item**
 - g. Legislative Update (from Robert Griffin) - pg. 78 - 82

H. BUILDING RELATIONSHIPS AND PARTNERS

- a. CABO Liaison – Rose Mcauliffe, Sacramento State
 - i. CABO Updates (12/3 & 1/12)
- b. Chancellor’s Office Liaisons
 - i. Business & Finance – Melinda Latas - pg. 83 - 89
 - ii. Advancement – Aaron Moore - pg. 90 - 91
 - iii. General Counsel – Carrie Reit - pg. 92
 - iv. Human Resources – Dave Grant

I. REPORTS

- a. AS/SU/REC – Taylor Buhler-Scott - pg. 93
- b. Commercial Services – Michael Lennon
- c. Business & Financial Services – Carlos Careaga - pg. 94 - 96
- d. Human Resources – Andrea Bozant - pg. 97
- e. Information Technology - Chilmann Chaudhary - pg. 98 - 99
- f. Long Range Planning/Nominations – Cecilia Ortiz
- g. Research Administration – Trina Beckwith - pg. 100 - 101
- h. Philanthropy – Monica Alejandre
- i. Property Management & Development – Patrice Griffith
- j. Risk Management & Insurance Programs – Chuck Kissel
- k. Past Presidents – Dave Edwards

J. INFORMATION AND ANNOUNCEMENTS

Next Meeting – June 12, 2026 –9am – 2pm via Zoom

K. ADJOURNMENT

Future Meetings

August 14, 2026 – TBD, 8:30am – 2pm
November 20, 2026 – virtual, 9am – 2pm
January 9, 2027 @Sheraton SD – time TBD

Contact Information

Kim Clark, Operations Manager
Kdclark.csuaoa@gmail.com

Dwayne Brummett, Business Manager
dbrummet@calpoly.edu



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 MEETING MINUTES
January 10, 2026 – 3pm – 5pm
Oakland City Center Marriott – Uptown (2nd Floor)

<u>OFFICERS</u>			Present
Cecilia Ortiz	President	CSU, Northridge	Yes
Heather Cairns	Past President,	CSU, Northridge	Yes
Andrew Singletary	President-Elect	CSU, Sacramento	Yes
Annie Macias	Secretary/Treasurer	CSU, San Marcos	Yes

ELECTED REPRESENTATIVES

Andrea Burns	Elected Representative	Cal Poly, San Luis Obispo	Yes
John Doebler	Elected Representative	CSU, Northridge	Yes
Melinda Swearingen	Elected Representative	San Diego State University	Yes
Janelle Temnick	Elected Representative	San Diego State University	Yes
Shailendra Baghel	Elected Representative	San Jose State University	Yes
Vilayat Del Rossi	Elected Representative	CSU, San Bernardino	Yes
Cyndi Farrington	Elected Representative	CSU, Long Beach	Yes
Kevin Mojaradi	Elected Representative	CSU, Northridge	Yes

STANDING COMMITTEE CHAIRS

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

APPOINTED STAFF (Non-Voting)

Kim Clark	Operations Manager		Yes
Dwayne Brummett	Financial Services Manager		Yes

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	Yes
Carrie Rieth	General Counsel Liaison	Chancellor's Office	No
Dave Grant	Human Resources Liaison	CSU Chancellor's Office	No



- A. CALL TO ORDER and ANNOUNCEMENTS – Cecilia Ortiz
The meeting was called to order at 3:02 p.m. by President Cecilia Ortiz. Announcement included that Intersect XLA will be dropping in at this meeting to take candid shots around 3:15pm.
- B. APPROVAL OF AGENDA – **Action Item**
M/Forrest Boggs, S/Doebler, no discussion, passed
Amendment to change the slate for next year – John name and ASI, page 9-11:
President Elect: Maddison Burton
- C. REVIEW AND APPROVAL OF 11/21/25 MEETING MINUTES – **Action Item**
M/Doebler, S/Baghel, passed
- D. PRESIDENT’S REPORT – Cecilia Ortiz
- a. Financial Transition Update
Resolution regarding Audit and 2024/25 Financial Statements – **Action item**

Chair Ortiz reviewed the resolution drafted by Robert Griffith, as outlined on page 8, and noted the need to include a date, aligning it with the appropriate fiscal year. It was also discussed, per Flynn, that notification to the organization should occur during the annual fiscal meeting. Questions were raised regarding whether the organization must adhere to higher standards if the established threshold is not met. The years referenced in the resolution were confirmed to be accurate, and it was acknowledged that, for practicality, two audits will likely be conducted.

M/Doebler, S/Baghel, passed
- b. 2026 EC Candidates Recommended for Election – **Action Item**

Committee reviewed the roster and it was noted to add Madison Burton.
M/Flynn, S/Wessel, passed
- E. FINANCIAL REPORT – Dwayne Brummett and Annie Macias
Brummett reported that tax filings will be completed on time, although audited financial statements are not currently required, and efforts to rebuild financial statements from older records are still underway as part of a transitional period. Accounts receivable include dues from campuses, as well as contributions from conference and business partners, and the organization maintains an investment reserve of approximately \$160K. There was discussion about the timeline for the budget file to be ready for the Executive Committee, with hopes of having it prepared by next year’s April EC meeting. Ortiz



shared that the goal is to establish a more robust budget planning process to give committees a clearer and more accurate financial picture, and in response to Doebler's inquiry about the organization's financial health, it was noted that the organization appears to be on more stable financial footing.

F. PRESIDENT-ELECT'S REPORT – Andrew Singletary

a. 2026 Conference Planning Committee Report

Members were reminded about key conference logistics, including badges, the appreciation breakfast, and an invitation for the Executive Committee to attend the grand opening of the business partners meeting from 3:00–4:30 p.m. Committees were also encouraged to remind participants to utilize Slack and social media, as well as note that the agenda is not scrolling properly in the app. Conference highlights include 490 registrations, with the hotel sold out on Sunday and Monday, participation from 48 business partners, and 46 general concurrent sessions. The conference schedule was reviewed, with Sunday featuring the ED meeting at 8:30 a.m., committee meetings at 1:00 p.m., the conference opening at 3:00 p.m., and a reception at 5:00 p.m. On Monday, the annual business meeting will take place at 5:00 p.m., during which membership will vote on the Executive Committee slate, along with a raffle for AirPods 3 to encourage strong attendance. Tuesday will include an AI-focused session.

b. Stripe/Airwallex Transition – Update

Singletary noted that PayPal served as the merchant account for conference registration in 2025, while Stripe is being considered due to its integration with QuickBooks, with an estimated setup fee of \$2,300. An update on Mailchimp was also provided, with Kim and Andrew having completed a demo to establish synchronization between the website and email communications. Mailchimp adheres to compliance rules for subscribing and unsubscribing from databases, and the next phase is expected to involve committees utilizing the listserv functionality.

G. MEMBER RESOURCES

- a. Robert Griffin's Annual Legislative and Compliance Report is posted to the website

H. NEW AND RETURNING BUSINESS ITEMS

a. Reports from Ad Hoc Committees

i. Collaborative Technology Tools and Storage – Andrew Singletary

Discussion included the use of Slack, Google Workspace, and Google Drive, with a focus on expanding access to shared drives for committees.



The conversation also highlighted goals and anticipated evolutions for the coming year, particularly around improving collaboration, communication, and resource sharing across teams.

- ii. Education & Conference Programming 2028 & Beyond – Cecilia Ortiz
 - 1. Recommendation for future Educational Programs and Conferences – **Action Item**

Ortiz provided an overview of the report, followed by discussion from members. John noted that adopting a hybrid model, including hosting portions of the conference on a campus, could help reduce costs. Members expressed openness to change and emphasized the importance of opportunities to come together and network. It was also confirmed that a contract is already in place for the 2027 conference at the Sheraton Marina in San Diego. Edwards recommended that any proposed conference changes be brought to the full Executive Committee, rather than only officers, and suggested establishing clear financial targets for service providers to determine whether the conference should remain in a student union setting for all three years or eventually transition back to a hotel. It was further recommended that a detailed proposal be shared with the entire Executive Committee and that clear targets be identified for future conferences.

Motion: M/Doebler, S/Flynn, passed

- b. Submission of Completed Conflict of Interest Documents – Voting EC Members Kim Clark, will be emailing EC to complete the COI for the year 2025-206

I. BUILDING RELATIONSHIPS AND PARTNERS

No Reports by the CABO and Chancellor's Officer Liaisons at this abbreviated meeting.

Aaron shared that the systemwide strategic plan, CSU Forward, was released to the Trustees in the fall. He also noted that CSUBuy is progressing quickly, with expansion underway to the next 16 campuses.

J. REPORTS

The Standing Committee Chairs' Annual Reports on their committee's accomplishments was included in AOA's Annual Report to Member Organizations sent out on January 4th. If time permits, Committee Chairs may share Committee updates.



K. INFORMATION AND ANNOUNCEMENTS

Next Meeting – April 17, 2026 – Long Beach, TBD

L. ADJOURNMENT: 4:08pm

By acclamation, the Executive Committee was adjourned at 1:43pm

Respectfully Submitted,

AOA Secretary/Treasurer



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	University Corporation, CSU Northridge
Carlos Careaga	Business & Fin Services	ASI, San Diego State
Andrea Bozant	Human Resources	University Corporation, CSU Northridge
Chilmann Chaudhary	Information Technology	Loker Student Union, CSU Dominguez Hills
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

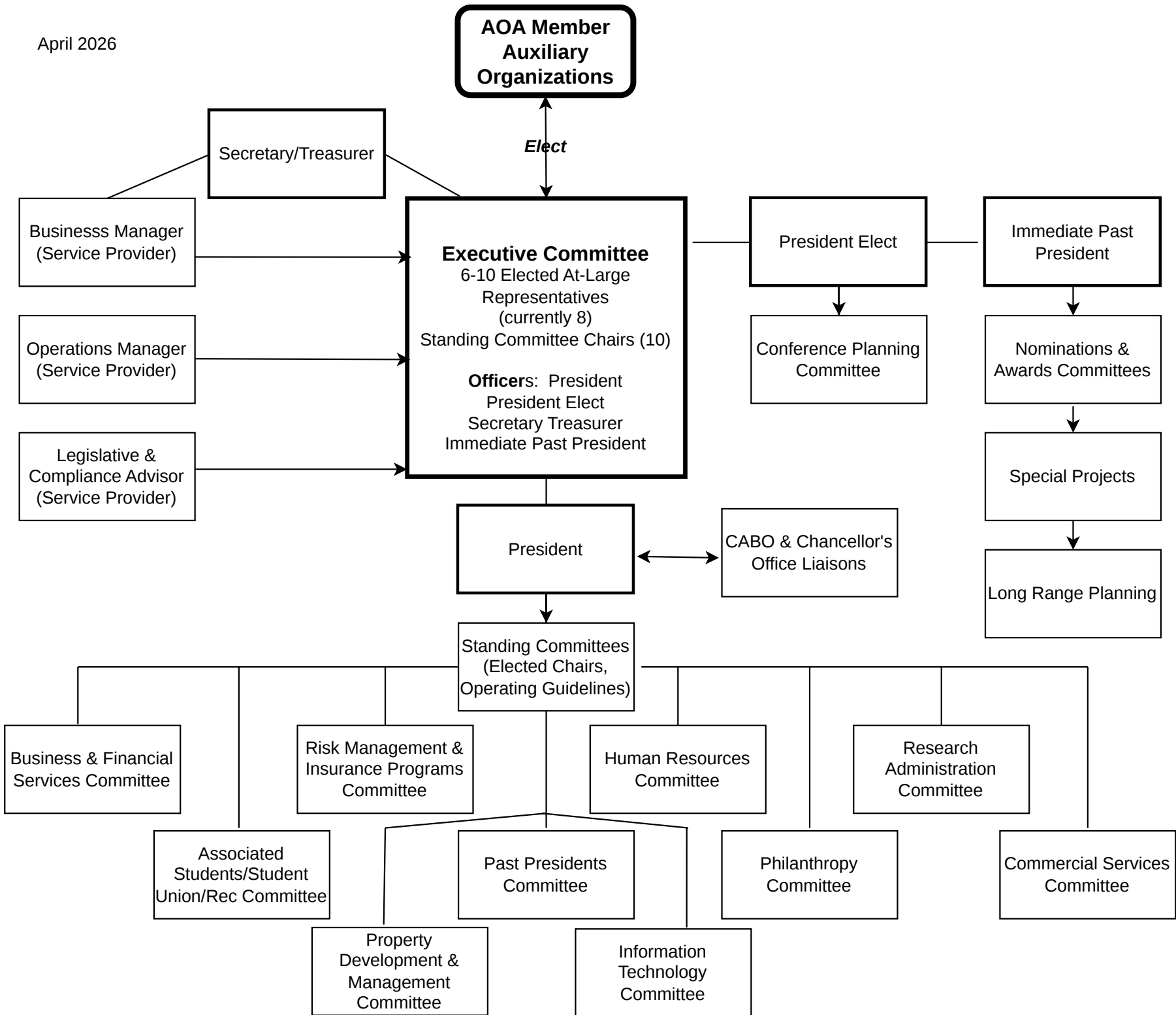
SERVICE PROVIDERS⁴

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

DESIGNATED LIAISONS⁵

Rose Mcauliffe	CABO Liaison	CSU Sacramento
Melinda Latas	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

-
- 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.



**INTERIM RETENTION AGREEMENT BETWEEN
CONSTANGY, BROOKS, SMITH & PROPHETE, LLP
AND THE AUXILIARY ORGANIZATIONS ASSOCIATION
CALIFORNIA STATE UNIVERSITIES**

The Auxiliary Organizations Association, California State Universities, ("AOA") hereby agrees to retain the law firm of Constangy, Brooks, Smith & Prophete, LLP ("the Firm") as its legal counsel for human resources advice and information from attorneys Nestor Barrero, Robert Wennagel or other Firm attorneys, as set forth below, for an initial interim period of **April 1, 2026 through June 30, 2026**, for a quarterly fee of Nine Thousand Dollars (\$8,000) payable upon billing as a non-refundable retainer within thirty (30) days from date of billing.

Constangy, Brooks, Smith & Prophete, LLP and the AOA agree:

1. The Firm will provide telephone consultations during the interim period of one hour or less to the auxiliary members of the AOA on human resources matters affecting their organizations, such that these consultations will be paid through the above quarterly retainer. Consultations exceeding the one hour limit or multiple consultations on the same matter that exceed the one-hour limit will be billed directly to the auxiliary member entity at the billing rate set forth below.

2. The Firm or its designated colleagues who are acceptable to the Association will attend and participate in any Human Resources Committee meetings of the AOA during the interim period on a virtual basis unless AOA requests in person participation. Expenses for travel if required will be billed and paid separately by the AOA to the extent they exceed the above-referenced interim retainer.

3. The Firm will prepare material on significant legal matters for distribution at the Human Resources Committee meetings and for inclusion in the Association's newsletter during the interim period when appropriate.


4. The Firm will provide to the AOA Secretary Treasurer at the end of the interim period an itemization of services provided to the AOA and its member auxiliaries under this agreement.

5. The Firm will perform any additional work requested by members of the AOA Officers Group at the capped rate of Three Hundred Fifty Dollars per hour (\$350.00/hour).


6. This Agreement does not pertain to litigation matters that are referred to and managed by the California State University Risk Management Authority and/or the Auxiliary Organizations Risk Management Alliance (CSURMA/AORMA) and its insurers. For such litigation matters if the Firm is selected as counsel, the Firm and CSURMA/AORMA will agree on, or come to an understanding regarding, the rates to be charged.

In WITNESS THEREOF, this agreement has been executed by the parties as of the dates indicated below.

**AUXILIARY ORGANIZATIONS
ASSOCIATION CALIFORNIA STATE
UNIVERSITIES**

By: 
Annie Macias (03/19/2026 14:18:19 PDT)
03/19/2026

**CONSTANGY, BROOKS, SMITH &
PROPHETE, LLP**

By: 
Nestor Barrero
04/01/2026






AOA Interim April to June 2026 Retention Agreement

Final Audit Report

2026-03-19

Created:	2026-03-19 (Pacific Daylight Time)
By:	Andrea Bozant (abozant@csumb.edu)
Status:	Signed
Transaction ID:	CBJCHBCAABAAae2w_cu3mWptSA8Oj2slahVRrpKRxXWH
Documents:	AOA Interim April to June 2026 Retention Agreement.pdf (2 pages)

"AOA Interim April to June 2026 Retention Agreement" History

-  Document created by Andrea Bozant (abozant@csumb.edu)
2026-03-19 - 10:45:18 AM PDT
-  Document emailed to Annie Macias (amacias@csusm.edu) for signature
2026-03-19 - 10:46:57 AM PDT
-  Email viewed by Annie Macias (amacias@csusm.edu)
2026-03-19 - 2:17:30 PM PDT
-  Document e-signed by Annie Macias (amacias@csusm.edu)
Signature Date: 2026-03-19 - 2:18:19 PM PDT - Time Source: server
-  Agreement completed.
2026-03-19 - 2:18:19 PM PDT

3/17/26

Andrew Singletary
President, Auxiliary Organizations Associations
California State University, Sacramento
6000 J Street, MS 6017, Sacramento, CA 95816
 asing@saclink.csus.edu

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

As part of the educational process, we provide an environment where CSUN students are mentored by professional faculty and staff to be job-ready in the creative industry and cultivate an entrepreneurial mindset. To this end, IntersectLA utilizes high-impact innovative practices that allow students to be creative in the design process, explore new ideas, and investigate advanced techniques as they develop solutions to our clients' challenges.

IntersectLA is a self-funded center and part of CSUN's Mike Curb College of Arts, Media, and Communication. All funding from completed projects helps support IntersectLA through student salaries, scholarships, and/or course units for collaborating on "real-world" projects with our clients. Our project revenue sustains the organization without seeking additional university funding. Please visit our [website](#) for further information.

Clients who hire IntersectLA are in full agreement and understand that their project will be fully developed under this learn-by-doing environment by students who are supervised by faculty and staff. In signing the contract, the client fully acknowledges that their project serves as a learning platform for students and that the client's business is an integral part of the program that supports our mission and vision.

The following is a proposal for the **Auxiliary Organizations Association – Email template design and development in Mailchimp, along with support for training and creation of graphic assets**. If some items in the contract can be combined to achieve further cost efficiencies, the budgetary figures will be adjusted to reflect such efficiencies.

We thank you again for this opportunity and look forward to working with you and your team. Please do not hesitate to contact us if you have any additional questions.

Sincerely,

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

PROJECT OBJECTIVES

This proposal outlines a collaboration between IntersectLA (IXLA) and the Auxiliary Organizations Association (AOA) Leadership to develop refreshed Mailchimp marketing materials.

IntersectLA will design and implement branded, accessible, and reusable email templates within Mailchimp to support AOA's primary communications, committee communications, and annual conference promotions. All templates must align with AOA brand standards (csuaoa.org), utilize AOA blue as the primary brand color, and comply with general web accessibility guidelines (Section 508).

Deliverables

1. General AOA Communication Template

- Master template for organization-wide communications to AOA members
- Reusable components: header, copy blocks, and footer
- Designed in alignment with AOA branding and email compliance standards

2. Committee Communication Templates

- Set of 9 committee-specific templates with unique headers for clear identification
- Standardized copy blocks and a distinct footer design
- Incorporation of IXLA-developed graphic icons
- Consistent use of AOA branding and compliance standards

3. Conference Email Templates

- Generic Conference Template: Flexible content blocks for announcements, registration, speakers, and sponsorships
- Annual Theme-Based Template: Custom graphics aligned with each year's conference visuals
- Defined promotional email types, saved as reusable templates for future use
- All templates adhere to AOA branding and email compliance standards

Implementation & Handoff

- Design, build, and test templates within AOA’s Mailchimp account
- Provide a brief training overview or written guidance on template use
- Deliver confirmation that templates are fully functional and ready for deployment

Proposed Budget

Deliverable	Description	Amount
Template Development Planning	Develop an implementation plan for all templates made for AOA Mailchimp campaign(s)	\$600
Committee Templates	Develop all 9 committee templates for AOA Mailchimp campaign(s)	\$540
Conference Template	Develop all conference templates for AOA Mailchimp campaign(s) general and themed	\$180
Training/Testing	Train designated AOA team members on the Mailchimp templating process and test procedural email disbursement for quality assurance.	\$300
Total		\$1620

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

Andrew Singletary
President, Auxiliary Organizations Association

Date

Concur

Shally Juarez
Assistant 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 IXLA 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.

AUXILIARY ORGANIZATIONS ASSOCIATION

Auxiliary Organizations Association

We are excited about the opportunity to partner with you on your upcoming conference. This proposal outlines our collaborative approach, ensuring meticulous attention to detail for an exceptional event. We are confident in our ability to exceed your expectations and look forward to a successful partnership.

Event Information

Title: Auxiliary Organizations Association
Start Date: Monday, January 10, 2028
End Date: Saturday, January 15, 2028
Guest Name: PATRICK BAILEY
Guest Email: patrickhbaileyjr@gmail.com

Grand Hyatt Indian Wells Resort & Villas

Host your conference at Grand Hyatt Indian Wells Resort & Villas, our world-class destination nestled in Greater Palm Springs, designed to inspire collaboration and success. Our expansive Indian Wells Ballroom and versatile Desert Vista Ballroom offer sophisticated settings for large sessions and intimate breakouts. The dedicated culinary team crafts exceptional dining experiences, using fresh, locally sourced ingredients to energize and delight. We promise an expertly managed event, ensuring every detail is flawlessly executed and your objectives are exceeded.

Danielle Santilli

Group Sales Manager

Tel: 201-668-0927 | danielle.santilli1@hyatt.com

Amenities

- Meeting Facilities
- On-Site Restaurant
- Resort Property
- Spa
- Golf
- Pool
- Fitness Center
- Digital Check-In
- Electric Vehicle Charging

Event Spaces

Designed with professionals in mind, our event spaces are equipped with everything needed to make your gathering a success, from dynamic layouts to high-speed connectivity and seamless service. Located in the heart of Indian Wells, we offer the perfect setting for productive meetings and inspiring corporate events. Grand Hyatt Indian Wells Resort & Villas provides a versatile setting for your conference, featuring meeting rooms, a multifunction venue, and outdoor terraces for breakout sessions.

Boardrooms

Our three 406-square-foot boardrooms combine sleek efficiency and cool charm. They are ideal venues for your next Palm Springs executive meeting, small reception or banquet seating up to 20 guests.

Indian Wells Ballroom

At 20,000 square feet, our largest venue combines soaring 24-foot ceilings and plenty of space with a warm ambience. This space accommodates up to 2,000 guests and, with its surrounding foyers, is limited only by your imagination.

The 18th Lawn

Overlook the 18th fairway with cool green turf, a lake and a waterfall in this serene setting that's

Sunset Room

Sunset Room offers stunning panoramic views in every direction, enhanced by floor-to-ceiling sliding glass doors that bring the outdoors in. Its flexible design makes it perfect for hosting hospitality events, executive meetings, receptions, or meals, adapting seamlessly to any occasion.

Grand Salon Ballroom

This 6,048 flexible square foot room works well for both small meetings or a grand reception. The adjoining foyer seamlessly blends in- and outdoors, with picturesque golf course views from its terrace.

The Verbena Terrace

Enchant your guests with this lovely outdoor event venue—as many as 300 for a reception or

Sunrise Terrace

This space features spectacular views and is designed with shades and misters to ensure comfort throughout the year, making it an ideal complement to the Sunset Room for any occasion.

The 18th Terrace

Our 2,100 square foot terrace adjoins the Indian Wells Ballroom and looks out over the 18th fairway. It can hold up to 200 guests for a reception and smaller groups for a banquet or similar gathering.

The Courtyard

Nestled between nature with picturesque mountain views and lush greenery, The Courtyard

perfect for open-air gatherings. Host up to 120 guests for a banquet or more for a cocktail reception.

Fireside Garden

The newly completed Fireside Garden offers a unique dining experience for up to 40 guests. Located near our Villas, this outdoor event venue boasts of an expansive private space with family style dining tables, lounge seating, firepit and outdoor chef's oven, so you can elevate the dining experience for your Palm Springs conference attendees, reception guests and more.

200 for a banquet. In our cool Indian Wells desert evenings, the fireplace adds a soft, glowing warmth.

The Hibiscus Room and Gardenia Room

Comprising 1,599 indoor square feet and 775 terrace square feet each, these rooms are a delight. Entertain up to 30 guests indoors and 60 outside on the terrace with the mountains and palm trees providing a scenic backdrop.

makes an ideal setting for your next outdoor reception, banquet or celebration.

Guest Rooms

Check-In

04:00 PM

Check-Out

11:00 AM

Designed as a restful sanctuary, the guest rooms at Grand Hyatt Indian Wells Resort & Villas offer world-class amenities and a signature focus on care, ensuring a memorable conference experience. Each space provides a seamless blend of comfort and support, fostering a sense of wellbeing and connection for your attendees throughout their stay.

1 BEDROOM VILLA

1100 sq ft | View Varies

Discover this 1,110-square-foot resort villa featuring one king bed in the bedroom, a fireplace in the expansive living space, a wet bar in the dining area and a grill on the private furnished patio. Step out to stunning views of the mountains in Greater Palm Springs and the resort golf course.

PENTHOUSE SUITE

875 sq ft | View Varies

Relax and spread out in 875 square feet of space with a king bed, separate living and dining rooms, powder room, a wet bar and a private balcony with expansive views of mountains, golf course or pool.

ONE BEDROOM PRES VILLA

1800 sq ft | View Varies

Indulge in 1,800 square feet of private luxury with a separate room furnished with a king bed, expansive residential living space with fireplace, dining area, wet bar and one and a half baths. Sliding glass doors open to lead you to golf course or lagoon views from your private furnished patio with outdoor spa grill. We offer the option to upgrade to two bedrooms.

1 KING BED

550 sq ft | View Varies

Relax comfortably in the largest guestrooms in Greater Palm Springs with our 550-square-foot room featuring a king bed and a queen-size sleeper sofa. Our spacious living area offers a workspace, a spa-inspired bath and private balcony.

Guest Room Block & Rates

Room Type	Rate	Monday - 01/10/2028	Tuesday - 01/11/2028	Wednesday - 01/12/2028	Thursday - 01/13/2028	Friday - 01/14/2028	Total Rooms	Total Cost
1 KING BED	\$279 USD	105	326	326	1	0	758	-
PENTHOUSE SUITE	279	5	5	5	1	0	16	-
ONE BEDROOM PRES VILLA	899	1	1	1	1	0	4	-
1 BEDROOM VILLA	699	4	4	4	1	0	13	-
Daily Room Night Total	0							
							Occupancy Tax: \$28,007.05 USD	
							City Tax: \$4,572.58 USD	
							CA Tourism Fee: \$434.40 USD	
							CA Tourism Tax: \$2,286.29 USD	
							Resort Fees: \$19,775.00 USD	
							Resort Fee Tax: \$3,053.26 USD	
							Estimated Total: \$58,128.58 USD	

Disclaimer

The room block and rates provided are based on availability at the time of booking and are subject to change.

General Terms and Conditions

All reservations are subject to availability, and guests are responsible for any damages during their stay. By booking, you agree to comply with hotel policies, including non-smoking, check-in/check-out times, and any applicable fees. The Guest Room Rates are quoted exclusive of (and will be subject to) any applicable taxes and other governmental-imposed fees in effect at the Hotel at the time of the meeting. Group acknowledges that the Taxes are subject to change and currently total 15.445%, including the following:

12.25% Occupancy Tax

3% TBID Assessment

.195% CA Tourism Assessment

15.445% Resort Fee Tax

Food & Beverage

Our culinary team is prepared to deliver exceptional catering services for your conference, from energizing breakfast buffets to elegant multi-course dinners. We focus on nurturing the mind and body with mindful and energizing options, ensuring your attendees feel cared for, focused, and ready to connect.

Minimum Spend* **\$250,000 USD**

The food and beverage charges are each subject to and exclusive of a separate mandatory service charge of 12.74%, which will be distributed to the service staff (banquet servers, banquet leads, banquet bartenders). The food and beverage charges are also subject to and exclusive of a separate mandatory charge of 13.26%, which will be retained by the Hotel as an administrative fee to cover administration of the banquet, special function, or package deal, is not a tip or gratuity, and will not be distributed as a tip or gratuity to the employees who provided service at your Event. Food and beverage charges also exclude taxes and fees for optional services requested by Group.

The Meeting and Event Space rental fee is also subject to and exclusive of a separate mandatory charge of 26%, which will be retained by the Hotel as an administrative fee to cover administration of the banquet, special function, or package deal, is not a tip or gratuity, and will not be distributed as a tip or gratuity to the employees who provided service at your Event. The meeting and event space rental excludes taxes.

The service charges and administrative fees, if applicable, may be subject to sales or other Taxes in effect at the time of the Event. Group's final bill(s) may vary depending on Group's final menu selections, number of attendees, and optional services requested by Group.

January 9, 2028

Time	Event Name	Space	Setup	Attendees
12:00 PM - 5:00 PM	SETUP- Registration	INDIAN WELLS LM FOYER	Other	8
1:00 PM - 3:00 PM	AOA Pre Meeting	GARDENIA AB	Hollow Square	24
3:00 PM - 5:00 PM	Mini Precon	GRAND SALON FG	Hollow Square	6

January 10, 2028

Time	Event Name	Space	Setup	Attendees
6:00 AM - 11:59 PM	Space Hold	DESERT VISTA AB	Other	0
6:00 AM - 11:59 PM	Conference Office	IWCC OFFICE 1	Other	6
6:00 AM - 11:59 PM	AV Storage	IWCC OFFICE 2	Other	6
7:00 AM - 8:00 PM	Storage/Staff Boxed Lunches	REG COUNTERS 1,2 & 3	Other	2
8:00 AM - 5:00 PM	Meetings	GARDENIA AB	U-Shape	24
8:00 AM - 5:00 PM	SETUP- Business Partner Exhibit	INDIAN WELLS IJKL	Exhibits	59
8:00 AM - 5:00 PM	CLIENT SETUP- Registration	INDIAN WELLS LM FOYER	Other	8

January 11, 2028

Time	Event Name	Space	Setup	Attendees
6:00 AM - 11:59 PM	Conference Office	IWCC OFFICE 1	Other	6
6:00 AM - 11:59 PM	AV Storage	IWCC OFFICE 2	Other	6
7:00 AM - 8:00 PM	Storage/Staff Boxed Lunches	REG COUNTERS 1,2 & 3	Other	0
8:00 AM - 5:00 PM	SETUP- Business Partner/Expo Grand Opening	INDIAN WELLS IJKL	Exhibits	59
8:00 AM - 5:00 PM	Space Hold	SUNRISE TERRACE	Other	0
8:00 AM - 9:00 PM	Space Hold	THE 18th TERRACE	Other	0
8:00 AM - 10:00 PM	Space Hold	FAIRWAY TERRACE	Other	0
9:00 AM - 5:00 PM	Registration	INDIAN WELLS LM FOYER	Other	8
10:00 AM - 2:00 PM	Financial Officers Association (Invite Only)	DESERT VISTA A	Hollow Square	30
10:30 AM - 8:00 PM	Committee Meetings	GARDENIA A	Theater	35
11:30 AM - 2:00 PM	AOA Executive Director's Luncheon	SUNSET ROOM	Hollow Square	50
12:00 PM - 8:00 PM	Committee Meetings	GARDENIA B	Theater	35
12:00 PM - 8:00 PM	Hallway	GRAND SALON DE	Other	0
12:00 PM - 8:00 PM	Committee Meetings	GRAND SALON F	Theater	35
12:00 PM - 8:00 PM	Committee Meetings	GRAND SALON G	Theater	35
12:00 PM - 8:00 PM	Committee Meetings	GRAND SALON H	Theater	35
1:00 PM - 10:00 PM	Conference Orientation/Drag Bingo	INDIAN WELLS P	Theater	162
2:00 PM - 3:30 PM	AOA Leadership Academy Meeting	VILLA PRIMROSE & PATIO	Other	9
3:30 PM - 5:30 PM	Water Stations	GRAND SALON FOYER	Other	200
7:00 PM - 8:30 PM	Overflow Dinner Seating	INDIAN WELLS M	Banquet	450
7:00 PM - 8:30 PM	Opening Dinner	INDIAN WELLS NO	Reception	400
7:00 PM - 11:00 PM	Dinner/Party Overflow	DESERT VISTA FOYER	Reception	0
7:00 PM - 12:00 AM	Game Night/Casino	DESERT VISTA BALLROOM	Other	0
7:00 PM - 12:00 AM	Bar	INDIAN WELLS NOP FOYER	Other	400

January 12, 2028

Time	Event Name	Space	Setup	Attendees
6:00 AM - 11:59 PM	Conference Office	IWCC OFFICE 1	Other	6
6:00 AM - 11:59 PM	AV Storage	IWCC OFFICE 2	Other	6
7:00 AM - 5:00 PM	Overflow Area	THE 18th TERRACE	Other	0
7:00 AM - 8:00 PM	Storage	REG COUNTERS 1,2 & 3	Other	0
7:30 AM - 1:30 PM	General Session/Lunch	INDIAN WELLS MNOP	Other	500
7:30 AM - 4:45 PM	Registration/Meals	INDIAN WELLS LM FOYER	Other	8
8:00 AM - 4:00 PM	Meetings	VILLA PRIMROSE & PATIO	Other	16
8:00 AM - 5:00 PM	Business Partner Exhibit	INDIAN WELLS IJKL	Exhibits	59
8:00 AM - 10:00 PM	Space Hold	FAIRWAY TERRACE	Other	0
8:00 AM - 11:00 PM	CSURMA Benefits Program Meeting and Breakfast/Presidential Reception	DESERT VISTA E	U-Shape	49
9:00 AM - 5:00 PM	Concurrent Session Blocks: AS	DESERT VISTA A	Theater	100
9:00 AM - 5:00 PM	Concurrent Session Blocks: Human Resources	DESERT VISTA B	Theater	100
9:00 AM - 5:00 PM	Concurrent Session Blocks	DESERT VISTA D	Theater	100
9:00 AM - 5:00 PM	Concurrent Session Blocks	GARDENIA A	Theater	35
9:00 AM - 5:00 PM	Concurrent Session Blocks: Risk Management	GARDENIA B	Theater	35
9:00 AM - 5:00 PM	Hallway	GRAND SALON DE	Other	0
9:00 AM - 5:00 PM	Concurrent Session Blocks: Commercial Services	GRAND SALON F	Theater	35
9:00 AM - 5:00 PM	Concurrent Session Blocks: Philanthropy	GRAND SALON G	Theater	35
9:00 AM - 5:00 PM	Concurrent Session Blocks: IT	GRAND SALON H	Theater	35
11:00 AM - 5:00 PM	Hallway	DESERT VISTA C	Other	0
11:00 AM - 5:00 PM	Water Stations	GRAND SALON FOYER	Other	200
6:00 PM - 9:30 PM	Pre Banquet Reception/Bars	THE 18TH TERRACE & LM FOYER	Reception	440
7:00 PM - 9:30 PM	Annual Banquet and Keynote Address	INDIAN WELLS MNOP	Banquet	535
9:00 PM - 11:00 PM	Space Hold	SUNRISE TERRACE	Other	0
9:00 PM - 11:00 PM	Presidential Reception	SUNSET ROOM	Other	0

January 13, 2028

Time	Event Name	Space	Setup	Attendees
6:00 AM - 2:00 PM	General Session/Closing Lunch	INDIAN WELLS MNOP	Other	400
6:00 AM - 11:59 PM	Conference Office	IWCC OFFICE 1	Other	6
6:00 AM - 11:59 PM	AV Storage	IWCC OFFICE 2	Other	6
7:00 AM - 12:15 PM	Overflow Area	THE 18th TERRACE	Other	0
7:00 AM - 8:00 PM	Storage	REG COUNTERS 1,2 & 3	Other	0
7:30 AM - 8:45 AM	AOA Past President's Standing Committee Meeting	VILLA PRIMROSE & PATIO	Boardroom	15
7:30 AM - 1:45 PM	Registration/Breakfast/Lunch	INDIAN WELLS LM FOYER	Other	8
8:00 AM - 2:30 PM	Business Partner Exhibit/Tear Down	INDIAN WELLS IJKL	Exhibits	59
8:30 AM - 3:00 PM	CABO Meeting	DESERT VISTA E	U-Shape	30
9:00 AM - 10:00 AM	Concurrent Session Block IV: AS	DESERT VISTA A	Theater	100
9:00 AM - 10:00 AM	Concurrent Session Block IV: Research	DESERT VISTA B	Theater	100
9:00 AM - 10:00 AM	Concurrent Session Block IV: Financial Services	DESERT VISTA D	Theater	100
9:00 AM - 10:00 AM	Concurrent Session Block IV: Commercial Services	GARDENIA A	Theater	35
9:00 AM - 10:00 AM	Concurrent Session Block IV:HR/RM Joint Session	GARDENIA B	Theater	35
9:00 AM - 10:00 AM	Concurrent Session Block IV: Philanthropy	GRAND SALON G	Theater	35
9:00 AM - 10:00 AM	Concurrent Session Block IV: IT	GRAND SALON H	Theater	35

Concessions

- One (1) Complimentary guest room per every Fifty (50) paid rooms at the group rate
 - Discounted Resort Fee of \$25.00 per room per night (originally \$45.00)
 - Discounted Overnight Self-Parking at \$15.00 per vehicle, per night
 - Six (6) Complimentary Valet parking passes
- 15% off 2028 AV Equipment pricing ordered with our in-house provider, currently Encore, when used as the sole provider, excludes service charge, labor, tax and any special ordered items
 - Double World of Hyatt points may be earned, up to 100,000 points
- Five (5) Penthouse Suites at the Group Rate, plus discounted resort fee per room, per night
 - One (1) upgrade to One-Bedroom Suite at the discounted room rate of \$679
 - One (1) upgrade to Presidential Villa at the discounted room rate of \$899

If contract is signed by 3.15.26, hotel will also extend:

- 50,000 signing World of Hyatt bonus points
- One (1) upgrade to One-Bedroom Villa at the group room rate



AOA Annual Conference 2028
Oakland Marriott City Center
1001 Broadway, Oakland, California, USA

+1 510-451-4000 [Visit Website](#)

[Open Full Proposal](#)

Welcome to the Sunny Side of the San Francisco Bay!

Auxiliary Organizations Association

Patrick Bailey

PO Box 249, Arroyo Grande, CA 93421-0249 USA

Dear Patrick Bailey:

We are excited about the opportunity to host your event at the Oakland Marriott City Center & Oakland Convention Center. Our staff looks forward to introducing you to a brand of hospitality, upon which we have built our reputation for excellence.

Oakland was recently recognized as one of the Top 10 Best Small Cities in the U.S. by Condé Nast Traveler Readers!

“The Town” is getting international attention for its diversity, art, food scene and nightlife. In addition, the influx of new businesses into the area makes Oakland a must-see destination. Enjoy the local charm of Chinatown, Lake Merritt, City Center’s outdoor mall and the Jack London Square waterfront district, featuring a 9-plex cinema, jazz clubs, shops, restaurants, and outdoor entertainment - all within walking distance of the hotel. Your attendees can also take advantage of our proximity to Downtown San Francisco, Oracle Arena, Napa/Sonoma Wine Country and Silicon Valley.

I sincerely thank you for taking the time to review my proposal. We are pleased to offer availability on a **first option** basis; however, we are not holding space. The current proposed rates are valid until



Rooms, Rates, and Dates

ALTERNATE DATES

01/02/28 - 01/07/28: \$199.00 + tax

01/03/28 - 01/08/28: \$199.00 + tax

01/11/28 - 01/16/28: \$240.00 + tax

01/18/28 - 01/23/28: \$204.00 + tax

Room rates above are subject to 14% Occupancy Tax, Tourism Assessment Fees (currently \$0.55) and Oakland Tourism Business Improvement District Fees (currently 2%), in effect at the time of check in.

GROUP RATE DETAILS

- Sleeping rooms are per room, per night and are based on single or double occupancy
- Rates quoted are for 85% Cumulative Attrition, 15% allowable Slippage
- 3 Week Cut-off
- Rates are non-commisionable

Guestrooms are not currently on hold. Rates and availability are subject to change until an Agreement is in place and executed.



Special Concessions

In consideration of the room night commitment and the functions identified on the Program Agenda, Hotel will provide your Group with the following special concessions:

1. 1 Presidential suite upgrade at group rate for 4 nights
2. Rate available 3 days pre/post based on availability
3. Discounted daily self-parking at \$35 inclusive of taxes and fees
4. 5 Junior suite upgrades at group rate for up to 4 nights each
5. Complimentary sleeping room internet
6. 15% discount off AV equipment pricing if Encore is the sole provider of audio visual services
7. 10% discount off of prevailing banquet menus
8. 1 per 45 complimentary rooms on a cumulative and actualized basis
9. Double Marriott Bonvoy points
10. Corkage fee reduced to \$25++ per bottle of wine (reduced from \$30++ per bottle)
11. Discounted corkage fee of \$1,000 for up to 5 vendors to serve pre-packaged snacks of 2oz or less. All additional vendors will be billed at \$1.00 per item or as outlined in the outside corkage fees clause below

We are committed to earning your business and would be pleased to further customize our offer to what best meets your needs.

Meeting Agenda

1/6/2028	Thu	5:00:00 PM	11:59:00 PM	Teardown	Existing Set Up	1	Oakland Ballroom West
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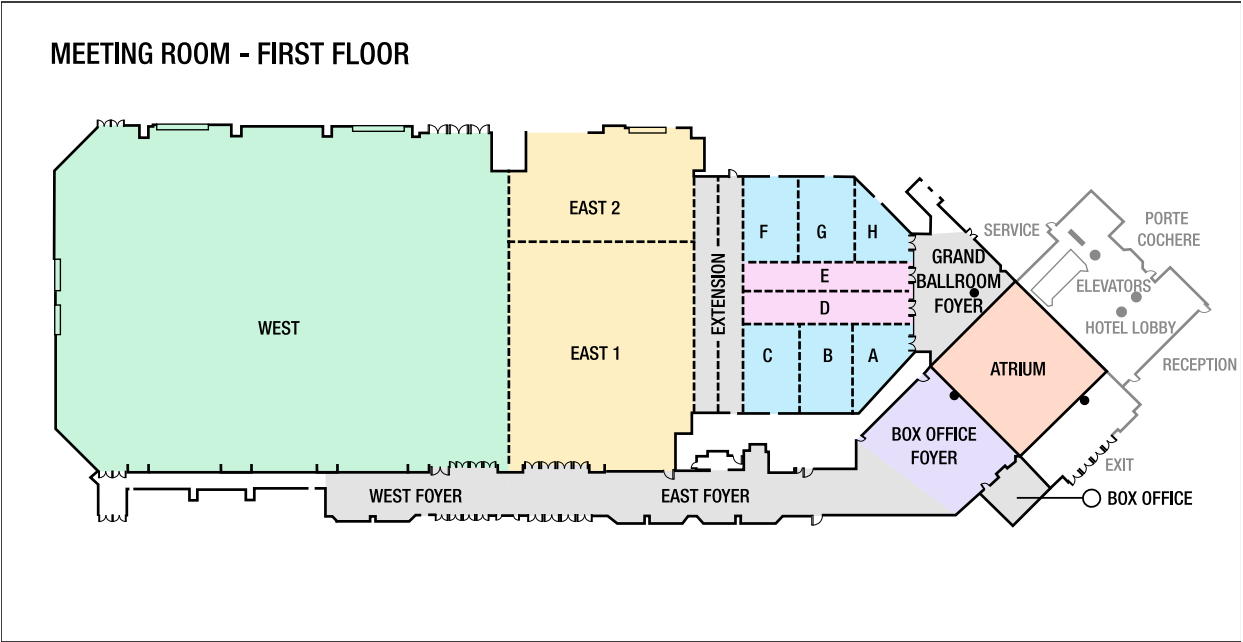
Group will be subject to applicable taxes in effect at the time of the Event (currently 10.75%). A 14.5% F&B Staff Charge and a 10.5% F&B House Charge are applied to all food & beverage related events, and a 25% House Charge is applied to all Meeting Room Rental. The House Charge on Room Rental is used to cover administrative, non-labor costs and is not a tip, gratuity or service charge for employees. Banquet managers, other Banquet employees and AV employees are not customarily tipped, so tips are not expected. All prices are subject to applicable taxes (currently 10.75%).



Floor Plans

Floor 01

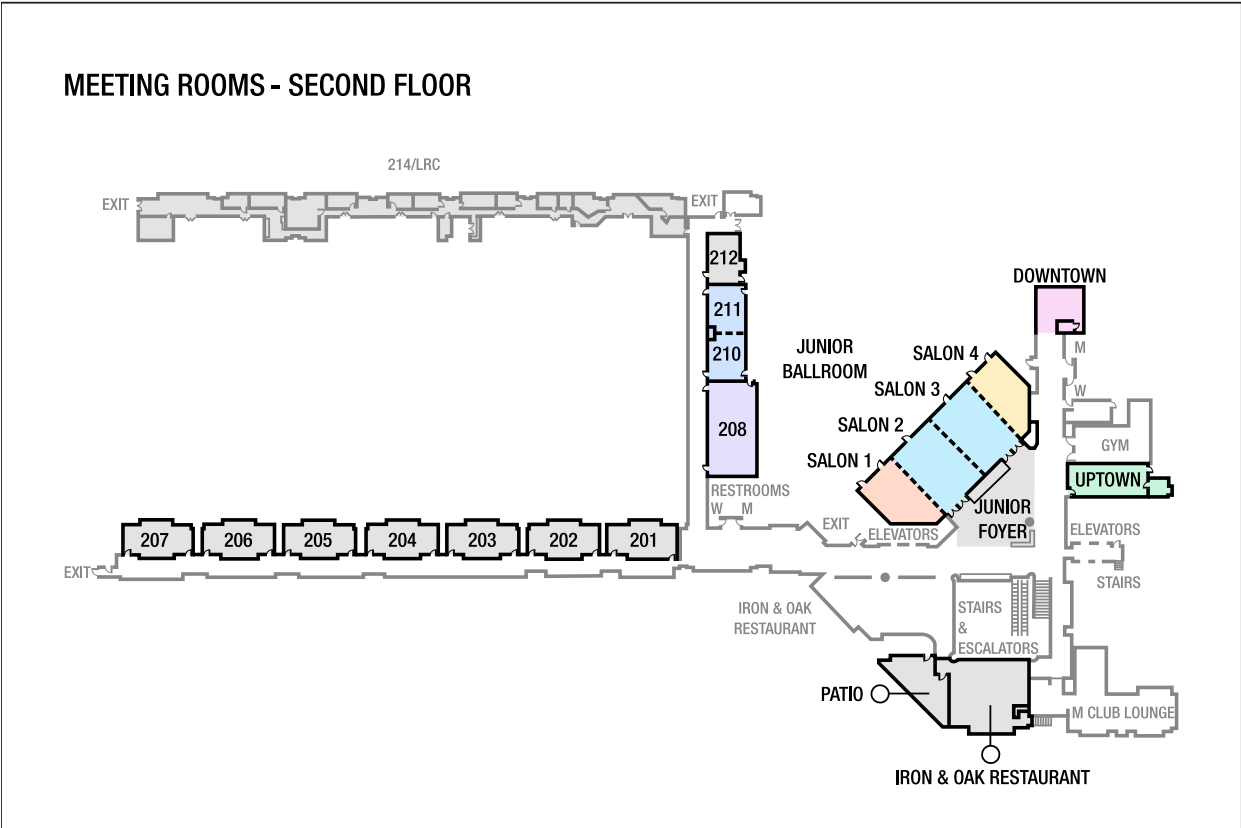
- Hotel Set Up/Exhibits/Cocktail Reception/24 Hour
- General Session
- Office and Storage
- Registration
- Breakout
- Hallway



Floor Plans

Floor 02

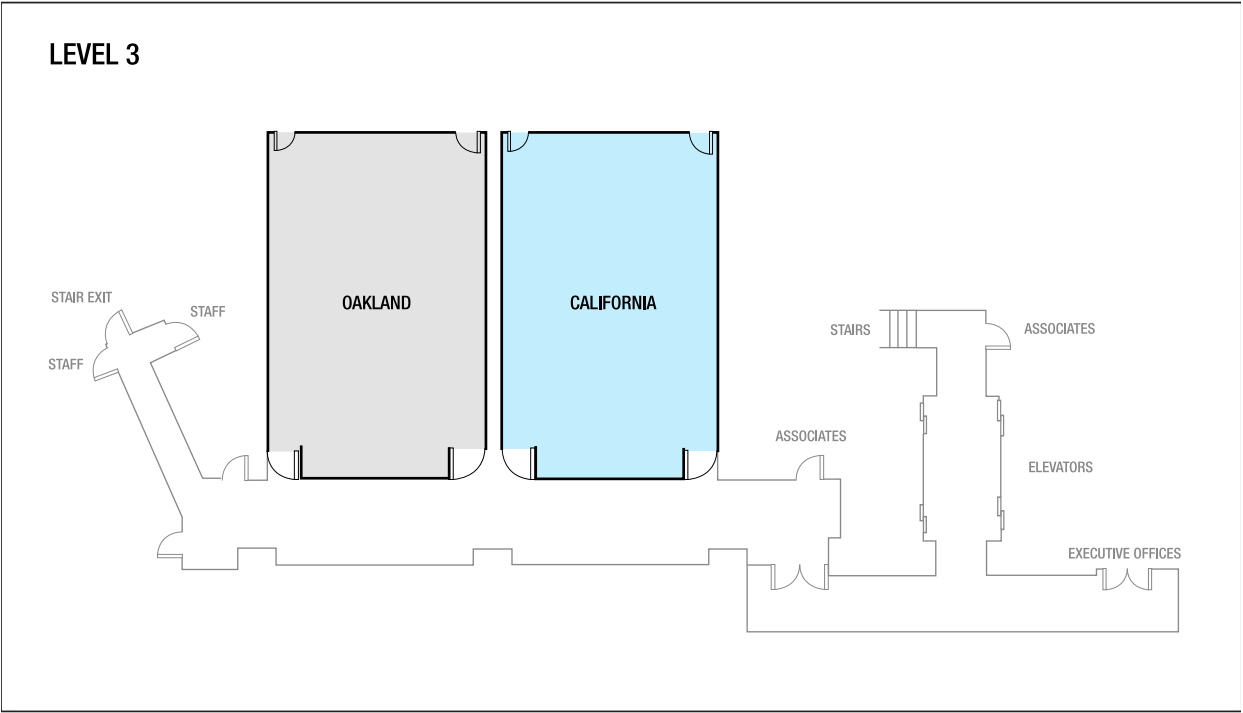
- Conference Planning Committee Meeting/Breako
- Executive Directors and HR Directors Meeting/Bi
- Breakout
- Breakout
- CSURMA/AORMA Breakfast Meeting
- CSURMA/AORMA Breakfast Meeting
- Meetings



Floor Plans

Floor 03

● President's Reception

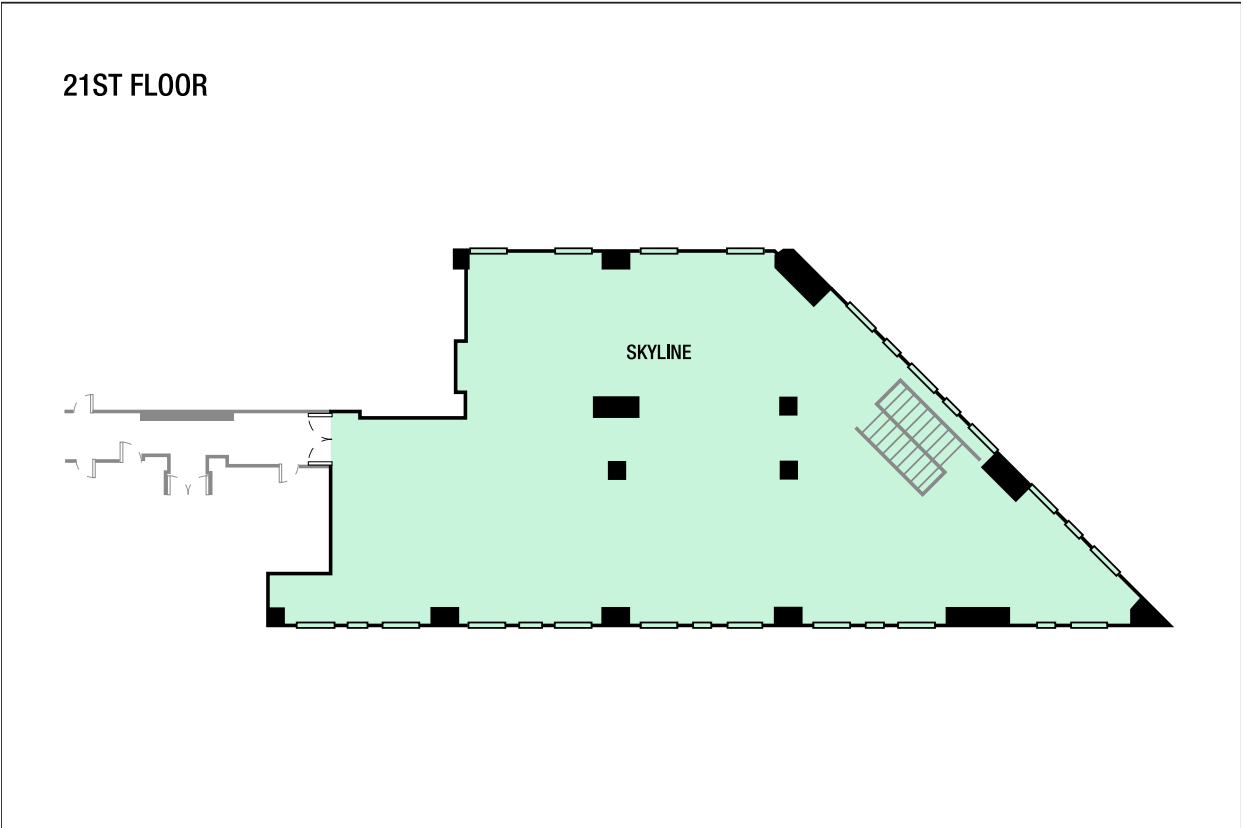


Floor Plans

Floor 21



● Appreciation Reception/Breakfast/Event Volunteer



Property Details

Property Details

- Over 100,000 square feet of flexible meeting space
- Public transportation (BART) is located directly across the street from the hotel - 11 minutes from San Francisco
- Connected to the Oakland Convention Center
- Four Green Key certified
- 21 floors, 259 king, 235 double/double, 5 junior suites, 1 presidential suite
- Fully equipped gym
- Large workstations and in-room WIFI
- In room dining
- Club-level rooms include free breakfasts, snacks, and complimentary non alcoholic beverages
- Top golf Suite on the 2nd floor @ Iron and Oak

Room Features

- Connecting rooms are available, 78 sets
- All rooms are non-smoking
- All rooms are air-conditioned
- Pets allowed for \$75 non-refundable fee per stay

Check-in and Check-Out

- Check-In 4:00PM

- Check-Out 11:00AM
- Mobile key available

Internet Access

- Guest rooms: Wireless
- High Speed: Check email + browse the Web for 14.95 USD/day
- Enhanced High Speed: Video chat, download large files + stream video for 18.95 USD/day
- Lobby and public areas: Complimentary Wireless
- Meeting rooms: Wireless, Wired

Parking

- **Self Parking Rates (20% taxable):**

1 Hour	\$12.00
2 Hours	\$24.00
3 Hours	\$36.00
4 Hours	\$46.00
4 +Hours	\$46.00
24 Hrs.Max (No in/Out)	\$46.00 (inclusive)
Lost Ticket Fee per day	\$46.00 (inclusive)
Motorcycle Fee/per day	\$20.00 (inclusive)
Hotel Guest (In/Out)	\$56.00 (inclusive)

Self Parking Rates - All Fees' Include 20% City of Oakland Users Tax;

Auxiliary Organizations Association (AOA)
 Profit & Loss Budget vs. Actual
 July 2025 through June 2026

AOA Budget Projection
 General Operations
 (as of 4/8/2026)

	Actuals				Projected Jul '25 - Jun 26	Budget			% Chg
	Jul '25 - Jun 26	Budget FYE	\$ Over Budget	% of Budget		Jul '26 - Jun 27	Jul '25 - Jun 26	Bud Diff Jul '26 - Jun 27	
Income									
49500 · Extraordinary Income	0.00	0.00	0.00	0.0%	0.00	0	0.00	0.00	0%
48000 · Unrealized Gains on Investments	0.00	0.00	0.00	0.0%	0.00 Adj at Y.E.	0	0.00	0.00	0%
47000 · Realized Gain on Investments	0.00	0.00	0.00	0.0%	0.00 Adj at Y.E.	0	0.00	0.00	0%
46000 · Dividend Income	0.00	0.00	0.00	0.0%	0.00 Adj at Y.E.	0	0.00	0.00	0%
45000 · Interest Income	0.00	0.00	0.00	0.0%	0.00	0	0.00	0.00	0%
40000 · AOA Dues	389,105.00	328,550.00	60,555.00	118.43%	350,105.50 Adj for PY rec'd	356,833	328,550.00	28,283.40	9%
Total Income	389,105.00	328,550.00	60,555.00	118.43%	350,105.50	356,833	328,550.00	28,283.40	9%
Gross Profit	389,105.00	328,550.00	60,555.00	118.43%	350,105.50	356,833	328,550.00	28,283.40	9%
Expense									
79100 · AOA Scholarship Program	0.00	10,000.00	-10,000.00	0.0%	10,000.00	10,000	10,000.00	0.00	0%
77750 · Leadership Academy Expense	0.00	18,000.00	-18,000.00	0.0%	0.00	22,000	18,000.00	4,000.00	22%
77700 · Leadership Academy Awards	478.74	0.00	478.74	100.0%	478.74	500	0.00	500.00	100%
77250 · AOA Salary Survey Expense	0.00	0.00	0.00	0.0%	0.00	-	0.00	0.00	0%
87500 · Speaker Travel Expenses	476.96	0.00	476.96	100.0%	476.96	500	0.00	500.00	100%
78500 · Website Content/Dir Managemt DJ	0.00	9,000.00	-9,000.00	0.0%	0.00	-	9,000.00	-9,000.00	-100%
77800 · Standing Committee Contingency	0.00	0.00	0.00	0.0%	5,000.00	25,000	0.00	25,000.00	100%
80461 · Kim Clark - Operations Manager	33,199.97	0.00	33,199.97	100.0%	43,199.96	43,000	0.00	43,000.00	100%
80200 · Conf Contract Service-D Johnson	0.00	0.00	0.00	0.0%	0.00	-	0.00	0.00	0%
84000 · Marketing/Communication Exp	537.33	0.00	537.33	100.0%	690.33	2,500	0.00	2,500.00	100%
83000 · Hotel Function & Meal Expense	0.00	0.00	0.00	0.0%	0.00	-	0.00	0.00	0%
80800 · Bank Credit Card Fees	165.84	0.00	165.84	100.0%	0.00	-	0.00	0.00	0%
79500 · Miscellaneous Expenses	1,011.82	10,000.00	-8,988.18	10.12%	660.94	10,000	10,000.00	0.00	0%
79000 · Gifts and Awards Expense	1,004.86	500.00	504.86	200.97%	1,004.86	1,000	500.00	500.00	100%
78000 · Web Hosting/Maintenance Exp	33,933.40	40,000.00	-6,066.60	84.83%	40,126.60	42,733	40,000.00	2,733.08	7%
77400 · Research Admin Com Expenses	0.00	0.00	0.00	0.0%	0.00	-	0.00	0.00	0%
77200 · HR Committee Expenses	1,250.00	0.00	1,250.00	100.0%	1,250.00	1,500	0.00	1,500.00	100%
77000 · AS/SU Committee Expenses	0.00	0.00	0.00	0.0%	0.00	-	0.00	0.00	0%
76500 · Executive Committee Meeting Exp	0.00	0.00	0.00	0.0%	0.00	25,000	0.00	25,000.00	100%
76000 · Executive Committee Travel Exp	2,596.63	4,051.00	-1,454.37	64.1%	7,596.63 est. 5k April Mtg	10,000	4,051.00	5,949.00	147%
75900 · Other Operational Support Exp	450.24	0.00	450.24	100.0%	450.24	500	0.00	500.00	100%
75500 · COGR Dues Expense	0.00	5,500.00	-5,500.00	0.0%	0.00	5,500	5,500.00	0.00	0%
75300 · Insurance Expense	12,724.00	8,000.00	4,724.00	159.05%	12,724.00	15,000	8,000.00	7,000.00	88%
75000 · Audit/Tax Prep Expenses	20,250.00	20,000.00	250.00	101.25%	20,250.00	22,000	20,000.00	2,000.00	10%
73500 · HR Counsel Expenses	1,722.00	3,000.00	-1,278.00	57.4%	1,722.00	3,000	3,000.00	0.00	0%
73000 · Retainer- HR Counsel	30,000.00	30,000.00	0.00	100.0%	30,000.00	30,000	30,000.00	0.00	0%
72500 · AOA General Counsel Expenses	0.00	0.00	0.00	0.0%	0.00	-	0.00	0.00	0%
71000 · Retainer - Legislative Liaison	5,775.00	12,000.00	-6,225.00	48.13%	12,000.00	12,000	12,000.00	0.00	0%

Auxiliary Organizations Association (AOA)
 Profit & Loss Budget vs. Actual
 July 2025 through June 2026

	Actuals				Projected	Proposed	Budget	Bud Diff	% Chg
	Jul '25 - Jun 26	Budget FYE	\$ Over Budget	% of Budget					
70500 · S/T Travel & AOA Office Expense	941.37	5,000.00	-4,058.63	18.83%	2,500.00	5,000	5,000.00	0.00	0%
70000 · Contacted Services-AOA Bus Mngr	33,481.72	60,249.00	-26,767.28	55.57%	41,231.71	38,500	60,249.00	-21,749.00	-36%
Total Expense	179,999.88	235,300.00	-55,300.12	76.5%	231,362.97	325,233	235,300.00	89,933.08	38%
Net Income	209,105.12	93,250.00	115,855.12	224.24%	118,742.53	31,600	93,250.00	-61,649.68	-66%

****Note: P/Y original budgeted expenses = 279,381 (b/4 EC revision)

16% Increase for 26-27
 \$ 44,701

AOA Budget Projection
 Conference
 (as of 4/8/2026)

	Projected				Projected Jul '25 - Jun 26	Proposed Jul '26 - Jun 27	Budget Jul '25 - Jun 26	Bud Diff Jul '26 - Jun 27	% Chg
	Jul '25 - Jun 26	Budget	\$ Over Budget	% of Budget					
Income									
52300 · In-Kind Contributions	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0%
49500 · Extraordinary Income	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0%
52000 · Business Partner Income								0.00	0%
52100 · Business Partner Reg Fee	0.00	19,500.00	-19,500.00	0.0%	0.00	20,000.00	19,500.00	500.00	3%
59000 · Other Conference Income	0.00	12,035.64	-12,035.64	0.0%	0.00	0.00	12,035.64	-12,035.64	-100%
52000 · Business Partner Income - Other	129,000.00	208,000.00	-79,000.00	62.02%	129,000.00	215,000.00	208,000.00	7,000.00	3%
Total 52000 · Business Partner Income	129,000.00	239,535.64	-110,535.64	53.85%	129,000.00	235,000.00	239,535.64	-4,535.64	-2%
50000 · Conference Registration Fees	397,931.94	241,575.00	156,356.94	164.72%	397,931.94	348,583.00	241,575.00	107,008.00	44%
Total Income	526,931.94	481,110.64	45,821.30	109.52%	526,931.94	583,583.00	481,110.64	102,472.36	21%
Gross Profit	526,931.94	481,110.64	45,821.30	109.52%	526,931.94	583,583.00	481,110.64	102,472.36	21%
Expense									
80470 · Cnf Contract Srv-Patrick Bailey	29,997.00	40,000.00	-10,003.00	74.99%	40,000.00	39,996.00	40,000.00	-4.00	0%
80350 · Debra Hammond Contract	20,625.00	22,500.00	-1,875.00	91.67%	26,250.00	26,250.00	22,500.00	3,750.00	17%
87500 · Speaker Travel Expenses	2,466.67	0.00	2,466.67	100.0%	2,466.67	2,467.00	0.00	2,467.00	100%
80460 · Bella Newberg	24,735.55	33,990.00	-9,254.45	72.77%	24,735.55	0.00	33,990.00	-33,990.00	-100%
80700 · Registration Area Support	350.95	300.00	50.95	116.98%	350.95	352.00	300.00	52.00	17%
80500 · Service Provider Travel Expense	1,468.13	5,300.00	-3,831.87	27.7%	1,468.13	1,468.00	5,300.00	-3,832.00	-72%
80450 · Cnf Contract Srv-Lorlie Leetham	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0%
89000 · Donated Goods and Services	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0%
80300 · Cnf Contract Service-Taren M	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0%
80100 · Cnf Contract Service-R Jackson	0.00	10,751.00	-10,751.00	0.0%	0.00	0.00	10,751.00	-10,751.00	-100%
86000 · CPC Expenses									
86100 · CPC Travel Expense	3,875.66	4,000.00	-124.34	96.89%	3,875.66	3,876.00	4,000.00	-124.00	-3%
86500 · CPC Meeting Expenses	0.00	8,700.00	-8,700.00	0.0%	0.00	0.00	8,700.00	-8,700.00	-100%
86000 · CPC Expenses - Other	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0%
Total 86000 · CPC Expenses	3,875.66	12,700.00	-8,824.34	30.52%	3,875.66	3,876.00	12,700.00	-8,824.00	-69%
80200 · Cnf Contract Service-D Johnson	0.00	4,000.00	-4,000.00	0.0%	0.00	0.00	4,000.00	-4,000.00	-100%
80000 · Conference Contract Services	14,341.00	9,960.00	4,381.00	143.99%	14,341.00	14,341.00	9,960.00	4,381.00	44%
80464 · Richard Chester	19,775.00	0.00	19,775.00	100.0%	28,250.00	28,250.00	0.00	28,250.00	100%
88000 · Web/AV Tech/ E Air Expense	5,777.91	15,841.00	-10,063.09	36.47%	20,077.91	21,000.00	15,841.00	5,159.00	33%
87000 · Speaker Contract Expenses	11,000.00	20,000.00	-9,000.00	55.0%	11,000.00	11,000.00	20,000.00	-9,000.00	-45%
85000 · Non-Hotel Function/Meal Exp	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0%
84000 · Marketing/Communication Exp	0.00	6,640.00	-6,640.00	0.0%	0.00	0.00	6,640.00	-6,640.00	-100%
83000 · Hotel Function & Meal Expense									
83300 · Hotel Room Charges	9,087.94	5,231.42	3,856.52	173.72%	9,087.94	9,088.00	5,231.42	3,856.58	74%
83200 · Hotel Meals Expense	229,052.78	224,276.22	4,776.56	102.13%	229,052.78	264,000.00	224,276.22	39,723.78	18%
83100 · Hotel Function Audio Visual	139,341.46	135,871.00	3,470.46	102.55%	139,341.46	139,342.00	135,871.00	3,471.00	3%
83000 · Hotel Function & Meal Expense - Other	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0%
Total 83000 · Hotel Function & Meal Expense	377,482.18	365,378.64	12,103.54	103.31%	377,482.18	412,430.00	365,378.64	47,051.36	13%
82000 · Cnf Gifts and Awards Expense	3,412.91	2,500.00	912.91	136.52%	3,412.91	3,413.00	2,500.00	913.00	37%

Auxiliary Organizations Association (AOA)
 Profit & Loss Budget vs. Actual
 July 2025 through June 2026

					Projected	Proposed			Budget	Bud Diff	% Chg
	Jul '25 - Jun 26	Budget	\$ Over Budget	% of Budget	Jul '25 - Jun 26	Jul '26 - Jun 27	Jul '25 - Jun 26	Jul '26 - Jun 27			
80900 · Other Conference Support Exp	5,085.50	1,500.00	3,585.50	339.03%	5,085.50		5,085.00	1,500.00	3,585.00	239%	
80800 · Bank Credit Card Fees	11,504.60	23,000.00	-11,495.40	50.02%	11,504.60		11,505.00	23,000.00	-11,495.00	-50%	
79000 · Gifts and Awards Expense	2,149.56	0.00	2,149.56	100.0%	2,149.56		2,150.00	0.00	2,150.00	100%	
78000 · Web Hosting/Maintenance Exp	0.00	0.00	0.00	0.0%	0.00		0.00	0.00	0.00	0%	
76000 · Executive Committee Travel Exp	0.00	0.00	0.00	0.0%	0.00		0.00	0.00	0.00	0%	
Total Expense	534,047.62	574,360.64	-40,313.02	92.98%	572,450.62		583,583.00	574,360.64	9,222.36	2%	
Net Income	-7,115.68	-93,250.00	86,134.32	7.63%	-45,518.68		0.00	-93,250.00	93,250.00	-100%	

2026 AOA Annual Conference Sponsorship Opportunities

SPONSORSHIP LEVELS AND BENEFITS	Premier \$30,000	Diamond \$20,000	Platinum \$15,000	Gold \$10,000	Silver \$5,000	Bronze \$3,000	Prospective Business Partner \$2,500
<p>Co-Sponsor Conference Opening and Welcome Reception</p> <ul style="list-style-type: none"> • Signage and verbal acknowledgment at opening reception, and conference announcements, recognition on mobile app. and social media 	X						
<p>Co-Sponsor Expo Lounge</p> <ul style="list-style-type: none"> • Signage and verbal acknowledgment during expo and conference announcements, recognition on mobile app. and social media. 	X						
<p>Sponsored Lunch (2 available - Business Partner Luncheon & Annual Banquet)</p> <ul style="list-style-type: none"> • Signage and verbal acknowledgment at the event, recognition on mobile app. and 		X					

social media. A three-minute speaking opportunity or video during lunch.							
<p>Conference Wi-Fi Sponsor (1 available)</p> <ul style="list-style-type: none"> ● Signage and verbal acknowledgment throughout the conference, recognition at annual banquet, lunches, all educational sessions and social media. A three-minute speaking opportunity or video during conference opening. 		X					
<p>Sponsor Expo Grand Opening Event</p> <ul style="list-style-type: none"> ● Signage and verbal acknowledgment at the expo and conference opening event, recognition on mobile app. and social media 			X				
<p>Co-Sponsored Breakfast (<u>2 available</u>) or Refreshment Break (<u>2 available</u>)</p> <ul style="list-style-type: none"> ● Sponsor recognized with signage and 				X			

verbal acknowledgement at the event, recognition on mobile app. and social media.							
Logo on one Conference Gift Item for Attendees (Commitment and Logo Required by October 31)	X	X	X				
Preferred table Location in Business Partner Expo	X	X	X	X			
BP logo displayed on all conference communications; and dynamic link on the AOA website (home page) for one-year	X	X	X	X			
Recognition at conference banquet and general sessions	X	X	X	X			
VIP Seating at conference banquet	4 seats	3 seats	2 seats	1 seat			
<u>Conference app promotions:</u>							
<ul style="list-style-type: none"> Sponsor Alerts to all attendees during conference 	3 alerts	3 alerts	2 alert	1 alert	1 alert		
<ul style="list-style-type: none"> BP logo rotating on home page of app. 	X	X	X	X			
<ul style="list-style-type: none"> BP video or brochures posted in Resource Gallery 	X	X	X	X	X		

Social Media Posts	2 posts	2 posts	2 posts	1 post	1 post		
Preliminary conference attendee list provided 3 weeks prior to start of conference	X	X	X	X	X	X	
Gift provided by AOA on behalf of business partner, business partner recognition during gift giveaway	\$300	\$250	\$200	\$150	\$50		
Exhibit Space in Business Partner Expo - six-foot table(s) (two chairs, basic electrical, wireless internet Included)	2	2	2	1	1	1	1
Complimentary Conference Registration(s) (Value \$775 each) (Access to all conference sessions, events, and meals)	5	4	3	2	1	1	50% Off 1 Registration
Signage at conference venues and recognition in mobile app (Registration required by November 30, 2025)	X	X	X	X	X	X	X
Final conference attendee List at conference	X	X	X	X	X	X	X

THANK YOU FOR YOUR SPONSORSHIP!

AOA is asking all business partners in the EXPO to donate 25 tote bags with their logo or approved artwork with promotional information or script.

For inquiries regarding the 2026 AOA Sponsorship opportunities, please contact admin@csuaoa.org

Proposal to Re-Center the AOA Leadership Academy around AOA Succession Planning

Developing the Future Leadership Bench of the Auxiliary Organizations Association
Implementation: January 2027 | Applications Open: August 2026

Background and Context

When the AOA Leadership Academy was launched in 2019, its purpose was straightforward: to develop a reliable pipeline of future AOA Presidents and leaders of the Executive Committee members. At that time, there was concern about the sustainability of AOA leadership and whether members felt adequately prepared to serve in governance roles (AOA Leadership Academy Pilot, 2019).

In 2024, the Academy shifted toward a broader focus on personal and professional leadership development while still providing some space for AOA organizational leadership content. That evolution strengthened individual competencies and expanded participation. However, the program's explicit role in succession planning for AOA was diminished (AOA Leadership Academy Expectations, 2024).

Over the past two years, AOA has again experienced difficulty recruiting Presidents and Executive Committee members. Feedback from members suggests that hesitation to serve often stems from uncertainty about expectations, governance responsibilities, and readiness, as well as on-campus or personal commitments.

Association best practices (e.g., ACE Fellows Program, NASPA Aspiring Presidents Institute, ASAE leadership development models) demonstrate that leadership pipelines are most successful when they:

- Explicitly identify participants as future governing leaders
- Include direct exposure to governance decision-making
- Pair participants with current and former top leaders
- Require applied leadership experiences
- Align curriculum with competencies required for the target roles

The current AOA model emphasizes communication, ethics, innovation, and professional growth (AOA Leadership Academy Expectations, 2024), strengths we should preserve. However, it does not clearly articulate a pathway to AOA President or Executive Committee leadership and service. The three-year model includes the following:

- Year 1
 - Ongoing monthly Zoom meetings focused on AOA and CSU fundamentals, auxiliary essentials, and leadership development skills

- Observe AOA Executive Committee meetings
- Year 2
 - The development of a service project to give back to AOA, led by the participants.
- Year 3
 - Participants serve as mentors to the next cohort of mentees. Mentorship is not 1-1, but rather a group of mentors providing guidance to all of the cohort.
- Participants may join an Executive Committee meeting at any point in this process.

In conversations with officers and individuals involved in the academy, there is a desire to focus the academy on AOA succession planning. Some current participants and leaders of the academy believe that the current content is sufficient to develop future AOA leaders, while others believe it has strayed too far from its intended focus.

This proposal restores the Academy’s original purpose while preserving the strengths added in recent years.

Purpose of the Revised Academy

Beginning in January 2027, the AOA Leadership Academy will serve as AOA’s formal succession-planning and leadership development program.

Its primary purpose will be to prepare and position members to serve as future AOA Presidents and Executive Committee leadership.

A secondary outcome will be the continued development of strong leaders within CSU auxiliary organizations. However, the Academy’s central objective must be to ensure sustained and prepared leadership for AOA. Much of the current content can be included while expanding the curriculum to ensure participants are prepared to assume AOA leadership after completion.

To ensure continuity and embed the Academy into AOA’s structure long-term, an AOA Leadership Academy Committee of the Executive Committee would be formed. The Past Presidents’ Committee Chair or the Immediate Past President would chair this committee. Membership would consist of select past presidents and previous academy participants.

Competencies Required for AOA Leadership

If the Academy serves as a true leadership pipeline, it must focus on the specific competencies required to govern AOA effectively. These include:

- Understanding AOA governance structures, bylaws, officer responsibilities, and succession processes
- Navigating relationships with the Chancellor’s Office and system partners
- Financial literacy at the association level, including budget oversight
- Strategic planning and conference governance

- Volunteer leadership and committee management
- Executive-level decision-making under conditions of ambiguity
- Public representation and facilitation of Executive Committee discussions

This approach moves beyond general leadership theory and centers on the realities of governing a statewide professional association.

Program Structure: Two-Year Cohort Model

The Academy will operate as a focused, two-year cohort model. This timeframe balances depth with practicality for auxiliary leaders managing demanding roles on their campuses. This practical compromise, shifting from three years to two years, provides enough time to build readiness, while avoiding burnout and participant fatigue.

Year 1: Governance Foundations

The first year will emphasize orientation to AOA governance and exposure to Executive Committee operations.

Participants will:

- Attend a two-day in-person governance intensive prior to an Executive Committee meeting (reviving the original 2019 structure). This experience can help build relationships, establish expectations, and set a strong foundation for the cohort experience moving forward
- Observe Executive Committee meeting(s)
- Observe each Standing Committee meetings to gain broad understanding of the important work the committees do
- Engage in zoom meetings to review content/curriculum, including governance case studies and structured decision-making exercises
- Develop working relationships with current Executive Committee members
- Gain familiarity with AOA committees, conference operations, and nomination processes

Estimated time commitment: 3–4 hours per month.

Special note should be made to the logistical and equity concern of an in-person governance intensive session. This could disproportionately impact smaller auxiliaries, staff with limited travel flexibility, and campuses with travel restrictions.

Year 2: Applied Leadership and Readiness

The second year will focus on applied leadership and preparation for governance service.

Participants will:

- Serve on an AOA standing committee

- If requested by the AOA Executive Committee, the Cohort may be asked to develop an applied leadership project that meaningfully supports AOA’s strategic priorities. If necessary, the EC will create a short list of opportunities with which the Cohort could engage. The Cohort could choose a project from this list. This is not a structural requirement of the Leadership Academy, but may be included if warranted
- Shadow an Executive Committee member
- Present their project at the AOA Annual Conference, if applicable
- Participate in a structured readiness discussion with mentors

Prior to the annual officer and Executive Committee nomination cycle and prior to the end of Year 2 of the Academy, the mentors will provide feedback to the AOA Leadership Academy Committee Chair on the progress of the mentees. That summary of information will be provided to the AOA officers for consideration.

Estimated time commitment: 5–6 hours per month.

Mentor Model Redesign

The current mentor structure will conclude in December 2026. Those Cohort members who would have finished their term as mentors in 2027 are welcome to participate in the revised Leadership Academy or volunteer to serve on Executive Committee.

Beginning in 2027, mentors will include:

- AOA Past Presidents
- Select former and current Executive Committee members, appointed by the AOA President

This structure ensures continuity, institutional knowledge, and alignment with AOA’s current strategic direction.

Mentors will:

- Meet quarterly with assigned participants
- Provide insight into Executive Committee expectations and responsibilities
- Support participants in evaluating their readiness for service
- Facilitate discussion of organizational governance case studies
- Provide written feedback to the Chair of the AOA Leadership Academy Committee at the conclusion of Year 2

This model reflects best practices in association leadership development, where former and current officers intentionally prepare the next generation of governing leaders. It also continues the multi-year mentor model established in recent years.

Selection Criteria and Cohort Composition

Core eligibility requirements will remain consistent with the current application framework, with additional emphasis on governance interest and future service.

Applicants will be expected to:

- Demonstrate interest in AOA governance roles
- Secure supervisor endorsement supporting participation and potential future AOA service
- Commit to serving on an AOA committee during the program

Selection will prioritize:

- Representation across auxiliary organization types
- Geographic diversity across the CSU system
- Individuals who may realistically assume AOA leadership roles within two to five years

Cohort size: 8-12 participants. A smaller cohort size and selection of the participants every other year may be too slow for AOA's succession needs.

Recruitment of the new Cohort should focus on the benefits that an auxiliary leader would receive from participation in the Leadership Academy, while communicating clearly the AOA leadership succession planning focus of the academy.

Implementation Timeline

- **Spring 2026:** Executive Committee approval
- **Summer 2026:** Develop application materials; finalize curriculum and mentor commitments
- **August 2026:** Applications open
- **October 2026:** Applications close
- **November 2026:** Executive Committee confirms cohort
- **January 2027:** Program launch at the AOA Annual Conference

This timeline allows for thoughtful preparation and clear communication to the membership. The program will run every other year with the next cohort starting in January 2027 and ending their cohort experience in December 2028. The next cohort will begin in January 2029.

Budget Impact

A rough estimate of the financial needs for this revised Academy program includes the following for 18 people (mentors and participants):

Year One Expenses (in-person Governance Intensive):

Expense	Basis	Estimated Cost
Airfare	\$500 per person	\$9,000
Hotel	\$250 per person x 2 days	\$9,000
Shuttle / Transportation	\$70 per person	\$1,260
Per Diem	\$75 per person x 2 days	\$2,700
Miscellaneous Supplies		\$500
Total (Year One)		\$22,460

*Current AOA Leadership Academy budget: \$26,392

Year Two Expenses (no in-person meeting):

Expense	Basis	Estimated Cost
Miscellaneous Supplies		\$500
Zoom		\$500
Total (Year Two)		\$1,000

Measures of Success

Within three years (by 2030), AOA should expect:

- A majority of Executive Committee members to be Academy alumni
- A consistent pipeline of President-Elect candidates from the Academy
- High levels of reported readiness among alumni
- Increased engagement in standing committees and governance activities

Success will ultimately be measured by the strength and sustainability of AOA’s leadership bench.

Conclusion

The 2019 Leadership Academy proposal recognized the importance of intentional succession planning. The 2024 revisions strengthened individual leadership development.

This proposal integrates both perspectives while restoring the Academy’s central purpose: preparing members to lead AOA.

By adopting this revised two-year model, the Executive Committee will establish a sustainable and deliberate pathway for future Presidents and Executive Committee members — ensuring continuity, readiness, and long-term organizational stability, while retaining the broader leadership development elements of the existing program.

DRAFT



CONSTANGY
Brooks Smith & Prophete

Proposal to Provide Legal Services

PREPARED FOR

California State
Auxiliary Organizations Association (AOA)
December 2025

Relationship Partner

Nestor Barrero

nbarrero@constangy.com

310.846.8772

December 19, 2025

Ranjit Kaur
Director, Human Resources
Auxiliary Organization Association
P.O. Box 249
Arroyo Grande, CA 93421

Re: Response to Request for Proposal for Legal Services for Auxiliary Organizations
Association

Dear Ms. Kaur:

On behalf of **Constangy, Brooks, Smith & Prophete, LLP**, we are pleased to submit our proposal in response to the Auxiliary Organizations Association's Request for Proposal for Legal Services.

Enclosed please find the following materials for your review:

- Firm Overview
- Experience and Qualifications
- Key Personnel Bios
- Approach to Services
- Fee Structure
- References

Please direct all communications regarding this proposal to:

Kenneth Sulzer
Partner
ksulzer@constangy.com
310.597.4552

We appreciate the opportunity to be considered for this engagement and look forward to continuing our relationship with the AOA.

Sincerely,



Kenneth Sulzer
Partner
Constangy, Brooks, Smith & Prophete, LLP

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FIRM OVERVIEW

Constangy, Brooks, Smith & Prophete, LLP has focused exclusively on workplace law for more than 75 years. From our roots in traditional labor relations and manufacturing to our nationally recognized labor and employment practice, we've built a reputation for practical guidance and true partnership with employers.

We have over 230 attorneys in 21 states and the District of Columbia providing counsel and representation in all facets of labor, employment, cybersecurity, and data privacy law.

Most of our attorneys practice in more than one practice area. For example, our labor relations team has substantive employment litigation experience, and most of our employment litigators handle both individual and class action matters. The wide-ranging experience of our attorneys enables them to deliver insightful and practical advice.

Our practice groups include:

- ❖ Advice & Counsel
- ❖ Appellate
- ❖ Artificial Intelligence
- ❖ Background Check & FCRA Litigation
- ❖ California Class Actions & Complex Litigation
- ❖ Cannabis & Employee Substance Abuse
- ❖ Class/Collective Actions
- ❖ Cybersecurity & Data Privacy
- ❖ Diversity, Equity & Inclusion Compliance
- ❖ EEO/Contractor Compliance, Reporting & Analytics
- ❖ Employee Benefits
- ❖ Employment Litigation Prevention & Defense
- ❖ ERISA Litigation
- ❖ Immigration
- ❖ Investigations
- ❖ Labor Relations
- ❖ Trade Secrets & Unfair Competition
- ❖ Transactional Solutions
- ❖ Wage and Hour Compliance & Litigation
- ❖ Whistleblower & Retaliation
- ❖ Workers' Compensation Defense
- ❖ Workplace Safety & OSHA

EXPERIENCE & QUALIFICATIONS

Constangy has extensive, directly relevant experience supporting auxiliary organizations within the California State University (CSU) system, as well as higher education and public sector employers nationwide. Our team already works closely with many of the largest CSU auxiliaries and brings a deep understanding of the employment, labor relations, and compliance issues that shape auxiliary operations.

DIRECT EXPERIENCE WITH CSU AUXILIARY ORGANIZATIONS

Our firm maintains ongoing advisory and labor relations relationships with all of the largest CSU auxiliaries, including auxiliaries at:

- Long Beach
- Chico
- San Diego (Aztec Shops)
- Fullerton
- Pomona
- San Luis Obispo

This year alone, our attorneys have devoted hundreds of hours to working with CSU auxiliaries. Recent engagements have included assisting multiple auxiliaries with union awareness efforts and a wide range of labor relations matters, including those in Long Beach, Chico, Pomona, Fullerton, and San Luis Obispo. We've also provided day-to-day advice and counsel to CSU auxiliaries for many years, giving Constangy unmatched insights into the employment, governance, and operational challenges facing nonprofit auxiliaries.

Constangy partner Nestor Barrero and attorney Colin Finnegan will also be presenting at the AOA Annual Conference in Oakland in January, demonstrating our active role in the AOA community and commitment to providing guidance on emerging employment and labor relations issues affecting auxiliaries.

EXPERIENCE WITH OTHER HIGHER EDUCATION ENTITIES

Constangy has a longstanding history of serving colleges, universities, and higher education systems across California and nationwide. Our attorneys have represented universities in:

- Employment litigation
- Labor negotiations
- Administrative hearings
- Day-to-day compliance and policy guidance

Notable representative matters include successful defense of institutions in retaliation, disability, Title IX, discrimination, and tenure-related lawsuits across state and federal courts.

EXPERIENCE WITH PUBLIC SECTOR EMPLOYERS

Constangy also brings decades of experience representing public sector employers, including K–12 school districts, municipalities, cities, regional authorities, and state agencies. Our attorneys have served as outside general counsel, negotiators, and trial counsel, advising on:

- Employee discipline
- Discrimination, harassment, and retaliation claims
- Public sector labor statutes
- Workplace investigations
- Collective bargaining and grievance arbitration

This background is directly relevant to auxiliaries, which operate within environments that share public accountability, unionized workforce, and regulatory compliance dynamics.

KEY PERSONNEL

DAY-TO-DAY COUNSEL SUPPORT

For the services outlined in this RFP, we have selected a team of experienced California-based attorneys who focus their practice on providing day-to-day employment advice and counsel.



Nestor Barrero

Partner

nbarrero@constangy.com

310.846.8772

Nestor is a partner in Constangy's Los Angeles and Orange County Offices who advises large and medium-sized employers on all aspects of labor and employment law, including compliance with anti-harassment, discrimination, privacy and workplace laws, effective performance management, negotiation of executive agreements, planning for layoffs, and defending wrongful termination cases in mediation, arbitration, or litigation. He has significant experience representing public sector clients, including large public university systems, K-12 schools, and charter schools. Nestor's full bio can be found [here](#).



Jeff Fields

Senior Counsel

jfields@constangy.com

310.846.8777

Jeff is based in Constangy's Los Angeles and Orange County offices and defends clients in cases involving wrongful termination, discrimination, harassment, retaliation, and wage and hour issues. He also provides responsive, efficient counsel to help clients navigate employment law challenges while maintaining a fair and productive workplace and avoiding employment disputes. Jeff's full bio can be found [here](#).



Robert Wennagel
Senior Counsel
rwennagel@constangy.com
949.743.3921

Robert is an experienced Orange County-based employment law attorney with a focus on helping clients navigate complex employment compliance issues, including how to avoid costly wage and hour litigation, create and scale up “best practice” handbook policies and HR practices, and mitigate risk from independent contractors and contingent workforces. Robert provides strategic guidance on numerous employment matters, including implementing new HRIS and payroll systems, recruitment, employee relations, high-risk separations, reductions-in-force, and disability accommodations. Robert’s full bio can be found [here](#).

OTHER ATTORNEYS

To the extent additional support, including labor relations strategy and employment litigation, is required, the following Constangy attorneys are also available to CSU AOA.



Tim Davis
Partner
tdavis@constangy.com
816.329.5910

Tim is a key member of Constangy’s Labor Relations practice group and advises clients on all aspects of the employer/employee relationship, including compliance with the NLRA, FMLA, Title VII, ADA, FLSA, ERISA, and state and local employment statutes. Tim has extensive experience representing clients before the National Labor Relations Board, the Equal Employment Opportunity Commission, the Department of Labor’s Wage & Hour Division, and in federal and state courts. He has represented employers in all aspects of union organizing campaigns, including interpreting the NLRA as it relates to union organizing efforts, developing responses to these efforts, and advising employers on what they can and cannot do during a union campaign. Tim’s full bio can be found [here](#).



Ken Sulzer
Los Angeles Office Managing Partner
ksulzer@constangy.com
310.597.4552

Ken Sulzer is managing partner of Constangy’s Los Angeles office and co-chair of the firm’s California Class Actions & Complex Litigation practice group. Ken focuses his practice on employment class actions and advising companies, boards of directors, and senior company officials in crisis management and “corporate” campaigns impacting companies and industries’ futures. Ken has handled industry-defining matters, often in matters involving class actions. Ken’s practice also includes labor relations, discrimination litigation, trade secrets, and non-compete issues, as well as OSHA, DOL, and FLSA matters. He is frequently quoted by major

media outlets, regularly serves as an expert witness on legal issues, and has testified before legislative and regulatory bodies on behalf of his clients. He has extensive experience working with public sector clients, including county governments, municipalities, and public universities. Ken's full bio can be found [here](#).



Colin Finnegan

Associate Attorney

cfinnegan@constangy.com

816.329.5940

Colin Finnegan is a labor and employment attorney with extensive experience in traditional labor matters and employment litigation. He routinely represents and counsels employers across the country in union organizing campaigns, unfair labor practice charges, union-awareness and leadership training, arbitrations, and collective bargaining negotiations. Colin also represents employers in litigation arising from labor-management disputes and workforce issues, and his experience spans a wide range of industries and organizational structures. Colin plays a significant role in Constangy's work with California State University (CSU) auxiliary organizations, supporting several of the largest auxiliaries in the system. This year alone, he has devoted hundreds of hours to advising auxiliaries on union-awareness initiatives, labor-relations strategy, and ongoing workforce matters, including active engagements with multiple auxiliaries at Long Beach, Chico, Pomona, Fullerton, and San Luis Obispo. Colin is also sitting for the California Bar in February to further strengthen the firm's ability to serve its growing auxiliary-client portfolio. Colin's full bio can be found [here](#).

APPROACH TO SERVICES

Constangy's service model for AOA is built on three pillars: responsiveness, consistency, and practical guidance informed by our longstanding work with CSU auxiliaries. Because our team already works closely with many of the largest auxiliaries in the CSU system, we are able to begin this engagement with a deep understanding of the environment in which AOA and its members operate. This familiarity allows us to deliver tailored, efficient support from day one.

We will meet the full scope of services outlined in this RFP through a coordinated team approach led by **Nestor Barrero**, who will serve as AOA's primary point of contact. Nestor will be supported by **Jeff Fields** and **Robert Wennagel** for day-to-day counseling services, with **Ken Sulzer**, **Tim Davis**, and **Colin Finnegan** available as needed for matters involving labor relations, complex litigation, or specialized expertise.

Our team will:

- Monitor and analyze legislative, judicial, and administrative developments affecting CSU auxiliaries and provide timely, digestible updates for the AOA community.
- Participate in AOA's annual conference and other events, offering training, panel participation, or workshops as mutually agreed.
- Attend HR Committee meetings as requested and provide quarterly insights on employment law developments, compliance risks, and emerging trends impacting auxiliaries.

- Prepare legal and HR materials, including written updates, newsletter content, and talking points tailored to auxiliary needs.
- Deliver prompt consultation services, meeting the 12–24-hour turnaround time specified, with clear tracking of hours and topics to support AOA’s reporting requirements.
- Provide representation to individual auxiliaries, when requested, under separate engagement agreements and billing structures.

COMMUNICATION AND RESPONSIVENESS

AOA and its members will have direct access to our team, with a designated point of contact responsible for coordination, rapid response, and ensuring continuity across all requests. Because our attorneys already work extensively with CSU auxiliaries, we are accustomed to the pace, context, and expectations of auxiliary HR and compliance questions, including the need for clear, concise guidance, often on short notice.

Our communication commitments include:

- Dedicated, rapid-response channels (email, phone, or virtual meeting) to meet the required 12–24-hour turnaround for consultation services.
- Quarterly HR Committee updates summarizing legal trends, common consultation topics, and campus-level needs, consistent with AOA’s reporting structure.
- Quarterly itemized reports documenting the number of consultations, general subject matter, time spent, and campuses served.
- Proactive outreach on significant legal changes affecting auxiliaries.

Alignment with AOA’s communication preferences, ensuring updates are delivered in the format and frequency most useful to the HR Chair and auxiliary members.

PROVIDING TIMELY UPDATES

Constangy is committed to providing timely, transparent updates that support informed decision-making. Our attorneys already serve as trusted advisors to numerous auxiliaries and understand the need for concise, operationally focused guidance that can be shared easily with HR teams, executive leadership, and campus partners.

Our update structure will include:

- Quarterly written updates for the HR Committee and AOA newsletter materials, summarizing key legal developments and implications for auxiliaries.
- Annual and mid-year presentations addressing major developments in employment law, labor relations, and compliance.
- Supplemental virtual training sessions, as required under the scope of work, offering deeper dives into emerging issues.
- Immediate alerts when new laws, regulations, or court decisions require prompt action by auxiliaries.

A PRACTICAL, COLLABORATIVE, AND FAMILIAR APPROACH

Constangy's relationship with CSU auxiliaries is long-standing and active. We understand the operational structures, workforce considerations, and governance realities auxiliaries navigate. Our goal is to serve as an accessible, knowledgeable extension of AOA's HR and compliance function, delivering practical support that is grounded in the realities of auxiliary operations.

Whether the issue is routine advice, a developing workplace challenge, or a systemwide trend, AOA can expect clear communication, prompt responses, and solutions-oriented guidance from a team that already understands your world and your members.

FEE STRUCTURE

Constangy proposes an annual retainer of **\$37,500**, which covers all services outlined in the RFP's Scope of Services. Services exceeding one hour per issue or one hour per auxiliary will be billed directly to the auxiliary organization at the rate of **\$350 per hour** for all attorneys providing services under this engagement.

Representation of individual auxiliaries in connection with class action litigation will incur a fee of **\$450 per hour**, unless otherwise mutually negotiated.

REFERENCES

ALLIANCE COLLEGE-READY PUBLIC SCHOOLS

Contact Name: Clara Lim

Title: Associate General Counsel

Phone Number: 213.342.1582

Email Address: clim@laalliance.org

CALIFORNIA STATE UNIVERSITY CORPORATIONS AND AUXILIARIES

Contact Name: Rosa Hernandez

Title: Chief Human Resources Officer for Long Beach State University, Beach Shops

Phone Number: 562.985.7854

Email Address: rosa.hernandez@csulb.edu

Contact Name: Jennifer Lakin

Title: Human Resources Director

Phone Number: 619.594.7501

Email Address: jlakin@sdsu.edu

Contact Name: Todd Summer

Title: Vice President, Business and Financial Affairs, San Diego State University

Phone Number: 619.594.7500

Email Address: tsummer@sdsu.edu

CLAREMONT COLLEGES

Contact Name: Crystal Rossetti

Title: Chief Human Resources Officer

Phone Number: 909.607.6925

Email Address: crystal.rossetti@claremont.edu

UNIVERSITY OF SOUTHERN CALIFORNIA

Contact Name: Matthew Bobb

Title: University Counsel

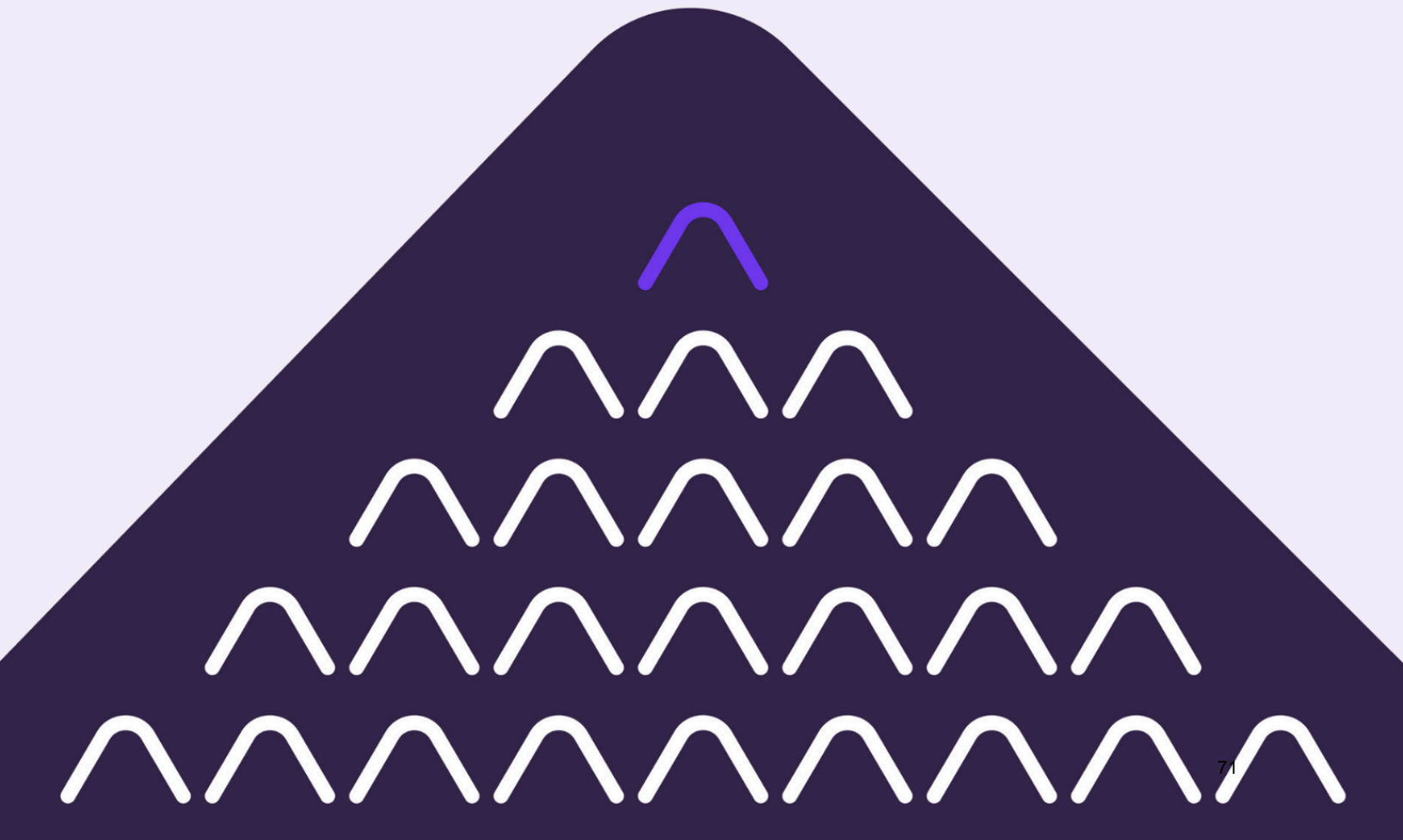
Phone Number: 213.821.2321

Email Address: mbobb@usc.edu



Proposal for
**Auxiliary Organizations
Association**

03/24/2026



Executive Summary



Dear Andrew

As a seasoned user of EventsAir, you're already familiar with the powerful tools and personalized support that have propelled your events to new heights. But as the landscape of event technology evolves, so does our commitment to meeting your evolving needs.

We understand that your organization's events are unique, each with its own set of challenges and objectives. That's why we remain dedicated to delivering a tailored experience, providing you with personalized recommendations and solutions that align with your requirements.

And, with over three decades of experience in innovating event technology, EventsAir has earned its reputation as a leader in the industry. Our ongoing commitment to innovation means you can continue to rely on us for our cutting-edge solutions and expertise.

As part of our commitment to providing the best value and service, we have updated our pricing model to better align with the needs of our clients and the industry. Your EventsAir Subscription is due for renewal on **May 1, 2026**, and I have calculated your renewal using the new pricing model.

Upgrade to Multi:

Our "Multi" package provides Auxiliary Organizations Association with enhanced EventsAir inclusions. We hope you're ready for unlimited registrations, unlimited users, and unlimited access to every single EventsAir feature. Your ongoing partnership is invaluable, which is why I have applied a generous discount to ensure this renewal does not disrupt your budgets.

As we navigate the future together, I invite you to explore the latest features and enhancements that EventsAir has to offer. Let's schedule a time to discuss how we can continue to support your event goals and overcome any new challenges that arise.

Looking forward to connecting soon.

Anita Mascioli
Account Manager
EventsAir

EventsAir Offer

Company: Auxiliary Organizations Association
Contact: Andrew Singletary
Address: PO Box 2177, Chico
Email: asing@saclink.csus.edu
Alias: aoa

Date: 03 / 24 / 2026
Offer Valid to: 05 / 01 / 2026
Sales Contact: Anita Mascioli
Email: a.mascioli@eventsair.com

Term: 12 months

Renewal Date: 05 / 01 / 2026

Your EventsAir License

EventsAir Multi Licence

Price \$10,500.00

- Includes 1 large events (>100 registrations)
- Unlimited small meetings (<100 registrations)
- Unlimited registrations
- Unlimited users
- Access to all standard EventsAir Features
- 24x7 support
- Platform access and data storage valid for your contract term
- EventsAir Pay available
- 10 hours of training

License Total (Year 1) **\$10,500.00**

Add Ons

EventsAir Pay powered by Stripe Annual Fee

Price \$100.00

Annual fee for payment processing facility for credit card transactions within EventsAir per merchant.

*For full list of fees, charges and conditions please refer to [EventsAir Pay Fee Schedule](#)

Quantity 1

Add Ons Total **\$100.00**

Quickbooks Finance Smart Connector

Price \$2,995.00

Annual subscription for access to the Finance Smart Connector. Includes connection and synchronizing:

- Invoices
- Payments
- Billing Contacts

For more detail, see 'Connector Scope' page.
One time configuration paid on invoice #041275

Quantity 1

Total \$2,995.00

Section total

\$2,995.00

Total Value (Year 1)

\$13,595.00

Payment Terms and Conditions



Annual Payment Terms: An invoice for your quote above will be raised upon receipt of this order. The balance is due within your standard terms.

Purchase Authorization

I hereby accept this EventsAir Offer as outlined above, the Contract Term & Payment Option (as indicated above) as a fully binding contract and accept that this order is subject to the [EventsAir Terms of Use.](#)

Signature:

Name:

Position / Title:

Date:



April 2, 2026

Kim Clark, Ed.D
AOA Operations Manager
AOA Executive Office

PROPOSAL & LETTER OF AGREEMENT CSUAOA.ORG WEBSITE MANAGEMENT

Dear Kim:

Here is Dent Agency LLC's (Dent) proposal for the Auxillary Organizations Association (AOA) website management (maintenance/updates) for July 1, 2026 through June 30, 2027. This will also serve as the Letter of Agreement, which upon approval will enable Dent to continue work on this project.

BACKGROUND & OBJECTIVES

AOA has a website built with WordPress and hosted on AWS that Dent has managed since December 2020. The initial agreement was for one year. At the end of that one-year period the agreement rolled over month-to-month at the same rate with no increases.

In early March 2026, Dent advised AOA that after five years with no fee adjustments it would increase the monthly fee 15% beginning May 1, 2026. AOA has asked Dent to postpone any increases for at least two months, or until a new annual agreement can be approved.

This letter responds to AOA's request for the new agreement.

BUDGET \$3,561.09/MONTH

INCLUDES:

- Website support – maintenance, software updates and content updates
- Monthly OS patching and backups
- Monthly WordPress and plugins updates
- 24/7 uptime monitoring
- Weekly security scanning for vulnerabilities
- Weekly verification for all internal/external links

SUCURI SECURITY MONITORING \$300.00/YEAR

No agency mark-up or additional charges beyond the subscription cost, which Dent pays.

TO BE DETERMINED / OUT-OF-SCOPE WORK

The following items are not included in this proposal and will be addressed separately, either through a site analysis and budget proposal or a new Statement of Work (SOW). Any out-of-scope work will be mutually agreed upon in writing before execution.

- **Accessibility (ADA / WCAG) Compliance Remediation**
Not included. If requested, Dent will conduct a site analysis to determine the scope of work and provide a separate budget proposal for the audit(s) and remediation.
- **Creative Work (copywriting, design, creative direction, implementation)**
Not included. If requested, creative services will be provided at a blended rate of \$120/hour.
- **Integrations & Third-Party Tools**
Integrations, APIs, or third-party tools not explicitly listed in the Scope of Work are not included. These require Dent to specify requirements and a separate budget proposal before any work begins.

BILLING

Dent will invoice AOA at the beginning of each month with payments due 30 days from the date of the



invoice. Invoices not paid on time are subject to an additional 1.5% monthly interest (18% APR), accruing daily from the due date until paid in full.

TERMINATION & ACCESS TRANSITION

Either party may terminate this agreement by providing 30 days' written notice. During the 30-day notice period, Dent will continue performing services and AOA remains obligated to pay for all work performed during that period under the same terms.

- **Immediate Access Upon Termination**
Upon termination, Dent will immediately provide AOA with all existing logins, credentials, and administrative access required to manage the website.
- **Transition Assistance Conditioned on Payment**
Any transition assistance beyond providing basic login access – including documentation, training calls, migration support, or active handoff coordination – will be provided only after AOA has paid all outstanding amounts and fees for work performed through the termination date. Such assistance, if requested, will be billed at \$150/hour.
- **Non-Payment**
If AOA has an outstanding balance at the time of termination, Dent will still provide basic login access as described above, but will not provide further transition support until balance is paid in full.

SENIOR STAFF COMMITMENT

As always with Dent, you will have senior-level attention throughout, with Steve Fanizza and Mike Parise as your key contacts for the duration this agreement.

NEXT STEPS

With your approval, Dent will continue work per the previous contract (November 10, 2020) through June 30, 2026 and start this new contract on July 1, 2026 – as per AOA's request. If this agreement doesn't work for AOA, Dent can transfer website to AOA at any time, but we feel it's fair that the monthly fee increase (15%) on the same timeline previously mentioned (starting May 1, 2026).

We very much appreciate this opportunity to continue working with AOA. Happy to hop on the phone to answer any questions!

Sincerely,

Michael Parise
Managing Partner

APPROVALS

April 2, 2026

Michael Parise, Dent

Date

AOA

Date

2025-26 CALIFORNIA LEGISLATIVE BILL SUMMARY UPDATE

Bills of Interest to Auxiliary Organizations

April 17, 2026

Deadlines: The last day to introduce bills this calendar year of the 2025-26 California Legislative Session was February 20. “Spot bills” are not included in this Update, but those with likely importance to auxiliary organizations will be tracked. They only hint at author’s intent. After 31 days in print, they can be substantially amended. August 31st is the last day for each house to pass bills. September 1st is the last day to pass bills in the Session, and the Governor has until September 1st to sign or veto bills across his desk by September 1st.

Bill status link:

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

Assembly:

AB 1566 (C. Jackson) – CANRA Mandated Reporting Neglect Standard Recasting. This bill, as introduced, would amend the *Child Abuse and Neglect Reporting Act* (CANRA) by recasting and refining circumstances within the definition of “severe neglect” for mandated reporting.

To the extent the proposed amendment would apply to campus programs staffed by auxiliary organizations, see EO 1083 – CSU policy (which would likely need amending if the bill were enacted). Bill before Assembly Public Safety Committee (3/5/26).

AB 1720 (Haney) – Event Admission Ticket Bulk Resellers. This bill, as amended, would prohibit bulk ticket resellers from selling event admission tickets for more than the equivalent of the original price for the ticket acquired directly from the primary contractor, plus 10%. Admission tickets to professional athletic events excepted. Violations would be subject to specified civil penalties and processes. Bill before several Assembly committees (March 8, 2026).

AB 1793 (Ward and Rogers) – Calculation of Cash Payments. This bill, as introduced, would enact the *Californians for Common Cents Act* to extend state law over consumer goods and services cash transactions by:

- Defining legal tender tied to federal law;
- implementing standardized symmetrical rounding on the full purchase price paid;
- Discouraging strategic pricing; and
- Authorizing implementing regulations.

Campus auxiliary organizations engage in commercial transactions with use of cash and would thereby be subject to the requirements of the bill, if enacted. Before Assembly B&F Committee (March 13, 2026).

AB 1821 (Pacheco) – California Public Records Act (CPRA): Fees and Response Time Changes. This bill, as amended, would amend the CPRA to:

- Require reasonable requester fee (with exceptions) for certain record searches
- Extend initial request response time to no more than 14 business days

Auxiliary organizations are specifically subject to CPRA *record exemption* provisions through the *McKee Transparency Act 2011*. The above proposed changes in this bill would not apply to the *McKee Act*. This bill will be tracked and reported should amendments extend to the *McKee Act*.

AB 1984 (Rogers) – Corporate Powers. This bill, as introduced, would revoke existing powers, privileges, and capacities of corporate entities, then reset them to only those specifically authorized by and organized under the California Corporations Code. The bill would specify that these provisions do not grant any power to a corporation to engage in ballot issue activity or election activity. The bill would declare void any act undertaken by a corporation beyond the scope of its granted powers. Before Assembly L. Gov & Jud Committees. (March 16, 2026)

Trustee regulations authorize auxiliary organizations to support Trustees’ approved positions (example: State bond ballot). Would an auxiliary organization that engaged in such activity under Title 5, §42403(c)(1)(B) be in conflict with this bill, if enacted?

AB 2007 (Bauer-Kahan) – Use of Youth Information by Youth Programs. This bill, as amended, would strictly limit the use of specified “covered information” on youth enrolled in an after-school youth program or activity (specified as “covered entity”) for marketing purposes. Before Assembly Jud Committee (March 25, 2026).

To the extent that a campus auxiliary organization operates such a youth program or activity within the definition of a “covered entity,” these restrictions and requirements would apply if the bill were enacted. Such youth programs/activities would likely need to:

- revise written operating rules and procedures for compliance;
- conduct staff orientation/training on requirements; and
- oversee and audit compliance.

AB 2025 (Pellerin) – Tenancy – Digitally Altered Images – Disclosure. This bill, as introduced, would amend and expand Real Estate Law regulating real estate broker and salespersons by setting advertisement or other promotional material disclosure requirements for digitally altered images that change representation in the rental of real property. Willful violation of these requirements would be a crime. Before Assembly P&CP Committee (March 16, 2026).

Some campus auxiliary organizations are engaged in faculty/staff rentals. [Student housing is secured by license, not rental tenancy. [Ref: 5 CCR § 42001] To the extent that auxiliary organizations use broker/sales agent service in housing rental programs, these disclosure requirements would appear to apply if this bill were enacted.

AB 2065 (Sharp-Colling) – Discrimination: formerly incarcerated status. This bill, as introduced, would amend and expand the *Unruh Civil Rights Act*, entitling all persons within the jurisdiction of this state full and equal status and accommodations in all *business establishments* regardless by specified characteristics, adding *formerly incarcerated* status, subject to circumscribed protection limitations. Before Assembly Jud Committee (March 12, 2026).

Auxiliary organizations commonly engage directly or by contract in business authorized *business establishment* activities contemplated by the *Act*. For example, public accommodated stores, bookstore, restaurants, hotels, faculty/staff housing.

If this bill is enacted, compliance would likely entail a process of notifications, orientation, and non-discrimination policy/contract reviews.

AB 2084 (Bauer-Kahan) – Tax-exempt Organizations: Status Revocation. This bill, as amended, would authorize the Board of Equalization, in its discretion, to retain the organization’s tax-exempt status for state income tax purposes if it determines a federal exempt-status suspension or revocation occurred for reasons other than fraud, intentional misrepresentation, misuse or diversion of organizational funds, failure to file necessary returns or reports, or other significant breaches of organizational reporting or governance requirements. This bill would take effect immediately as a tax levy. Before Assembly R&T Committee (March 27, 2026).

AB 2221 (Irwin) – Supervision of Trustees and Fundraisers for Charitable Purposes Act. This bill, as introduced, would amend the *Supervision of Trustees and Fundraisers for Charitable Purposes Act* as it relates to the regulatory framework for recipient charitable organizations, charitable fundraising platforms, and platform charities. Specifically:

- “good standing” would be based upon absence of AG final action prohibiting fundraising solicitation or operation of charity or platform
- Platform distribution and disclosure requirements
- AG filing requirements and procedures

Before Assembly P&CP Committee (March 16, 2026).

Philanthropic auxiliary organizations may be *recipient charitable organizations* of donations through solicitations and distributions of charitable fundraising platforms or platform charities. To that extent, these requirements would apply, if bill enacted.

AB 2535 (Gallagher) – Expanded Food Security Policy as Affecting CSU. Introduced as a Spot bill, now appended, it would:

- Declare expanded state access-rights policy to sufficient locally grown and raised, affordable and healthy food.
- Require CSU to consider this expanded policy in campus food services and student nutrition through policies, guidelines, and procurement practices.
- Not expand any obligation of the state to provide food or nutrition assistance or to require the expenditure of additional resources to develop food infrastructure.

Before Assembly Human Services Committee (March 17, 2026).

CSU would likely adopt a parallel policy for campus food services operated by or through auxiliary organizations. Such a systemwide policy could result in commercial service support auxiliary organizations, including a few student body organizations, to encourage this expanded food security objective by, in turn, adopting *permissive* policies and practices that would extend to contracted services.

Compliance costs unknown, but likely *de minimis*. Customer benefits potentially important. The auxiliary organization-operated student ag enterprise projects would doubtless be supportive.

AB 2766 (Aherns) – CSU Student housing for Foster Youth and Homeless Youth. This bill, as introduced and as would be applied to the CSU, expands the student housing priority regimen for current and former foster or homeless youth applicants, as defined. Before Assembly HE & HS Committees (March 16, 2026).

Some campus auxiliary organizations may operate or manage student housing programs on behalf of the university, including available occupancy over school breaks and year-round. Such programs would appear to be subject to this regimen, if enacted.

AB 2768 (Aherns) – CSU Student Enrollment Fees & Costs Deferred for Foster Youth or Former Foster Youth. This bill, as introduced and as applied to the CSU, would require any unpaid initial student enrollment fees and costs, as defined, to be deferred for foster or former foster youth until initial disbursement of the student’s financial aid award. This requirement would apply beginning with the 2027-2027 Academic Year. Before Assembly HE Committee (March 16, 2026).

Judged to be on a modest scale, those campus auxiliary organizations that function as student body organizations, or that manage bookstores or student housing programs on behalf of a university, would likely experience some delay in student body and housing license fees, and courseware payments.

Senate:

SB 918 (K. Seyarto) – Food facilities – Retail Food Safety. This bill, as amended, would amend the *Retail Food Code* by relaxing existing food service passthrough window service requirements, with conditions. Cleared Senate review committees and on Approp Committee’s consent calendar (March 26, 2026).

For campus retail food facilities operated by or through auxiliary organizations with such window service, this proposed relaxation would be available working with local health service enforcement agencies.

SB 977 (W. Pierson) – Children’s Meals Served at Chain Restaurants. This bill, as introduced, would establish a dietary regimen and procedures related to “children’s meals” served by chain restaurants, as defined. Cleared Senate review committees and on Approp Committee’s consent calendar (March 26, 2026).

It is conceivable that campus auxiliary organizations authorized to provide food services now contract with private chain restaurants, or similar retail food establishments as part of chains, meeting the bill’s definition. Whether they offer “children’s meals” is unknown at present. If so, the provisions of this bill would apply if the bill were enacted as introduced.

Campus food services operated directly by an auxiliary organization do not appear to meet the chain restaurant definition.

SB 1273 (Cabaldon) – Tied-house Restrictions on Wine Instructional Events & Promotional Lectures; Video Advertisements. This bill, as introduced, would relax some existing tied-house promotional requirements, including in advance of an event. Cleared Senate review committees; before Approp Committee (March 27, 2026).

A few campuses auxiliary organizations operate viticulture programs and some sponsor wine-tasting events subject to tied-house requirements. This bill would eliminate or ease event promotion methods, as well as advertising during an event.

4/7/26 REG

April 2026 - Business and Finance Liaison Report
*Submitted by Melinda Latas, Chief Compliance Officer,
Business & Finance, Chancellor's Office*

RECENT BOARD OF TRUSTEES MEETINGS

January 26-28th key agenda items:

Committee on Finance

- California State University, Long Beach University Student Union Renovation and Expansion Financing Approval
- 2025-2026 Student Fee Report
- CSU Fiscal Health Monitoring
- 2026-2027 Operating Budget Update

March 9-11 key agenda items:

Committee on Campus Planning, Buildings and Grounds

- San Diego State University Evolve Student Housing, Ph. 2 Schematic Design Approval and Financing

Committee on Finance

- Approval of Minutes
- California State University, Bakersfield - Conceptual Approval of a Public-Private Partnership for a Solar Project
- California State University Annual Debt Report
- Approval of the Lottery Budget and Report
- California State University Quarterly Investment Report
- 2026-2027 CSU Budget Priorities

Committee on Educational Policy

- Student Wellness and Basic Needs

Full agendas, recordings, and item write-ups for the board of Trustees can be found at:

www.calstate.edu/bot

CABO

Upcoming CABO Meeting Dates:

- May 20, 2026 (Virtual)
- August 5, 2026 (Virtual)

UPDATE ON CSU CONNECT ACCESS FOR AUXILIARY EMPLOYEES

CSU Connect, CSU’s new systemwide employee intranet for systemwide communication and sharing, will be replacing [CSYou](#) in August 2026. More information is available on the [CSU Connect FAQ page](#). CSU Connect is already available to CSU employees for early access.

We are working to enable access for auxiliary employees that collaborate with other campus departments and systemwide programs over the upcoming two months. Broader availability for auxiliary employees will be evaluated sometime after July 2026.

Thank you for your partnership! Please feel free to reach out to if helpful as you connect with others on this topic.

Questions? Contact [Michael Tullinger](#) or [Zahraa Fadlalah](#)

CSU COOKIE CONSENT PROJECT

The CSU Cookie Consent Project began in October 2025, and was completed as scheduled in early 2026. This project aims to enhance transparency and alignment with privacy best practices and regulations across all California State University digital platforms. It standardizes how campuses collect, manage, and display cookie consent notices, ensuring users are informed about data collection practices. Through a unified consent management tool, CSU provides users with clear options to manage their cookie preferences on non-authenticated pages. Ultimately, the project strengthens CSU’s commitment to protecting personal data and promoting user trust in its online systems. If an auxiliary site is on a university subdomain connected to the main domain, the banner will appear. If you have any questions or are interested in learning more, please contact Stephanie Honda, Director of the CSU Privacy Program.

CSUBUY AND CSU SYSTEMWIDE CONCUR UPDATE

CSUBuy was implemented at all locations, except San Deigo, in January 2026. On April 6, Concur Travel and Expense Management will be implemented at all locations too. Please see these CSYou sites, [CSUBuy](#) and [CSU Systemwide Concur](#), for more information.

2025-26 FINANCIAL REPORTING TIMELINE AND TRAINING

The consolidated financial reporting key due dates are noted below. University and auxiliary organization information **must be provided timely and accurate**.

Key Dates	Due Date
Reporting Package (version 1) in Wdesk	September 2-10, 2026
Auxiliary Organization Audited Financial Statements	September 18, 2026
Reporting Package (version 2) in Wdesk	September 25, 2026

The annual training has been moved up one month this year to April due to no CSU Business Conference. A save the date e-mail was sent by Sherry Pickering on February 3, 2026. The dates for the annual training are:

GAAP: April 22-23, AM

GAAP Single Audit: April 30

GAAP Auxiliary Organizations: May 7

Please notify [Sherry Pickering](#) in advance if you anticipate any reporting delays. All delays will be escalated to the university CFO.

2024-25 AUXILIARY ORGANIZATIONS AUDIT RESULTS

Nineteen findings were identified across five auxiliaries, including a qualified opinion for the Cal State L.A. University Auxiliary Services, Inc. single audit. Corrective action plans are in place for all, with active monitoring by the Chancellor's Office. This represents an improvement, as findings decreased 16%, from twenty-two last year to nineteen this year and were more isolated as just two auxiliary organizations generated fifteen of the nineteen findings. And the financial statement audits were **completed two months earlier than last year**, finishing in mid-October rather than late December.

AUXILIARY ORGANIZATION ANNUAL REVIEW SUBMISSION AND RETENTION GUIDANCE

The annual review has four required elements, as [outlined in this policy section](#), that must be submitted to the university president or designee by June 30th:

1. **Operating agreement review:** Verify that written operating agreements are current and that auxiliary activities comply with authorized functions, with appropriate professional management in place
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. **Completed Control Self-Assessment (CSA):** Standardized template with all sections completed and certified by the Auxiliary Executive Director and CFO

Documentation format: While the CSA must use the required template, there is no prescribed format for items 1-3. Each university and auxiliary may determine the most appropriate format (such as a memo, brief report, or structured summary), provided all required elements are addressed. These assessments do not need to be lengthy or complex – they should be practical and proportionate to your organization's scope and activities.

Note: The annual audit and financial reporting process has been updated to require confirmation that the university received the annual review items from each auxiliary.

While submissions are due June 30th for timely consideration, the university's review and approval process may extend beyond that date. Retain all supporting documentation, including any remediation materials and written communications related to university approvals.

FISCAL YEAR 2024-25 GAAP FINANCIAL STATEMENTS AND SINGLE AUDIT UPDATE

The consolidated financial statements were issued on November 24, 2025. The Single Audit Report was issued on January 16, 2026. Both reports were presented to the board of trustees at the March meeting for review and approval prior to public release.

SECTION 117 OF THE HIGHER EDUCATION ACT FOREIGN GIFT REPORTING

Deadline Reminder: Calendar year 2025 disclosure reports are **due Monday, February 2, 2026**, via the new portal at www.ForeignFundingHigherEd.gov. A webinar from December 15, 2025 explaining the portal is available online. Given the heightened focus on compliance, accuracy and timeliness are critical. For more information and CSU-specific guidance, visit [this link](#).

CAL STATE COSTS DASHBOARDS SHAREPOINT SITE

The first four dashboards are now available on the [Cal State Costs Dashboards](#) SharePoint site.

Cal State Costs is a systemwide initiative designed to expand access to CSU financial and operational data, enabling leaders to better understand cost structures and make data-informed decisions. Developed in response to a key recommendation from the Sustainable Financial Model Workgroup Report, the initiative provides a suite of dashboards that highlight trends in revenues, expenses, workforce, student profiles, and the cost of direct instruction. These tools offer a consistent and transparent view of financial data across the CSU, empowering university leaders to assess cost profiles and guide financial planning.

Available dashboards:

Details on data methodology are available in the Introduction tab of each dashboard.

1. **Revenues** - Presents revenue per FTES across all universities, organized by major revenue categories. Users can compare revenue patterns across institutions and assess trends that influence financial sustainability.
2. **Expenses** - Displays CSU-wide expense data by NACUBO functional categories (FIRMS). Users can analyze resource allocation across functional areas and benchmark cost structures systemwide.
3. **Workforce** - Highlights key staffing ratios across all universities. Users can examine workforce distribution patterns and evaluate staffing needs and operational efficiency.
4. **Student Profile** - Provides CSU student and course characteristics using State-Support FTES and headcount data. Users can explore enrollment trends, analyze course-taking patterns, and compare student profiles across universities.

The fifth dashboard, **Cost of Direct Instruction**, will be added to the site in early 2026. This dashboard presents the direct cost of instruction across several cost drivers, allowing users to view trends within a university and compare instructional disciplines across universities.

If you have questions, please email fa@calstate.edu, and your inquiry will be routed to the appropriate contact.

NEW SYSTEMWIDE POLICIES

The CSU Policy Library provides a comprehensive way to quickly find CSU systemwide policies and is available at <https://www2.calstate.edu/policies>. This library replaces former Executive Orders, ICSUAM, SUAM, and Coded Memorandum repositories and lists. The [landing page](#) highlights new or

newly revised policies as well as those accessed most frequently. Policies updated since the November meeting are in the table below.

To receive notifications from our CSU Policy Library listserv whenever policies are created, revised, or retired, send an email to: subscribe-csupolicylibrary@lists.calstate.edu to be added to the listserv.

Title	Last Approved
Annual Disclosure Requirement of Exclusive Arrangements for On-Campus Credit Card Marketing	12/23/2025
California State University Insurance Requirements	11/10/2025
CSU Contracts and Procurement	1/16/2026
CSU Payment Card	1/28/2026
Fiscal Authority and Responsibility	1/14/2026
Five-Year Capital Improvement Program Procedures and Formats for Capital Outlay	12/10/2025
Hospitality Policy	3/18/2026
Real Property (Real Estate) Transactions	3/30/2026
Records Retention and Disposition Schedules	1/29/2026
Resolutions of the Board of Trustees 2025	3/6/2026
CSU Student Debt Collection Practices	1/29/2026
Board of Trustees Policy on Executive Compensation	1/30/2026
California State Polytechnic University, Humboldt Student Fees	12/1/2025
California State University, Channel Islands Student Fees	1/14/2026
California State University, Fullerton Student Fees	12/1/2025

<u>California State University, Sacramento Student Fees</u>	12/1/2025
<u>CSU Law Enforcement Policies</u>	2/27/2026
<u>CSU Local Admission Areas and Designated Service Areas for School-College Relations</u>	1/7/2026
<u>CSU Native American Graves Protection and Repatriation Act (NAGPRA) Policy</u>	11/13/2025
<u>CSU Privacy Program</u>	2/4/2026
<u>CSU Youth Protection Policy</u>	1/27/2026
<u>Delegation of Capital Outlay Management Authority</u>	3/30/2026
<u>Educational Broadband Service Contracts</u>	3/30/2026
<u>Facilities Operating and Management</u>	11/18/2025
<u>Facility Maintenance</u>	11/18/2025
<u>Higher Education Student Housing Grant Program Reporting</u>	3/30/2026
<u>Illegal Electronic File Sharing and Protection of Electronic Copyrighted Material</u>	2/3/2026
<u>Information Technology Procurement</u>	2/3/2026
<u>Intellectual Property: Campus Policies</u>	3/10/2026
<u>New Facility Site Clearance and Site Certification</u>	3/2/2026
<u>Sales, Service, and Advertising of Alcoholic Beverages</u>	1/29/2026
<u>Security of Cash and Cash Equivalents</u>	3/10/2026
<u>Segregation of Cash Handling Duties</u>	3/10/2026
<u>Standing Delegations of Administrative Authority</u>	11/6/2025

<u>Systemwide Nursing Policy</u>	1/5/2026
<u>Teacher Education Preliminary Credential Programs</u>	2/19/2026
<u>Travel and Business Expense Payments</u>	2/27/2026
<u>Video Security Cameras</u>	12/15/2025

Advancement Liaison Report
AOA Executive Committee
April 17, 2026
Submitted by: Aaron Moore

Office of Systemwide Philanthropy

- Systemwide Advancement has been renamed the Office of Systemwide Philanthropy.
- The new name better reflects our growing role in fundraising at the system level.
- It also reflects our focus on supporting the philanthropic work of the universities through shared services, advisory support, technical guidance and assistance, benchmarking, and the sharing of best practices.

CSU Foundation

- The CSU Foundation continues its work to become the model philanthropic foundation for the CSU through review of its practices, policies, and infrastructure, with the goal of strengthening support for campuses.
- The CSU Foundation has recently implemented board member term limits.
- The Foundation is actively recruiting new board members who better reflect the CSU's people, geography, and key industries.
- As discussed with the AOA Executive Committee today, related work is also underway to revise the CSU Auxiliary Organizations Policy to establish a best practice of term limits for auxiliary organization boards.

2024-25 CSU Donor Impact Report

- At the January 2026 meeting of the Board of Trustees, the 2024-25 CSU Donor Impact Report was presented.
- The report highlighted \$567 million in gift commitments and \$482 million in gift receipts systemwide.
- It also noted that 97% of gift receipts were designated by donors, leaving only about \$14 million in undesignated support across the entire CSU.
- Cumulative endowment market value reached an all-time high of \$3.1 billion.
- The CSU also reached 4.5 million living alumni.

CSU Forward

- The Division of External Relations & Communications is responsible for the implementation of several areas of CSU Forward, the systemwide strategic plan.

- This includes advocacy, alumni engagement in support of student career success, and efforts to strengthen systemwide brand recognition in ways that support enrollment.

CSU Voices

- CSU Voices continues to build as the CSU's systemwide e-advocacy network.
- The platform helps engage alumni, employees, parents, friends, and other supporters in advocacy on behalf of the CSU.
- Auxiliary leaders and employees are encouraged to participate and help expand the network's reach.

I. Class Action Lawsuit: Refund of Tuition and Fees

A class action lawsuit was filed by CSU students asserting claims for refunds of tuition and fees from Spring 2020 when the pandemic forced CSU to pivot to remote instruction. The case is heading to trial in June 2026.

II. Observed Trends and Compliance Reminders

CSU and its auxiliaries have experienced an increase in records access requests. Auxiliaries are subject to the McKee Transparency Act, which—similar to the California Public Records Act—requires disclosure of all records that are not legally exempt. Because responses to these requests are time-sensitive, all requests should be promptly forwarded to the designated records access officer to ensure timely and compliant handling.

Additionally, there has been a noticeable rise in wage and hour litigation involving auxiliary employees. Auxiliaries should review applicable wage and hour requirements and consult with auxiliary legal counsel as needed to ensure full compliance with governing laws and regulations.



Associated Students, Student Union, Recreation (AS/SU/RE) Committee

AOA Executive Committee Meeting

AS/SU/RE Chair Report

April 17, 2026

- Committee selected Rebecca Hasgard as the committee vice chair for 2026. I am undergoing onboarding meetings for her.
- The committee is exploring the option of adding another formalized sub-group for marketing (and potentially programming included as well). For reference, we already have AS Advisors, Executive Directors, and Rec Centers sub-groups.
- We'll be hosting our bi-annual meeting in June virtually, this was decided during the last business meeting during the AOA Conference.
- We're going to attempt a different approach for conference session outreach this year. Rebecca and I will be brainstorming an approach that will be geared towards reducing overlap with other committees and identifying and filling gaps in content. Our goal is to make it a more inclusive experience for the variety of different departments / positions types within AS/SU/RE auxiliaries, while leveraging that content from other committees is also of interest to our members.

Report to AOA executive Committee
Business and Financial Services Subcommittee

April 6, 2026

Business and Financial Services Subcommittee conference calls have been held:

- February 06, 2026 – Steering committee
- March 13, 2026 – Steering committee

Committee meeting Minutes have been provided to the executive committee.

The February meeting focused on recapping the annual conference, dates for future meetings and discussion about on-line educational sessions replacing a Fall Mini-conference. The committee decided, due to ongoing budget issues at several campuses, not to host a Fall Mini Conference and instead have multiple 45-minute-long educational sessions. The committee will create a survey for membership to provide input on educational topics.

March meeting discussed the Executive Committee Orientation the chair attended and future dates for the educational sessions. The draft members survey was discussed along with ways to increase member engagement on the calls.

Future planned meetings for the committee are:

- April 9, 2026 – Steering committee
- May 8, 2026 – Member call – and educational Session
- June 12, 2026 – Steering Committee
- September 2026 - Member call – and educational Session
- October/November 2026 – Member call – and educational Session

AOA Business & Financial Services Steering Committee

Agenda

February 6, 2026 @ 10:00 AM PST

Via Zoom

1. **Call to Order** – Chair Careaga called the meeting to order at 10:05 AM
2. **Roll Call** – Carlos Careaga, Lionel Lawrence, Navika Jindal, Yvonne Cuellar
3. **Approval of Agenda** – it was motioned and seconded approve the BFSSC meeting agenda
LAWRENCE / JINDAL **CARRIED 4-0-0**
4. **Orientation Manual** – Chair Careaga reviewed the Executive Committee Orientation Manual
5. **Information** –
 - a. Meeting times for remainder of academic year – The Committee discussed and will schedule Standing Committee meetings on the second or third Fridays of the month at 10:00 AM.
 - b. Educational Sessions – Committee discussed hosting quarterly zoom sessions with Subject Matter Experts (SMEs) discussing relevant topics with an emphasis on current fraud, banking, audit, and AI issues impacting our industry and organizations. These zoom meetings would be held in lieu of a mini conference. The committee decided to send out a survey to the membership – using Slack – and hear from membership regarding topics they might be interested in.

Navika Jindal will draft the survey

Carlos Careaga will talk to AOA leadership about using Slack to deliver the survey
6. **Other Items** – Lionel Lawrence commented on increasing the level of engagement from colleagues at other campuses. Chair Careaga will talk to AOA about tools to spread the word about committee meetings.
7. **Adjournment** – The meeting was adjourned at 11:01 AM

Approved By:



Carlos F Caraga
Committee Chair

Prepared By:



Navika Jindal Feb 17, 2026 10:35:26 PST

Navika Jindal
Committee Secretary

AOA Business & Financial Services Steering Committee

Agenda

March 13, 2026 @ 10:00 AM PST

Via Zoom


1. **Call to Order** – Chair Careaga called the meeting to order at 10:02 AM
2. **Roll Call** – Carlos Careaga, Lionel Lawrence, Navika Jindal
 - a. **Members not in attendance** – Yvonne Cuellar
3. **Approval of Agenda** – it was motioned and seconded approve the BFSSC meeting agenda
LAWRENCE / JINDAL **CARRIED 3-0-0**
4. **Approval of Previous meeting Minutes** – it was motioned and seconded approve the BFSSC meeting minutes from February 6, 2026
LAWRENCE / JINDAL **CARRIED 3-0-0**
5. **AOA Executive Committee Orientation Zoom the Chair attended**
 - a. Available Budget – The Steering Committee discussed if there was any need to request a budget allocation from AOA. Everyone agreed that education sessions should be delivered via zoom and barring anything unforeseen, no budget allocation is necessary.
 - b. AOA Executive Committee Meetings – Chair Careaga informed the committee of upcoming Executive Committee Meeting dates and that the April 17 meeting will be in person in Long Beach
6. **Update on Survey** – The Committee was unable to access the survey that Navika Jindal created on Slack. Navika will reach out AOA President Andrew Singletary to ask for assistance. The Survey is to be sent out to AOA Business and Financial Services members asking for their input on educational session topics.
7. **Educational Sessions**
 - a. <https://docs.google.com/document/d/1ojt7RQJ37peRTz4NbtbumqLPG1UMtN-PhbKC344n3NY/edit?usp=sharing>
8. **Quarterly BFSSC meeting** – The committee discussed having a Business and Financial Services Committee meetings in May, September and October / November.
9. **Other Items** - None
10. **Adjournment** – The meeting was adjourned at 11:05 AM
JINDAL / LAWRENCE **CARRIED 3-0-0**

Approved By:



Carlos F Caraga
Committee Chair

Prepared By:



Navika Jindal
Committee Secretary

Quarterly Summary

The Human Resources (HR) Committee continues to meet on the last Friday of each month, with consistent participation and engagement across auxiliaries. Meetings are structured to support both open discussion and targeted collaboration, and members continue to use Slack as the primary platform for communication and resource sharing between meetings. The group has grown to nearly 70 active members on Slack, with ongoing engagement outside of scheduled meetings.

This quarter, the committee discussed updates to the meeting structure aimed at maximizing time and increasing engagement. This includes exploring breakout room discussions focused on key HR topic areas such as employee relations, compensation, recruitment, and HRIS, as well as potential expert-led roundtables.

A key focus has also been the transition to new legal counsel. The HR Committee supported the RFP process and finalist review, with final approval aligned with the Executive Committee timeline. A transition and test phase is anticipated prior to full implementation, with the goal of ensuring the selected firm meets the needs of auxiliaries and provides timely, practical HR guidance.

In addition to structural improvements, the committee continues to serve as a space for real-time problem solving and knowledge sharing. Recent discussions have included topics such as qualified overtime reporting requirements, emergency contact and detainment notification practices, executive compensation approaches, reference check policies, and employee death procedures. These discussions highlight the complexity of HR operations across auxiliaries and the value of shared practices and peer support.

The committee will continue to assess the effectiveness of these changes and identify opportunities to expand training and resource offerings based on member needs.

Themes for the Year

The committee remains focused on strengthening connection and collaboration across auxiliary HR professionals. Priorities include improving access to shared resources, increasing opportunities for peer-to-peer learning, and supporting members in navigating evolving compliance requirements and operational challenges. Continued emphasis will be placed on leveraging Slack and structured discussions to maintain engagement between meetings and build a more connected HR network.

Committee Leadership, 2026

- **Chair:** Andrea Bozant - The University Corporation at Monterey Bay
- **Vice Chair:** Natalie Tapia - Loker Student Union, CSU Dominguez Hills
- **Secretary:** Cindy Cerna - Associated Students, CSU Northridge
- **Conference Planner:** Ranjit Kaur - San José State University Research Foundation

Prepared by: Andrea Bozant, Chair, AOA HR Committee



2026 AOA IT Committee Chair Report

2026 Chair

Chilmann Chaudhary
IT Support Technician
Loker Student Union, CSUDH inc.
Cchaudhary1@csudh.edu
(310) 243-3854

Report By Month

Month	Action Items Completed
January 2026	<ul style="list-style-type: none"> Debra Hammond contacted Chilmann Chaudhary, Vice Chair of the AOA IT Committee, to introduce herself and request information regarding the IT Committee’s CPC representative. Chilmann Chaudhary provided the requested information to support the CPC committee.
January 2026	<ul style="list-style-type: none"> Patrick Speers resigned from his position as Chair of the AOA IT Committee, effective January 29. Following his resignation, Vice-Chair Chilmann Chaudhary was appointed as Interim Chair of the AOA IT Committee. Calvin Yun facilitated the transition of leadership responsibilities on behalf of Patrick Speers. Calvin Yun coordinated with Karen Malone via email to introduce Chilmann Chaudhary and arrange her participation in ISAC meetings. Calvin Yun and Chilmann Chaudhary conducted a Zoom meeting to review the responsibilities of the Chair role and to share relevant resources from AOA’s Google Workspace (GWS). Chilmann Chaudhary contacted Andrew Singletary to obtain access to AOA’s Google Workspace. Andrew Singletary provided guidance to Chilmann Chaudhary on her responsibilities as Chair and assisted her in accessing necessary resources within AOA’s Google Workspace and Slack channels.
February 2026	<ul style="list-style-type: none"> Chilmann Chaudhary attended the AOA Conference Planning introductory meeting on February 16. Chilmann Chaudhary participated in the CPC wrap-up meeting for the 2026 conference on February 18. During the wrap-up meeting, highlights from the 2026 Conference educational sessions were discussed, along with areas identified for improvement. Chilmann Chaudhary attended the ISAC meeting on February 17.



AOA IT Committee

<p>March 2026</p>	<ul style="list-style-type: none"> • Chilmann Chaudhary led the first AOA IT Committee meeting on March 4. • During the meeting, Chilmann Chaudhary self-nominated for the role of Chair of the AOA IT Committee and was approved by committee members. • Alfred Padilla was nominated and approved by the committee members as Vice-Chair of the AOA IT Committee. • Chilmann Chaudhary shared updates and key information from the ISAC meeting with the AOA IT Committee. • Chilmann Chaudhary communicated leadership transition updates regarding the Chair and Vice-Chair roles to Debra Hammond and Andrew Singletary via email. • Alfred Padilla was onboarded into his role and subsequently invited by Debra Hammond to attend the monthly CPC meeting. • Chilmann Chaudhary was unable to attend the ISAC meeting on March 17 due to a miscommunication regarding AOA Chair representation and role expectations. • Following this, Chilmann Chaudhary reached out to the ISAC Chair for support and to obtain relevant information. • Andrew Singletary clarified the responsibilities of the AOA IT Chair within ISAC and connected Chilmann Chaudhary with Robyn Pennington to confirm attendance expectations for ISAC meetings. • CSU ISO Josh Callahan contacted Chilmann Chaudhary on March 30 to connect and share relevant information.
<p>April 2026</p>	<ul style="list-style-type: none"> • Chilmann Chaudhary has scheduled the next AOA IT Committee meeting for April 6. • She will share updates from the ISAC meeting and engage with committee members to support ongoing IT issues related to CSU auxiliaries. • Chilmann Chaudhary plans to organize and compile all required documentation within AOA's Google Workspace (GWS) for record-keeping purposes. • She intends to add committee members to the IT Slack channel to facilitate timely and effective communication. • Chilmann Chaudhary plans to connect with Alfred Padilla to exchange key information related to conference planning. • Chilmann Chaudhary will attend the in-person EC meeting on April 17.
<p>July 2026</p>	<ul style="list-style-type: none"> - Scheduled AOA IT Committee meeting on July 6.
<p>October 2026</p>	<ul style="list-style-type: none"> - Scheduled AOA IT Committee meeting on October 6.

Our **2026 Subcommittee Leadership** consist of **Trina Beckwith** from **San Marcos** as **Chair**, **Mike Kusiak** from **East Bay** as **Vice Chair** and **Myrna Weber** from **San Bernardino** as **Secretary**.

In January 2026 at the AOA meeting, the RAC group met and announced the new RAC Leadership: Mike Kusiak for Vice Chair (East Bay) and Myrna Weber for Secretary (San Bernardino). Trina Beckwith coordinated 5 research and sponsored program educational sessions at the conference.

On January 26, 2026, RAC Leadership held a RAC Chat with Anne Feuerborn from Maximus and Melissa Mullen from the Chancellor's Office. They presented on "Navigating Changes in Indirect and Direct Costing." There were approximately 35-45 attendees.

On February 13, 2026 the outgoing Chair, Julie Wessel and Melissa Mullen met with Trina Beckwith (RAC Chair), Mike Kusiak (incoming Vice Chair), and Myrna Weber (incoming Secretary) to debrief on responsibilities for RAC Leadership. Ana Aguirre from the CO created a RAC Leadership HUB on SharePoint to deposit AOA and RAC documents for future leadership members. This will make for a smoother transition and avoid emailing documents from old to new leadership during transition.

On March 3, 2026, RAC discontinued using the RAC Google Group as a means for communication for committee members. A new CSU Listserv was created and implemented on this day. The new listserv is more secure and requires CSU email addresses. The old Google Group was getting too much spam.

The 2026 RAC Spring meeting will be held in San Marcos on May 12 and 13 (2 full days) with a short Strategic Leadership meeting on May 14. The Strategic Leadership meeting will include RAC Leadership and folks from the CO.

RAC leadership continues to attend CCRO's regular meetings on the last Thursday of each month. This opens a channel of communication between the groups that enables the Power of 23 to address and resolve complex issues.

In an effort to maintain connectivity with the larger AOA group, RAC continues posting meetings and workshop information on the AOA website.

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

RAC continues to be 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.