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**EXECUTIVE COMMITTEE SPECIAL MEETING  
AGENDA**

**May 27, 2026 – 1:00pm**

Zoom Link:

<https://csus.zoom.us/j/81937071822?pwd=WENiOj8bzIDYLWFfzmhxb3WrMAHTn.1&from=addon>

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- A. CALL TO ORDER and ANNOUNCEMENTS – Andrew Singletary
- B. APPROVAL OF AGENDA – **Action Item** - pg. 1
- C. FINANCIAL MANAGERS REPORT - 2025/26
  - a. Balance Sheet, Detailed Trial Balance and A/R reports - pgs. 2-8
  - b. 2024/25 990's Filed – update – to be posted on website
  - c. Reserve Policy Review - pgs. 9-10
- D. 2026/27 Conference Budget – **Action Items** - pgs. 11 - 34
  - a. Service Provider Renewals
    - i. Conference Administrative Manager – Patrick Bailey - \$40,000
    - ii. Educational Content Coordinator – Debra Hammond - \$15,000 (July 1, 2026 – February 28, 2027)
    - iii. Business Partner Coordinator – Richard Chester - \$33,900
    - iv. Events Air Support Provider Proposal – Eric Andersson - \$40,000 (June 1, 2026 – February 28, 2027)
  - b. Frank Kitchen Keynote Agreement – \$12,000
  - c. IXLA Conference Support Agreement - \$10,760
- E. 2026/27 Operations Budget – **Action Items** - pgs. 35 - 65
  - a. Service Provider Renewals
    - i. Operations Manager – Kim Clark - \$40,000
    - ii. Financial Manager – Dwayne Brummett – \$39,500
    - iii. Legislative and Compliance Advisor – Robert Griffin - \$150/hr
  - b. CSUN ASI Technology Support for AOA – update
  - c. Website Migration and Hosting - \$3,250 (1 time) + \$5,500 annually
  - d. IXLA Content Management Agreement - \$3,780 (June 1, 2026 – June 30, 2027)
  - e. Salary Survey – HR Committee - \$12,500
- F. Conference Site Proposal – 2028/2030 – Update - pgs. 66 - 79
- G. ADJOURNMENT

**Future Meetings**

June 12, 2026 – virtual, 9am – 2pm  
August 14, 2026 – Long Beach Marriott, 8:30am – 2pm  
November 20, 2026 – virtual, 9am – 2pm  
January 9, 2027 @Sheraton SD – time TBD

Auxiliary Organizations Association (AOA)

05/13/26

Balance Sheet  
As of May 13, 2026

	<u>May 13, 26</u>
ASSETS	
Current Assets	
Checking/Savings	
10000 · Checking Account	149,268.39
10300 · Money Market Account	<u>275.44</u>
Total Checking/Savings	149,543.83
Accounts Receivable	
11030 · AOA Dues Receivable 2025	49,656.00
11900 · AOA Dues Receivable 2026	155,559.00
11400 · Business Partner Receivable	4,218.75
11000 · AOA Dues Receivable 2024	<u>31,598.00</u>
Total Accounts Receivable	241,031.75
Other Current Assets	
13505 · Prepaid Events Air	<u>11,329.17</u>
Total Other Current Assets	<u>11,329.17</u>
Total Current Assets	401,904.75
Fixed Assets	
15000 · Accumulated Depreciation	-59,790.00
14000 · Web Developmt Depreciable Asset	<u>59,790.00</u>
Total Fixed Assets	0.00
Other Assets	
12950 · Conference Prepaid Expense	47,500.00
16200 · Vanguard Short -Term Investmnts	44,113.60
16500 · L-T Deposit with Hotels/Vendors	10,000.00
16000 · Vanguard Long-Term Investmnts	<u>118,037.47</u>
Total Other Assets	<u>219,651.07</u>
TOTAL ASSETS	<u><u>621,555.82</u></u>
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Other Current Liabilities	
22000 · AOA Dues Deferred Income	<u>173,877.00</u>
Total Other Current Liabilities	<u>173,877.00</u>
Total Current Liabilities	<u>173,877.00</u>
Total Liabilities	173,877.00
Equity	
35000 · *Retained Earnings	323,201.54
Net Income	<u>124,477.28</u>
Total Equity	<u>447,678.82</u>
TOTAL LIABILITIES & EQUITY	<u><u>621,555.82</u></u>

Auxiliary Organizations Association (AOA)

Transactions by Account

As of May 13, 2026

05/13/26

Type	Date	Num	Name	Split	Amount	Balance
10000 · Checking Account						178,723.76
Bill Pmt -Check	02/17/26	3247	Centium Software, Inc.	20900 · Other Accounts Payable	-175.00	178,548.76
Bill Pmt -Check	02/17/26	3248	Dent Agency LLC	20900 · Other Accounts Payable	-3,096.60	175,452.16
Bill Pmt -Check	02/17/26	3249	Kim Clark	20900 · Other Accounts Payable	-3,600.30	171,851.86
Bill Pmt -Check	02/17/26	3250	Richard Chester	20900 · Other Accounts Payable	-2,943.10	168,908.76
Bill Pmt -Check	02/17/26	3251	Aaron Rutschman	20900 · Other Accounts Payable	-476.96	168,431.80
Deposit	02/18/26			50000 · Conference Registratio...	24,999.86	193,431.66
Bill Pmt -Check	02/24/26	3252	Constangy, Brooks, Smith & Prophete LLP	20900 · Other Accounts Payable	-1,802.20	191,629.46
Bill Pmt -Check	02/24/26	3253	Megan Duncan	20900 · Other Accounts Payable	-2,931.00	188,698.46
Bill Pmt -Check	02/24/26	3254	Patrick Bailey	20900 · Other Accounts Payable	-3,388.54	185,309.92
Bill Pmt -Check	02/24/26	3255	Dwayne Brummett	20900 · Other Accounts Payable	-349.45	184,960.47
General Journal	02/28/26			-SPLIT-	-627.02	184,333.45
Check	02/28/26			80800 · Bank Credit Card Fees	-19.95	184,313.50
Deposit	03/03/26			50000 · Conference Registratio...	1,743.52	186,057.02
Bill Pmt -Check	03/03/26	3256	Debra L. Hammond	20900 · Other Accounts Payable	-4,102.31	181,954.71
Deposit	03/04/26			50000 · Conference Registratio...	0.00	181,954.71
Bill Pmt -Check	03/11/26	3450	Centium Software, Inc.	20900 · Other Accounts Payable	-2,965.92	178,988.79
Bill Pmt -Check	03/11/26	3451	CSU, Sacramento University Union	20900 · Other Accounts Payable	-1,737.90	177,250.89
Bill Pmt -Check	03/11/26	3452	Dent Agency LLC	20900 · Other Accounts Payable	-3,096.60	174,154.29
Bill Pmt -Check	03/11/26	3453	Dwayne Brummett	20900 · Other Accounts Payable	-2,583.33	171,570.96
Bill Pmt -Check	03/11/26	3454	Intersect LA	20900 · Other Accounts Payable	-14,341.00	157,229.96
Bill Pmt -Check	03/11/26	3455	MaynardNexsen	20900 · Other Accounts Payable	-16,722.00	140,507.96
Bill Pmt -Check	03/11/26	3456	Patrick Bailey	20900 · Other Accounts Payable	-3,333.00	137,174.96
Bill Pmt -Check	03/11/26	3457	Richard Chester	20900 · Other Accounts Payable	-2,825.00	134,349.96
Payment	03/13/26	144985	Associated Students of CSU Sacramento	11900 · AOA Dues Receivable ...	3,704.00	138,053.96
Payment	03/13/26	207297	Forty-Niner Shops, Inc., CSU Long Beach	11900 · AOA Dues Receivable ...	4,938.00	142,991.96
Payment	03/23/26	676817	CSU San Bernardino Associated Studnets	11900 · AOA Dues Receivable ...	1,696.00	144,687.96
Payment	03/23/26	3003	Associated Students, San Jose State	11900 · AOA Dues Receivable ...	3,704.00	148,391.96
Payment	03/23/26	30898	CSU Sacramento University Union	11900 · AOA Dues Receivable ...	4,938.00	153,329.96
Payment	03/23/26	18650	Fresno State Programs for Children, Inc.	11900 · AOA Dues Receivable ...	1,497.00	154,826.96
Payment	03/23/26	157947	CSU Bakersfield Foundation	11900 · AOA Dues Receivable ...	8,590.00	163,416.96
Payment	03/23/26	292103	CSU Dominguez Hills Toro Auxiliary Part.	11900 · AOA Dues Receivable ...	6,172.00	169,588.96
Payment	03/23/26	103099	Agricultural Foundation of CSU Fresno	11900 · AOA Dues Receivable ...	2,700.00	172,288.96
Payment	03/23/26	469869	CSU Fresno, Foundation	11900 · AOA Dues Receivable ...	7,715.00	180,003.96
Payment	03/23/26	14331	Associated Students, CSU Long Beach	11900 · AOA Dues Receivable ...	4,358.00	184,361.96
Payment	03/23/26	111320	CSU, Northridge Foundation	11900 · AOA Dues Receivable ...	6,172.00	190,533.96
Payment	03/23/26	1015356	Cal Poly Pomona Associated Students	11900 · AOA Dues Receivable ...	4,358.00	194,891.96
Payment	03/23/26	1903	CSU, Northridge Univ. Student Union	11900 · AOA Dues Receivable ...	4,938.00	199,829.96
Payment	03/23/26	448573	CSU Fullerton Auxiliary Services Corp.	11900 · AOA Dues Receivable ...	7,715.00	207,544.96
Payment	03/23/26	328535	CSU Fresno Association, Inc.	11900 · AOA Dues Receivable ...	2,700.00	210,244.96
Payment	03/23/26	2420	Dominguez Hills Philanthropic Foundation	11900 · AOA Dues Receivable ...	2,700.00	212,944.96
Payment	03/23/26	135289	CSU Fullerton, Associated Students	11900 · AOA Dues Receivable ...	6,172.00	219,116.96
Payment	03/23/26	218317	Associated Students, San Diego State Univ	11900 · AOA Dues Receivable ...	6,172.00	225,288.96
Payment	03/23/26	425967	Cal State LA University Auxiliary Svcs	11900 · AOA Dues Receivable ...	6,172.00	231,460.96
Bill Pmt -Check	03/27/26	3458	Debra L. Hammond	20900 · Other Accounts Payable	-1,875.00	229,585.96
Bill Pmt -Check	03/27/26	3459	Kim Clark	20900 · Other Accounts Payable	-6,666.66	222,919.30
Bill Pmt -Check	03/27/26	ACH 3-27	Oakland Marriott City Center	20900 · Other Accounts Payable	-187,482.18	35,437.12
General Journal	03/31/26	ReconMar		-SPLIT-	-4,214.90	31,222.22
Check	03/31/26			80800 · Bank Credit Card Fees	-5.00	31,217.22
Payment	04/01/26	201499	San Francisco State Univ. Foundation	11900 · AOA Dues Receivable ...	1,696.00	32,913.22
Payment	04/01/26	406168	Cal State Los Angeles Univ. Student Union	11900 · AOA Dues Receivable ...	2,700.00	35,613.22
Payment	04/01/26	1015443	Cal Poly Pomona Associated Students	11900 · AOA Dues Receivable ...	4,938.00	40,551.22
Payment	04/01/26	6365	Cal Poly Humboldt Foundation	11900 · AOA Dues Receivable ...	2,700.00	43,251.22
Payment	04/01/26	500602	California State University Foundation	11900 · AOA Dues Receivable ...	2,700.00	45,951.22
Payment	04/01/26	56013	CSU Dominguez Hills Loker Student Union	11900 · AOA Dues Receivable ...	1,696.00	47,647.22
Bill Pmt -Check	04/03/26	3460	Dwayne Brummett	20900 · Other Accounts Payable	-2,583.33	45,063.89

Auxiliary Organizations Association (AOA)

Transactions by Account

As of May 13, 2026

05/13/26

Type	Date	Num	Name	Split	Amount	Balance
Payment	04/08/26	819486	CSU, Los Angeles Associated Students	11900 · AOA Dues Receivable ...	1,696.00	46,759.89
Payment	04/08/26	38006	CSU Fresno Associated Students	11900 · AOA Dues Receivable ...	1,696.00	48,455.89
Payment	04/08/26	18671	Fresno State Programs for Children, Inc.	11900 · AOA Dues Receivable ...	1,696.00	50,151.89
Payment	04/08/26	677328	CSU San Bernardino Student Union	11900 · AOA Dues Receivable ...	3,704.00	53,855.89
Payment	04/08/26	34453	CSU San Bernardino University Enterprises	11900 · AOA Dues Receivable ...	7,715.00	61,570.89
Payment	04/08/26	33	Cal Poly State University	11900 · AOA Dues Receivable ...	7,715.00	69,285.89
Payment	04/08/26	712	CSU Monterey Bay Otter Student Union	11900 · AOA Dues Receivable ...	1,497.00	70,782.89
Payment	04/08/26	30	CSU Humboldt Associated Students	11900 · AOA Dues Receivable ...	682.00	71,464.89
Bill Pmt -Check	04/08/26	3461	Kim Clark	20900 · Other Accounts Payable	-20.21	71,444.68
Bill Pmt -Check	04/08/26	3462	Robert E. Griffin	20900 · Other Accounts Payable	-2,775.00	68,669.68
Bill Pmt -Check	04/14/26	3463	Patrick Bailey	20900 · Other Accounts Payable	-3,333.00	65,336.68
Bill Pmt -Check	04/14/26	3464	Richard Chester	20900 · Other Accounts Payable	-2,825.00	62,511.68
Payment	04/15/26	510691	CSU Chico, Associated Students	11900 · AOA Dues Receivable ...	4,938.00	67,449.68
Payment	04/15/26	368976	CSU Northridge, University Corporation	11900 · AOA Dues Receivable ...	2,700.00	70,149.68
Payment	04/15/26	514	CSU Channel Islands Associated Students	11900 · AOA Dues Receivable ...	1,647.00	71,796.68
Payment	04/21/26	681	CSU Channel Islands Univ. Auxiliary Svcs.	11900 · AOA Dues Receivable ...	2,700.00	74,496.68
Payment	04/21/26	4026	Fresno Athletic Corporation	11900 · AOA Dues Receivable ...	7,715.00	82,211.68
Payment	04/21/26	339	CSU Bakersfield Student Centered Enterpri	11900 · AOA Dues Receivable ...	2,700.00	84,911.68
Payment	04/21/26	25971	CSU Chico University Foundation	11900 · AOA Dues Receivable ...	4,938.00	89,849.68
Payment	04/21/26	713	CSU Monterey Bay Otter Student Union	11900 · AOA Dues Receivable ...	1,497.00	91,496.68
Bill Pmt -Check	04/23/26	3465	Debra L. Hammond	20900 · Other Accounts Payable	-1,875.00	89,621.68
Payment	04/27/26	137466	Sonoma State Enterprises, Inc.	11900 · AOA Dues Receivable ...	2,700.00	92,321.68
Payment	04/27/26	157450	San Jose State Univ Tower Foundation	11900 · AOA Dues Receivable ...	6,172.00	98,493.68
Payment	04/27/26	1739	CSU San Bernardino Philanthropic Foundat	11900 · AOA Dues Receivable ...	2,700.00	101,193.68
Payment	04/27/26	108330	Sacramento State University Foundation	11900 · AOA Dues Receivable ...	3,704.00	104,897.68
Payment	04/27/26	1108	CSU Sacramento Capital Public Radio, Inc.	11900 · AOA Dues Receivable ...	9,732.00	114,629.68
General Journal	04/30/26	ReconAPR		-SPLIT-	10.45	114,640.13
Check	04/30/26			79400 · Bad Debt Expense	-3,704.00	110,936.13
Bill Pmt -Check	05/04/26	3466	Dent Agency LLC	20900 · Other Accounts Payable	-3,096.60	107,839.53
Bill Pmt -Check	05/04/26	3467	Kim Clark	20900 · Other Accounts Payable	-3,333.33	104,506.20
Payment	05/06/26	2240	CSU Northridge N. Campus Univ. Dev. Corp.	11900 · AOA Dues Receivable ...	773.00	105,279.20
Payment	05/06/26	120765	CSU Fullerton Philanthropic Foundation	11900 · AOA Dues Receivable ...	4,938.00	110,217.20
Payment	05/06/26	2561545	SDSU Research Foundation	11900 · AOA Dues Receivable ...	7,715.00	117,932.20
Payment	05/06/26	305785	CSU Bakersfield Associated Students, Inc.	11900 · AOA Dues Receivable ...	1,696.00	119,628.20
Payment	05/06/26	12015	Cal Poly Humboldt Sponsored Programs Fdn	11900 · AOA Dues Receivable ...	7,715.00	127,343.20
Payment	05/06/26	1115	CSU Sacramento Capital Public Radio, Inc.	11900 · AOA Dues Receivable ...	4,358.00	131,701.20
Payment	05/06/26	813	Cal Poly Corporation	11900 · AOA Dues Receivable ...	7,490.00	139,191.20
Payment	05/06/26	249708	Orrick, Herrington & Sutcliffe LLP	11900 · AOA Dues Receivable ...	4,050.00	143,241.20
Bill Pmt -Check	05/06/26	3468	Centium Software, Inc.	20900 · Other Accounts Payable	-13,595.00	129,646.20
Bill Pmt -Check	05/06/26	3469	Centium Software, Inc.	20900 · Other Accounts Payable	-105.00	129,541.20
Bill Pmt -Check	05/12/26	3470	Patrick Bailey	20900 · Other Accounts Payable	-3,895.81	125,645.39
Bill Pmt -Check	05/12/26	3471	Attorney General's Registry of Charitable	20900 · Other Accounts Payable	-100.00	125,545.39
Payment	05/13/26	719	CSU Monterey Bay Otter Student Union	11900 · AOA Dues Receivable ...	1,696.00	127,241.39
Payment	05/13/26	33150	CSU, Northridge Associated Students	11900 · AOA Dues Receivable ...	3,704.00	130,945.39
Payment	05/13/26	302552	CSU Los Angeles Foundation	11900 · AOA Dues Receivable ...	1,696.00	132,641.39
Payment	05/13/26	533	CSU Channel Islands Associated Students	11900 · AOA Dues Receivable ...	1,497.00	134,138.39
Payment	05/13/26	2442	CSU Monterey Bay Foundation	11900 · AOA Dues Receivable ...	2,329.00	136,467.39
Payment	05/13/26	2561660	SDSU Research Foundation	11900 · AOA Dues Receivable ...	6,809.00	143,276.39
Payment	05/13/26	219186	Associated Students, San Diego State Univ	11900 · AOA Dues Receivable ...	5,992.00	149,268.39
Total 10000 · Checking Account					-29,455.37	149,268.39
TOTAL					-29,455.37	149,268.39

## Auxiliary Organizations Association

Accounts Receivable Aging as of 5/13/2026

2026 Dues

	Current	1 - 30	31 - 60	61 - 90	> 90	TOTAL
CSU Long Beach, 49er Foundation	0.00	0.00	0.00	4,938.00	0.00	4,938.00
CSU Stanislaus University Student Union	0.00	0.00	0.00	1,696.00	0.00	1,696.00
Sonoma State University Foundation	0.00	0.00	0.00	1,696.00	0.00	1,696.00
CSU San Marcos, Foundation	0.00	0.00	0.00	2,700.00	0.00	2,700.00
San Jose State Spartan Shops, Inc.	0.00	0.00	0.00	1,696.00	0.00	1,696.00
San Jose State University Research Fdn	0.00	0.00	0.00	7,715.00	0.00	7,715.00
San Francisco State Associated Students	0.00	0.00	0.00	3,704.00	0.00	3,704.00
San Diego State Mission Valley Enterprise	0.00	0.00	0.00	1,696.00	0.00	1,696.00
CSU Sacramento University Enterprises	0.00	0.00	0.00	7,715.00	0.00	7,715.00
Cal Poly Pomona Philanthropic Fdn.	0.00	0.00	0.00	4,938.00	0.00	4,938.00
CSU Monterey Bay Foundation	0.00	0.00	0.00	1,696.00	0.00	1,696.00
CSU Long Beach, Research Foundation	0.00	0.00	0.00	7,715.00	0.00	7,715.00
CSU East Bay Educational Foundation, Inc.	0.00	0.00	0.00	3,704.00	0.00	3,704.00
CSU Dominguez Hills Associated Students	0.00	0.00	0.00	1,696.00	0.00	1,696.00
CSU Chico Enterprises	0.00	0.00	0.00	7,715.00	0.00	7,715.00
CSU Channel Islands Associated Students	0.00	0.00	0.00	1,696.00	0.00	1,696.00
CSU Bakersfield Auxiliary for Spons. Pgms	0.00	0.00	0.00	4,938.00	0.00	4,938.00
Associated Students, CSU Long Beach	0.00	0.00	0.00	4,938.00	0.00	4,938.00
Associated Students, CSU, East Bay	0.00	0.00	0.00	1,696.00	0.00	1,696.00
CSU, East Bay Foundation	0.00	0.00	0.00	6,172.00	0.00	6,172.00
CSU San Marcos Associated Students	0.00	0.00	0.00	1,696.00	0.00	1,696.00
CSU Humboldt Associated Students	0.00	0.00	0.00	773.00	0.00	773.00
CSU Stanislaus Aux & Business Services	0.00	0.00	0.00	773.00	0.00	773.00
Cal Poly SLO University Foundation	0.00	0.00	0.00	7,715.00	0.00	7,715.00
Cal Poly SLO Associated Students	0.00	0.00	0.00	4,938.00	0.00	4,938.00
SJSU Student Union	0.00	0.00	0.00	4,938.00	0.00	4,938.00
CSU, Northridge Univ. Student Union	0.00	0.00	0.00	0.00	0.00	0.00
CSU Monterey Bay University Corporation	0.00	0.00	0.00	7,715.00	0.00	7,715.00
Humboldt State University Center Board	0.00	0.00	0.00	773.00	0.00	773.00
Sonoma State Associated Students Inc.	0.00	0.00	0.00	1,696.00	0.00	1,696.00
CSU Channel Islands Foundation	0.00	0.00	0.00	3,704.00	0.00	3,704.00
The Campanile Foundation, SDSU	0.00	0.00	0.00	7,715.00	0.00	7,715.00
San Marcos University Corporation	0.00	0.00	0.00	6,172.00	0.00	6,172.00
SF State University Corporation	0.00	0.00	0.00	6,172.00	0.00	6,172.00
SDSU Aztec Shops LTD	0.00	0.00	0.00	7,715.00	0.00	7,715.00
CSU Stanislaus Foundation	0.00	0.00	0.00	3,193.00	0.00	3,193.00
Alliant Insurance Services	0.00	4,218.75	0.00	0.00	0.00	4,218.75
CSU Stanislaus, Associated Students, Inc.	0.00	0.00	0.00	1,696.00	0.00	1,696.00
Cal Poly Pomona Foundation	0.00	0.00	0.00	7,715.00	0.00	7,715.00
<b>TOTAL</b>	<b>0.00</b>	<b>4,218.75</b>	<b>0.00</b>	<b>155,559.00</b>	<b>0.00</b>	<b>159,777.75</b>

Outstanding Auxiliary 2024 Dues @ 5/18/2026

Auxiliary	Invoice Number	Invoice Amount
California State University, Bakersfield Auxiliary For Sponsored Programs Administration	AOA 2024-2	\$3269
The University Foundation, California State University, Chico	AOA 2024-11	\$682
Chico State Enterprises	AOA 2024-12	\$6809
California State University, Dominguez Hills Philanthropic Foundation	AOA 2024-16	\$682
Cal State Fullerton Philanthropic Foundation	AOA 2024-28	\$682
Associated Students of the California Maritime Academy	AOA 2024-41	\$682
California Maritime Academy Foundation, Inc.	AOA 2024-42	\$1497
Cal Maritime Corporation	AOA 2024-43	\$2383
University Corporation at Monterey Bay	AOA 2024-46	\$6809
Cal Poly Pomona Foundation, Inc.	AOA 2024-53	\$6809
Associated Students of San Francisco State University	AOA 2024-69	\$3269
Sonoma State Enterprises, Inc.	AOA 2024-84	\$2383
<b>TOTAL</b>		<b>\$35956</b>

Outstanding Auxiliary 2025 Dues @ 5/18/2026

Auxiliary	Invoice Number	Invoice Amount
California State University, Bakersfield Auxiliary For Sponsored Programs Administration	AOA 2025-2	\$ 4794
California State University, Channel Islands Foundation	AOA 2025-7	\$ 2621
Associated Students, Inc., California State University, Dominguez Hills	AOA 2025-13	\$ 1647
Associated Students, California State University, Fresno	AOA 2025-20	\$ 1647
Associated Students of Cal Poly Humboldt	AOA 2025-29	\$ 750
Humboldt State University Center Board of Directors	AOA 2025-30	\$ 1647
Cal Poly Humboldt Foundation	AOA 2025-31	\$ 1647
CSULB 49er Foundation	AOA 2025-34	\$ 4794
Associated Students of the California Maritime Academy	AOA 2025-41	\$ 750
California Maritime Academy Foundation, Inc.	AOA 2025-42	\$ 2621
Cal Maritime Corporation	AOA 2025-43	\$ 2621
University Student Union of California State University, Northridge	AOA 2025-50	\$ 4794
North Campus - University Park Development Corporation	AOA 2025-51	\$ 750
University Union Operation of California State University, Sacramento	AOA 2025-59	\$ 4794
Santos Manuel Student Union of California State University, San Bernardino	AOA 2025-62	\$ 3596
CSUSB Philanthropic Foundation	AOA 2025-63	\$ 1647
California State University San Marcos Foundation	AOA 2025-80	\$ 2621
California State University San Marcos Corporation	AOA 2025-81	\$ 5992
The Associated Students of California State University, San Marcos	AOA 2025-82	\$ 1647
Sonoma State Enterprises, Inc.	AOA 2025-84	\$ 2621
California State University, Stanislaus Auxiliary and Business Services	AOA 2025-87	\$ 1647
<b>TOTAL</b>		<b>\$55648</b>

## **AOA RESERVE POLICY**

### **Background and Purpose**

The establishment of adequate reserves assures fiscal viability and is an integral part of the organization's long range planning. The AOA Executive Committee has established the following reserves.

#### **Working Capital Reserve**

A Working Capital Reserve (Priority 1) will be maintained to fund general operations in the event of a significant loss of operating income. The funding target will be equal to 50% of the most recently approved annual general operating expense budget, with a minimum reserve balance of \$50,000.

#### **Conference Contingency Reserve**

A Conference Contingency Reserve (Priority 2) will be maintained to provide a funding source for the annual conference in the event of a major loss of income for this purpose. The funding target will be equal to 50% of the actual business partner support recorded in the prior year, with a minimum reserve balance of \$75,000. In evaluating this reserve, consideration will also be given to any possible risks associated with non-refundable deposit commitments for future conferences.

#### **General Contingency Reserve**

An optional General Contingency Reserve (Priority 3) will be maintained at a level, as determined annually, necessary to mitigate any other contingencies not contemplated elsewhere within this policy, but with a minimum reserve balance of \$50,000.

### **Annual Reserves Review**

A review of the reserves will be conducted with the annual budget review. This review will include:

1. Analysis of the target levels for each reserve
2. The purpose of each reserve
3. The recommended funding for each reserve based upon the established priority.

Estimated funds in excess of the reserve funding levels established for the year by the Executive Committee will be used as a source of funding for the general operating budget, or for multi-year projects beyond the scope of the annual operating budget.

**Reserve Draws, Additions, and Funding Goal Changes**

The AOA Treasurer is authorized to draw on the Working Capital Reserve as necessary to manage the adopted budget with subsequent written notice to the Executive Committee. Additions or changes to the Working Capital Reserve will be authorized by action of the Executive Committee.

All draw-downs, additions, and changes to the Conference Reserve and the General Contingency Reserve will be authorized by action of the Executive Committee.

**Reserve Investments and Earnings**

Investments tied to reserves are subject to the Investment Policy. Gains and losses generated from reserve investments are posted to the current year's general operating account.

***Approved by the Executive Committee on June 20, 2008 Revised July 23, 2013,  
and November 15, 2013***

AOA Budget Projection  
 Conference  
 (as of 5/12/2026)

					Projected	Proposed Budget Bud Diff			% Chg
	Jul '25 - Jun 26	Budget	\$ Over Budget	% of Budget	Jul '25 - Jun 26	Jul '25 - Jun 26	Jul '26 - Jun 27		
<b>Income</b>									
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%	29,225.00	30,000.00	19,500.00	10,500.00	54%
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%	238,000.00	240,000.00	208,000.00	32,000.00	15%
Total 52000 - Business Partner Income	129,000.00	239,535.64	-110,535.64	53.85%	267,225.00	270,000.00	239,535.64	30,464.36	13%
50000 - Conference Registration Fees	397,931.94	241,575.00	156,356.94	164.72%	261,450.00	348,583.00	241,575.00	107,008.00	44%
<b>Total Income</b>	<b>526,931.94</b>	<b>481,110.64</b>	<b>45,821.30</b>	<b>109.52%</b>	<b>528,675.00</b>	<b>618,583.00</b>	<b>481,110.64</b>	<b>137,472.36</b>	<b>29%</b>
<b>Gross Profit</b>	<b>526,931.94</b>	<b>481,110.64</b>	<b>45,821.30</b>	<b>109.52%</b>	<b>528,675.00</b>	<b>618,583.00</b>	<b>481,110.64</b>	<b>137,472.36</b>	<b>29%</b>
<b>Expense</b>									
80470 - Cnf Contract Srv-Patrick Bailey	29,997.00	40,000.00	-10,003.00	74.99%	40,000.00	40,000.00	40,000.00	0.00	0%
80350 - Debra Hammond Contract	20,625.00	22,500.00	-1,875.00	91.67%	26,250.00	15,000.00	22,500.00	-7,500.00	-33%
<b>NEW Eric Andersen - NEW PROVIDER</b>						<b>40,000.00</b>	<b>0.00</b>	<b>40,000.00</b>	<b>100%</b>
87500 - Speaker Travel Expenses	2,466.67	0.00	2,466.67	100.0%	2,466.67	3,000.00	0.00	3,000.00	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	500.00	300.00	200.00	67%
80500 - Service Provider Travel Expense	1,468.13	5,300.00	-3,831.87	27.7%	2,030.94	2,500.00	5,300.00	-2,800.00	-53%
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 - Conf Contract Service-Taren M	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0%
80100 - Conf 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	4,000.00	4,000.00	0.00	0%
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	4,000.00	12,700.00	-8,700.00	-69%
80200 - Conf 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	13,000.00	9,960.00	3,040.00	31%
80464 - Richard Chester	19,775.00	0.00	19,775.00	100.0%	28,250.00	33,900.00	0.00	33,900.00	100%
88000 - Web/AV Tech/ E Air Expense	5,777.91	15,841.00	-10,063.09	36.47%	16,586.24	13,003.00	15,841.00	-2,838.00	-18%
87000 - Speaker Contract Expenses	11,000.00	20,000.00	-9,000.00	55.0%	11,000.00	13,000.00	20,000.00	-7,000.00	-35%
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	3,500.00	2,500.00	1,000.00	40%
80900 - Other Conference Support Exp	5,085.50	1,500.00	3,585.50	339.03%	5,079.16	4,000.00	1,500.00	2,500.00	167%
80800 - Bank Credit Card Fees	11,504.60	23,000.00	-11,495.40	50.02%	14,197.66	12,000.00	23,000.00	-11,000.00	-48%
79000 - Gifts and Awards Expense	2,149.56	0.00	2,149.56	100.0%	2,149.56	2,500.00	0.00	2,500.00	100%
<b>NEW Conference Contingency - NEW</b>						<b>6,250.00</b>	<b>0.00</b>	<b>6,250.00</b>	<b>100%</b>
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%
<b>Total Expense</b>	<b>534,047.62</b>	<b>574,360.64</b>	<b>-40,313.02</b>	<b>92.98%</b>	<b>572,208.48</b>	<b>618,583.00</b>	<b>574,360.64</b>	<b>44,222.36</b>	<b>8%</b>
<b>Net Income</b>	<b>-7,115.68</b>	<b>-93,250.00</b>	<b>86,134.32</b>	<b>7.63%</b>	<b>-43,533.48</b>	<b>0.00</b>	<b>-93,250.00</b>	<b>93,250.00</b>	<b>-100%</b>

TO: AOA Officers  
FROM: Patrick Bailey

Please accept this as my proposal to continue to provide support services as Conference Administrative Manager for the AOA CPC. I have responded to five prompts included in the RFP and have also included a copy of my resume and the names and numbers of three references. If while you are making your decision you have any questions or need any additional information, please feel free to reach out to me directly.

Thank you for your consideration. I appreciate it.  
Very best,

Patrick Bailey  
[patrickhbaileyjr@gmail.com](mailto:patrickhbaileyjr@gmail.com)  
626.235.8620

1. I'd like to express my interest in providing Conference Administrative Manager for the 2028 AOA Conference. My experience in conference coordination, program management and my knowledge of AOA and the CSU will help me be very successful in this capacity.  
Yes, I am available to attend the 2027 conference and yes, I absolutely would be ready to support the 2028 CPC by February.
2. From 1991 – 2002 I was employed by the University-Student Union at California State University, Los Angeles serving as Executive Director for 10 of those years. During my tenure there, I never missed an AOA annual conference or any of the Associated Students/Student Union subcommittee meetings (I also served a term as chair the committee). While at CSULA, AOA contracted with the USU to assist in conference location selection and to provide conference signage (at conferences held at the Lodge at Sonoma & the Monterrey Marriott)

Starting in September 2019 until my retirement, I served as the Executive Director of the Associated Students at Cal State, Northridge. Again, I have been an active AOA conference attendee and have participated in the AS/Student Union committee.

Additionally, I would add that during my volunteer experience in the Association of College Unions International (ACUI) I have a long history of coordinating and hosting conferences, tournaments and a variety of other gatherings and events. I served as chair of ACUI's 100<sup>th</sup> Anniversary Celebration and conference, chaired and served as host for the ACUI annual conference (Anaheim & Washington DC), hosted two College Bowl National Tournaments, two National Billiards tournaments and one National Table Tennis championships on campus, chaired/hosted three regional ACUI conferences, and twice hosted the PAC-12 Directors conference.

I'd would also add that during my 35+ years working in higher education, I have always been responsible for signature campus programs from New Student Orientation to Commencement and have programmed artists from Yoyo Ma to Maya Angelou. Twice in my career, I have had the honor of presenting the President of the United States of America.

3. My professional experiences coupled with my personal knowledge of AOA and the CSU prepares me well to assume this position. I am very detailed orientated and have both of my degrees in Communications. Professionally I have been a member and have attended NACAS conferences, so would be very familiar in that environment and its membership. I've also had the pleasure of providing this service to AOA for the past two years.
4. For the year of services, I would request \$40,000 (\$10,000 a quarter)

5. REFERENCES

Marsha Herman-Betzen, former Executive Director ACUI  
812.340.2167

Debra L. Hammond, Executive Director CSUN USU  
818.720.4812

Jason Cline, CEO of SHRM-Atlanta  
317.331.7808

## AOA Educational Content Coordinator

The Service Provider shall become familiar with all AOA policies, procedures, and business practices to perform the services stated in this Contract.

### Required Travel and Meeting Participation

- Attendance at [monthly teleconference](#) Conference Planning Committee (CPC) Meetings throughout the year with the number of calls increasing, as needed during the weeks preceding the conference. ([July 2026 – March 2027](#))
- Attendance at annual conference in January including pre- and wrap up meetings for a total of [five days \(Friday – Tuesday\)](#)
- Provide on-site conference support with the AOA Conference Support Team as requested by the CPC Chair

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Participation in a minimum of one monthly teleconference between in-person meetings

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### Coordinate Session Planning Sub-Committee

- Once incumbents are selected by members of the Executive Committee/Committee Chairs, train and instruct session planning coordinators on responsibilities and timelines. Educational session tracks/educational topic areas include (noting all segments may not be represented at every conference).
  - AS/SU/REC
  - Commercial Services
  - Financial Services
  - Human Resources
  - Information Technology
  - Marketing and Communications ([not currently operating](#))
  - Philanthropic
  - Property Development [& Management](#)
  - Research Administration
  - Risk Management
- Develop session information production schedule and communicate with session planning coordinators
- Oversee session proposal ideas and distribution to session planning coordinators, providing introductions and follow-up information
- Assist session planning coordinators in identifying potential session topics and presenters
- [Coordinate monthly ed session coordinators online meetings to assist in creating, selecting and managing the educational content of the conference](#)
- Prepare and distribute “follow-up duties” report to session planning coordinators. Track activities of [ed session coordination](#) timeline and provide reminders of upcoming tasks
- Provide assistance to session planning coordinators in performing follow-up duties and

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presenter material

**Provide Administrative Support to the Session Planning Sub-Committee**

- Distribute and review overall conference evaluation for input and ideas
- Review and discuss historical conference program material
- Solicit session ideas from Executive Committee and general membership
- Solicit and review session proposals from business partners and connect those ideas with session coordinators. Prepare correspondence and follow-up with Business Partners
- Develop conference session matrix to ensure well rounded educational tracks
- Track and assist with communications with session presenters and standing committee chairs to ensure timely and accurate session information
- Review and determine meeting room requirements and approximate attendee counts for session assignment
- Assist session planning coordinators with gathering needed information from session presenters
- [Coordinate with Events Air service support provider to input session and presenter information into conference software](#)
- [Coordinate with Events Air service support provider to upload presentation material into conference software](#)
- [Coordinate with Events Air service support provider to track presenter registrations in conference software and follow up with presenter regarding registration](#)
- Monitor and follow-up on changes/additions to session topics/speakers [and coordinate input of changes with Events Air service support provider](#)
- [Coordinate with Events Air service support provider to track changes to sessions across multiple documents for accuracy \(i.e., Function agenda, online forms, mobile app\)](#)
- Provide session planning coordinators with other assistance as needed to ensure well rounded conference educational sessions

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**Provide support to the CPC Chair and AOA Conference Support Team**

- Assist in the research and recruitment of topics and presenters for super and general sessions, in collaboration with the President Elect/Conference Planning Chair. Once topics/sessions identified assist the CPC with the identification of a coordinator
- [Oversee session proposal selection process and coordinate with Events Air service support provider for notification of session proposal acceptance and provide notification for declined proposals](#)
- Work with BP Manager to identify/accept additional session proposals from new/prospective business partners
- [Coordinate with Events Air service support provider to manage the on-going update of the session matrix, function agenda, timelines, and follow-up duties](#)

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- Assist [Events Air service support provider](#) with tracking session presenter registration, hotel requirements, and AV needs
- Assist in the development, tracking, and proofing of conference material including the conference program, conference technical script, audio-visual requirements, on-line program information, and mobile application program content
- When applicable, assist in the development of session evaluations for the mobile app and distribution of confidential session evaluations
- Assist with update and implementation of conference software to include website development, presenter portal, business partner portal, on-site applications, attendee app
- Provide CPC Chair and Conference Support Team with other assistance as requested throughout the year and at the conference

**Special Projects Support for Conference Planning and Executive Committee**

- Upon input from EC on organizational priorities moving forward, participate in and provide assistance with expanded scope of work, training and development, or special projects as needed or requested.
  - One example could include support to the AOA Leadership Academy which currently collaborates with the Immediate Past President position.
- Special Project support compensation is not included in the base agreement compensation.

**Deleted: NACAS Conference Support (Attendance to be determined by Executive Committee)**

<#>Attend NACAS Annual Conference and assist with booth set up, break down and transportation of booth materials.  
 <#>Staff AOA booth during exhibitor scheduled time to promote AOA and recruit potential Business Partners for the AOA annual conference.  
 <#>Connect and engage with conference attendees and other exhibitors to provide information on the benefits of becoming an AOA Business Partner.  
 <#>Help expand the list of prospective Business Partners for inclusion into the conference contacts report.

**Commented [HD2]:** This section is not applicable

**Deleted: Support for Continuing Education Programming (Webcasts, webinars, etc.)**

<#>Needs input from EC on organizational priorities moving forward.

**Compensation**

- \$15,000 USD 8-month contract (July 2026 – February 2027), payable in monthly installments of \$1875.00.
- Special Project support will be contracted on a per-assignment basis at a rate of \$50.00 per hour.
- Service Provider is responsible for submitting monthly invoices to AOA to receive compensation.

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**BUSINESS PARTNER**  
**SUPPORT SERVICES AGREEMENT**  
***RENEWAL & EXTENSION***

This Support Services Agreement Renewal & Extension (“Agreement”) is entered into as of **July 1, 2026**, by and between the Auxiliary Organizations Association, a California nonprofit public benefit corporation (“AOA”), and Richard Chester (“Contractor”).

***RECITALS***

WHEREAS, the Parties previously entered into a Support Services Agreement entered into August 12, 2025, which expires June 30, 2026; and

WHEREAS, the Parties desire to renew and extend the Agreement for an additional term under the same general terms and conditions;

NOW, THEREFORE, the Parties agree as follows:

- 1. Renewal and Extension** The existing Agreement is hereby renewed and extended without interruption.
- 2. Term** July 1, 2026 through June 30, 2027.
- 3. Services** Contractor shall provide general support services to AOA including program, conference, business partner, administrative and strategic support.
- 4. Compensation** Total compensation of \$33,900, paid monthly upon receipt of Contractor’s invoice. Approved expenses with receipts will be reimbursed and may be included on the monthly invoice.
- 5. Independent Contractor** Contractor is an independent contractor, not an employee.
- 6. Termination** Either Party may terminate with ninety (90) days’ written notice.
- 7. Continuation** All other terms remain in full force and effect.

IN WITNESS WHEREOF, the Parties have executed this Agreement as of the date first written above.

**CONTRACTOR**

By: \_\_\_\_\_

Name: Richard Chester

Date: April 29, 2026

Eric W. Andersson  
2017 East Florida Street  
Long Beach, California 90814  
ericwandersson@gmail.com  
(562) 394-8226

May 13, 2026

Andrew Singletary  
Auxiliary Organizations Association

Re: Proposal for Remote Conference Operations Support  
Auxiliary Organizations Association Conference  
January 10–12, 2027

Dear Andrew:

Thank you for the opportunity to bid for remote conference operations support for the Auxiliary Organizations Association Conference, scheduled for January 10–12, 2027. I am pleased to submit this proposal for independent contractor services to support the planning, configuration, and back-end management of the conference.

This engagement would focus on remote conference operations and EventsAir administration. The proposed scope of work encompasses back-end conference operations, including the setup and maintenance of EventsAir, management of the presentation submission workflow, and updates to the registration website. It also involves configuration of the registration system, generation of reports, administration of the sponsor portal, and concurrent session scheduling.

Under this proposal, the Association's committees would remain responsible for content selection, conference app management, communications, program decisions, sponsor management, and day-of event delivery. I will be available online during the event for troubleshooting related to the areas within my scope of work; however, I will not be responsible for on-site staffing or live event execution unless those services are separately contracted.

My rate for this engagement is \$115 per hour, for up to 40 remote hours per month, from May 2026 through February 2027. This estimate assumes approximately 400 total hours, for an estimated project total of \$46,000, exclusive of any approved reimbursable expenses. Work is capped at 10 hours per week unless additional hours are approved in advance.

Turnaround time for requests will be subject to the weekly hour limit, project priorities, and the timing of information or approvals provided by the Association. Major changes after established deadlines, including registration rebuilds, program restructuring, session rescheduling, sponsor portal changes, or new reporting needs, shall require additional approved hours.

The Association will be responsible for providing timely decisions, content approvals, committee outputs, and access to EventsAir, branding assets, and all required event information necessary to complete the work.

I look forward to supporting the Auxiliary Organizations Association Conference and helping ensure that the back-end systems, registration processes, submission workflows, and session scheduling are organized and well-managed.

Please let me know if you would like to proceed, and I would be happy to finalize the agreement and project timeline.

Sincerely,

A handwritten signature in black ink, appearing to read 'EWA', written in a cursive style.

Eric W. Andersson

Exhibit A  
Scope of Work  
Auxiliary Organizations Association Conference  
January 10–12, 2027

This Scope of Services describes the remote conference operations and EventsAir support to be provided by Eric Andersson as an independent contractor for the Auxiliary Organizations Association Conference.

### **1. Term of Engagement**

Services are provided from May 2026 through February 2027, unless extended or modified by written agreement.

### **2. Estimated Hours and Rate**

Contractor provides up to 40 remote hours per month, capped at 10 hours per week, at a rate of \$115 per hour.

The engagement assumes approximately 400 total hours, for an estimated total of \$46,000, exclusive of approved reimbursable expenses.

Additional hours must be approved in advance by the Association and billed at the same hourly rate unless otherwise agreed in writing.

### **3. Scope of Services**

Contractor provides remote back-end conference operations support, including:

- EventsAir configuration and maintenance
- Presentation submission workflow management
- Registration website setup and updates
- Registration configuration and related attendee data support
- Sponsor portal configuration
- Report generation related to registration, submissions, sessions, and other configured EventsAir functions
- Concurrent session scheduling, including setup and updates based on approved program decisions
- General back-end conference operations support related to the above areas
- Online troubleshooting support during the conference for matters within Contractor's scope of work

### **4. Client Responsibilities**

The Association and its committees remain responsible for:

- Content selection
- Conference app management
- Conference communications
- Program decisions
- Sponsor management
- Day-of event delivery
- On-site staffing
- Speaker recruitment and speaker communications, unless otherwise agreed
- Final review and approval of website, registration, sponsor, submission, and scheduling content
- Timely provision of required information, approvals, branding assets, access credentials, payment processor access, EventsAir access, and committee outputs

## **5. Out-of-Scope Services**

The following services are outside the scope of this engagement unless separately contracted:

- On-site conference staffing
- Live event execution or floor management
- Full sponsor management or sales
- Conference app setup or management
- Content selection or program decision-making
- Marketing or attendee communications strategy
- Graphic design or branding development
- Vendor negotiation or contract management
- Budget ownership or financial reconciliation beyond EventsAir reporting support
- Major post-deadline rebuilds or restructuring not caused by Contractor error

## **6. Change Management**

Turnaround time for requests is subject to the weekly hour limit, project priorities, and timely receipt of required information and approvals.

Major changes after established deadlines require additional approved hours, including but not limited to:

- Registration rebuilds
- Program restructuring
- Concurrent session rescheduling
- New or revised sponsor portal requirements
- New or revised report requests
- Significant changes to submission workflows
- Changes caused by delayed committee decisions or incomplete information

## **7. Event Availability**

Contractor will be available online during the conference for troubleshooting related to EventsAir and back-end systems within the approved scope of work. Contractor is not responsible for on-site staffing, live event execution, or day-of operational management unless separately contracted.

## **8. Independent Contractor Status**

Contractor performs services as an independent contractor and is responsible for determining the method and manner of performing the services within the approved scope, timeline, and project priorities.

# ERIC W. ANDERSSON

2017 E. Florida St. | Long Beach, CA 90814 | (562) 394-8226 | ericwandersson@gmail.com

## PROFESSIONAL PROFILE

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Higher education administration leader with extensive experience in policy governance, change management, project management, departmental operations, fiscal administration, human resources liaison work, and systemwide stakeholder engagement. Skilled in leading complex initiatives, managing policy and administrative systems, supporting audits, directing operational teams, and delivering executive-level support within large public university systems.

## CORE COMPETENCIES

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Higher Education Administration	Policy Lifecycle Management	Change Management
Project Management	Office Management	Event Planning
Customer Service	Communication	Human Resources
Analytical Problem Solving	Detail-Oriented Execution	Budget & Fiscal Administration

## TECHNOLOGY

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EventsAir | PolicyStat | Lexipol | Microsoft Office Suite | PeopleSoft HRMS | PeopleSoft FM

## EDUCATION

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**Bachelor of Arts in English, Creative Writing** - University of South Florida, Tampa, FL **12/2008**

GPA: 3.97 | Graduated Summa Cum Laude | Member, Phi Kappa Phi Honor Society

## PROFESSIONAL EXPERIENCE

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**Director, CSU Policy Library** - California State University Chancellor's Office **5/2022 - 12/2026**

- Led the development, implementation, publication, and oversight of CSU Systemwide and Chancellor's Office policies across the CSU's 23 campuses and the Chancellor's Office; managed the full policy life cycle from drafting and stakeholder review through executive approval, publication, and dissemination.
- Directed daily operations of the CSU Policy Library Office, including personnel management, budget, purchasing, administrative functions, and policy-related support services; served as system administrator for PolicyStat and Lexipol.
- Collaborated with executives, administrators, review committees, campus representatives, and subject matter experts to integrate stakeholder feedback, improve policy consistency, and implement best practices for policy administration.
- Oversaw development, maintenance, and publication of systemwide law enforcement policies, including the CSU Law Enforcement Policy Manual; partnered with the CSU Council of Police Chiefs to support compliance and alignment with IACLEA accreditation standards.
- Reviewed and supported Auxiliary Operating Agreements, coordinated agreement amendments and modifications with campuses, managed the Auxiliary Organizations section of Calstate.edu, and escalated compliance issues for resolution.
- Served as an executive committee member for the California Higher Education Collaborative Conference and administered websites, registration portals, sponsor management, agenda development, calls for abstracts, and event app implementation using EventsAir.

**Assistant Director, Strategic Initiatives** - California State University Chancellor's Office **6/2016 - 5/2022**

- Directed daily functions of the Strategic Initiatives department, including personnel management, budget, purchasing, and financial activities; served as Fiscal and Human Resources Liaison for Strategic Initiatives, Public Safety, and Chancellor's Office Security.
- Managed the Integrated CSU Administrative Manual, ensuring accuracy of policy creation and updates, facilitating the review process, obtaining executive approval, posting policies to the ICSUAM website, and notifying stakeholders.
- Developed, communicated, implemented, and integrated change management strategies and project plans; supported process improvement efforts and strategic initiatives such as CSU-CCC-UC Cross-Institutional Collaboration, UknowledgeShare.com, the US Bank Electronic Payment User Guide, and systemwide procedures and guidelines.

- Worked directly with the Assistant Vice Chancellor on Chancellor's Office and systemwide audits, including audit report review, management response submission, and service as back-up Audit Contact.
- Supported Executive Office fiscal transactions and activities overseen by the Assistant Vice Chancellor, Chancellor's Chief of Staff, and Deputy Chief of Staff; managed Public Safety operational areas including FCC licenses, alarm permits, MSDS, ergonomic assessments, emergency lists, annual contracts, DMV and state vehicle records, and parking.

**Assistant Director, Administration** - California State University Chancellor's Office

**4/2012 - 6/2016**

- Directed day-to-day operations of the Financial Services Administration department; supervised the Administrative Support Coordinator and managed the five-person Administrative Support Unit.
- Served as Financial Services Human Resources Liaison, assisted managers and staff with HR-related issues, ran departmental reports, and directed the annual budget allocation process for the Financial Services Division.
- Managed the Financial Services Administration budget of approximately \$730K and utilized signature authority for purchase order approvals across Financial Services departments totaling approximately \$10M.
- Coordinated special projects and initiatives involving research, evaluation, analysis, and written or oral recommendations for systemwide application; directed the annual Records Retention and Disposition process under Executive Order 1031.
- Prepared and prioritized documents, correspondence, schedules, calendars, and other materials for the Assistant Vice Chancellor/Controller; managed purchasing, travel arrangements, reimbursements, check requests, and service work orders.
- Directed updates and accuracy of Financial Services intranet and internet webpages; managed daily posting of Accounts Receivable checks and cash for deposit; oversaw mail, call routing, and confidential work assignments.

**Assistant Director** - University of South Florida, Office of Postdoctoral Affairs

**10/2009 - 8/2011**

- Directed daily operations of the Office of Postdoctoral Affairs, a highly visible USF System Office housed within the Graduate School, including employee and postdoctoral scholar management.
- Established policies, action plans, and accountability measures; evaluated customer service levels, implemented service improvements, and supervised staff, graduate liaisons, and undergraduate student workers.
- Managed projects and initiatives for postdoctoral scholars and OPA staff, including internal and external communications, newsletter and brochure production, and development of high-quality web content.
- Led all phases of the OPA website redesign and developed strategies, methodologies, and tools to facilitate organizational enhancements and change initiatives.
- Oversaw an operating budget of approximately \$560K and served as accountable officer designee for Graduate School accounts totaling \$27M; prepared materials and conducted training workshops and conferences with internal and external stakeholders.
- Tracked postdoctoral scholar eligibility and compliance, maintained HR, leave, and payroll records using GEMS PeopleSoft HCM, coordinated travel requests in FAST PeopleSoft FM, supported the USF Postdoctoral Association, maintained the OPA master database, and served as the USF point of contact for national postdoctoral and non-faculty researcher reports.

**REFERENCES**

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**Melinda Latas** | Chief Compliance Officer | California State University, Chancellor's Office | mlatas@calstate.edu | (562) 951-4144

**Robyn Pennington** | Chief of Staff, Business & Finance | California State University, Chancellor's Office | rpennington@calstate.edu | (562) 951-4552

**Shawn Holland** | Chief of Facilities Operations | California State University, Chancellor's Office | sholland@calstate.edu | (562) 951-4634



## Frank Kitchen Enterprises

Signature requested on May 06, 2026

# Service Agreement

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### Business: Frank Kitchen Enterprises

frank@frankkitchen.com

500 W. Estrealla Parkway, STE B2137, Goodyear, c/o Dwayne Brummett , PO Box 249 , Arroyo  
AZ, 85338

(480) 405-7658

### Recipient: Auxiliary Organizations Association (AOA)

amacias@csusm.edu

Grande, CA 93421

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This contract is between Frank Kitchen Enterprises (the "Business") and Auxiliary Organizations Association (AOA) (the "Client") dated 05/06/2026.

The purpose of this agreement is to confirm all of the details for the upcoming programs and services to be provided for your organization.

## Payment schedule

The Client will pay the Business **\$12,000.00**

Due in full on January 12, 2027

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Deposit	<b>\$6,000.00</b>
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Due on June 01, 2026

Balance	<b>\$6,000.00</b>
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Due on January 12, 2027

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## Deliverables

<b>Speaking Fee</b>	
<b>Total</b>	<b>\$12,000.00</b>

## Terms

### Details

Here are the details as agreed upon:

Event: 2027 AOA Annual Conference

Date: January 10-12, 2027

Time: TBD

Presenter: Frank Kitchen

Topics: 2 Keynotes (60 Minutes) and 1 Breakout (Up to 60 minutes) TBD

Location: Sheraton San Diego Resort, San Diego, CA

Group Size: 400-500

Resources: N/A

A/V Needs: LCD projector, a large screen, and a lapel/handheld microphone

Lodging: Two Nights Lodging for Presenter (January 10, 2026 and January 11, 2026)

Professional Fee: \$12,000.00 USD (Fee includes Travel )

### Invoices

Frank Kitchen Enterprises will invoice the Auxiliary Organizations Association for 50% Confirmation Payment of \$6,000 due by Monday, June1, 2026 and a Final Payment of \$6,000 due on Tuesday, January 12, 2026. The Confirmation Payment is refundable if Frank Kitchen Enterprises cancels the event or fails to perform services.

### Payment Methods

Payment will be made to Frank Kitchen Enterprises, FED ID # 26-3845212 via check, an approved payment card, or by any other payment method (ACH).

### Rescheduling

In the unlikely event our work needs to be rescheduled your confirmation payment will be applied to a new, mutually agreed upon date to take place within one year of the date on this agreement. Note: Fee will be "fee in effect" at the time of rescheduling.

### Authority to sign

Each party has the authority to enter into this Contract and to perform all of its obligations under this Contract.

## Modifications

The Client and the Business must agree to any changes to this contract in writing.

## Signatures

This contract may be signed electronically or in hard copy. If signed in hard copy, it must be returned to the Business for valid record. Electronic signatures count as original for all purposes.

By typing their names as signatures below, both parties agree to the terms and provisions of this agreement.

### Business signature

Owner name	Frank Kitchen
Owner signature	<i>Frank Kitchen</i>
Business date signed	05/06/2026

### Recipient signature

Recipient name	
Recipient signature	
Recipient date signed	

5/16/26

**Andrew Singletary**

**AOA President**

Director, Information Technology Services and Facilities

Union WELL, Inc.

California State University, Sacramento

6000 J Street, MS 6017, Sacramento, CA 95819

p: 916.278.3347 | e: [asing@saclink.csus.edu](mailto:asing@saclink.csus.edu)

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

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

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

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

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

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

Sincerely,

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

**PROJECT OBJECTIVES**

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

**PROJECT TIMELINE & DELIVERY**

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

**Timeline Objective**

The project is expected to span approximately 8 months, June 2026 to January 2027. Specific deliverables and milestones will be prioritized after the project kickoff. Delays in feedback may impact launch dates. The conference dates are January 10-13, 2027. It is expected that the team will arrive for conference support on January 8, 2027

Service	Description	Fee
<b>Project Coordination</b>	Overall project management/coordination with the AOA team. Includes monthly board meeting attendance, 7 total CPC meetings.	\$2,000
<b>Visual Design Template &amp; Style Guide</b>	Create a visual guide using existing brand ID, organize assets in a shared folder, and revise the PowerPoint template.	\$800
<b>Print Collateral Design</b>	Design materials include conference bags, table tents, banners, event signage, pins, marketing documents, and game cards. Includes reasonable revisions (2-3 rounds) and print file preparation.	\$1,200
<b>Conference App Support + Messaging Support</b>	Set up, instructions, and general configuration support. On-site conference support/editing	\$2,000
<b>Social Media Support (6 months)</b>	Design templates and implement prioritized tactics as outlined in the social media plan.	\$1,200
<b>Photography/Videography</b>	Edited content from event coverage. Using visuals from an on-site photographer/videographer. Provide B-roll/Photos in Box	\$1000
<b>Onsite Support</b>	Four-person team including a designer, a photographer/ videographer, a social media producer, and general support.	\$2,560

**TOTAL ESTIMATED FEES: \$10,760**

**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**

\_\_\_\_\_  
**Annie Macias**

ASecretary/Treasurer - AOA

\_\_\_\_\_  
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, as agreed upon by both parties. 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) Client will pay expenses incurred at time of cancellation and client agrees to provide 30 days notice of cancellation. 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 (AOA)  
Profit & Loss Budget vs. Actual  
July 2025 through June 2026

AOA Budget Projection

General Operations

(as of 5/12/2026)

	Actuals			
	Jul '25 - Jun 26	Budget FYE	\$ Over Budget	% of Budget
<b>Income</b>				
49500 · Extraordinary Income	0.00	0.00	0.00	0.0%
48000 · Unrealized Gains on Investments	0.00	0.00	0.00	0.0%
47000 · Realized Gain on Investments	0.00	0.00	0.00	0.0%
46000 · Dividend Income	0.00	0.00	0.00	0.0%
45000 · Interest Income	0.00	0.00	0.00	0.0%
40000 · AOA Dues	389,105.00	328,550.00	60,555.00	118.43%
<b>Total Income</b>	<b>389,105.00</b>	<b>328,550.00</b>	<b>60,555.00</b>	<b>118.43%</b>
<b>Gross Profit</b>	<b>389,105.00</b>	<b>328,550.00</b>	<b>60,555.00</b>	<b>118.43%</b>
<b>Expense</b>				
79100 · AOA Scholarship Program	0.00	10,000.00	-10,000.00	0.0%
77750 · Leadership Academy Expense	0.00	18,000.00	-18,000.00	0.0%
77700 · Leadership Academy Awards	478.74	0.00	478.74	100.0%
77250 · AOA Salary Survey Expense	0.00	0.00	0.00	0.0%
87500 · Speaker Travel Expenses	476.96	0.00	476.96	100.0%
78500 · Website Content/Dir Managemt DJ	0.00	9,000.00	-9,000.00	0.0%
77800 · Standing Committee Contingency	0.00	0.00	0.00	0.0%
80461 · Kim Clark - Operations Manager	33,199.97	0.00	33,199.97	100.0%
80200 · Conf Contract Service-D Johnson	0.00	0.00	0.00	0.0%
84000 · Marketing/Communication Exp	537.33	0.00	537.33	100.0%
83000 · Hotel Function & Meal Expense	0.00	0.00	0.00	0.0%
80800 · Bank Credit Card Fees	165.84	0.00	165.84	100.0%
79500 · Miscellaneous Expenses	1,011.82	10,000.00	-8,988.18	10.12%
79000 · Gifts and Awards Expense	1,004.86	500.00	504.86	200.97%
78000 · Web Hosting/Maintenance Exp	33,933.40	40,000.00	-6,066.60	84.83%
77400 · Research Admin Com Expenses	0.00	0.00	0.00	0.0%
77200 · HR Committee Expenses	1,250.00	0.00	1,250.00	100.0%
77000 · AS/SU Committee Expenses	0.00	0.00	0.00	0.0%
76500 · Executive Committee Meeting Exp	0.00	0.00	0.00	0.0%
76000 · Executive Committee Travel Exp	2,596.63	4,051.00	-1,454.37	64.1%
75900 · Other Operational Support Exp	450.24	0.00	450.24	100.0%
75500 · COGR Dues Expense	0.00	5,500.00	-5,500.00	0.0%
75300 · Insurance Expense	12,724.00	8,000.00	4,724.00	159.05%
75000 · Audit/Tax Prep Expenses	20,250.00	20,000.00	250.00	101.25%
73500 · HR Counsel Expenses	1,722.00	3,000.00	-1,278.00	57.4%
73000 · Retainer- HR Counsel	30,000.00	30,000.00	0.00	100.0%
72500 · AOA General Counsel Expenses	0.00	0.00	0.00	0.0%
71000 · Retainer - Legislative Liaison	5,775.00	12,000.00	-6,225.00	48.13%
70500 · S/T Travel & AOA Office Expense	941.37	5,000.00	-4,058.63	18.83%

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

Actuals

	<u>Jul '25 - Jun 26</u>	<u>Budget FYE</u>	<u>\$ Over Budget</u>	<u>% of Budget</u>
70000 · Contacted Services-AOA Bus Mngr	33,481.72	60,249.00	-26,767.28	55.57%
Total Expense	179,999.88	235,300.00	-55,300.12	76.5%
Net Income	209,105.12	93,250.00	115,855.12	224.24%

\*\*\*\*Note: P/Y original budgeted expenses =

14%  
 \$ 44,701

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

AOA Budget Projection

General Operations

(as of 5/12/2026)

	Projected	Budget Proposed
	Jul '25 - Jun 26	Jul '26 - Jun 27
<b>Income</b>		
49500 · Extraordinary Income	0.00	0
48000 · Unrealized Gains on Investments	0.00 Adj at Y.E.	0
47000 · Realized Gain on Investments	0.00 Adj at Y.E.	0
46000 · Dividend Income	0.00 Adj at Y.E.	0
45000 · Interest Income	0.00	0
40000 · AOA Dues	342,408.00	356,833
<b>Total Income</b>	<b>342,408.00</b>	<b>356,833</b>
<b>Gross Profit</b>	<b>342,408.00</b>	<b>356,833</b>
<b>Expense</b>		
79100 · AOA Scholarship Program	0.00	10,000
77750 · Leadership Academy Expense	0.00	22,460
77700 · Leadership Academy Awards	478.74	500
77250 · AOA Salary Survey Expense	0.00	12,500
87500 · Speaker Travel Expenses	476.96	500
78500 · Website Content/Dir Managemt DJ	0.00	-
77800 · Standing Committee Contingency	5,000.00	25,000
80461 · Kim Clark - Operations Manager	43,199.96	40,000
80200 · Conf Contract Service-D Johnson	0.00	-
84000 · Marketing/Communication Exp	690.33	2,500
83000 · Hotel Function & Meal Expense	0.00	-
80800 · Bank Credit Card Fees	0.00	-
79500 · Miscellaneous Expenses	1,311.00	10,000
79000 · Gifts and Awards Expense	1,004.86	1,000
78000 · Web Hosting/Maintenance Exp	40,126.60	20,000
77400 · Research Admin Com Expenses	0.00	-
77200 · HR Committee Expenses	1,250.00	1,500
77000 · AS/SU Committee Expenses	0.00	-
76500 · Executive Committee Meeting Exp	0.00	25,000
76000 · Executive Committee Travel Exp	7,596.63 est. 5k April Mtg	10,000
75900 · Other Operational Support Exp	450.24	4,500
75500 · COGR Dues Expense	0.00	5,500
75300 · Insurance Expense	12,724.00	15,000
75000 · Audit/Tax Prep Expenses	20,250.00	22,000
73500 · HR Counsel Expenses	1,722.00	3,000
73000 · Retainer- HR Counsel	30,000.00	30,000
72500 · AOA General Counsel Expenses	0.00	-
71000 · Retainer - Legislative Liaison	12,000.00	12,000
70500 · S/T Travel & AOA Office Expense	2,500.00	5,000

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

	<u>Projected</u>	<u>Proposed</u>
	<u>Jul '25 - Jun 26</u>	<u>Jul '26 - Jun 27</u>
70000 · Contacted Services-AOA Bus Mngr	<u>41,231.71</u>	<u>39,500</u>
Total Expense	<u>222,013.03</u>	<u>317,460</u>
Net Income	<u>120,394.97</u>	<u>39,373</u>

279,381 (b/4 EC revision)

Increase for 26-27

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

AOA Budget Projection

General Operations

(as of 5/12/2026)

	Budget		% Chg
	Jul '25 - Jun 26	Bud Diff Jul '26 - Jun 27	
<b>Income</b>			
49500 · Extraordinary Income	0.00	0.00	0%
48000 · Unrealized Gains on Investments	0.00	0.00	0%
47000 · Realized Gain on Investments	0.00	0.00	0%
46000 · Dividend Income	0.00	0.00	0%
45000 · Interest Income	0.00	0.00	0%
40000 · AOA Dues	328,550.00	28,283.40	9%
<b>Total Income</b>	<b>328,550.00</b>	<b>28,283.40</b>	<b>9%</b>
<b>Gross Profit</b>	<b>328,550.00</b>	<b>28,283.40</b>	<b>9%</b>
<b>Expense</b>			
79100 · AOA Scholarship Program	10,000.00	0.00	0%
77750 · Leadership Academy Expense	18,000.00	4,460.00	25%
77700 · Leadership Academy Awards	0.00	500.00	100%
77250 · AOA Salary Survey Expense	0.00	12,500.00	100%
87500 · Speaker Travel Expenses	0.00	500.00	100%
78500 · Website Content/Dir Managemt DJ	9,000.00	-9,000.00	-100%
77800 · Standing Committee Contingency	0.00	25,000.00	100%
80461 · Kim Clark - Operations Manager	0.00	40,000.00	100%
80200 · Conf Contract Service-D Johnson	0.00	0.00	0%
84000 · Marketing/Communication Exp	0.00	2,500.00	100%
83000 · Hotel Function & Meal Expense	0.00	0.00	0%
80800 · Bank Credit Card Fees	0.00	0.00	0%
79500 · Miscellaneous Expenses	10,000.00	0.00	0%
79000 · Gifts and Awards Expense	500.00	500.00	100%
78000 · Web Hosting/Maintenance Exp	40,000.00	-20,000.00	-50%
77400 · Research Admin Com Expenses	0.00	0.00	0%
77200 · HR Committee Expenses	0.00	1,500.00	100%
77000 · AS/SU Committee Expenses	0.00	0.00	0%
76500 · Executive Committee Meeting Exp	0.00	25,000.00	100%
76000 · Executive Committee Travel Exp	4,051.00	5,949.00	147%
75900 · Other Operational Support Exp	0.00	4,500.00	100%
75500 · COGR Dues Expense	5,500.00	0.00	0%
75300 · Insurance Expense	8,000.00	7,000.00	88%
75000 · Audit/Tax Prep Expenses	20,000.00	2,000.00	10%
73500 · HR Counsel Expenses	3,000.00	0.00	0%
73000 · Retainer- HR Counsel	30,000.00	0.00	0%
72500 · AOA General Counsel Expenses	0.00	0.00	0%
71000 · Retainer - Legislative Liaison	12,000.00	0.00	0%
70500 · S/T Travel & AOA Office Expense	5,000.00	0.00	0%

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

	Budget		Bud Diff	% Chg
	Jul '25 - Jun 26	Jul '26 - Jun 27		
70000 · Contacted Services-AOA Bus Mngr	60,249.00	-20,749.00		-34%
Total Expense	235,300.00	82,160.00		35%
Net Income	93,250.00	-53,876.60		-58%

(1)

### AOA Operations Manager

Annual Agreement: July 1, 2025 - June 30, 2026

Reporting to: AOA President or AOA Designee

Service Provider shall become familiar with all AOA policies, procedures, and business practices to perform the services stated in this Contract.

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#### Business Management/Operations Duties

- Conduct business in accordance with the AOA Accounting and Administrative Policy guidelines and internal controls adopted by the Executive Committee
- Provide support and guidance for Standing Committee Chairs including budget development and reimbursements
- Provide support and guidance for Officers and Executive Committee including reimbursements
- Retention of the corporation's records (with the Secretary/Treasurer and Financial Manager),
- Collaborate with the AOA Financial Manager to analyze compensation, prepare a balanced operating budget, and to monitor business activity
- Implement strategic on-boarding for new Service Providers

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#### Required Travel and Meeting Participation

- Attendance at approximately four (4) one to two-day Executive Committee (EC) Meetings throughout the year (April, June, August and November)
- Participation as needed in a regular virtual meetings with AOA President, Officers and other Service Providers,
- Attendance at annual conference in January including pre- and post- wrap up meetings for total of six days

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#### Corporate Administration

- Conduct the day-to-day business activity of the Association (e.g., contracts, RFP's, administration of special projects and training programs, correspondence)
- Prepare policy statements for board action, and update AOA policy and procedures manual annually
- Collect and distribute EC and member business meeting minutes,
- Coordinate support meeting lists and notes (Officers, Support Providers, etc)

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- Distribute Policy Communications from Chancellor's Office and compile responses
- Administration of Elections
- Coordination of appropriate signatures on legally binding documents requiring Corporate Attestation
- Collection and preparation of Annual Report to Membership
- Facilitate feedback on proposed policy changes with CO and Exec Directors as needed

**Executive Committee Support**

- Arrange for meeting locations and hotel accommodations
- Assist President and other Officers in preparation and distribution of meeting agendas and associated supporting materials
- Provide support to Standing Committee Chairs in development of meeting sites, hotel contracts, food and beverage arrangements

**Website Resource Support**

- Work with Committee Chairs annually to update AOA Website Directory
- Contact each Auxiliary or Campus as needed to update the AOA Website Directory and other contact lists
- Review inactive member/email accounts currently residing on directory and update
- Annual review and update as necessary the AOA Website
- Provide orientation and resource materials on AOA website
- Report significant information, news alerts, and AOA activity; respond to membership inquiries
- Coordinate website updates with the 3rd party vendor

**Compensation**

- \$40,000 USD annual rate, payable in monthly installments of \$3,333.33
- Service Provider is responsible for submitting monthly invoices to AOA to receive compensation

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## **AOA Financial Management/Accounting Support**

Annual Agreement: July 1, ~~2025~~2026 - June 30,  
~~2026~~2027 Reporting to: AOA President or AOA  
Designee

Service Provider shall become familiar with all AOA policies, procedures, and business practices to perform the services stated in this Contract.

### **Financial Management Duties**

#### **Accounting**

- Process and post all financial transactions (e.g., deposits, disbursements, receivables, invoices, journal entries, banking, hotel bonus points) ~~(See/Tr)~~
- Provide accounting support for the annual conference
- Collect annual dues from the AOA membership ~~(See/Tr)~~
- Manage investment accounts per Investment Policy
- Provide accounting and financial advice and support to AOA Service Providers
- 

#### **Reporting**

- Generate quarterly reports for Executive Committee (i.e., statement of income and expense, balance sheet, outstanding receivables, return on investment, reserves), encompassing General Operations, Annual Conference, and Special Projects ~~(See/Tr)~~
- Provide to the AOA President (monthly) and Executive Committee (quarterly) a listing of all financial transactions and comparisons of budget to actuals with variance analysis
- Prepare an annual report of income and expenses and a statement of financial condition for AOA's annual business meeting

#### **Annual Budgets**

- Prepare a consolidated annual budget, in conjunction with AOA Officers and Standing Committee Chairs for approval by the Executive Committee
- Prepare multi-year financial forecasts including projections of income, expenses, and reserves
- Assist the Conference Chair in the preparation of a detailed conference budget, and other conference support as requested by the Conference Chair and other delegated related-subtasks
- Research site locations for the annual conferences, and provide input on contracts in coordination with the Administrative Conference Coordinator and Operations Manager
- Analyze compensation of Service Providers to provide recommendations for contract terms

(2)

### **Audit/Tax Returns**

- Prepare and coordinate submittal of working papers and schedule of requests for the annual external audit and ~~present~~ facilitate presentation of -the CPA's audit to the Executive Committee for approval ~~(See/Tt)~~
- Work with the external CPA on the preparation of annual tax returns (Form 990, Form 199, Form RRF 1, Biennial Statement of Information) as required for review and approval by the Executive Committee
- Prepare, distribute, and file annual 1099's for Service Providers

### **General Duties**

- Support the strategic on-boarding of new Service Providers by educating them on financial and accounting practices
- Provide support for utilization of annual conference management software.
- Maintain and store backup documents and files.
- Maintain relationships with banking and other financial institutions on behalf of AOA.
- Provide recommendations and advice to AOA leadership regarding financial matters and general business operations.
- Coordinate with AOA Service Providers in delivering the services in this Agreement
- Maintain vendor and customer relationships on behalf of AOA
- 

### **Meeting Attendance and Participation**

- Attend AOA meetings as necessary in performing the scope of work in this Agreement in order to support AOA operations:
  - AOA Officers Meetings
  - AOA CORE Meetings
  - AOA Conference Planning Meetings
  - AOA Executive Committee Meetings
  - Annual AOA Conference

### **Compensation**

- \$39,500 USD annual rate, payable in monthly installments of \$3,291.67
- Service Provider is responsible for submitting monthly invoices to AOA to receive compensation

## **SUPPORT SERVICE-PROVIDER AGREEMENT**

This Support Service-Provider Agreement ("Agreement") is made effective this 1st day of July, 2026 (the "Effective Date"), by and between the Service-Recipient, the AUXILIARY ORGANIZATIONS ASSOCIATION, a California nonprofit, public benefit corporation ("AOA"), and ROBERT E. GRIFFIN, the Service-Provider ("CONTRACTOR"). AOA and CONTRACTOR each are referred to herein separately as "Party" and are referred to herein collectively as the "Parties." There are no other parties to this Agreement.

### **Explanatory and Operative Statements**

The AOA is composed exclusively of its members – the separate auxiliary organizations that support and enhance the educational mission of the California State University (CSU) system and each of its campuses. The AOA mission is to offer professional development, issue collaboration, represent common interests, and assist new or evolving member-organizations.

The resource and policy constraints upon member-organizations require AOA to rely heavily upon the members to carry out its mission. AOA must seek and obtain needed internal business and program support from member-organizations, a few qualified firms, but particularly from experienced individuals on a service-provider basis. These internal functions and tasks have included providing corporate secretary and governing board support, administrative, treasury and accounting tasks, purchasing, interest group and conferencing support, and Internet AOA site development and administration.

CONTRACTOR under this agreement is a member-organization executive-retiree and former AOA leader, willing and able to independently dedicate a reasonable amount of business time as an AOA service-provider. The semi-retirement status of CONTRACTOR requires him to limit or foreclose his other customary business engagements with service-recipients.

### **Terms and Conditions**

In consideration of the mutual covenants contained herein and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the Parties agree to the following terms and conditions:

1. **Services to be Provided**

On or before the Effective Date of this Agreement, or as soon as practicable, the CONTRACTOR shall commence the support services specified in the *Scope of Work* (SoW) Statement, **EXHIBIT A** (contents of which are incorporated herein by reference). The CONTRACTOR shall exercise the

same timeliness and due diligence customary under industry standards in carrying out the work specified in this Agreement. CONTRACTOR under this Agreement shall act as an independent contractor in close collaboration with AOA leadership, the Executive Committee, and Conference Planning Committee, and an employer-employee relationship is not implied or intended, and shall not be practiced by the Parties,

The CONTRACTOR may from time to time offer or be requested to provide support to AOA outside the SoW Statement under this Agreement, with or without the expectation of additional charge to AOA associated with that support. Any ambiguity over such circumstances shall be clarified and resolved in advance by the AOA President and the Operations Manager, and, where appropriate, documented by the Parties in accordance with Section 5. The AOA President shall recommend to the AOA governing board any budget supplements for services of the CONTRACTOR that may involve additional fees to CONTRACTOR in such circumstances.

2. Term of Agreement

The term of this Agreement shall be July 1, 2026, ending June 30, 2027. The Parties may extend the term for additional one-year periods by written amendments to this Agreement.

3. Service Fee and other Charges

In full consideration of the services satisfactorily performed by CONTRACTOR under this Agreement, AOA shall pay to CONTRACTOR in accordance with **EXHIBIT A** at the *Authorized Hourly Rate*: \$150.00.

CONTRACTOR will be compensated for approved out-of-pocket expenses and related charges incurred during the performance of the contracted support services.

4. Status of Parties

During the term of this Agreement or any extension thereof, CONTRACTOR represents that the tasks, activities, projects or programs (“Work”) specified in the SoW are all within CONTRACTOR’S professional capability to provide on a timely basis, and working in close cooperation with [*Examples: Executive Committee and Officers Group*]. It is mutually understood and accepted that:

a). that the CONTRACTOR is free from the control and direction of the AOA in connection with the performance of the Work, both under this Agreement for the performance of the Work and in fact;  
*and*

b). that the CONTRACTOR performs the Work that is outside the usual course of AOA business;  
*and*

c). that the CONTRACTOR is engaged in an independently established trade, occupation, or business of the same nature as the Work performed under the SoW.

5. Scope of Work Modification

The Parties may modify the terms and conditions of this relationship by an amended SoW, signed and dated by the Parties and appended to the SSA, or by an amended SSA.

6. Termination of Services

Either party may terminate this agreement for good cause upon a 90-day written notice to the other party.

7. Assignment

The Parties understand that this Agreement represents a contract for work that is personal to CONTRACTOR. Accordingly, neither this Agreement, nor any duties or obligations under this Agreement may be assigned by CONTRACTOR without the prior written consent of AOA, which consent AOA may grant or deny in its sole discretion.

8. Notices

Any notices required to be given under this Agreement by either Party to the other may be effected by personal delivery in writing or by mail, registered or certified, postage prepaid with return receipt requested, or by electronic mail transmission (including PDF), to the party to whom such notice or communication is directed, to the mailing address or regularly-monitored electronic mail address of such party as follows:

AOA:

Kim Clark, Operations Manager  
P.O. Box 90483  
Long Beach, CA. 90809  
Email: Kdclark.csuaoa@gmail.com

Contractor:

Robert E. Griffin  
1436 Johnson Avenue  
San Luis Obispo CA 93401  
Email: GRIFR@aol.com

Any such notice or communication shall be deemed to have been given on (i) the day such notice or communication is personally delivered, (ii) three (3) days after such notice or communication is mailed by prepaid certified or registered mail, (iii) one (1) working day after such notice or communication is sent by overnight courier, or (iv) the day such notice or communication is sent electronically, provided that the sender has received a confirmation of such electronic transmission. A party may, for purposes of this Agreement, change his, her or its address, fax number, email address or the person to whom a notice or other communication is marked to the attention of, by giving notice of such change to the other party pursuant to this Section.

9. Confidentiality

CONTRACTOR agrees that it will keep in the strictest confidence, all proprietary or confidential AOA information to which CONTRACTOR becomes exposed during the term of this Agreement, and that it will not disclose any such information to anyone except with the advance written consent of AOA. CONTRACTOR shall not utilize for pecuniary gain not contemplated by the terms of this agreement any information not a matter of public record which CONTRACTOR receives by reason of this agreement, regardless of whether the CONTRACTOR is under contract at the time such gain would be realized.

10. Tax Responsibility

CONTRACTOR is responsible for paying when due all income taxes, including estimated taxes, incurred or falling due as a result of the compensation paid by AOA to CONTRACTOR for the work to be performed hereunder. If CONTRACTOR is an individual who is a nonresident of California, CONTRACTOR understands that compensation paid to CONTRACTOR hereunder may be subject to withholding for California state income tax in accordance with California Revenue and Taxation Code Section 18662 and Title 18 of the California Code of Regulations, Section 18662-4(a).

9. Entire Agreement

This Agreement constitutes the entire agreement between the Parties with respect to the subject matter hereof, and there are no inducements, representations, warranties, or understandings that do not appear within the terms and provisions of this Agreement. Only a writing signed by both Parties may modify this Agreement. The laws of the State of California shall govern the interpretation of this Agreement.

10. Authorization

Each individual signing this Agreement warrants and represents that he has the full authority and is duly authorized and empowered to execute this Agreement on behalf of the Party for which he signs.

11. Choice of Law, Jurisdiction and Venue

The provisions of this Agreement and its interpretation shall be governed by the laws of the State of California, excluding its choice of law provisions. Each Party hereto irrevocably consents to the jurisdiction of the federal and state courts with jurisdiction in Los Angeles County and agree that with respect to the litigation of any disputes growing out of this Agreement, jurisdiction and venue for such litigation shall be exclusively proper in the federal and state courts with jurisdiction in Los Angeles County, California. The parties hereto agree that with respect to any litigation arising out of or in connection with this Agreement, the prevailing party shall be entitled to an award of its

attorneys' fees and costs. Each party hereto waives any claim of forum non conveniens or any other defense or allegation contending that the forum is inconvenient..

12. Severability and Construction

If any provision of this Agreement shall be held by a court of competent jurisdiction to be illegal, invalid or unenforceable, the remaining provisions shall remain in full force and effect. This Agreement has been negotiated by the Parties and their respective counsel and shall be interpreted fairly in accordance with its terms and without any strict construction in favor of or against either Party.

13. Counterparts

This Agreement will be executed by the Parties on or before the Effective Date and may be executed in one or more counterparts, each of which when so executed and delivered shall be deemed to be an original, but all of which taken together form but one and the same instrument.

14. Binding Effect

This Agreement shall be binding on the Parties, their successors in interest, and present and future subsidiaries, assignees or acquirers, including any acquirer of substantially all of the assets of a Party.

IN WITNESS HEREOF, AOA and CONTRACTOR have caused their duly authorized signatories to execute this Agreement to be effective as of the Effective Date.

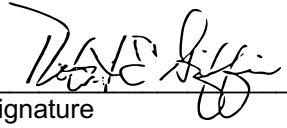
AUXILIARY ORGANIZATIONS  
ASSOCIATION

CONTRACTOR

Kim Clark, Operations Manager

Robert E. Griffin, INDIVIDUAL

\_\_\_\_\_  
Signature

  
\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

April 20, 2026  
Date

**EXHIBIT A**

[Scope of Work Statement appended]

## Scope of Work

A. Support Services. This support element will provide the following services:

1. *Current Compliance Developments*. Keep current on relevant major compliance issues, Federal and California legislation, CSU regulations, and system-wide policy developments (including Executive Orders, *ICSUAM* and coded memoranda) affecting AOA member-organizations. Significant issues that come to the attention of Consultant or Business Manager shall be analyzed, summarized and reported, *as requested*, to the Executive Committee and member-organizations. [*Authorized Rate* (total estimated hours: 30)]

2. *AOA Leadership Consultation*. *As requested*, comment on and advise the AOA leadership and Business Manager on governance, compliance, policy development, legislative matters and business transactions. [*No Charge for meetings, email or telephone conversations; research/analysis at Authorized Hourly Rate* (total estimated hours: 10)]

3. *Member-Organization Initial Consultation*. Provide *initial consultation* with member-organization executives on legislative or oversight issues, governance, compliance, policy development and management practices, exemption status, corporate formation, restructurings and dissolution, and related matters. This service element contemplates up to a one-hour limit per matter. [*Authorized Rate* (total estimate hours: 20)]

B. Special Project Services. As assigned and authorized by the Business Manager, provide extended consultation, author, update, and/or edit professional papers, analytical reports or research on subjects relating to the oversight, governance, compliance, policy development, exemption status, corporate formation, restructuring and dissolution, and management or related matters of auxiliary organizations. [*Authorized Hourly Rate* (total estimate hours: 20)]

This service element will also be available by direct engagement with member-organizations at the *Authorized Hourly Rate* beyond any *Initial Consultation* provided under (A)(3) above.

# Hosting Transition Proposal

Auxiliary Organizations Association (AOA)



# AOA Website Hosting Transition & Migration

This Statement of Work outlines Three29's scope for migrating the AOA website (csuaoa.org) from its current hosting environment to Three29's managed serverless hosting platform, and for providing ongoing back-end hosting and management on an annual basis.

This engagement is structured to support AOA's transition away from its current hosting provider while accommodating a separate marketing partner who will manage front-end content updates inside the WordPress admin.

## Engagement Overview

AOA is consolidating its back-end hosting and WordPress management with Three29 while keeping front-end content management with its existing marketing partner. This proposal covers two phases:

- A one-time migration from the current host to Three29's environment
- An annual hosting and management agreement aligned to AOA's July 1 – June 30 fiscal year

The site is small, traffic is low outside of the December–January conference period, and no major feature work is in scope for this engagement. Future enhancements can be addressed under a separate scope.

## Migration Scope

Three29 will migrate the existing WordPress site from its current hosting environment to Three29's managed serverless hosting platform. Migration is performed using Three29's standard WordPress migration toolset and includes a full staging environment for AOA review prior to cutover.

### Three29 will:

- Create a full backup of the existing site prior to migration
- Stand up a staging environment on Three29's servers



- Migrate all WordPress content, plugins, themes, media, and database to the staging environment
- Configure the staging environment for AOA team review and testing
- Coordinate DNS cutover with AOA at the agreed-upon go-live time
- Spot-check the front end of the migrated site
- Provide post-cutover support to confirm the site is functioning on the new environment

**AOA will:**

- Develop and execute a functional QA test plan, including registration, member login, profile access, calendar functionality, and any other site-specific functions
- Temporarily disable user registration during the cutover window if needed
- Approve the staging environment prior to DNS cutover

Because Three29 does not have historical knowledge of the existing site, functional QA is owned by AOA. Three29's QA is limited to confirming the migration completed successfully and the front end loads as expected.



# Managed Hosting SLA

Three29 is committed to providing reliable and high-performing web hosting services. We guarantee 99.8% uptime for all hosted websites, excluding scheduled maintenance and circumstances beyond our control (e.g., force majeure events, third-party outages). Hosting infrastructure is supported by third-party providers, and performance and uptime are subject to those providers' systems and service levels.

Three29 provides managed web hosting on a secure, serverless hosting cloud. In addition to monthly server space, backups, on a quarterly basis Three29 completes the following tasks to ensure the site is updated.

- WordPress Security Updates
- Server Software Updates
- Initial Site Migration

## SSL & Caching

Three29 will integrate the following features to help ensure secure browsing and quick page loads:

- SSL Certificate
- CDN Integration

## Hack Repair

In the event that your site is hacked on the Three29 AWS server, Three29 will restore the site for free.

## Backups & Recovery

The hosting environment includes routine automated backups stored off-site. Backups are intended to support restoration of the website in the event of data loss or system failure. Restoration requests will be handled within a commercially reasonable timeframe.

## Updates & Maintenance

Consultant will perform routine WordPress core, theme, and plugin updates as part of ongoing maintenance. While updates are tested where practical, Client acknowledges that third-party software may introduce conflicts or issues outside of Consultant's control.



## Security

Consultant implements commercially reasonable security measures, including monitoring and standard platform-level protections provided by the hosting provider. However, Client acknowledges that no system can be guaranteed to be fully secure.

## Support & Response

Consultant will make commercially reasonable efforts to respond to hosting-related issues in a timely manner during normal business hours. Emergency issues impacting site availability will be prioritized.

## Uptime Disclaimer

Consultant does not guarantee uninterrupted or error-free operation of the hosting environment. Availability is dependent on third-party infrastructure providers and factors outside Consultant's control.

## Client Responsibilities

Client is responsible for maintaining current access credentials, managing content updates (unless otherwise agreed), and notifying Consultant promptly of any issues.

## Migration / Offboarding

Upon request, Consultant will provide reasonable cooperation to assist in transferring the website to a third-party hosting provider. Such services may be subject to additional fees.

## Uptime Guarantee

- Monthly Uptime Guarantee: 99.8%
- Measurement Period: Quarterly
- Downtime Calculation: Downtime is defined as any period where the server is unreachable due to Three29-controlled issues.

## Exclusions

This SLA does not apply to:

- Scheduled maintenance (with at least 24 hours' notice)
- Client-side errors or configuration issues
- Issues caused by third-party services or software



- Force majeure events

## Service Credits

If monthly uptime falls below 99.8%, the client is eligible for a service credit:

- 99.0%–99.79%: 1% of quarterly hosting fee
- Below 99.0%: 15% of quarterly hosting fee

Requests for service credits must be submitted in writing within 10 days of the end of the affected quarter.



# Pricing & Approval

This engagement is structured as two separate quotes to align with AOA's fiscal year and approval thresholds.

## Quote A: Migration & Bridge Hosting

Covers one-time migration, staging, QA support, DNS cutover, and bridge hosting from go-live through June 30, 2026.

**\$3,250 — one-time**

## Quote B: Annual Hosting Agreement (July 1, 2026 – June 30, 2027)

Ongoing managed hosting and WordPress maintenance for the 12-month period aligned to AOA's fiscal year.

### AOA may select either payment option:

- \$5,500 paid annually (one month free with annual prepayment)
- \$500 per month billed monthly

Both options include all hosting, SLA, and management services described above.

## Change Management

Any feature development, plugin work, site enhancements, or technical modifications introduced after approval of this SOW will be scoped and approved through a separate change order or project agreement.

5/4/26

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

**Client Contact: Kim Clark**  
kdclark.csuaoa@gmail.com

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.

**This proposal outlines an annual retainer agreement between IntersectLA (IXLA) and the Auxiliary Organizations Association (AOA) to provide ongoing website management, maintenance, and updates.** IXLA will work closely with AOA stakeholders to ensure the website remains current, functional, and aligned with organizational goals. This includes content updates, technical support, design refinements, and overall site optimization to maintain a professional and effective digital presence.

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,  
**IntersectLA TEAM**

## PROJECT OBJECTIVES

- Maintain and update AOA’s website on a consistent basis
- Ensure accuracy and timeliness of all web content
- Provide design and UX improvements as needed
- Support ongoing organizational communication through web updates
- Offer consultation on best practices for web strategy and performance

## Scope of Work

### January (Initial Intensive Management Phase):

- Comprehensive website review and updates
- Content restructuring and cleanup (if needed)
- UX/UI refinements and design adjustments
- Technical troubleshooting and optimization
- Coordination with AOA team for priorities

### Ongoing Monthly Maintenance (February – December):

- Content updates and edits
- Adding/removing pages or sections as needed
- Image and media updates
- Minor design adjustments
- General website support and consultation

This structure aligns with IntersectLA’s standard approach to phased and ongoing engagement, ensuring flexibility and responsiveness to client needs.

## Proposed Budget

Web Management Retainer – AOA

January Web Management (30–40 hours):	\$900
June Bridge Month	\$240
Monthly Web Updates (July 1, 2026 – June 30,2027)	
\$240/month × 11 months:	\$2,640

**ANNUAL TOTAL: \$3,780**

**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**

\_\_\_\_\_  
**Annie Macias**

Secretary/Treasurer - AOA

\_\_\_\_\_  
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.



2122 University Circle  
Memphis TN 38112  
(909) 260-2765

[rlane@hrstrats.com](mailto:rlane@hrstrats.com)

May 1, 2026

Andrea Bozant  
Director, Human Resources & Payroll Services  
The University Corporation at Monterey Bay

By e-mail

**Re: 2026 AOA Salary Survey Project Scope**

Dear Andrea:

It is a pleasure to provide you with this Scope of Services that outlines how we would provide assistance with the AOA's compensation survey for 2026.

Once again, we will collect, report, and disseminate salary information to the various participant auxiliary organizations within the CSU system. The project fee is based upon replicating the 2024 survey with respect to data collection, data analysis, and report output. Once again, we will prepare the final report as an adobe acrobat .pdf file.

The project scope and fee includes the following activities:

- Communicate with the committee to review the previous survey and identify any position additions or deletions as well as changes to the healthcare questions;
- Update the web-based data collection instrument to include any additions or deletions of positions;
- Distribute passwords to members at each AOA organization with an explanatory e-mail that encourages participation;
- Answer questions as they arise from members regarding data input issues;
- Tabulate the results using the same format as the 2024 survey; and,
- Prepare a final report in a .pdf file format that will be e-mailed to all participants

### **Project Fee**

The fee as previously agreed, will be **\$12,500**.

### **Billing Policy**

While my fee structure is generally lower than most consulting firms, it is my policy to ask for an initial deposit. **I will therefore prepare and submit an initial invoice for 40% of the agreed fee. Invoices will then be submitted monthly up to 80% of the agreed upon fee. The final invoice will not be billed and payable until the project is completed to your reasonable satisfaction.**

I hope this proposal is acceptable to you and look forward to working with you on this important project. If you have any questions please feel free to call me at (909) 260-2765

Sincerely,



Richard Lane  
President  
Human Resources Strategies, Inc.



**GROUP SALES AGREEMENT**

**DESCRIPTION OF GROUP AND EVENT**

The following represents an agreement between Oakland Marriott City Center, 1001 Broadway, Oakland, CA, 94607, (510) 451-4000 and Auxiliary Organizations Association.

ORGANIZATION: Auxiliary Organizations Association  
CONTACT:

Name: Annie Macias  
Job Title: Treasurer  
Street Address: PO Box 249  
City, State, Postal Code: Arroyo Grande, CA 93421-0249  
Country/Region: USA  
Phone Number: (805) 756-1142  
E-mail Address: amacias@csusm.edu

NAME OF EVENT: Auxiliary Organizations Association Annual Conference  
REFERENCE #: M-W4H2V2T  
OFFICIAL PROGRAM DATES: Tuesday, 01/11/2028 - Sunday, 01/16/2028

**GUEST ROOM COMMITMENT/GROUP ROOM RATES**

The Hotel agrees that it will provide, and Group agrees that it will be responsible for utilizing, 957 room nights in the pattern set forth below (such number and such pattern, the “Room Night Commitment”):

**Attendees**

Date	Day	Run of House	Junior Suite	Presidential	Total Rooms
01/11/2028	Tue	19	5	1	25
01/12/2028	Wed	104	5	1	110
01/13/2028	Thu	400	5	1	406
01/14/2028	Fri	400	5	1	406
01/15/2028	Sat	10	0	0	10

Start Date	End Date	Room Type	Single
01/11/2028	01/15/2028	Run of House	\$240.00
01/11/2028	01/14/2028	Junior Suite	\$240.00
01/11/2028	01/14/2028	Presidential	\$240.00

Hotel room rates are subject to applicable state and local taxes: Occupancy Tax (Currently 14%) + CA Tourism Fee (currently at \$0.55) + Oakland Tourism Fee (Currently at 2%) in effect at the time of check in.

**SPECIAL CONCESSIONS**

In consideration of the Room Night Commitment and the functions identified on the Function Information Agenda/Event Agenda, Hotel will provide Auxiliary Organizations Association with the following special concessions:

1. One (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 \$25 inclusive of taxes and fees
4. Five (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 on the 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 \$35++ per bottle)
11. Discounted outside vendor catering 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 vendor catering fee clause below

#### **OUTSIDE VENDOR CATERING FEE**

Hotel agrees to allow Auxiliary Organizations Association's business vendors to serve individual pre-packaged & customized samples complimentary if items are not available for purchase through the hotel.

Hotel agrees to the following corkage fees for name brand items that can be purchased through the hotel:

- Pre-packaged dry snacks (less than 2 oz) – \$1.00 per item
- Prepared hot or cold items (less than 3 oz) – \$2.00 per item
- Bottled non-alcoholic beverage (standard 12 oz can) – \$1.00 per item

Alcoholic beverages are not permitted. All vendors must be self-contained and require no storage or equipment from the hotel.

#### **COMMISSION**

The group room rates listed above are net non-commissionable. Auxiliary Organizations Association will advise its designated agency of these rates and address any resulting agency compensation issues directly with the management of the appropriate agency.

#### **METHOD OF RESERVATIONS**

Reservations for the Event will be made by the individual directly on ResLink, the customized event booking platform provided by the Hotel. Additionally, reservations can also be made at (800) 228-9290 or (510) 451-4000.

#### **GUARANTEED RESERVATIONS**

All reservations must be accompanied by a first night room deposit or guaranteed with a major credit card or by Auxiliary Organizations Association. Hotel will not hold any reservations unless secured by one of the above methods.

#### **CUT-OFF DATE**

Reservations by attendees must be received on or before December 21, 2028, (the "Cut-Off Date"). At the Cut-Off Date, Hotel will review the reservation pick up for the Event, release the unreserved rooms for general sale, and determine whether or not it can accept reservations based on a space- and rate-available basis at the Auxiliary Organizations Association group rate after this date.

#### **NO ROOM TRANSFER BY GUEST**

Auxiliary Organizations Association agrees that neither Auxiliary Organizations Association nor attendees of the Event nor any intermediary shall be permitted to assign any rights or obligations under this Group Sales Agreement, or to resell or otherwise transfer to persons not associated with Auxiliary Organizations Association reservations for guestrooms, meeting rooms or any other facilities made pursuant to this Group Sales Agreement.

#### **INDIVIDUAL CANCELLATION**

Cancellation must be received 72 hours prior to arrival date, or first night's room and tax will be charged to the Master or the individual's credit card provided at time of booking.

#### **BILLING ARRANGEMENTS**

The following billing arrangements apply: Individual to pay all charges (cash-paying guests may be asked to leave a cash or credit card deposit to guarantee payment).

#### **ADVANCE PAYMENT SCHEDULE**

Auxiliary Organizations Association agrees to pay the following advance payments:

Deposit Amount	Deposit Due Date
\$10,000.00	With the Signed Agreement
\$50,000.00	July 15, 2027
\$50,000.00	October 13, 2027
Full prepayment of the estimated total of master account unless direct billing is approved	30 days prior to Arrival Date

The above payments will be applied to payment of the Master Account. In the event that the payments exceed the balance of the Master Account, including any liquidated damages associated with cancellation/attrition by Western Association for College Admission Counselling, Hotel will refund the difference between the payments and the balance of the Master Account within thirty (30) days.

**MASTER ACCOUNT**

Hotel must be notified in writing at least 14 days prior to arrival of the authorized signatories and the charges that are to be posted to the Master Account. Any cancellation or attrition fees will be billed to the Master Account.

**METHOD OF PAYMENT**

The method of payment of the Master Account will be established upon approval of Auxiliary Organizations Association’s credit. If credit is approved, the outstanding balance of Auxiliary Organizations Association Master Account (less any advance deposits and exclusive of disputed charges) will be due and payable upon receipt of invoice.

Auxiliary Organizations Association will raise any disputed charge(s) within [NUMBER OF DAYS] days after receipt of the invoice. The Hotel will work with Auxiliary Organizations Association in resolving any such disputed charges, the payment of which will be due upon receipt of invoice after resolution of the dispute. If payment of any invoice is not received within thirty (30) days of the date on which it was due, Hotel will impose a finance charge at the rate of the lesser of 1-1/2% per month (18% annual rate) or the maximum allowed by law on the unpaid balance commencing on the invoice date.

Auxiliary Organizations Association has indicated that it has elected to use the following form of payment:

- Cash, money order, or other guaranteed form of payment
- Credit card (We accept all major credit cards)
- Company check or Electronic Funds Transfer
- \_\_\_\_\_ [agreed alternative]

Auxiliary Organizations Association may not change this form of payment.

In the event that credit is not approved, Auxiliary Organizations Association agrees to pay an advance deposit in an amount to be determined by the Hotel in its reasonable discretion, with the full amount due prior to the start of the group’s event.

**FUNCTION INFORMATION AGENDA/EVENT AGENDA – FUNCTION SPACE REQUESTED**

Based on the requirements outlined by Auxiliary Organizations Association, the Hotel has reserved the function space set forth on the below Function Information Agenda/Event Agenda.

Date	Day	Start Time	End Time	Post As/Signage	Set-Up Style	Expected	Function Space
1/11/2028	Tue	1:00 PM	11:59 PM	Office and Storage	Special	8	Box Office
1/11/2028	Tue	3:15 PM	6:30 PM	Officers Meeting	Conference	15	Downtown Room
1/11/2028	Tue	1:00 PM	3:00 PM	Conference Planning Committee Meeting	Conference	30	Uptown Room
Date	Day	Start Time	End Time	Post As/Signage	Set-Up Style	Expected	Function Space
1/12/2028	Wed	10:00 AM	12:00 PM	Meeting	Conference	20	Downtown Room
1/12/2028	Wed	12:00 PM	5:00 PM	Registration	Registration	1	Grand Ballroom Atrium
1/12/2028	Wed	8:00 AM	6:00 PM	Meeting	Conference	30	Uptown Room
1/12/2028	Wed	6:00 AM	11:59 PM	Office and Storage	Special	8	Box Office

Date	Day	Start Time	End Time	Post As/Signage	Set-Up Style	Expected	Function Space
1/13/2028	Thu	6:00 AM	3:00 PM	Hallway	Existing Set Up	1	Grand Ballroom DE
1/13/2028	Thu	6:00 AM	11:59 PM	General Session	Rounds of 8	500	Oakland Ballroom West
1/13/2028	Thu	6:00 AM	11:59 PM	Office and Storage	Special	8	Box Office
1/13/2028	Thu	8:00 AM	9:30 AM	Appreciation Reception/breakfast/event Volunteers	Rounds of 8	40	Skyline - 21st Floor
1/13/2028	Thu	8:30 AM	10:00 AM	Executive Directors and HR Directors Meeting	Theatre	75	Junior Ballroom 1
1/13/2028	Thu	8:30 AM	10:00 AM	Coffee Break	Theatre	75	Junior Ballroom 1
1/13/2028	Thu	9:00 AM	5:00 PM	Registration	Registration	1	Grand Ballroom Atrium
1/13/2028	Thu	9:00 AM	6:30 PM	Exhibits	Exhibits	400	Oakland Ballroom East
1/13/2028	Thu	10:00 AM	12:00 PM	AOA Leadership Academy Meeting	Conference	20	Downtown Room
1/13/2028	Thu	10:30 AM	1:00 PM	Executive Directors Brunch	Rounds of 8	40	Skyline - 21st Floor
1/13/2028	Thu	1:00 PM	3:00 PM	Breakout 1	Theatre	75	Grand Ballroom AB
1/13/2028	Thu	1:00 PM	3:00 PM	Breakout 2	Theatre	75	Grand Ballroom C
1/13/2028	Thu	1:00 PM	3:00 PM	Breakout 3	Theatre	75	Grand Ballroom F
1/13/2028	Thu	1:00 PM	3:00 PM	Breakout 4	Theatre	75	Grand Ballroom GH
1/13/2028	Thu	1:00 PM	3:00 PM	Breakout 5	Theatre	75	Junior Ballroom 1
1/13/2028	Thu	1:00 PM	3:00 PM	Breakout 6	Theatre	75	Junior Ballroom 2-3
1/13/2028	Thu	1:00 PM	3:00 PM	Breakout 7	Theatre	75	Junior Ballroom 4
1/13/2028	Thu	1:00 PM	3:00 PM	Breakout 8	Theatre	75	OCC 208
1/13/2028	Thu	1:00 PM	3:00 PM	Breakout 9	Theatre	30	Uptown Room
1/13/2028	Thu	6:00 AM	11:59 PM	Family Room	Special	1	Family Room
1/13/2028	Thu	4:30 PM	6:30 PM	Cocktail Reception	Existing Set Up	1	Oakland Ballroom East
Date	Day	Start Time	End Time	Post As/Signage	Set-Up Style	Expected	Function Space
1/14/2028	Fri	6:00 AM	5:00 PM	Hallway	Existing Set Up	1	Grand Ballroom DE
1/14/2028	Fri	6:00 AM	11:59 PM	Exhibits	Exhibits	400	Oakland Ballroom East
1/14/2028	Fri	6:00 AM	11:59 PM	General Session	Rounds of 8	500	Oakland Ballroom West
1/14/2028	Fri	7:30 AM	8:45 AM	Breakfast	Rounds of 8	500	Oakland Ballroom West
1/14/2028	Fri	11:45 AM	12:45 PM	Lunch	Rounds of 8	500	Oakland Ballroom West
1/14/2028	Fri	6:00 AM	11:59 PM	Office and Storage	Special	8	Box Office
1/14/2028	Fri	7:00 AM	2:00 PM	CABO-FOA Meetings	Rounds of 10	60	Skyline - 21st Floor
1/14/2028	Fri	7:00 AM	8:00 AM	Breakfast	Rounds of 10	60	Skyline - 21st Floor
1/14/2028	Fri	8:00 AM	5:00 PM	Continuous Break	Rounds of 10	60	Skyline - 21st Floor
1/14/2028	Fri	11:45 AM	12:45 PM	Lunch	Rounds of 10	60	Skyline - 21st Floor

1/14/2028	Fri	8:00 AM	5:00 PM	Breakout 3	Theatre	75	Grand Ballroom F
1/14/2028	Fri	8:00 AM	9:00 AM	CSURMA/AORMA Breakfast Meeting	Rounds of 10	50	OCC 210/11
1/14/2028	Fri	8:00 AM	5:00 PM	Registration	Existing Set Up	1	Grand Ballroom Atrium
1/14/2028	Fri	8:00 AM	5:00 PM	Breakout 1	Theatre	75	Grand Ballroom AB
1/14/2028	Fri	8:00 AM	5:00 PM	Breakout 2	Theatre	75	Grand Ballroom C
1/14/2028	Fri	8:00 AM	5:00 PM	Breakout 4	Theatre	75	Grand Ballroom GH
1/14/2028	Fri	8:00 AM	5:00 PM	Breakout 5	Theatre	75	Junior Ballroom 1
1/14/2028	Fri	8:00 AM	5:00 PM	Breakout 7	Theatre	75	Junior Ballroom 4
1/14/2028	Fri	8:00 AM	5:00 PM	Breakout 6	Theatre	75	Junior Ballroom 2-3
1/14/2028	Fri	8:00 AM	5:00 PM	Breakout 8	Theatre	75	OCC 208
1/14/2028	Fri	8:00 AM	5:00 PM	Breakout 9	Theatre	30	Uptown Room
1/14/2028	Fri	8:00 AM	8:45 AM	VEBA Trustees Meeting	Conference	20	Downtown Room
1/14/2028	Fri	2:30 PM	4:30 PM	Meeting	Rounds of 10	60	Skyline - 21st Floor
1/14/2028	Fri	6:00 PM	7:00 PM	President's Reception	Cocktail Rounds	30	California
1/14/2028	Fri	6:00 AM	11:59 PM	Family Room	Special	1	Family Room
<b>Date</b>	<b>Day</b>	<b>Start Time</b>	<b>End Time</b>	<b>Post As/Signage</b>	<b>Set-Up Style</b>	<b>Expected</b>	<b>Function Space</b>
1/15/2028	Sat	6:00 AM	2:00 PM	Hallway	Existing Set Up	1	Grand Ballroom DE
1/15/2028	Sat	6:00 AM	5:00 PM	Office and Storage	Special	8	Box Office
1/15/2028	Sat	7:30 AM	4:00 PM	General Session	Rounds of 8	500	Oakland Ballroom West
1/15/2028	Sat	7:30 AM	8:45 AM	Breakfast	Rounds of 9	500	Oakland Ballroom West
1/15/2028	Sat	12:30 PM	2:00 PM	Lunch	Rounds of 10	500	Oakland Ballroom West
1/15/2028	Sat	3:00 PM	4:00 PM	PM Break	Rounds of 11	500	Oakland Ballroom West
1/15/2028	Sat	6:00 AM	11:59 PM	Family Room	Special	1	Family Room
1/15/2028	Sat	8:00 AM	9:00 AM	Past Presidents Meeting	Conference	1	Downtown Room
1/15/2028	Sat	8:00 AM	12:30 PM	Breakout 3	Theatre	75	Grand Ballroom F
1/15/2028	Sat	6:00 AM	11:59 PM	Registration	Existing Set Up	1	Grand Ballroom Atrium
1/15/2028	Sat	8:00 AM	12:30 PM	Breakout 1	Theatre	75	Grand Ballroom AB
1/15/2028	Sat	8:00 AM	12:30 PM	Breakout 2	Theatre	75	Grand Ballroom C
1/15/2028	Sat	8:00 AM	12:30 PM	Breakout 5	Theatre	75	Junior Ballroom 1
1/15/2028	Sat	8:00 AM	12:30 PM	Breakout 6	Theatre	75	Junior Ballroom 2-3
1/15/2028	Sat	8:00 AM	12:30 PM	Breakout 7	Theatre	75	Junior Ballroom 4
1/15/2028	Sat	8:00 AM	12:30 PM	Breakout 8	Theatre	75	OCC 208
1/15/2028	Sat	8:00 AM	12:30 PM	Breakout 4	Theatre	75	Grand Ballroom GH
1/15/2028	Sat	8:00 AM	12:30 PM	Breakout 9	Theatre	30	Uptown Room

### **F&B STAFF & HOUSE CHARGE, ROOM RENTAL HOUSE CHARGE & AV HOUSE CHARGE**

All Food and Beverage (F&B) prices are subject to a Staff Charge (currently 14.5%) and House Charge (currently 10.5%). Room Rental prices are subject to a House Charge (currently 25%). All F&B prices and F&B House Charges may increase as the result of changing market conditions, costs, taxes or other objective factors as determined by the Hotel. Auxiliary Organizations Association agrees to pay the F&B prices and F&B Staff and /or F&B House charges in effect at the time of the event. The Staff Charge on F&B is distributed in its entirety to employees providing the service. The House Charge on F&B and Room Rental is retained entirely by the Hotel; the AV House Charge is retained entirely by the Hotel and/or AC Provider. The house Charge on F&B, Room Rental and AV 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.

### **MINIMUM BANQUET FOOD AND BEVERAGE REVENUE REQUIREMENT**

Auxiliary Organizations Association agrees to a minimum banquet food and beverage revenue of **\$175,000.00**, exclusive of tax, House, and Staff charge (the "Minimum Banquet Food and Beverage Revenue"). Hotel will confirm the food and beverage prices 3 months prior to Auxiliary Organizations Association's arrival date. Auxiliary Organizations Association shall provide Hotel with advance notice of the date(s), time(s), and number of covers with respect to each function no less than 72 hours prior to the first scheduled function if it wishes to schedule for the Event.

### **FACILITY FEES**

Based on Auxiliary Organizations Association's requirements, Hotel's function space fees would be \$75,000.00. Based upon the Room Night Commitment and the functions identified on the Function Information Agenda/Event Agenda outlined in this Agreement, the Hotel will reduce these fees to **\$15,500.00**.

### **OUTSIDE FOOD AND BEVERAGE POLICY**

All food and beverages served at functions associated with the Event (except those snacks outlined above in the "Outside Vendor Catering Fee" clause) must be provided, prepared, and served by Hotel, and must be consumed on Hotel premises.

### **DAMAGE TO FUNCTION SPACE**

Auxiliary Organizations Association agrees to pay for any damage to the function space that occurs while Auxiliary Organizations Association is using it. Auxiliary Organizations Association will not be responsible, however, for ordinary wear and tear or for damage that it can show was caused by persons other than Auxiliary Organizations Association and its attendees.

### **ATTRITION**

Hotel is relying upon Auxiliary Organizations Association's use of the Room Night Commitment and, if applicable, the Minimum Banquet Food and Beverage Revenue. Auxiliary Organizations Association agrees that a loss will be incurred by Hotel if Auxiliary Organizations Association's actual usage is less than 85% of the Room Night Commitment.

Hotel agrees to allow for a 15% reduction in the Room Night Commitment. Hotel will subtract the actual room usage and the amount of permissible attrition from the Room Night Commitment. The difference of room nights will be multiplied by the group's average room rate (excluding staff and or complimentary rooms) and the resulting amount will be posted as attrition charges to Auxiliary Organizations Association's Master Account, plus applicable taxes, at the conclusion of the Event.

Additionally, at the conclusion of the Event, if the actual banquet food and beverage revenue is less than the Minimum Banquet Food and Beverage Revenue, forty percent (40%) of the difference will be posted to the Master Account.

These charges represent a reasonable effort on behalf of the Hotel to establish its loss prospectively and shall be due as liquidated damages.

### **ADJUSTMENTS TO CONCESSIONS**

In the event of reductions in the Room Night Commitment of greater than 20%, the Hotel may adjust any concessions previously offered in this Agreement, including those concessions offered on a complimentary basis, and may also adjust the Function Space in direct proportion to the reduction in the Room Night Commitment.

### **CANCELLATION**

Either Hotel or Group may cancel this Agreement without cause upon written notice to the other party at any time prior to the Event. In the event Group cancels without cause, Group shall pay Hotel liquidated damage in an amount calculated according to the table below (the Cancellation Charges"), plus applicable taxes. Applicable service charges will be added to the Cancellation Charges when cancellation occurs sixty (60) days or less prior to the first date of the Event.

Date of Contract signing up to January 12, 2027	<b>50%</b> of Guestroom Revenue, <b>40%</b> of Food & Beverage Minimums + meeting space rental
From January 13, 2027 to September 12, 2027	<b>75%</b> of Guestroom Revenue, <b>40%</b> of Food & Beverage Minimums + meeting space rental
From September 13, 2027 to December 11, 2027	<b>90%</b> of Guestroom Revenue, <b>40%</b> of Food & Beverage Minimums + meeting space rental
From December 12, 2027 to start date of event	<b>100%</b> of Guestroom Revenue, <b>100%</b> of Food & Beverage Minimums + meeting space rental

Payment of the Cancellation Charges shall be made by Group to Hotel at the time this Agreement is cancelled. Hotel and Group agree that: (a) the damages suffered by Hotel in the event that Group cancels without cause are difficult to calculate, for reasons, including, but not limited to, the uncertainty, at the time of contracting, of the business that can be rebooked and the associated rates; (b) the above formula is reasonable estimated of such damages; and (c) the Cancellation Charges do not constitute a penalty.

In the event Hotel cancels this Agreement without cause, Hotel shall pay Group any direct damage suffered as a result of the cancellation, which damages shall not exceed the amount calculated according to above table.

**IMPOSSIBILITY**

The performance of this Agreement is subject to termination without liability upon the occurrence of any circumstance beyond the control of either party – such as acts of God, war, acts of terrorism, government regulations, disaster, strikes, civil disorder, or curtailment of transportation facilities – to the extent that such circumstance makes it illegal or impossible for the Hotel to provide, or for groups in general to use, the Hotel facilities. The ability to terminate this Agreement without liability pursuant to this paragraph is conditioned upon delivery of written notice to the other party setting forth the basis for such termination as soon as reasonably practical - but in no event longer than ten (10) days - after learning of such basis.

**COMPLIANCE WITH LAW**

This Agreement is subject to all applicable federal, state, and local laws, including health and safety codes, alcoholic beverage control laws, disability laws, federal anti-terrorism laws and regulations, and the like. Hotel and Auxiliary Organizations Association agree to cooperate with each other to ensure compliance with such laws.

**CHANGES, ADDITIONS, STIPULATIONS, OR LINING OUT**

Any changes, additions, stipulations or deletions including corrective lining out by either Hotel or Auxiliary Organizations Association will not be considered agreed to or binding on the other unless such modifications have been initialed or otherwise approved in writing by the other.

**LITIGATION EXPENSES**

The parties agree that, in the event litigation relating to this Agreement is filed by either party, the non-prevailing party in such litigation will pay the prevailing party's costs resulting from the litigation, including reasonable attorneys' fees.

**LIQUOR LICENSE**

Auxiliary Organizations Association understands that Hotel's liquor license requires that beverages only be dispensed by Hotel employees or bartenders. Alcoholic beverage service may be denied to those guests who appear to be intoxicated or are underage.

**DISCOUNTED PARKING RATES**

Please note parking rates and taxes are subject to change without notice and all fees include 20% City Tax.

**Self-Parking**

Discounted rate of 25.00 Self-Parking with in/out privileges

- Guest will pay parking machines when exiting garage

**Additional Rates**

Lost Ticket Fee/per day (No Refund): \$25.00

**Overnight Valet** - Tax is NOT included

\$55.00 + Plus Tax overnight parking

### **Standard Daily Rates**

- Each 20 minutes: \$4.00
- 1 hour: \$12.00
- 2 hours: \$24.00
- 3 hours: \$36.00
- 4+ hours: \$46.00

### **PORTERAGE STAFF CHARGE**

A \$8.00 round trip, per bag Porterage Staff Charge is applied to luggage services that will be guaranteed by the Customer and posted to the Master Account. The Porterage Staff Charge may increase between the time of this Agreement and the time of the event. The increase may be the result of changing market prices, costs, taxes or other objective factors as determined by the Hotel. The Hotel will provide not less than 45 days' notice of such changes, which notice may be by email. You agree to pay the Porterage Staff Charge in existence at the time of the event. The Porterage Staff Charge is paid in full to employees servicing the event. All prices are subject to applicable taxes (currently 0%).

### **COMPLIANCE WITH EQUAL OPPORTUNITY LAWS**

This section describes Marriott's obligations as a U.S. federal contractor. It does not apply to customers that are not part of the U.S. federal government or using funds from the U.S. federal government for this contract.

Marriott shall comply with all applicable laws, statutes, rules, ordinances, codes, orders and regulations of all federal, state, local and other governmental and regulatory authorities and of all insurance bodies applicable to the Hotel premises in performing its obligations under this Agreement.

Marriott (referred to as "contractor" in this section) shall comply with Executive Order 11246, as amended, Section 503 of the Rehabilitation Act of 1973, as amended, and the Vietnam Era Veterans' Readjustment Assistance Act, as amended, which are administered by the United States Department of Labor ("DOL"), Office of Federal Contract Compliance Programs ("OFCCP"). The equal employment opportunity clauses of the implementing regulations, including but not limited to 41 C.F.R. §§ 60.1-4, 60-300.5(a), and 60-741.5(a), are hereby incorporated by reference, with all relevant rules, regulations and orders pertaining thereto. **This contractor and subcontractor shall abide by the requirements of 41 C.F.R. §§ 60-1.4(a), 60-300.5(a) and 60-741.5(a). These regulations prohibit discrimination against qualified individuals based on their status as protected veterans or individuals with disabilities, and prohibit discrimination against all individuals based on their race, color, religion, sex, sexual orientation, gender identity, or national origin. Moreover, these regulations require that covered prime contractors and subcontractors take affirmative action to employ and advance in employment individuals without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, protected veteran status or disability.**

Marriott also shall comply with Executive Order 13496 and with all relevant rules, regulations and orders pertaining thereto, to the extent applicable. The employee notice clause and all other provisions of 29 C.F.R. Part 471, Appendix A to Subpart A, are hereby incorporated by reference.

To the extent applicable, Marriott shall include the provisions of this section in every subcontract or purchase order so that such provisions shall be binding upon each contractor, subcontractor or vendor performing services or providing materials relating to this Agreement and the services provided pursuant to the terms hereof.

### **PRIVACY**

Marriott International, Inc. ("Marriott") is committed to complying with obligations applicable to Marriott under applicable privacy and data protection laws, including to the extent applicable EU data protection laws. Hotel shall comply with the then-current Marriott Group Global Privacy Statement (the "Privacy Statement," currently available at <http://www.marriott.com/about/privacy.mi>) with respect to any personal data received under this Agreement.

Without limiting the foregoing obligation, Hotel has implemented measures designed to: (1) provide notice to individuals about its collection and use of their personal data, including through the Privacy Statement; (2) use such personal data only for legitimate business purposes; (3) provide means by which individuals may request to review, correct, update, suppress, restrict or delete or port their personal data, consistent with applicable law; (4) require any service providers with whom personal data is shared to protect the confidentiality and security of such data; and (5) use technical and organizational measures to protect personal data within its organization against unauthorized or unlawful access, acquisition, use, disclosure, loss, or alteration.

Auxiliary Organizations Association will obtain all necessary rights and permissions prior to providing any personal data to Hotel, including all rights and permissions required for Hotel, Hotel affiliates, and service providers to use and transfer the personal data to locations both within and outside the point of collection (including to the United States) in accordance with Hotel's privacy statement and applicable law. Notwithstanding any other provision, Hotel may use an individual's own personal data to the extent directed by, consented to or requested by such individual.

### **PHISHING**

Please be aware that bad actors can impersonate Hotel employees. Group should never rely solely on contact information sent in an email or respond directly to any email requesting a bank account information change. If Group receives a request from Hotel regarding bank account information, Group should contact the Hotel via verified phone number or in person to confirm the request prior to providing such information.

### **IN-HOUSE EQUIPMENT**

Hotel will provide, at no charge, a reasonable amount of meeting equipment (for example, chairs, tables, etc.). These complimentary arrangements do not include special setups or extraordinary formats that would deplete Hotel's present in-house equipment to the point of requiring rental of an additional supply to accommodate Auxiliary Organizations Association's needs. If such special setups or extraordinary formats are requested, Hotel will present Auxiliary Organizations Association two (2) alternatives: (1) charging Auxiliary Organizations Association the rental cost for additional equipment, or (2) changing the extraordinary setup to a standard format, avoiding the additional cost.

### **CONVENTION CENTER PRODUCTION GUIDELINES**

All rules, regulations, and fees listed within the Oakland Convention Center Production guidelines will apply.

### **DRAYAGE AND MATERIAL HANDLING**

The Oakland Marriott City Center has no storage facilities for Exhibit Materials. All freight must be consigned to the decorating company. Shipments that arrive prior to show time will be refused and/or forwarded to the official decorator at the exhibitor's expense.

The service contractor must handle all decorating and material handling of exhibits and related products. All items belonging to the individual exhibitors must be brought to the back service entrance. There are no storage facilities available for empty crates, skids, containers, cartons, or vehicles. The service contractor must work directly with the Event Manager should some exhibitor packages be sent directly to the hotel.

Due to the limited hotel storage, all shipments should be scheduled to arrive at the hotel no earlier than (3) days prior to the event.

Storage and handling fees will be applicable for all incoming and outgoing shipments, in addition to the standard postage/shipment fee.

Shipping and Receiving Handling fees for incoming and outgoing packages is as follows:

- Envelope (under 1 lb.) - \$8.00 each/per move
- 1.1 - 6 lbs. - \$10.00 each/per move
- 6.1 - 15 lbs. - \$20.00 each/per move
- 15.1 - 30 lbs. - \$30.00 each/per move
- 30.1 - 50 lbs. - \$50.00 each/per move
- 50.1 - 75 lbs. - \$100.00 each/per move
- 75.1 - 100 lbs. (Non-Palletized) - \$150.00 each/per move
- 100.1 - 150 lbs. (Non-Palletized) - \$200.00 each/per move
- 150.1 - Pallet (Shrink Wrapped & Self-Contained) - \$300.00 each/per move

\*Crates/Pallets - \$300.00 each/per move

\*Crates and Pallets are restricted to height and width dimensions. Max is 6 H 'x'8'W

### **TECHNICAL SERVICES**

of the Hotel meeting space, an on-site Encore Event Technologies representative will be on property to supervise during load-in, operation and teardown. Encore Event Technologies will be on-site during all functions with audio-visual equipment for support and supervision. This is to ensure our Audio-Visual Service Standards are upheld and provide support to both the client and the Third-Party Vendor. All requests and schedules (load in, load out, and run of show) must be submitted no later than 14 days prior to your event. The following charges will apply:

- The Encore representative will be billed at prevailing set/strike labor rates on a 5-hour minimum. After 8 hours in a single workday the rate will increase to time and a half for up to 12 hours of total work. If the time exceeds 12

hours in a single workday the rate will be double time. If the show exceeds 5 days or 40 hours in a work week (Saturday to Friday) the rate will be time and a half from the 6th day or 41st hour worked in the week.

• If multiple rooms are required additional Encore representatives may need to be booked to cover all areas where work is being facilitated. (i.e. if the Convention Center, Ballroom, and Breakout rooms are in use there may be a need for multiple representatives)

### **UNATTENDED ITEMS/ADDITIONAL SECURITY**

The Hotel cannot ensure the security of items left unattended in function rooms. Special arrangements may be made with the Hotel for securing a limited number of valuable items. If Auxiliary Organizations Association requires additional security with respect to such items or for any other reason, the Hotel will assist in making these arrangements. All security personnel to be utilized during the Event are subject to Hotel approval.

### **USE OF OUTSIDE VENDORS**

If Auxiliary Organizations Association wishes to hire outside vendors to provide any goods or services at Hotel during the Event, Auxiliary Organizations Association must notify Hotel of the specific goods or services to be provided and provide sufficient advance notice to the Hotel so that the Hotel can (i) determine, in Hotel's sole discretion, whether such vendor must provide Hotel, in form and amount reasonably satisfactory to Hotel, an indemnification agreement and proof of adequate insurance, and (ii) approve, using reasonable judgment, the selection of the outside vendor and the goods or services to be provided by such outside vendor to Auxiliary Organizations Association, taking into consideration: (a) whether Hotel offers such goods and services; (b) the risk level posed by certain activities; and (c) the safety and well-being of guests at Hotel.

### **PERFORMANCE LICENSES**

Auxiliary Organizations Association will be solely responsible for obtaining any necessary licenses or permission to perform, broadcast, transmit, or display any copyrighted works (including without limitation, music, audio, or video recordings, art, etc.) that Auxiliary Organizations Association may use or request to be used at the Hotel.

### **MARRIOTT BONVOY EVENTS**

Marriott Bonvoy Events provides Points or Miles to eligible Marriott Bonvoy Members who book and hold qualifying meetings and events at Participating Properties.

Approximately ten (10) business days after the conclusion of the Event (provided that the Event is not cancelled and Auxiliary Organizations Association has otherwise complied with the material terms and conditions of this Agreement), the Hotel will award Points or Miles to the Member and relevant account identified below. By inserting the airline frequent flyer account information, the recipient elects to receive Miles instead of Points.

Marriott Bonvoy Events is not available in certain circumstances, including (1) for any government employee or official booking a government event (U.S. government event or non-U.S. government event); (2) for any employee of a state-owned or state-controlled entity ("SOE") booking an event on behalf of the SOE; or (3) for any other planner or intermediary when booking an event on behalf of a non-U.S. governmental entity or SOE. Hotels in the Asia Pacific region are restricted from awarding Points or Miles to any intermediary booking an event on behalf of any governmental entity or SOE.

GROUP MUST CHECK ONE OPTION BELOW:

- The Contact (as identified on page 1 of this Agreement or the Authorized Signer of this Agreement) is eligible to receive Points or Miles.

Member Name \_\_\_\_\_  
Marriott Bonvoy Membership Number \_\_\_\_\_

\*If Miles are desired instead of Points, please also provide:

Participating airline name \_\_\_\_\_  
Participating airline frequent flyer account number \_\_\_\_\_

OR

- The Contact (as identified on page 1 of this Agreement or the Authorized Signer of this Agreement) declines or is not eligible to receive Points or Miles and hereby waives the right to receive Points or Miles in connection with the Event.

The individual identified above to receive either Points or Miles may not be changed without such individual's prior written consent. The number of Points or Miles to be awarded shall be determined pursuant to the Marriott Bonvoy Terms and Conditions (the "Terms and Conditions"), as in effect at the time of award. All Marriott Bonvoy Terms and Conditions apply. The Terms and Conditions are available on-line at <https://www.marriott.com/loyalty/terms/default.mi> and may be changed at the sole discretion of Marriott International, Inc. at any time and without notice. Capitalized terms used in this section have the meanings given to them in the Terms and Conditions.

\*Electronic selection – This may be done in Microsoft Word by double-clicking on the above unfilled box, choosing a blackened box, and then clicking "Insert." Alternatively, one can use the commands "Insert" and "Symbol," choose the blackened box, and then click "Insert."

### **HIGH RISK ACTIVITIES**

Hotel has committed to providing the room nights and function space, as applicable, set forth in this Agreement based on information about the event that Auxiliary Organizations Association has given to the Hotel. Auxiliary Organizations Association agrees that it has presented all material information required in order for Hotel to provide the rooms and facilities set forth in this Agreement. Should Hotel, in its sole reasonable discretion, determine at any time that the Event will include a high-risk activity that was previously undisclosed to the Hotel (including by way of example, and not by limitation, biological agents, pyrotechnics, etc.), Hotel may terminate this Agreement immediately and without liability, upon written notice to Auxiliary Organizations Association.

### **CONNECT RESPONSIBLY**

As part of the Connect Responsibly program in which Hotel participates, Auxiliary Organizations Association may choose to receive a Meeting Impact Report ("MIR"). If Auxiliary Organizations Association elects to receive the MIR, Hotel will provide Auxiliary Organizations Association a MIR at the conclusion of the event that displays the calculated carbon and water footprints of the event based on industry methodologies, as well as the sustainable practices that were implemented during the event.

Auxiliary Organizations Association elects the following:

#### **Meeting Impact Report (MIR):**

- Yes, Auxiliary Organizations Association would like to receive the MIR
- No, Auxiliary Organizations Association would prefer not to receive the MIR

#### **Carbon Offset Credits:**

If Auxiliary Organizations Association elects to receive a MIR, Auxiliary Organizations Association may also choose to purchase carbon offset credits. Should Auxiliary Organizations Association elect to purchase carbon offset credits, Hotel will either provide Auxiliary Organizations Association information regarding how to purchase carbon offset credits or purchase the credits on Auxiliary Organizations Association's behalf and bill them to Auxiliary Organizations Association, as indicated below.

To select one of the first two options below, Auxiliary Organizations Association must first opt-in above to receiving the MIR.

- Hotel will provide Auxiliary Organizations Association with the website link so Auxiliary Organizations Association may purchase carbon offset credits
- Hotel will purchase carbon offset credits on Auxiliary Organizations Association's behalf and include the charge on Auxiliary Organizations Association's final bill
- Auxiliary Organizations Association elects not to purchase carbon offset credits for this program

**ACCEPTANCE**

When presented by the Hotel to Auxiliary Organizations Association, this document is an invitation by the Hotel to Auxiliary Organizations Association to make an offer. Upon signature by Auxiliary Organizations Association, this document will be an offer by Auxiliary Organizations Association. Only upon signature of this document by all parties will this document constitute a binding agreement. Unless the Hotel otherwise notifies Auxiliary Organizations Association at any time prior to Auxiliary Organizations Association’s execution of this document, the outlined format and dates will be held by the Hotel for Auxiliary Organizations Association on a first-option basis until **Friday, May 29, 2026**. If Auxiliary Organizations Association cannot make a commitment prior to that date, this invitation to offer will revert to a second-option basis or, at the Hotel’s option, the arrangements will be released, in which case neither party will have any further obligations.

Upon signature by both parties, Auxiliary Organizations Association and the Hotel shall have agreed to and executed this Agreement by their authorized representatives as of the dates indicated below.

**SIGNATURES**

Approved and authorized by Auxiliary Organizations Association:

Name: (Print) \_\_\_\_\_

Title: (Print) \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Approved and authorized by Hotel:

Name: (Print) \_\_\_\_\_

Title: (Print) \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**From:** Singletary, Andrew P <asing@saclink.csus.edu>  
**Subject:** Fwd: AOA 2028  
**Date:** April 28, 2026 at 8:06 AM  
**To:** Kim Clark <kdclark.csuaoa@gmail.com>



Probably add this to officers for discussion. It's a ways out and we still don't have 2029 plans quite yet.

**Andrew Singletary**  
Director, Information Technology Services and Facilities  
**p:** 916.278.3347 | **e:** asing@saclink.csus.edu

He, Him, His  
Analytical | Deliberative | Discipline | Responsibility | Consistency

**Union WELL, Inc.**  
California State University, Sacramento  
6000 J Street, MS 6017, Sacramento, CA 95819

Begin forwarded message:

**From:** Patrick Bailey <Patrickhbaileyjr@gmail.com>  
**Date:** April 28, 2026 at 7:30:47 AM PDT  
**To:** "Singletary, Andrew P" <asing@saclink.csus.edu>  
**Subject:** Fwd: AOA 2028

### External Sender

ATTENTION: This email originated outside of Sacramento State.

Do not click links or open attachments unless you recognize the sender and know the content is safe. If you have concerns about this email, please report it via the Report Phishing button.

Andrew  
FYI....I told Rex I would share with you for some feedback.  
PB

Sent from my iPhone

Begin forwarded message:

**From:** "Maxion, Rex" <Rex.Maxion@marriott.com>  
**Date:** April 27, 2026 at 11:39:44 AM CDT  
**To:** Patrick Bailey <patrickhbaileyjr@gmail.com>  
**Subject:** Re: AOA 2028

Patrick,

I hope you had an excellent weekend! It was great speaking with you last Wednesday. I apologize for the delay. I was discussing with my team and we are excited to have you back in 2028.

I know that you mentioned that it would be difficult to book far out due to deposit schedules. If we worked with you on that, would you be open to a multi-year to include both 2028 and 2030? I spoke with my team and we would be able to defer 2030 deposit payments until after your 2028 conference. We can also be flexible with how frequent as well as how much due to your history with us. This way you can secure 2030 dates and we can also offer the same concessions as 2028. Here is a snapshot of how 2030 would look like:

is a snapshot of how 2030 would look like.

AOA Annual Conference January 2030

Guest Room Dates: Monday 01/07/2030 - Saturday 01/12/2030

Meeting Space Dates: Wednesday 01/09/2030 - Friday 01/11/2030, same space

Group Rate: \$199.00+tax

F&B Minimum: Keep it flat at \$175,000.00

Meeting Room Rental: Keep it flat at a discounted rate of \$15,500.00 with F&B minimum

Special Concessions: Same as 2028 concessions, however, we would be able to increase the AV discount from 15% to 20% if booking both years.

Deposit schedule: We will not collect the first deposit until after the 2028 conference. We are flexible on the deposit amount and frequency on the schedule for 2030.

Let me know what you think! If you would like to explore this further, please let me know. Or if you would only like to contract just 2028 for now, we can do that as well. With how busy January is for us, we would like to offer availability out when we can and with additional incentives if it works for you.

Thanks Pat, please let me know what you think!

**Rex Maxion | Senior Sales Executive**

**[Oakland Marriott City Center | Oakland Convention Center](#)**

1001 Broadway, Oakland, CA 94607

**O** 510.466.6480 | **M** 510.332.1288

**[Oakland Marriott Meeting Planner Guide](#)**

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**From:** Patrick Bailey <patrickhbaileyjr@gmail.com>

**Sent:** Tuesday, April 21, 2026 2:11 PM

**To:** Maxion, Rex <Rex.Maxion@marriott.com>

**Subject:** Re: AOA 2028

This message is from an EXTERNAL SENDER - be CAUTIOUS, particularly with links and attachments.

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Perfect

I'll see you tomorrow

PB

Sent from my iPhone

On Apr 21, 2026, at 2:58 PM, Maxion, Rex <Rex.Maxion@marriott.com> wrote:

Patrick,

Sounds good! I just sent you a calendar invite with a TEAMS link for tomorrow's call. Talk soon!

**Rex Maxion | Senior Sales Executive**

**[Oakland Marriott City Center | Oakland Convention Center](#)**

1001 Broadway, Oakland, CA 94607

**O** 510.466.6480 | **M** 510.332.1288