



CSURMA Executive Committee Meeting Agenda

“This is an Open Public Meeting”

In accordance with the requirements of the Bagley-Keene Open Meeting Act, notice of this meeting must be posted in publicly accessible places, including the Internet, at least ten (10) days in advance of the meeting.

Per Government Code section 54954.2, persons requesting disability-related modifications or accommodations, including auxiliary aids or services in order to participate in the meeting, are requested to contact Alliant at (415) 403-1400 twenty-four hours in advance of the meeting. Entrance to the meeting location requires routine provision of identification to building security. However, CSURMA does not require any member of the public to register his or her name or to provide other information, as a condition to attendance at any public meeting and will not inquire of building security concerning information so provided. See Government Code section 54953.3.

Date & Time:	October 24, 2025 – 8:30 AM to 10:00 AM
Primary Location:	CSU Long Beach Anna W. Ngai Alumni Center, D'Reams Family Boardroom. 1250 Bellflower Blvd., <i>(located on the corner of Beach Drive and Brotman Drive)</i> Long Beach, CA 90840
Virtual Location:	Virtual Meeting (Zoom) Video Chat: https://alliantinsurance.zoom.us/j/93552373896 Teleconference: 1 669 900 6833 Meeting Number: 935 5237 3896 Passcode: 316130

A = Action Item
I = Informational Item

A. Call to Order

1.	Approval of the Agenda	A	<i>p. 4</i>
	The Committee will be asked to approve the agenda.		

B. Public Comments

CSURMA Executive Committee Meeting Agenda “This is an Open Public Meeting”

C. Consent Calendar

The Committee is asked to take action on the consent calendar items as a group, except that a member may request that an item be withdrawn from the Consent Calendar for discussion and action.

- | | |
|--|----------------------------------|
| <p>1. Approval of Minutes – September 5, 2025
The Committee will be asked to approve the minutes from its last meeting.</p> | <p>A <i>p. 5</i></p> |
| <p>2. Financial Reports</p> | |
| <p>a. Draft Financial Statement at September 30, 2025
The Committee will be asked to review and accept the unaudited Financial Statements.</p> | <p>A <i>p. 16</i></p> |
| <p>b. Treasurer’s Quarterly Investment Report at September 30, 2025
The Committee will be asked to review and accept the Treasurer’s Quarterly Investment Reports.</p> | <p>A <i>p. 31</i></p> |
| <p>3. Campus Risk Pools Rates & Gross Funding / Revision to Property and Aime Rating
The Committee will be asked to approve revisions to the Property and AIME rating for FY 26/27.</p> | <p>A <i>p. 33</i></p> |

D. General Administration

- | | |
|---|----------------------------------|
| <p>1. Policy and Procedure No. 12, Committee Member Professional Development
The Committee will be asked to approve revisions to Policy and Procedure No. 12.</p> | <p>A <i>p. 46</i></p> |
| <p>2. San Francisco Bay Region Network –Allocation of Claim Cost
The Committee will be asked to review the claim cost allocation memo, providing direction as appropriate.</p> | <p>I <i>p. 48</i></p> |
| <p>3. CSURMA Orientation Meeting with CSU Campuses
The Committee will be asked to discuss scheduling meetings with newly appointed Campus Vice Presidents.</p> | <p>I <i>p. 51</i></p> |

E. Standing Committee Reports

- | | |
|--|----------------------------------|
| <p>1. AIME Program Update
The Committee will receive a verbal report of the AIME programs.</p> | <p>I <i>p. 52</i></p> |
| <p>2. AORMA Programs Update
The Committee will receive a verbal report on the AORMA programs.</p> | <p>I <i>p. 53</i></p> |

A Public Entity Joint Powers Authority

CSURMA Executive Committee Meeting Agenda

“This is an Open Public Meeting”

F. Closed Session

Pursuant to Cal. Gov. Code Sec. 11126(e)(1) & 11126(f)(1) – Action may be taken per Government Code Section 11126(e)(1) & 11126(f)(1). The matters below may be discussed. The Committee may take action or provide direction to Staff regarding the matters.

- | | |
|---|---|
| 1. Rogers v. CSU | A |
| 2. Marco v. CSU | A |
| 3. V.S., J.R. v. CSU | A |
| 4. L.G. v. CSU | A |
| 5. Obeidin, et al. adv. CSU | A |
| 6. EEOC adv. CSU | A |
| 7. Batie-Smoose v. CSU | A |
| 8. CSE Coverage Claim | A |
| 9. Chico State Enterprises Property Claim | A |

G. Information Item

- | | | |
|---|---|--------------|
| 1. CSURMA Committee Member Professional Development | I | <i>p. 54</i> |
| The Committee will receive website information for professional development training and conferences. | | |
| 2. CSURMA Meeting Calendar | I | <i>p. 56</i> |
| The Committee will review the current CSURMA Meeting Calendars. | | |
| 3. FY 2025/26 Long Range Planning Goals | I | <i>p. 58</i> |
| The Committee will review the Long-Range Action Plan. | | |
| 4. CSURMA Administrative Service Calendar | I | <i>p. 61</i> |
| The Committee will review the CSURMA Administrative Service Calendar. | | |
| 5. CSURMA Executive Committee and Staff Contact List | I | <i>p. 68</i> |
| The Committee will review the contact list, making revisions as appropriate. | | |

H. Adjournment

The next CSURMA Executive Committee meeting is scheduled for Friday, December 5, 2025 at the Alliant Office in Irvine, CA. If you have questions regarding the agenda package, please contact Mimi Long at mlong@alliant.com / (415) 403-1423 and Tevea Him at thim@alliant.com / (415) 403-1416

A Public Entity Joint Powers Authority

APPROVAL OF THE AGENDA

ISSUE: The Committee will be asked to approve the agenda for today's meeting.

RECOMMENDATION: Staff recommends that the Committee approve the agenda as presented.

FISCAL IMPACT: None.

BACKGROUND: None.

PUBLICATION: None.

ATTACHMENT(S): None.

APPROVAL OF MINUTES – SEPTEMBER 5, 2025

ISSUE: The Executive Committee will be asked to review and approve the draft minutes of its September 5, 2025 meeting.

RECOMMENDATION: It is recommended that the Executive Committee approve the minutes from its September 5, 2025 meeting, including revisions as necessary.

FISCAL IMPACT: None.

BACKGROUND: The minutes reflect the action taken by the Executive Committee at its last meeting.

PUBLICATION: All CSURMA Executive Committee meeting minutes are posted on the CSURMA website once they are approved.

ATTACHMENT(S):

- a. CSURMA EC Meeting Minutes – September 5, 2025

**MINUTES OF THE
CSURMA EXECUTIVE COMMITTEE MEETING**

SEPTEMBER 5, 2025 @ 8:30 AM

**ALLIANT INSURANCE SERVICES
18100 VON KARMAN AVENUE, 10TH FLOOR • IRVINE, CA 92612**

MEMBERS PRESENT

Scott Apel (Chair), California State University, Long Beach
Mike Beatty, San Francisco State University
Colin Donahue, California State University Northridge
Robert Eaton (Treasurer), CSU Office of the Chancellor, Financing, Treasury & Risk Management
Chuck Kissel, CSU Fullerton Auxiliary Services Corporation
Rose McAuliffe (Vice Chair), California State University, Stanislaus
Bill Olmsted, University Union Operation of CSUS, Inc.
Lynniece Warren, California State University, San Bernardino
Jeff Wilson, San Francisco State University

MEMBERS ABSENT

None

STAFF, GUESTS & CONSULTANTS

Smey Chum, CSU Office of the Chancellor, Financial Services
Zachary Gifford, CSU Office of the Chancellor – Systemwide Risk Management
Tevea Him, Alliant Insurance Services, Inc.
Daniel Howell, Alliant Insurance Services, Inc.
William Hsu, CSU Office of the Chancellor, Office of General Counsel
Deanna Jacona, Hudson Claims Consulting
Alice Kim, CSU Office of the Chancellor, Financial Services
Amy Lightner, Alliant Insurance Services, Inc.
Mimi Long, Alliant Insurance Services, Inc.
Ryan Lopez, Alliant Insurance Services, Inc.
Jullia Perancullo, CSU Office of the Chancellor, Financial Services
Jaime Thompson, CSU Office of the Chancellor, Office of General Counsel
Edward Villanueva, Capital Planning, Design, and Construction
Robin Webb, CSU Office of the Chancellor, Office of General Counsel

A. CALL TO ORDER

The meeting was called to order by the Chair, Scott Apel at 8:30 AM.

A1. Approval of the Agenda

A motion was made to approve the meeting agenda.

Motion: Robert Eaton
Second: Rose McAuliffe

NAME	AYE	ABSTAIN	NAY	ABSENT
Scott Apel	X			
Mike Beatty	X			
Colin Donahue	X			
Robert Eaton	X			
Chuck Kissel	X			
Rose McAuliffe	X			
Bill Olmsted	X			
Lynniece Warren	X			
Jeff Wilson	X			

Motion carried.

B. PUBLIC COMMENTS

There were no comments from members of the public.

C. CONSENT CALENDAR

- C1. Approval of Minutes – May 2, 2025 and May 16, 2025**
- C2. Adoption of CSURMA Executive Committee and Board of Directors FY 2026-27 Meeting Calendar**
- C3a. Financial Reports: Draft Financial Statement at June 30, 2025**
- C3b. Financial Reports: Treasurer’s Quarterly Investment Report at June 30, 2025**

A motion was made to approve the items on the consent calendar.

Motion: Chuck Kissel
Second: Robert Eaton

NAME	AYE	ABSTAIN	NAY	ABSENT
Scott Apel	X			
Mike Beatty	X			
Colin Donahue	X			
Robert Eaton	X			
Chuck Kissel	X			
Rose McAuliffe	X			
Bill Olmsted	X			
Lynniece Warren	X			
Jeff Wilson	X			

Motion carried.

D. GENERAL ADMINISTRATION

D1. Excess Insurance Renewal Report

Amy Lightner provided an overview of the CSURMA excess insurance renewals for FY 2025–26. Table 1 shows a year over year summary.

CSURMA Campus and AORMA Risk Pools Year Over Year Insurance Cost at July 1, 2025				
Coverage	FY 24/25	FY 25/26	\$ Change	% Change
Liability Reinsurance	6,462,833	7,282,615	819,782	13%
Liability Excess Insurance	20,957,814	23,805,044	2,847,230	14%
Property	35,518,148	35,339,349	-178,799	-1%
Workers' Compensation	32,967,819	34,534,408	1,566,589	5%
Cyber	1,766,975	1,745,850	-21,125	-1%
Fine Arts	331,517	331,517	0	0%
SLIP, SAFECLIP, CLIP	963,591	1,189,467	225,877	23%
Aviation	274,709	326,595	51,886	19%
Medical Malpractice	272,395	272,395	0	0%
Fidelity	532,192	532,192	0	0%
Total Cost:	\$100,047,993	\$105,359,433	\$5,311,440	5%

D2. CSURMA Risk Pools Rating Plan Task Group

The Executive Committee established the Rating Plans Task Groups (RPTG) to review and recommend revisions to the rating plans for each of the Campus Coverage Programs. The RPTG convened on August 1, 2025, and August 19, 2025.

The Committee received a report on the task group's findings and recommendations:

Liability Program – Rating Recommendations

1. Update deductible selection credits for fiscal years 2026/27, 2027/28, and 2028/29.
2. Increase the minimum deductible from \$50,000 to \$100,000.
3. Increase the claim retention from \$50,000 to \$100,000 and the claim cap from \$500,000 to \$650,000 for use in the Experience Modification (X-Mod) calculation.
4. Increase the minimum deductible for Self-Supporting Funds from \$35,000 to \$50,000.

5. Continue to monitor injuries/claims resulting from combat sports.

Property Program – Rating Recommendations

1. Continue surveying campuses regarding remote locations to validate information such as physical address, location descriptions, and property valuations.
2. Update deductible selection credits for fiscal years 2026/27, 2027/28, and 2028/29.
3. Update claim surcharges as follows:
 Risk Pool Claim Surcharge: Increase from 1% to 2% for each claim over \$100,000.
 Excess Insurance Claim Surcharge:
 - 5% for each claim over \$1,000,000 (no change)
 - 10% for each claim over \$2,500,000 (new)
 - 15% for each claim over \$5,000,000 (increased from 10%)

A motion was made to recommend approval of the proposed revisions to the Campus Liability and Property Program rating plans for adoption by the Board.

Motion: Mike Beatty

Second: Bill Olmsted

NAME	AYE	ABSTAIN	NAY	ABSENT
Scott Apel	X			
Mike Beatty	X			
Colin Donahue	X			
Robert Eaton	X			
Chuck Kissel	X			
Rose McAuliffe	X			
Bill Olmsted	X			
Lynniece Warren	X			
Jeff Wilson	X			

Motion carried.

D3. Campus Risk Pool Actuarial Reports Valued at June 30, 2025

The Committee reviewed the actuarial report exhibits.

A motion was made to accept the actuarial reports as presented.

Motion: Lynniece Warren

Second: Chuck Kissel

NAME	AYE	ABSTAIN	NAY	ABSENT
Scott Apel	X			
Mike Beatty	X			
Colin Donahue	X			
Robert Eaton	X			
Chuck Kissel	X			
Rose McAuliffe	X			
Bill Olmsted	X			
Lynniece Warren	X			
Jeff Wilson	X			

Motion carried.

D4a. Campus Risk Pools Funding Status at June 30, 2025

The Committee reviewed the Estimated Risk Pool Funding Status exhibit as of June 30, 2025.

D4b. 2025 Proposed Campus Dividend / Assessment

The Committee reviewed the Goal for Retained Funds exhibit and the Risk Pool Funding Status and Cash Flow Obligations exhibit.

As shown on the CSURMA Financial Statement as of June 30, 2025:

- The **Campus Workers' Compensation Program** has a fund balance of \$22,400,507, but a current cash and investments deficit of -\$11,453,292.
Any dividend declared from this program would worsen the current cash and investments position.
- The **Campus Liability Program** has a fund balance deficit of -\$28,248,653.
The program will continue to be assessed \$5,000,000 annually until the fund balance becomes positive.

A motion was made to approve an assessment of \$5,000,000 to the Liability Program and to declare no dividend from the Workers' Compensation Program.

Motion: Jeff Wilson

Second: Scott Apel

NAME	AYE	ABSTAIN	NAY	ABSENT
Scott Apel	X			
Mike Beatty	X			
Colin Donahue	X			
Robert Eaton	X			

NAME	AYE	ABSTAIN	NAY	ABSENT
Chuck Kissel	X			
Rose McAuliffe	X			
Bill Olmsted	X			
Lynniece Warren	X			
Jeff Wilson	X			

Motion carried.

D4c. FY 2026/27 Rates and Gross Funding Campus Coverage Programs

The Committee reviewed the draft FY 2026/27 rates and gross funding worksheets for each Campus Coverage Program. The overall program costs are noted below:

Campus	Current FY 25/26	Proposed FY 26/27	\$ Chg	% Chg
Liability	\$44,843,251	\$60,269,625	\$15,426,374	34%
Workers' Compensation	34,940,364	37,722,012	\$2,781,648	8%
Property	41,215,726	41,184,333	(\$31,393)	0%
AIME	4,282,080	4,399,158	\$117,078	3%
Auto Liability	4,024,469	3,078,149	(\$946,320)	-24%
IDL NDI UI	14,991,757	14,949,918	(\$41,839)	0%
Total	\$144,297,647	\$161,603,195	\$17,305,548	12%

A motion was made to recommend to the Board of Directors the adoption of the Campus Coverage Programs funding for FY 2026/27 as presented, which includes the Rating Plans Task Group's recommended rating plan updates.

Motion: Mike Beatty

Second: Robert Eaton

NAME	AYE	ABSTAIN	NAY	ABSENT
Scott Apel	X			
Mike Beatty	X			
Colin Donahue	X			
Robert Eaton	X			
Chuck Kissel	X			
Rose McAuliffe	X			
Bill Olmsted	X			
Lynniece Warren	X			
Jeff Wilson	X			

Motion carried.

D5. Workers' Compensation Claims Administration Audit

CSURMA engages Sedgwick Claims Management Services (Sedgwick CMS) to serve as third-party claims administrator (TPA) for Campus Workers' Compensation Risk Pool claims. A service performance audit was completed by Deanna Jacona, CSURMA's Senior Workers' Compensation Claims Consultant. Jacona provided a summary of the audit results.

A motion was made to accept the report as presented.

Motion: Mike Beatty

Second: Robert Eaton

NAME	AYE	ABSTAIN	NAY	ABSENT
Scott Apel	X			
Mike Beatty	X			
Colin Donahue	X			
Robert Eaton	X			
Chuck Kissel	X			
Rose McAuliffe	X			
Bill Olmsted	X			
Lynniece Warren	X			
Jeff Wilson	X			

Motion carried.

D6. Liability Claims Administration Audit

CSURMA engaged R.E. Powers & Company, LLC to conduct a liability claims administration audit of the Systemwide Risk Management (SRM). Zachary Gifford presented a summary of the audit findings.

A motion was made to accept the report as presented.

Motion: Chuck Kissel

Second: Mike Beatty

NAME	AYE	ABSTAIN	NAY	ABSENT
Scott Apel	X			
Mike Beatty	X			
Colin Donahue	X			
Robert Eaton	X			
Chuck Kissel	X			
Rose McAuliffe	X			
Bill Olmsted	X			

Lynniece Warren	X			
Jeff Wilson	X			

Motion carried.

D7. San Francisco Bay Region Network

In response to enrollment declines, demographic shifts, and significant financial pressures at Sonoma State University, San Francisco State University, and CSU East Bay, the San Francisco Bay Region Network (SFBRN) is being launched. The SFBRN will consolidate the campuses' back-office administrative and transactional operations into a single, cost-effective structure.

The consolidated operations will include:

- Information Technology
- Human Resources
- Procurement
- Accounts Payable

Because SFBRN's exposures to loss must be allocated among the three campuses, a rating allocation plan will be required.

The Program Administrator was directed to:

- Draft an internal memo outlining how claim costs will be allocated between the participating entities, and
- Include the memo as an information item on the October CSURMA Executive Committee agenda.

D8. AI Campus Security

There has been growing interest in Artificial Intelligence (AI) Security across the CSU system. While some campuses may already have limited AI-based security measures in place, there is currently no systemwide solution.

The Committee directed the Program Administrator to consult with a subject matter expert and bring a formal recommendation to the Executive Committee.

D9. Liability Program Scope of Coverage for Entrepreneurial Activities

Staff recently became aware that a campus hosted a large-scale music concert with approximately 50,000 attendees. Historically, events of this magnitude were typically organized by third-party promoters, with the University serving as the venue host and receiving compensation for facility use and security services. In such cases, the University benefited from liability protections through the promoter's indemnification and insurance, as required by the facilities use agreement.

As campuses begin to take a more active role in planning and managing these types of events, there is a potential increase in liability exposure that may not be fully addressed under CSURMA's Campus and Auxiliary Organization Liability Program coverage and funding structure.

The Committee directed the Program Administrator to:

- Add this topic to the FY 2025/26 Long-Range Action Plan, and
- Survey campuses and auxiliary organizations to assess the frequency and nature of these entrepreneurial activities.

E. AUXILIARY ORGANIZATIONS INSURANCE PROGRAMS

E1. AIME Program Update

Michael Beatty provided an overview of the AIME meeting.

E2. AORMA Programs Update

Chuck Kissel gave an overview of the AORMA Officers' Retreat, as well as the most recent AORMA Committee meeting.

F. CLOSED SESSION

1. CSU v. SELF
2. Rogers/Weber v. CSU
3. Marco v. CSU
4. Paredes/Ramos v. CSU
5. Roe v. CSU
6. Shepler v. CSU

A motion was made to enter closed session at 10:25 AM.

Motion: Rose McAuliffe

Second: Chuck Kissel

NAME	AYE	ABSTAIN	NAY	ABSENT
Scott Apel	X			
Mike Beatty	X			
Colin Donahue	X			
Robert Eaton	X			
Chuck Kissel	X			
Rose McAuliffe	X			
Bill Olmsted	X			
Lynniece Warren	X			
Jeff Wilson	X			

Motion carried.

The Committee came out of closed session at 10:57 AM. The Chair reported that no action was taken during the closed session.

G. INFORMATION ITEMS

The Committee reviewed the information items, and no action was taken.

- G1. Campus Workers' Compensation Program Aggregate Stop Loss Coverage Status (PARCEL)**
- G2. CSURMA Committee Member Professional Development**
- G3. CSURMA Meeting Calendar**

The Executive Committee will meet on December 5, 2025, at the Alliant Irvine office. Therefore, the January 2026 meeting traditionally held during the AOA conference will be canceled.

- G4. FY 2025/26 Long Range Planning Goals**
- G5. CSURMA Administrative Service Calendar**
- G6. CSURMA Executive Committee & Staff Contact List**

H. ADJOURNMENT

The meeting was adjourned at 10:59 PM.

FINANCIAL REPORTS
FINANCIAL STATEMENT AT SEPTEMBER 30, 2025

ISSUE: The Chancellor's Office Financial Services prepares Financial Statements for CSURMA. The Executive Committee is asked to review the Draft Financial Statement as a part of the Consent Calendar. The Chancellor's Office, Systemwide Accounting and Reporting Staff will be available at the meeting to answer questions.

RECOMMENDATION: It is recommended that the Executive Committee review and accept the Draft Financial Statement at September 30, 2025 as a part of the Consent Calendar.

FISCAL IMPACT: None.

BACKGROUND: Financial Statements provide a status of CSURMA's financial position and are relied upon for decision making by the Executive Committee.

PUBLICATION: None.

ATTACHMENT(S):

- a. Draft Financial Statement at September 30, 2025

CSURMA

QUARTERLY REPORT

September 30, 2025

CSURMA
Financial Statements Quarterly Review
September 30, 2025

Executive Summary

- Total current assets, cash and investments (SWIFT): \$63,482,555 (44% of total investments)
 - Currently exceeds the target range of 15–40%
 - With upcoming payments, the balance will return to the target range in the next several months.
- Total claims payments & legal expenses: \$18,756,007
 - On track to meet FY2025/26 budget of \$82,701,568
 - Includes \$5,660,000 in IDL/NDI/UI accrued expenses (estimated based on historical data)

Program Cash Deficits & Offsetting Assets

1. Campus Worker's Compensation | Operating cash shortfall: \$9,207,093

- Offsetting assets:
 - Long-term investments: \$37,601,314
 - Accounts receivable: \$1,071,367
- Cause: Mainly due to the PY Dividends payout of \$7.50M.
- Recovery plan: Under further discussion, and no Dividends declared in FY2025/26.

2. Auto Liability | Timing-related cash deficit: \$2,371,242

- Cause: Insurance premiums were paid in excess of the contributions collected from members.
- Recovery plan: None. Premiums in FY 27/28 will need to address this.

3. AORMA Property | Timing-related cash deficit: \$1,090,166

- Offsetting assets:
 - Long-term investments: \$1,222,466
 - Accounts receivable: \$4,091,161
- Cause: Insurance premiums were paid in excess of the contributions collected from members.
- Recovery plan: Expect to be reduced by year-end with the premium and assessments collections.

4. AORMA UIP | Timing-related cash deficit: \$1,915,839

- Offsetting assets:
 - Long-term investments: \$3,361,538
 - Accounts receivable: \$38,162
- Cause: Timing difference between claim disbursements and quarterly billing.
- Recovery plan: None. Premiums in FY 26/27 will address this.

5. Miscellaneous Purchased Insurance | Timing-related cash deficit: \$158,676

- Offsetting assets:
 - Accounts receivable: \$67,947
- Cause: Timing difference between CSU International Program insurance premium payment (\$200,000).
- Recovery plan: Expect to be reduced by year-end.

Budget Variances (>10% or \$100k threshold)

1. Positive Variances

- Investment Income
 - Amount: Exceeded budget by \$18,088 (101%)
 - Reason: Increased portfolio earnings

2. Negative Variances

- JPA insurance
 - Amount: Exceeded budget by \$12,256 (115%)
 - Reason: The Budget was approved in May 2025 before the Annual Premium increase was known.


Jeni Kitchell (Oct 14, 2025 08:10:18 PDT)

Jeni Kitchell

Assistant Vice Chancellor for Finance and Budget Administration/ Controller

Date Oct 14, 2025

California State University Risk Management Authority

Account Receivable Aging by Member

As of : September 30, 2025

Campus	Member	Current	31-60	61-90	91-120	Balance
POMONA	ASSOC STUDENTS INC - CAL POLY POMONA	76,548				76,548
SACRAMENTO	ASSOC STUDENTS INC - SACRAMENTO STATE	21,913				21,913
BAKERSFIELD	CSU BAKERSFIELD AUXILIARY	9,031			52,736	61,767
NORTHRIDGE	THE UNIVERSITY CORPORATION	70,410				70,410
b MONTEREY BAY	UNIVERSITY CORP AT MONTEREY BAY	140,805	198	2,504	2,770,297	2,913,804
SACRAMENTO	UNIVERSITY ENTERPRISES INC	347,629				347,629
SAN JOSE	SAN JOSE STATE UNIV RESEARCH FOUNDATION	46,395	9,193			55,588
SAN LUIS OBISPO	CAL POLY CORPORATION	155,341				155,341
POMONA	CAL POLY POMONA FOUNDATION INC.	196,949				196,949
HUMBOLDT	HUMBOLDT SU SPONSORED PROGRAM FOUNDATION	59,977				59,977
SAN BERNARDINO	SANTOS MANUEL STUDENT UNION OF CSUSB	3,280	18,447			21,727
CHICO	CHICO STATE ENTERPRISES	99,643				99,643
FULLERTON	CSU FULLERTON AUXILIARY SERVICES CORP	130,939				130,939
DOMINGUEZ HILLS	ASSOC STUDENTS INC - CSU DOMINGUEZ HILLS	353	5,950			6,303
EAST BAY	ASSOC STUDENTS INC - CSU EAST BAY	3,478				3,478
a FULLERTON	ASSOC STUDENTS INC - CSU FULLERTON	25,360	43,513		335,841	404,714
HUMBOLDT	ASSOC STUDENTS INC - HUMBOLDT STATE	1,880			12,465	14,345
a SAN FRANCISCO	ASSOC STUDENTS INC - SAN FRANCISCO STATE	10,114	11,095			21,209
SAN LUIS OBISPO	ASSOC STUDENTS INC - CAL POLY SLO	21,914				21,914
a SONOMA	ASSOC STUDENTS INC - CSU SONOMA	2,634	767		16,970	20,371
STANISLAUS	ASSOC STUDENTS INC - CSU STANISLAUS	798				798
SAN BERNARDINO	UNIVERSITY ENTERPRISES CORPORATION	66,037				66,037
SAN DIEGO	AZTEC SHOPS LTD	187,116				187,116
a NORTHRIDGE	CSU NORTHRIDGE FOUNDATION	3,373			14,478	17,851
a FRESNO	CSU FRESNO ASSOCIATION	225,431			1,219,972	1,445,403
a NORTHRIDGE	CSU NORTHRIDGE NORTH CAMPUS PARK DEVELOP	2,279			10,653	12,932
DOMINGUEZ HILLS	D P & K B LOKER UNIV STUDENT UNION INC	1,756				1,756
a SACRAMENTO	CAPITAL PUBLIC RADIO	212,770	12,030			224,800
MONTEREY BAY	CSU MONTEREY BAY FOUNDATION	2,123			10,542	12,665
DOMINGUEZ HILLS	CSUDH TORO AUXILIARY PARTNERS	44,289				44,289
CHICO	ASSOC STUDENTS INC - CSU CHICO	105				105
LONG BEACH	ASSOC STUDENTS INC - CSU LONG BEACH	18,915				18,915
SAN BERNARDINO	ASSOC STUDENTS INC - CSU SAN BERNARDINO	2,502				2,502
SAN DIEGO	ASSOC STUDENTS INC - SAN DIEGO STATE	43,836				43,836
SAN JOSE	ASSOC STUDENTS INC - SAN JOSE STATE	9,176				9,176
a FRESNO	CSU FRESNO ATHLETIC CORPORATION	32,739			557,491	590,230
LONG BEACH	CSU LONG BEACH RESEARCH FOUNDATION	102,997				102,997
LONG BEACH	FORTY-NINER SHOPS INC, CSU LONG BEACH	15,789				15,789
LOS ANGELES	CALSTATE LA AUXILIARY SERVICES, INC.	47,741				47,741
SAN DIEGO	SAN DIEGO STATE UNI RESEARCH FOUNDATION	236,255				236,255

California State University Risk Management Authority

Account Receivable Aging by Member

As of : September 30, 2025

	Campus	Member	Current	31-60	61-90	91-120	Balance
a	SAN MARCOS	CSU SAN MARCOS CORPORATION	67,861	411		339,259	407,531
	BAKERSFIELD	CSU BAKERSFIELD FOUNDATION	3,638				3,638
	MONTEREY BAY	CSUMB OTTER STUDENT UNION	3,717			28,156	31,873
a	SAN JOSE	TOWER FOUNDATION	4,592			37,086	41,678
	SAN FRANCISCO	UNIVERSITY CORPORATION, SF STATE	5,566				5,566
	SAN JOSE	STUDENT UNION INC., SJSU	4,465				4,465
	CHANNEL ISLAND	ASSOC STUDENTS INC - CSU CHANNEL ISLANDS	2,355				2,355
	MARITIME	ASSOC STUDENTS INC - CSU MARITIME ACADEM	2,086			10,653	12,739
	SAN BERNARDINO	CSUSB PHILANTHROPIC FDN	2,411				2,411
	BAKERSFIELD	ASSOC STUDENTS INC - CSU BAKERSFIELD	2,515			13,765	16,280
a	FRESNO	ASSOC STUDENTS INC - FRESNO STATE	3,820			37,277	41,097
	LOS ANGELES	ASSOC STUDENTS INC - CSU LOS ANGELES	2,326				2,326
	SAN MARCOS	ASSOC STUDENTS INC - CSU SAN MARCOS	3,021			12,190	15,211
a	CO	CSU - FOUNDATION	2,019			11,977	13,996
	EAST BAY	CSUEB - FOUNDATION	5,262				5,262
	SACRAMENTO	UNIVERSITY UNION OPERATION of CSUS, INC	23,299				23,299
	FULLERTON	CSU FULLERTON PHILANTHROPIC FOUNDATION	3,017				3,017
a	SAN MARCOS	CSU SAN MARCOS FOUNDATION	2,385			11,448	13,833
	SAN JOSE	SPARTAN SHOPS, INC.	10,548				10,548
	CHICO	CSU CHICO UNIVERSITY FOUNDATION	3,695				3,695
	MARITIME	CALIFORNIA MARITIME ACADEMY FOUNDATION	3,166				3,166
	LOS ANGELES	CSU LOS ANGELES FOUNDATION	1,892				1,892
	CHANNEL ISLAND	CSU CHANNEL ISLANDS FOUNDATION	2,073				2,073
	HUMBOLDT	HUMBOLDT STATE UNIVERSITY FOUNDATION	3,244				3,244
	SONOMA	SONOMA STATE UNIVERSITY FOUNDATION	3,512				3,512
	STANISLAUS	STANISLAUS STATE FOUNDATION	5,072				5,072
	CHANNEL ISLAND	CHANNEL ISLANDS UNIV AUX SVCS, INC.				76,495	76,495
	STANISLAUS	CSU STANISLAUS AUXILIARY & BUSINESS SVCS	8,680				8,680
a	FRESNO	FRESNO STATE PROGRAM FOR CHILDREN	5,981			29,917	35,898
a	FRESNO	THE AGRICULTURAL FOUNDATION, CSU FRESNO	5,502			46,294	51,796
a	SONOMA	SONOMA STATE UNIVERSITY ENTERPRISES, INC	12,167	1,000		75,267	88,434
	BAKERSFIELD	STUDENT UNION OF CSU BAKERSFIELD	5,393			45,162	50,555
	CHICO	AUXILIARY ORGANIZATION ASSOCIATION	2,071			10,653	12,724
	EAST BAY	CAL STATE EAST BAY EDUCATIONAL FDN	2,071				2,071
	POMONA	CAL POLY POMONA PHILANTHROPIC FDN	1,857				1,857
	SAN LUIS OBISPO	CAL POLY FOUNDATION	2,884			17,453	20,337
	SAN FRANCISCO	SFSU FOUNDATION	2,099				2,099
	MARITIME	CAL MARITIME CORPORATION	6,528			48,686	55,214
	SAN DIEGO	SDSU MISSION VALLEY ENTERPRISES	568				568
	LONG BEACH	LONG BEACH STATE FOUNDATION	2,905				2,905

California State University Risk Management Authority

Account Receivable Aging by Member

As of : September 30, 2025

Campus	Member	Current	31-60	61-90	91-120	Balance
CHICO	THE UNIVERSITY FOUNDATION	2,370				2,370
FRESNO	CSU FRESNO FOUNDATION	75,760				75,760
DOMINGUEZ HILLS	CSU DOMINGUEZ HILLS PHILANTHROPIC FDN	2,126				2,126
LONG BEACH	CSULB FORTY-NINER FOUNDATION(OLD)	3,076				3,076
SAN DIEGO	THE CAMPANILE FOUNDATION, SDSU	1,510				1,510
c	To accrue AO Dividends - 2nd Installment for FY26/27	92,501				92,501
c	To accrue 26-27 AO LiabAssessment	962,144				962,144
c	To accrue 2526 Cmps Liab Assessmt	5,000,000				5,000,000
c	To accrue Doshi Recovery - Continental Insurance	1,500,000				1,500,000
c	To accrue AR for FY2526 Q1 Campus Deductible Recovery	1,824,051				1,824,051
c	To accrue AR Excess Amounts >125K as of 09.30.25	1,075,679				1,075,679
c	To accrue AG Invoice #833283	1,710				1,710
c	To accrue AG Invoice #826033	1,767				1,767
Total		\$ 13,459,576	102,604	2,504	5,853,183	\$ 19,417,867

Notes pertaining to AORMA invoices & JE

- a** Members have indicated that payment will be processed for over 30-day invoices
- b** Invoice is being paid by installment.
- c** Accrual JEs

California State University Risk Management Authority

Travel Expense Report

July 1, 2025 to September 30, 2025

Travel Dates	Traveler	Location	Purpose	Lodging	Meals & Incidentals	Transportation & Business Expenses	Concur Fees	Total Amount
07/08/25-07/08/25	Novak Brown, Jamie Jennifer	Los Angeles, CA	SCHEEM Meeting July 2025			32.90		\$ 32.90
07/14/25-07/14/25	Novak Brown, Jamie Jennifer	San Marcos, CA	CSU Emergency Managers Workshop			116.20		116.20
TOTAL				\$ —	—	149.10	—	\$ 149.10

California State University Risk Management Authority

Statement of Net Position - Campus Programs

As of 9/30/2025

(Unaudited)

	Liability	Workers' Compensation	IDL/NDI/UI	Property	AIME	Auto Liability	Total Campus Programs
Assets:							
Current assets:							
Cash and Investments	\$ 31,585,838	(9,207,093)	17,244,779	21,015,471	3,812,349	(2,371,242)	62,080,101
Accounts receivable	6,828,326	1,071,367	—	—	—	—	7,899,693
Reinsurance receivable	—	—	—	—	—	—	—
Prepaid insurance	—	—	—	—	—	—	—
Prepaid expense	—	1,795,000	—	—	799,815	—	2,594,815
Noncurrent assets:							
Other long-term investments	19,449,639	37,601,314	4,518,134	1,804,809	3,585,035	—	66,958,931
Capital assets, net	818,125	—	—	—	—	—	818,125
Total assets:	\$ 58,681,928	31,260,588	21,762,913	22,820,280	8,197,199	(2,371,242)	140,351,665
Liabilities:							
Current liabilities:							
Accounts payable	\$ 308,106	577,879	5,660,000	—	326,496	—	6,872,481
Unearned revenues	416,667	—	—	—	—	—	416,667
Interest Payable	5,790	—	—	—	—	—	5,790
SBITA liabilities - current portion	20,039	—	—	—	—	—	20,039
Reported claims, current	12,261,579	2,166,061	—	—	48,590	—	14,476,230
Claims incurred but not reported, current	12,128,221	433,948	—	—	1,388,283	—	13,950,452
Noncurrent liabilities:							
SBITA liabilities - net of current portion	135,401	—	—	—	—	—	135,401
Reported claims, noncurrent	22,063,742	3,897,656	—	—	87,434	—	26,048,832
Claims incurred but not reported, noncurrent	21,823,774	780,856	—	—	2,498,105	—	25,102,735
Total liabilities:	69,163,318	7,856,400	5,660,000	—	4,348,908	—	87,028,626
Fund balance	(10,481,390)	23,404,188	16,102,913	22,820,280	3,848,290	(2,371,242)	53,323,039
Total liabilities and fund balance	\$ 58,681,928	31,260,588	21,762,913	22,820,280	8,197,199	(2,371,242)	140,351,665

California State University Risk Management Authority

Statement of Net Position - AORMA Programs

As of 9/30/2025

(Unaudited)

	AORMA Liability	AORMA Workers' Comp	AORMA Property	AORMA Crime	AORMA UIP	Total AORMA Programs
Assets:						
Current assets:						
Cash and Investments	\$ 1,909,825	558,901	(1,090,166)	829,298	(1,915,839)	292,019
Accounts receivable	6,768,386	443,509	4,091,161	109,008	38,162	11,450,227
Reinsurance receivable	—	—	—	—	—	—
Prepaid insurance	—	—	—	—	—	—
Prepaid expense	—	155,000	—	—	—	155,000
Noncurrent assets:						
Other long-term investments	5,398,803	3,407,239	1,222,466	285,117	3,361,538	13,675,163
Capital assets, net	—	—	—	—	—	—
Total assets:	\$ 14,077,015	4,564,648	4,223,461	1,223,423	1,483,861	25,572,409
Liabilities:						
Current liabilities:						
Accounts payable	\$ 348	537,898	299	15	373,000	911,560
Unearned revenues	—	—	—	—	—	—
Interest Payable	—	—	—	—	—	—
SBITA liabilities - current portion	—	—	—	—	—	—
Reported claims, current	1,405,345	6,964	—	—	—	1,412,309
Claims incurred but not reported, current	2,176,244	6,906	—	—	—	2,183,150
Noncurrent liabilities:						
SBITA liabilities - net of current portion	—	—	—	—	—	—
Reported claims, noncurrent	2,528,807	12,532	—	—	—	2,541,339
Claims incurred but not reported, noncurrent	3,915,979	12,427	—	—	—	3,928,406
Total liabilities:	10,026,723	576,727	299	15	373,000	10,976,764
Fund balance	4,050,292	3,987,921	4,223,162	1,223,409	1,110,861	14,595,645
Total liabilities and fund balance	\$ 14,077,015	4,564,648	4,223,461	1,223,423	1,483,861	25,572,409

California State University Risk Management Authority

Statement of Net Position - Miscellaneous Programs

As of 9/30/2025

(Unaudited)

	Miscellaneous Purchased	Club Sports	Total Miscellaneous Programs	Grand Total All Programs
Assets:				
Current assets:				
Cash and Investments	\$ (158,676)	1,269,110	1,110,435	63,482,555
Accounts receivable	67,947	—	67,947	19,417,867
Reinsurance receivable	—	—	—	—
Prepaid insurance	—	—	—	—
Prepaid expense	—	12,692	12,692	2,762,507
Noncurrent assets:				
Other long-term investments	—	110,820	110,820	80,744,914
Capital assets, net	—	—	—	818,125
Total assets:	\$ (90,728)	1,392,622	1,301,894	167,225,968
Liabilities:				
Current liabilities:				
Accounts payable	\$ —	—	—	7,784,042
Unearned revenues	—	—	—	416,667
Interest Payable	—	—	—	5,790
SBITA liabilities - current portion	—	—	—	20,039
Reported claims, current	—	—	—	15,888,539
Claims incurred but not reported, current	—	—	—	16,133,602
Noncurrent liabilities:				
SBITA liabilities - net of current portion	—	—	—	135,401
Reported claims, noncurrent	—	—	—	28,590,171
Claims incurred but not reported, noncurrent	—	—	—	29,031,141
Total liabilities:	—	—	—	98,005,391
Fund balance	(90,729)	1,392,622	1,301,893	69,220,578
Total liabilities and fund balance	\$ (90,728)	1,392,622	1,301,894	167,225,968

California State University Risk Management Authority
Statement of Revenues, Expenses, and Changes in Net Position - Campus Programs
As of 9/30/2025
(Unaudited)

	Liability	Workers' Compensation	IDL/NDI/UI	Property	AIME	Auto Liability	Total Campus Programs
OPERATING REVENUES:							
Contributions	\$ 44,853,935	34,940,364	14,991,757	41,226,764	4,282,080	4,024,468	144,319,368
Reinsurance premiums	(2,945,638)	—	—	(27,061,626)	—	—	(30,007,264)
Total operating revenues:	41,908,298	34,940,364	14,991,757	14,165,138	4,282,080	4,024,468	114,312,105
OPERATING EXPENSES:							
DIRECT PROGRAM EXPENSES:							
Claims payment & legal expenses	5,509,312	3,682,186	5,690,000	1,511,843	1,214,584	—	17,607,924
Deductible recoveries	(1,824,051)	—	—	—	—	—	(1,824,051)
Claims administrators	—	1,733,786	22,438	—	120,000	—	1,876,223
Claims management information systems	81,790	61,847	—	30,363	—	—	174,000
Program administrator	77,845	213,050	49,166	65,554	4,097	—	409,712
Brokerage commissions	2,956,493	2,189	938	832,955	994	—	3,793,569
Insurance premiums	22,651,194	31,488,780	—	3,281,798	3,918	3,078,149	60,503,839
Taxes, assessments & fees	—	—	—	—	—	—	—
Actuarial services	4,802	4,802	—	1,746	4,802	—	16,151
Claims audit	5,000	—	—	—	11,000	—	16,000
Workshops/training	12,466	10,270	4,364	13,734	—	—	40,833
Loss control	222,654	54,849	—	17,792	—	—	295,295
Reinsurance/excess recoveries	(400,000)	(2,793,528)	—	—	—	—	(3,193,528)
Dividend distributions (Assessment collections)	(5,000,000)	—	—	—	—	—	(5,000,000)
Total direct program expenses:	24,297,504	34,458,230	5,766,905	5,755,784	1,359,395	3,078,149	74,715,967
GENERAL & ADMINISTRATIVE EXPENSES:							
Financial audit	—	—	—	—	—	—	—
Executive Committee & Board expenses	177	135	58	177	19	—	567
JPA insurance	15,981	12,290	5,268	16,115	1,699	—	51,353
Memberships, associations & dues	4,670	28,643	1,635	5,145	562	—	40,655
Chancellor's Office Overhead Costs	186,594	141,294	60,625	184,878	19,416	—	592,806
Total general & administrative expenses:	207,422	182,362	67,585	206,315	21,696	—	685,380
Total operating expenses:	24,504,926	34,640,591	5,834,491	5,962,099	1,381,090	3,078,149	75,401,347
NON-OPERATING REVENUES:							
Investment income (loss)	363,892	703,908	84,499	33,451	67,102	—	1,252,852
Total non-operating revenues:	363,892	703,908	84,499	33,451	67,102	—	1,252,852
BEGINNING RETAINED EARNINGS	(28,248,653)	22,400,507	6,861,148	14,583,790	880,199	(3,317,561)	13,159,430
NET SURPLUS(DEFICIT)	17,767,264	1,003,681	9,241,765	8,236,490	2,968,091	946,319	40,163,609
ENDING RETAINED EARNINGS	\$ (10,481,390)	23,404,188	16,102,913	22,820,280	3,848,290	(2,371,242)	53,323,039

California State University Risk Management Authority
Statement of Revenues, Expenses, and Changes in Net Position - AORMA Programs
As of 9/30/2025
(Unaudited)

	AORMA Liability	AORMA Workers' Comp	AORMA Property	AORMA Crime	AORMA UIP	Total AORMA Programs
OPERATING REVENUES:						
Contributions	\$ 11,636,255	2,327,618	9,754,295	493,132	385,733	24,597,032
Reinsurance premiums	(3,925,274)	—	(7,831,343)	—	—	(11,756,616)
Total operating revenues:	7,710,981	2,327,618	1,922,952	493,132	385,733	12,840,416
OPERATING EXPENSES:						
DIRECT PROGRAM EXPENSES:						
Claims payment & legal expenses	468,113	257,294	15,446	—	373,000	1,113,852
Deductible recoveries	—	—	—	—	—	—
Claims administrators	4,500	170,996	—	—	7,396	182,891
Claims management information systems	7,828	1,873	6,725	—	—	16,427
Program administrator	182,915	112,862	73,944	7,784	11,675	389,180
Brokerage commissions	645,988	151	252,932	26,852	78	926,001
Insurance premiums	1,597,857	2,245,227	331,038	249,919	—	4,424,042
Taxes, assessments & fees	—	—	—	—	—	—
Actuarial services	4,802	4,802	1,746	—	—	11,349
Claims audit	6,500	—	—	—	—	6,500
Miscellaneous program services	—	—	—	—	—	—
Workshops/training	15,564	6,517	20,778	891	—	43,750
Loss control	23,914	4,767	7,490	—	—	36,171
Reinsurance/excess recoveries	(471,005)	(151,599)	—	—	—	(622,604)
Program committee	635	122	545	27	—	1,328
Dividend distributions (Assessment collections)	(268,303)	(368,234)	—	—	—	(636,536)
Total direct program expenses:	2,219,309	2,284,777	710,645	285,473	392,148	5,892,352
GENERAL & ADMINISTRATIVE EXPENSES:						
Financial audit	—	—	—	—	—	—
Executive Committee & Board expenses	46	9	39	2	5	101
JPA insurance	18,799	3,680	16,290	798	2,050	41,617
Memberships, associations & dues	—	2,755	—	—	—	2,755
Chancellor's Office Overhead Costs	47,666	9,162	40,950	2,012	5,201	104,992
Total general & administrative expenses:	66,511	15,606	57,279	2,811	7,256	149,464
Total operating expenses:	2,285,820	2,300,383	767,924	288,284	399,405	6,041,816
NON-OPERATING REVENUES:						
Investment income (loss)	101,016	63,791	22,816	5,336	62,943	255,902
Total non-operating revenues:	101,016	63,791	22,816	5,336	62,943	255,902
BEGINNING RETAINED EARNINGS	(1,475,885)	3,896,895	3,045,318	1,013,226	1,061,589	7,541,143
NET SURPLUS(DEFICIT)	5,526,177	91,026	1,177,845	210,183	49,271	7,054,502
ENDING RETAINED EARNINGS	\$ 4,050,292	3,987,921	4,223,162	1,223,409	1,110,861	14,595,645

California State University Risk Management Authority
Statement of Revenues, Expenses, and Changes in Net Position - Miscellaneous Programs
As of 9/30/2025
(Unaudited)

	Misc Purchased	Club Sports	Total Miscellaneous Programs	Grand Total All Programs
OPERATING REVENUES:				
Contributions	\$ 399,079	107,568	506,648	169,423,048
Reinsurance premiums	—	—	—	(41,763,880)
Total operating revenues:	399,079	107,568	506,648	127,659,168
OPERATING EXPENSES:				
DIRECT PROGRAM EXPENSES:				
Claims payment & legal expenses	—	34,230	34,230	18,756,007
Deductible recoveries	—	—	—	(1,824,051)
Claims administrators	—	8,000	8,000	2,067,114
Claims management information systems	—	—	—	190,427
Program administrator	—	—	—	798,892
Brokerage commissions	87,261	6,501	93,761	4,813,331
Insurance premiums	517,556	36,673	554,229	65,482,109
Taxes, assessments & fees	—	—	—	—
Actuarial services	—	—	—	27,500
Miscellaneous program services	—	—	—	—
Workshops/training	—	—	—	84,583
Loss control	—	—	—	331,466
Reinsurance/excess recoveries	—	—	—	(3,816,132)
Program committee	—	—	—	1,328
Dividend distributions (Assessment collections)	—	—	—	(5,636,536)
Total direct program expenses:	604,816	85,404	690,220	81,298,539
GENERAL & ADMINISTRATIVE EXPENSES:				
Financial audit	—	—	—	—
Executive Committee & Board expenses	—	2	2	669
JPA insurance	—	163	163	93,133
Memberships, associations & dues	—	—	—	43,410
Chancellor's Office Overhead Costs	—	1,827	1,827	699,624
Miscellaneous indirect services	—	—	—	—
Total general & administrative expenses:	—	1,992	1,992	836,836
Total operating expenses:	604,816	87,396	692,212	82,135,375
NON-OPERATING REVENUES:				
Investment income (loss)	—	2,072	2,072	1,510,826
Transfers In/Out	—	—	—	—
Total non-operating revenues:	—	2,072	2,072	1,510,826
BEGINNING RETAINED EARNINGS	115,008	1,370,378	1,485,386	22,185,959
NET SURPLUS(DEFICIT)	(205,737)	22,245	(183,492)	47,034,619
ENDING RETAINED EARNINGS	\$ (90,729)	1,392,622	1,301,893	69,220,578

California State University Risk Management Authority
Statement of Revenues, Expenses, and Changes in Net Position
As of 9/30/2025
(Unaudited)

	Budget vs. Actual			
	FY25-26 Budget	YTD Actual	Variance Favorable (Unfavorable)	Actual as % of Budget
OPERATING REVENUES:				
Contributions	\$ 177,342,484	169,423,048	(7,919,436)	96 %
Reinsurance premiums	(46,904,460)	(41,763,880)	5,140,580	89 %
Total operating revenues:	130,438,024	127,659,168	(2,778,856)	98 %
OPERATING EXPENSES:				
DIRECT PROGRAM EXPENSES:				
Claims payment & legal expenses	82,701,568	18,756,007	63,945,561	23 %
Deductible recoveries	(8,190,547)	(1,824,051)	(6,366,496)	22 %
Claims administrators	4,589,278	2,067,114	2,522,164	45 %
Claims management information systems	381,768	190,427	191,341	50 %
Program administrator	3,195,568	798,892	2,396,676	25 %
Brokerage commissions	5,026,397	4,813,331	213,066	96 %
Insurance premiums	68,439,795	65,482,109	2,957,686	96 %
Taxes, assessments & fees	246,998	—	246,998	— %
Actuarial services	31,270	27,500	3,770	88 %
Claims audit	22,500	22,500	—	100 %
Coverage counsel	15,000	—	15,000	— %
Program legal	24,500	—	24,500	— %
Miscellaneous program services	10,000	—	10,000	— %
Workshops/training	310,500	84,583	225,917	27 %
Loss control	1,849,445	331,466	1,517,979	18 %
Reinsurance/excess recoveries	(24,652,033)	(3,816,132)	(20,835,901)	15 %
Program committee	15,000	1,328	13,672	9 %
Dividend distributions (Assessment collections)	(6,794,085)	(5,636,536)	(1,157,549)	83 %
Total direct program expenses:	127,222,922	81,298,539	45,924,383	64 %
GENERAL & ADMINISTRATIVE EXPENSES:				
Financial audit	40,000	—	40,000	— %
Executive Committee & Board expenses	10,000	669	9,331	7 %
JPA insurance	80,877	93,133	(12,256)	115 %
Memberships, associations & dues	70,735	43,410	27,326	61 %
Chancellor's Office Overhead Costs	2,781,672	699,624	2,082,048	25 %
Miscellaneous indirect services	43,050	—	43,050	— %
Total general & administrative expenses:	3,026,334	836,836	2,189,498	28 %
Total operating expenses:	130,249,256	82,135,375	48,113,881	63 %
NON-OPERATING REVENUES:				
Investment income (loss)	1,492,738	1,510,826	18,088	101 %
Total non-operating revenues:	1,492,738	1,510,826	18,088	101 %
NET SURPLUS (DEFICIT)	\$ 1,681,506	47,034,619	45,353,113	2797 %

**FINANCIAL REPORT
TREASURER’S QUARTERLY INVESTMENT REPORT AT
SEPTEMBER 30, 2025**

ISSUE: California Government Code Section 53646(b)(1) requires that the CSURMA Treasurer submit a Quarterly Investment Report stating that all investments are in compliance with the current investment policy and that CSURMA has sufficient funds to meet its expenditure requirements for the next six months. The CSURMA Treasurer will be on hand to address questions.

RECOMMENDATION: It is recommended that the Executive Committee review and accept the Treasurer’s quarterly report as part of the Consent Calendar.

FISCAL IMPACT: None.

BACKGROUND: None.

PUBLICATION: None.

ATTACHMENT(S):

- a. Treasurer’s Certification Letter dated October 13, 2025



Officers

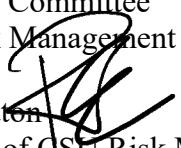
Scott Apel
Chair – 562-985-1658

Thom Davis
Vice Chair – 661-654-2287

Robert Eaton
Treasurer - 562-951-4572

Zachary Gifford
Secretary-Auditor - 562-951-4568

To: Executive Committee
CSU Risk Management Authority

From: Robert Eaton 
Treasurer of CSU Risk Management Authority

Re: Treasurer's Certification

Date: October 13, 2025

As of September 30, 2025, the Authority funds held in investments are sufficient to meet the Authority's cash flow needs for the following six (6) months, and the investments are in accordance with the investment policy of the Authority, as duly authorized by the Executive Committee.

Robert Eaton
Treasurer
CSU Risk Management Authority

**CAMPUS RISK POOLS & GROSS FUNDING
REVISION TO PROPERTY AND AIME RATING**

ISSUE: The Committee is asked to approve the updated FY 2026/27 rating for the Campus Property and AIME Programs. The total insurable values used in the Campus Property Program rating have been updated. Alliant is in the process of updating its property database, which maintains all member property values. The database was offline from June 30, 2025, through October 1, 2025; therefore, any changes made after June 30, 2025, were not reflected in the FY 2026/27 Property Program rating information presented to the Executive Committee in September 2025.

Additionally, the athletics' census, used in developing the AIME rating, was not finalized until September 25, 2025. The FY 2026/27 AIME rating has been updated to reflect the finalized census data.

RECOMMENDATION: The Executive Committee is asked to recommend to the Board of Directors adoption of the Campus coverage programs funding for FY 26/27.

FISCAL IMPACT: Calculations of the recommended funding for the Campus coverage programs are in accordance with the policies and procedures and rating plans adopted and approved by the Board of Directors.

BACKGROUND: None.

PUBLICATION: None at this time, but the contributions approved by the Board will be included in the "early-bird" letter which will be sent out in November 2025.

ATTACHMENT(S):

- a. Comparison of Property and AIME Rating
- b. FY 2026/27 Campus Coverage Programs Proposed Funding (Draft)
- c. Policy & Procedure No.7 – Self-Insured Program Funding

CSURMA Risk Pools FY 2026/27
Cost Comparison

Campus	Property Cost Comparison				AIME Cost Comparison			
	9/5/2025	10/24/2025	\$ Chg	% Chg	9/5/2025	10/24/2025	\$ Chg	% Chg
Bakersfield	720,015	644,618	-75,397	-10%	203,677	209,451	5,774	3%
Channel Islands	666,604	652,264	-14,340	-2%	0	0	0	0%
Chico	1,646,680	1,621,096	-25,584	-2%	32,042	34,062	2,020	6%
Dominguez Hills	838,530	821,256	-17,274	-2%	118,525	121,811	3,286	3%
East Bay	1,413,505	1,385,311	-28,194	-2%	52,492	52,612	120	0%
Fresno	1,733,553	1,699,019	-34,534	-2%	506,251	519,605	13,354	3%
Fullerton	2,785,378	2,743,332	-42,046	-2%	286,135	292,526	6,391	2%
Humboldt	1,050,388	1,029,441	-20,947	-2%	41,217	42,532	1,315	3%
Long Beach	2,374,803	2,350,591	-24,212	-1%	649,895	667,204	17,309	3%
Los Angeles	1,987,240	1,947,630	-39,610	-2%	56,304	58,022	1,718	3%
Monterey Bay	609,428	596,851	-12,577	-2%	83,770	86,515	2,745	3%
Northridge	2,342,393	2,424,899	82,506	4%	255,341	262,943	7,602	3%
Pomona	1,849,386	1,830,409	-18,977	-1%	187,888	194,156	6,268	3%
Sacramento	1,947,883	1,907,850	-40,033	-2%	310,793	318,718	7,925	3%
San Bernardino	1,756,860	1,883,257	126,397	7%	55,442	56,685	1,243	2%
San Diego	3,064,295	2,995,140	-69,155	-2%	405,607	416,805	11,198	3%
San Francisco	4,326,966	4,257,210	-69,756	-2%	32,503	31,580	-923	-3%
San Jose	4,767,774	5,040,745	272,971	6%	550,510	565,309	14,799	3%
San Luis Obispo	2,431,775	2,521,431	89,656	4%	478,485	493,543	15,058	3%
San Marcos	833,390	816,855	-16,535	-2%	29,098	31,215	2,117	7%
Sonoma	1,346,501	1,332,739	-13,762	-1%	0	0	0	0%
Stanislaus	704,864	690,811	-14,053	-2%	63,183	64,731	1,548	2%
Chancellor's Office	145,337	142,543	-2,794	-2%	0	0	0	0%
Total	\$41,343,548	\$41,335,298	-\$8,250	0%	\$4,399,158	\$4,520,025	\$120,867	3%

**CSURMA Risk Pools FY 2026/27
All Programs Combined**

A	B	C	D	E	F	G	H	I	J	K	L	M
Campus	Current FY 25/26	Current FY 26/27	\$ Chg	% Chg	Current FY 25/26	Proposed FY 26/27	\$ Chg	% Chg	Current FY 26/27	Proposed FY 26/27	\$ Chg	% Chg
Liability	\$44,843,251	\$60,862,400	\$16,019,150	36%	\$44,843,251	\$60,269,625	\$15,426,374	34%	\$60,862,400	\$60,269,625	(\$592,775)	-1%
Workers' Compensation	34,940,364	37,722,012	2,781,648	8%	34,940,364	37,722,012	2,781,648	8%	37,722,012	37,722,012	\$0	0%
Property	41,215,726	41,335,300	119,574	0%	41,215,726	41,335,298	119,572	0%	41,335,300	41,335,298	(\$2)	0%
AIME	4,282,080	4,520,025	237,945	6%	4,282,080	4,520,025	237,945	6%	4,520,025	4,520,025	\$0	0%
Auto Liability	4,024,469	3,078,149	(946,320)	-24%	4,024,469	3,078,149	(946,320)	-24%	3,078,149	3,078,149	\$0	0%
IDL NDI UI	14,991,757	14,949,918	(41,839)	0%	14,991,757	14,949,918	(41,839)	0%	14,949,918	14,949,918	\$0	0%
Total	\$144,297,647	\$162,467,804	\$18,170,158	13%	\$144,297,647	\$161,875,027	\$17,577,380	12%	\$162,467,804	\$161,875,027	-\$592,777	0%

Current FY 25/26: Represents the contributions paid by the Campuses for the current fiscal year, using the current rating plan.

Current FY 26/27: Represents the contributions to be paid by the Campuses for FY 26/27, using the current rating plan.

Proposed FY 26/27: Represents the contributions to be paid by the Campuses for FY 26/27, if the BOD accepts all RPTG recommended revisions to the Coverage Program rating plans.

RPTG: Rating Plan Task Group

CSURMA Risk Pools FY 2026/27
All Programs Combined

A	B	C	D	E	F	G	H	I	J	K	L	M
Campus	Current FY 25/26	Current FY 26/27	\$ Chg	% Chg	Current FY 25/26	Proposed FY 26/27	\$ Chg	% Chg	Current FY 26/27	Proposed FY 26/27	\$ Chg	% Chg
Bakersfield	3,145,681	3,518,986	373,305	12%	3,145,681	3,463,009	317,327	10%	3,518,986	3,463,009	-55,978	-2%
Channel Islands	2,467,500	2,695,012	227,512	9%	2,467,500	2,630,658	163,158	7%	2,695,012	2,630,658	-64,354	-2%
Chico	5,005,428	5,440,512	435,084	9%	5,005,428	5,368,629	363,201	7%	5,440,512	5,368,629	-71,883	-1%
Dominguez Hills	4,795,800	5,237,491	441,691	9%	4,795,800	5,254,518	458,719	10%	5,237,491	5,254,518	17,027	0%
East Bay	4,622,568	4,841,584	219,016	5%	4,622,568	4,805,901	183,332	4%	4,841,584	4,805,901	-35,683	-1%
Fresno	7,392,477	8,789,272	1,396,794	19%	7,392,477	8,966,104	1,573,626	21%	8,789,272	8,966,104	176,832	2%
Fullerton	8,793,824	9,639,841	846,017	10%	8,793,824	9,818,269	1,024,445	12%	9,639,841	9,818,269	178,428	2%
Humboldt	3,595,494	3,902,599	307,105	9%	3,595,494	3,810,998	215,503	6%	3,902,599	3,810,998	-91,601	-2%
Long Beach	10,988,653	12,339,059	1,350,406	12%	10,988,653	12,058,730	1,070,078	10%	12,339,059	12,058,730	-280,328	-2%
Los Angeles	7,426,069	8,297,758	871,689	12%	7,426,069	8,463,817	1,037,747	14%	8,297,758	8,463,817	166,059	2%
Monterey Bay	2,662,770	3,012,388	349,618	13%	2,662,770	2,874,022	211,252	8%	3,012,388	2,874,022	-138,366	-5%
Northridge	9,542,085	10,606,440	1,064,354	11%	9,542,085	10,523,974	981,888	10%	10,606,440	10,523,974	-82,466	-1%
Pomona	7,925,750	9,327,756	1,402,006	18%	7,925,750	9,148,728	1,222,978	15%	9,327,756	9,148,728	-179,028	-2%
Sacramento	7,109,385	7,890,441	781,056	11%	7,109,385	7,753,597	644,212	9%	7,890,441	7,753,597	-136,844	-2%
San Bernardino	6,842,308	7,868,678	1,026,370	15%	6,842,308	7,556,488	714,180	10%	7,868,678	7,556,488	-312,191	-4%
San Diego	9,824,588	11,556,901	1,732,313	18%	9,824,588	11,611,085	1,786,497	18%	11,556,901	11,611,085	54,184	0%
San Francisco	8,854,492	9,863,977	1,009,486	11%	8,854,492	10,044,167	1,189,675	13%	9,863,977	10,044,167	180,190	2%
San Jose	10,530,572	12,338,762	1,808,190	17%	10,530,572	12,486,155	1,955,583	19%	12,338,762	12,486,155	147,393	1%
San Luis Obispo	10,062,032	11,128,610	1,066,578	11%	10,062,032	11,072,049	1,010,017	10%	11,128,610	11,072,049	-56,562	-1%
San Marcos	3,636,806	4,065,351	428,545	12%	3,636,806	4,030,869	394,063	11%	4,065,351	4,030,869	-34,483	-1%
Sonoma	4,024,027	4,399,948	375,921	9%	4,024,027	4,352,968	328,941	8%	4,399,948	4,352,968	-46,980	-1%
Stanislaus	3,359,947	3,965,051	605,104	18%	3,359,947	3,903,047	543,100	16%	3,965,051	3,903,047	-62,004	-2%
Chancellor's Office	1,689,390	1,741,386	51,996	3%	1,689,390	1,877,247	187,857	11%	1,741,386	1,877,247	135,861	8%
Total	\$144,297,647	\$162,467,804	\$18,170,158	13%	\$144,297,647	\$161,875,027	\$17,577,380	12%	\$162,467,804	\$161,875,027	-\$592,777	0%

Current FY 25/26: Represents the contributions paid by the Campuses for the current fiscal year, using the current rating plan.

Current FY 26/27: Represents the contributions to be paid by the Campuses for FY 26/27, using the current rating plan.

Proposed FY 26/27: Represents the contributions to be paid by the Campuses for FY 26/27, if the BOD accepts all RPTG recommended revisions to the Coverage Program rating plans.

RPTG: Rating Plan Task Group

CSURMA Risk Pools FY 2026/27
Liability Coverage Program - Cost Comparison

A	B	C	D	E	F	G	H	I	J	K	L	M
Campus	Current FY 25/26	Current FY 26/27	\$ Chg	% Chg	Current FY 25/26	Proposed FY 26/27	\$ Chg	% Chg	Current FY 26/27	Proposed FY 26/27	\$ Chg	% Chg
Bakersfield	1,086,229	1,467,243	381,014	35%	1,086,229	1,419,281	333,052	31%	1,467,243	1,419,281	(47,963)	-3%
Channel Islands	751,617	990,855	239,238	32%	751,617	933,745	182,128	24%	990,855	933,745	(57,110)	-6%
Chico	1,699,263	2,295,668	596,405	35%	1,699,263	2,188,063	488,800	29%	2,295,668	2,188,063	(107,605)	-5%
Dominguez Hills	1,750,110	2,230,115	480,005	27%	1,750,110	2,257,878	507,768	29%	2,230,115	2,257,878	27,763	1%
East Bay	1,266,801	1,620,249	353,449	28%	1,266,801	1,601,860	335,059	26%	1,620,249	1,601,860	(18,389)	-1%
Fresno	2,470,907	3,832,283	1,361,375	55%	2,470,907	4,026,097	1,555,190	63%	3,832,283	4,026,097	193,814	5%
Fullerton	2,696,848	3,699,331	1,002,483	37%	2,696,848	3,898,473	1,201,624	45%	3,699,331	3,898,473	199,142	5%
Humboldt	1,305,933	1,613,755	307,822	24%	1,305,933	1,535,003	229,069	18%	1,613,755	1,535,003	(78,752)	-5%
Long Beach	3,629,823	4,825,519	1,195,697	33%	3,629,823	4,562,905	933,082	26%	4,825,519	4,562,905	(262,614)	-5%
Los Angeles	2,662,667	3,547,062	884,395	33%	2,662,667	3,732,599	1,069,932	40%	3,547,062	3,732,599	185,537	5%
Monterey Bay	838,909	1,180,716	341,807	41%	838,909	1,050,167	211,258	25%	1,180,716	1,050,167	(130,549)	-11%
Northridge	2,493,995	3,341,043	847,048	34%	2,493,995	3,285,522	791,527	32%	3,341,043	3,285,522	(55,521)	-2%
Pomona	1,878,905	2,988,623	1,109,718	59%	1,878,905	2,818,977	940,072	50%	2,988,623	2,818,977	(169,646)	-6%
Sacramento	2,361,032	3,107,620	746,588	32%	2,361,032	2,985,836	624,804	26%	3,107,620	2,985,836	(121,784)	-4%
San Bernardino	2,420,534	3,578,565	1,158,031	48%	2,420,534	3,230,931	810,396	33%	3,578,565	3,230,931	(347,635)	-10%
San Diego	3,050,327	4,259,149	1,208,822	40%	3,050,327	4,357,566	1,307,239	43%	4,259,149	4,357,566	98,417	2%
San Francisco	2,064,762	2,549,198	484,437	23%	2,064,762	2,584,401	519,640	25%	2,549,198	2,584,401	35,203	1%
San Jose	2,752,224	3,935,498	1,183,275	43%	2,752,224	4,122,108	1,369,885	50%	3,935,498	4,122,108	186,610	5%
San Luis Obispo	2,665,705	3,246,461	580,756	22%	2,665,705	3,107,187	441,482	17%	3,246,461	3,107,187	(139,274)	-4%
San Marcos	1,364,166	1,844,639	480,473	35%	1,364,166	1,818,288	454,121	33%	1,844,639	1,818,288	(26,352)	-1%
Sonoma	1,127,370	1,591,328	463,958	41%	1,127,370	1,554,417	427,047	38%	1,591,328	1,554,417	(36,911)	-2%
Stanislaus	1,481,404	2,047,366	565,963	38%	1,481,404	1,990,635	509,231	34%	2,047,366	1,990,635	(56,731)	-3%
Chancellor's Office	1,023,720	1,070,112	46,392	5%	1,023,720	1,207,687	183,967	18%	1,070,112	1,207,687	137,575	13%
Total	\$44,843,251	\$60,862,400	\$16,019,150	36%	\$44,843,251	\$60,269,625	\$15,426,374	34%	\$60,862,400	\$60,269,625	-\$592,775	-1%

Includes funding for SPLIP, SAFECLIP, CLIP, Medical Malpractice, Aviation (all lines), Trustees E&O and Fiduciary Liability.

Current FY 25/26: Represents the contributions paid by the Campuses for the current fiscal year, using the current rating plan.

Current FY 26/27: Represents the contributions to be paid by the Campuses for FY 26/27, using the current rating plan.

Proposed FY 26/27: Represents the contributions to be paid by the Campuses for FY 26/27, if the BOD accepts all RPTG recommended revisions to the Coverage Program rating plans.

RPTG: Rating Plan Task Group

CSURMA Risk Pools FY 2026/27
Workers' Compensation Coverage Program - Cost Comparison

A	B	C	D	E
Campus	Current FY 25/26	Current FY 26/27	\$ Chg	% Chg
Bakersfield	773,930	810,581	36,651	5%
Channel Islands	697,150	764,702	67,552	10%
Chico	1,036,863	1,006,240	(30,623)	-3%
Dominguez Hills	1,429,774	1,406,148	(23,626)	-2%
East Bay	1,258,369	1,239,361	(19,008)	-2%
Fresno	1,697,712	1,926,901	229,189	13%
Fullerton	1,749,075	1,803,570	54,495	3%
Humboldt	651,744	709,028	57,284	9%
Long Beach	2,845,542	3,157,620	312,078	11%
Los Angeles	1,557,104	1,765,630	208,526	13%
Monterey Bay	770,194	805,852	35,658	5%
Northridge	2,754,026	2,863,335	109,309	4%
Pomona	2,910,916	3,144,030	233,114	8%
Sacramento	1,447,533	1,599,934	152,401	11%
San Bernardino	1,758,397	1,741,451	(16,946)	-1%
San Diego	2,229,974	2,814,166	584,192	26%
San Francisco	2,043,561	1,990,757	(52,804)	-3%
San Jose	1,547,708	1,594,477	46,769	3%
San Luis Obispo	2,946,492	3,560,157	613,665	21%
San Marcos	824,996	873,715	48,719	6%
Sonoma	904,357	941,002	36,645	4%
Stanislaus	669,252	763,487	94,235	14%
Chancellor's Office	435,695	439,868	4,173	1%
Total	\$34,940,364	\$37,722,012	\$2,781,648	8%

CSURMA Risk Pools FY 2026/27
Property Coverage Program - Cost Comparison

A	B	C	D	E	F	G	H	I	J	K	L	M
Campus	Current FY 25/26	Current FY 26/27	\$ Chg	% Chg	Current FY 25/26	Proposed FY 26/27	\$ Chg	% Chg	Current FY 26/27	Proposed FY 26/27	\$ Chg	% Chg
Bakersfield	686,971	652,633	(34,338)	-5%	686,971	644,618	(42,353)	-6%	652,633	644,618	(8,015)	-1%
Channel Islands	674,193	659,508	(14,685)	-2%	674,193	652,264	(21,929)	-3%	659,508	652,264	(7,244)	-1%
Chico	1,664,639	1,585,374	(79,265)	-5%	1,664,639	1,621,096	(43,543)	-3%	1,585,374	1,621,096	35,722	2%
Dominguez Hills	861,774	831,992	(29,782)	-3%	861,774	821,256	(40,518)	-5%	831,992	821,256	(10,736)	-1%
East Bay	1,473,463	1,402,605	(70,858)	-5%	1,473,463	1,385,311	(88,152)	-6%	1,402,605	1,385,311	(17,294)	-1%
Fresno	1,801,884	1,716,001	(85,883)	-5%	1,801,884	1,699,019	(102,865)	-6%	1,716,001	1,699,019	(16,982)	-1%
Fullerton	2,887,357	2,764,046	(123,311)	-4%	2,887,357	2,743,332	(144,025)	-5%	2,764,046	2,743,332	(20,714)	-1%
Humboldt	1,094,568	1,042,290	(52,278)	-5%	1,094,568	1,029,441	(65,127)	-6%	1,042,290	1,029,441	(12,849)	-1%
Long Beach	2,479,944	2,368,305	(111,639)	-5%	2,479,944	2,350,591	(129,353)	-5%	2,368,305	2,350,591	(17,714)	-1%
Los Angeles	2,125,945	1,967,108	(158,837)	-7%	2,125,945	1,947,630	(178,315)	-8%	1,967,108	1,947,630	(19,478)	-1%
Monterey Bay	626,882	604,668	(22,214)	-4%	626,882	596,851	(30,031)	-5%	604,668	596,851	(7,817)	-1%
Northridge	2,362,789	2,451,844	89,055	4%	2,362,789	2,424,899	62,110	3%	2,451,844	2,424,899	(26,945)	-1%
Pomona	1,921,501	1,839,791	(81,710)	-4%	1,921,501	1,830,409	(91,092)	-5%	1,839,791	1,830,409	(9,382)	-1%
Sacramento	1,990,862	1,922,910	(67,952)	-3%	1,990,862	1,907,850	(83,012)	-4%	1,922,910	1,907,850	(15,060)	-1%
San Bernardino	1,939,832	1,847,813	(92,019)	-5%	1,939,832	1,883,257	(56,575)	-3%	1,847,813	1,883,257	35,444	2%
San Diego	3,118,170	3,039,373	(78,797)	-3%	3,118,170	2,995,140	(123,030)	-4%	3,039,373	2,995,140	(44,233)	-1%
San Francisco	3,517,822	4,112,223	594,401	17%	3,517,822	4,257,210	739,388	21%	4,112,223	4,257,210	144,987	4%
San Jose	4,471,769	5,079,962	608,193	14%	4,471,769	5,040,745	568,976	13%	5,079,962	5,040,745	(39,217)	-1%
San Luis Obispo	2,367,680	2,438,719	71,039	3%	2,367,680	2,521,431	153,751	6%	2,438,719	2,521,431	82,712	3%
San Marcos	865,905	824,986	(40,919)	-5%	865,905	816,855	(49,050)	-6%	824,986	816,855	(8,131)	-1%
Sonoma	1,403,067	1,342,808	(60,259)	-4%	1,403,067	1,332,739	(70,328)	-5%	1,342,808	1,332,739	(10,069)	-1%
Stanislaus	730,707	696,084	(34,623)	-5%	730,707	690,811	(39,896)	-5%	696,084	690,811	(5,273)	-1%
Chancellor's Office	148,002	144,257	(3,745)	-3%	148,002	142,543	(5,459)	-4%	144,257	142,543	(1,714)	-1%
Total	\$41,215,726	\$41,335,300	\$119,574	0%	\$41,215,726	\$41,335,298	\$119,572	0%	\$41,335,300	\$41,335,298	-\$2	0%

Includes funding for Deadly Weapons Response, Cyber Liability, Fine Arts, Pollution, Earthquake, Fidelity/Crime, and Flood.

Current FY 25/26: Represents the contributions paid by the Campuses for the current fiscal year, using the current rating plan.

Current FY 26/27: Represents the contributions to be paid by the Campuses for FY 26/27, using the current rating plan.

Proposed FY 26/27: Represents the contributions to be paid by the Campuses for FY 26/27, if the BOD accepts all RPTG recommended revisions to the Coverage Program rating plans.

RPTG: Rating Plan Task Group

CSURMA Risk Pools FY 2026/27
AIME Coverage Program - Cost Comparison

A	B	C	D	E
Campus	Current FY 25/26	Current FY 26/27	\$ Chg	% Chg
Bakersfield	197,554	209,451	11,897	6%
Channel Islands	-	-	-	-
Chico	34,537	34,062	(475)	-1%
Dominguez Hills	93,895	121,811	27,916	30%
East Bay	51,532	52,612	1,080	2%
Fresno	533,951	519,605	(14,346)	-3%
Fullerton	282,539	292,526	9,987	4%
Humboldt	34,405	42,532	8,127	24%
Long Beach	634,698	667,204	32,506	5%
Los Angeles	30,741	58,022	27,281	89%
Monterey Bay	57,801	86,515	28,714	50%
Northridge	257,960	262,943	4,983	2%
Pomona	113,472	194,156	80,684	71%
Sacramento	345,665	318,718	(26,947)	-8%
San Bernardino	70,615	56,685	(13,930)	-20%
San Diego	374,888	416,805	41,917	11%
San Francisco	35,077	31,580	(3,497)	-10%
San Jose	550,108	565,309	15,201	3%
San Luis Obispo	502,881	493,543	(9,338)	-2%
San Marcos	24,677	31,215	6,538	26%
Sonoma	-	-	-	-
Stanislaus	55,084	64,731	9,647	18%
Chancellor's Office	-	-	-	0%
Total	\$4,282,080	\$4,520,025	\$237,945	6%

**CSURMA Risk Pools FY 2026/27
Auto Liability Coverage Program - Cost Comparison**

A	B	C	D	E
Campus	Current FY 25/26	Current FY 26/27	\$ Chg	% Chg
Bakersfield	103,753	77,673	(26,080)	-25%
Channel Islands	94,395	57,335	(\$37,060)	-39%
Chico	119,350	90,959	(\$28,391)	-24%
Dominguez Hills	111,891	83,294	(\$28,597)	-26%
East Bay	63,066	51,101	(\$11,965)	-19%
Fresno	315,328	237,618	(\$77,710)	-25%
Fullerton	236,462	184,371	(\$52,091)	-22%
Humboldt	102,397	75,629	(\$26,768)	-26%
Long Beach	283,456	213,039	(\$70,418)	-25%
Los Angeles	164,784	71,030	(\$93,755)	-57%
Monterey Bay	76,628	56,722	(\$19,906)	-26%
Northridge	206,828	187,744	(\$19,084)	-9%
Pomona	207,371	216,411	\$9,041	4%
Sacramento	185,806	165,566	(\$20,240)	-11%
San Bernardino	212,389	188,868	(\$23,521)	-11%
San Diego	270,029	210,228	(\$59,801)	-22%
San Francisco	144,712	114,108	(\$30,604)	-21%
San Jose	191,231	147,170	(\$44,061)	-23%
San Luis Obispo	603,667	406,557	(\$197,110)	-33%
San Marcos	106,466	79,717	(\$26,749)	-25%
Sonoma	118,672	88,404	(\$30,268)	-26%
Stanislaus	105,109	74,096	(\$31,013)	-30%
Chancellor's Office	678	511	(\$167)	-25%
Total	\$4,024,469	\$3,078,149	(\$946,320)	-24%

*Allocated per reported fleet count submitted to Chancellor's Office and DGS.
Auto Liability is managed by the State Vehicle Liability Self-Insurance Program
(VELSIP).*

**CSURMA Risk Pools FY 2026/27
IDL NDI UI - Coverage Comparison**

A	B	C	D	E
Campus	Current FY 25/26	Current FY 26/27	\$ Chg	% Chg
Bakersfield	297,244	301,405	4,161	1%
Channel Islands	250,145	222,612	(27,533)	-11%
Chico	450,776	428,209	(22,567)	-5%
Dominguez Hills	548,356	564,131	15,775	3%
East Bay	509,338	475,656	(33,682)	-7%
Fresno	572,695	556,864	(15,831)	-3%
Fullerton	941,542	895,997	(45,545)	-5%
Humboldt	406,447	419,365	12,918	3%
Long Beach	1,115,190	1,107,372	(7,818)	-1%
Los Angeles	884,828	888,906	4,078	0%
Monterey Bay	292,356	277,915	(14,441)	-5%
Northridge	1,466,487	1,499,531	33,044	2%
Pomona	893,586	944,745	51,159	6%
Sacramento	778,487	775,693	(2,794)	0%
San Bernardino	440,541	455,296	14,755	3%
San Diego	781,199	817,180	35,981	5%
San Francisco	1,048,558	1,066,111	17,553	2%
San Jose	1,017,532	1,016,346	(1,186)	0%
San Luis Obispo	975,607	983,174	7,567	1%
San Marcos	450,596	411,079	(39,517)	-9%
Sonoma	470,561	436,406	(34,155)	-7%
Stanislaus	318,391	319,287	896	0%
Chancellor's Office	81,295	86,638	5,343	7%
Total	\$14,991,757	\$14,949,918	(\$41,839)	0%

Includes Industrial Disability Leave, Nonindustrial Disability Insurance, and Unemployment Insurance.

CSURMA

POLICY AND PROCEDURE NO. 7

ADOPTED: January 1, 2000

AMENDED: April 27, 2015, March 2, 2023

SUBJECT: Self-Insured Program Funding

ISSUE:

The California State University Risk Management Authority (CSURMA) operates various self-insured coverage programs. Generally, these programs include a primary layer of pooling, with excess and reinsurance coverage. Each program is responsible for all costs generated by that program, as well as a proportionate share of the JPA's general administrative costs. It is important that each self-insured program be properly funded to satisfy its liabilities. This policy and procedure continues the policy adopted by the CSURMA Board of Directors on April 24, 1997.

POLICY STATEMENT:

It is the policy of CSURMA that each self-insured program shall establish budgets with a goal of full funding, including a reasonable risk margin. Such funding shall be determined by the Executive Committee as a part of each year's annual budget based upon the recommendations of a professional actuary and staff.

PROCEDURE:

CSURMA staff is responsible for developing draft budgets for each of the self-insured programs for each fiscal year. As a part of the budget development, staff will work with the CSU and its actuary to determine projected liabilities for the CSURMA's self-insured programs. The actuary's reports shall be used by staff and the Executive Committee to develop recommended rates and funding for each self-insured program.

It is the policy of CSURMA to fund fully the self-insured programs. Adopted funding shall include sufficient funds projected to pay the following cost elements:

- Administrative expenses shall be funded on a cash basis for each program year;
- Prior year cash deficits (if any) shall be funded on a cash basis; *(subject to a plan approved and adopted by the CSURMA Executive Committee)*
- Prior years' claims payable shall be funded on a cash basis to the extent accrued reserves do not amount to full funding; *(subject to a plan approved and adopted by the CSURMA Executive Committee)*
- Current year expected liabilities shall be funded on an accrual (incurred) basis; and

CSURMA

POLICY AND PROCEDURE NO. 7

- At such time as all outstanding liabilities are fully funded, a reasonable risk margin shall be funded.

Staff shall make an annual report to the Board of Directors, detailing the self-insurance programs' funding status in accordance with this Policy & Procedure No. 7.

POLICY AND PROCEDURE NO. 12 – COMMITTEE MEMBER PROFESSIONAL DEVELOPMENT

ISSUE: Policy and Procedure No. 12, provides the CSURMA Executive Committee reimbursement of the registration and travel costs to attend professional development conferences. Currently, the Policy and Procedure provides \$2,500 in reimbursement annually per year, per Executive Committee member. Policy and Procedure No. 12 has been amended to include CSUMRA’s Treasurer, Security-Auditor and supporting Office of General Counsel and can be used for travel expenses including underwriter meetings.

RECOMMENDATION: Staff recommends that the Committee approve the revisions to Policy and Procedure No. 12 – CSURMA Committee Member Professional Development, with additional amendments as appropriate.

FISCAL IMPACT: Currently \$22,500 is included in the FY 25/26 CSURMA budget for Executive Committee professional development.

BACKGROUND: The Policy and Procedure only included reimbursement for Executive Committee members and has been revised to include CSUMRA’s Treasurer, Security-Auditor and supporting Office of General Counsel and can be used for travel expenses including underwriter meetings.

PUBLICATION: The revised Policy and Procedure will be posted on the CSURMA website.

ATTACHMENT(S):

- a. Policy and Procedure No. 12 – CSURMA Committee Member Professional Development (*w/ revisions*)

CSURMA

POLICY AND PROCEDURE NO. 12

ADOPTED: March 24, 2011, March 21, 2014, January 10, 2016, October 28, 2022

EFFECTIVE: March 24, 2011; October 24, 2025

SUBJECT: CSURMA COMMITTEE MEMBER PROFESSIONAL DEVELOPMENT

Should there be any discrepancy between this document and either the JOINT POWERS AGREEMENT or BYLAWS, the JOINT POWERS AGREEMENT and BYLAWS will govern.

POLICY:

It is in the best interest of the Authority that individuals who serve on the CSURMA Executive Committee, including the Treasurer, Security-Auditor and CSURMA supporting Office of General Counsel, are knowledgeable of the administrative workings of joint powers authorities and risk management practices, procedures, and insurance markets. It shall be the policy of the CSURMA to fund annually travel for Executive Committee Members, and CSURMA's Treasurer, Security-Auditor and supporting Office of General Counsel, who elect to attend professional development training, and conferences and underwriter meetings as described in this Policy and Procedure.

PROCEDURE:

1. If the Board of Directors adopts a budget that includes travel expenses for Executive Committee professional development, then travel during the applicable fiscal year will be approved and reimbursed pursuant to this Policy and Procedure.
2. The Executive Committee member may submit to the Secretary-Auditor a written request to attend a professional development program. Eligible programs shall include risk management related courses, underwriter meetings and attendance at conferences such as PARMA, CAJPA, PRIMA, URMIA, NACUBO, WACUBO or other similar professional conferences.

Allowable Expenses

- a) Registration cost of registering for the Professional Development conference in the amount not to exceed 2,500.00, and
 - b) Travel Expenses pursuant to CSURMA Policy and Procedure No. 17 – Travel Reimbursement.
3. The Attendee will provide the Executive Committee or Board of Directors with a verbal or written report of information gained from the professional development program attended.

SAN FRANCISCO BAY REGION NETWORK – ALLOCATION OF CLAIM COSTS

ISSUE: At its last meeting in September 2025, the Committee directed the Program Administrator to draft an internal memo outlining how claim costs would be allocated between the participating entities of the San Francisco Bay Region Network. This memo is attached for the Committee’s review.

RECOMMENDATION: No action is recommended; however, the Committee may provide direction to the Program Administrator as appropriate.

FISCAL IMPACT: No fiscal impact is expected from action on this item at today’s meeting.

BACKGROUND: The San Francisco Bay Region Network (“SFBRN” or “the Network”) will be established by consolidating back-office administrative and transactional functions at Sonoma State University (SSU), San Francisco State University (SFSU), and California State University, East Bay (CSUEB) into a single cost-efficient structure. The Network was launched in response to ongoing enrollment declines, demographic shifts, and significant financial pressures in the region.

By integrating back-office administrative and transactional operations into a single, shared core, the Network seeks to enhance efficiency, reduce duplication, and optimize resource allocation while maintaining each university’s unique identity, accreditation, and academic mission. This approach moves beyond traditional cost-reduction strategies, offering a forward-looking solution to the urgent fiscal and demographic challenges facing these institutions.

By standardizing processes and leveraging shared technology platforms, the Network anticipates substantial cost savings and improved operational effectiveness, ensuring that all three universities can continue to serve their communities sustainably. This model also has the potential to inform similar collaborations across the CSU and the higher education sector at large.

The first phase of the Network will integrate a subset of key administrative and transactional functions by early 2026, with additional areas to be considered as the project evolves. The initiative is grounded in transparent governance, stakeholder engagement, and strict adherence to existing policies and agreements.

The link below provides additional information.

<https://www.sfbrn.calstate.edu/>

PUBLICATION: None.

ATTACHMENT(S):

- a. San Francisco Bay Region Network Allocation of Claim Costs Memo

San Francisco Bay Region Network (SFBRN) Allocation of Claim Costs

The San Francisco Bay Region Network (SFBRN) consolidates back-office administrative and transactional functions for Sonoma State University (SSU), San Francisco State University (SFSU), and California State University, East Bay (CSUEB) into a single cost-efficient structure. This initiative was launched in response to declining enrollment, demographic shifts, and financial pressures in the region. This document describes how typical insurance claim costs will be allocated under SFBRN. Specific claim situations may require review under the CSURMA Claims Handling Policy and Procedure No. 22 to determine allocation.

Claim cost allocation:

1. **Workers' Compensation:** Costs are allocated to the home campus of the injured employee.
 - **Example:** Employee of Campus A is injured while performing work at or on behalf of Campus B. The claim will be attributed to Employee's home campus, Campus A.
2. **Liability:**
 - Third-party liability (bodily injury, property damage, personal injury) – Allocated to the campus where the injury or damage occurred.
 - Errors and Omissions, Media Wrongful Acts, Employment Practices Liability, and Employee Benefits Liability – Allocated to the campus where the incident originated.
 - **Example:** Employee of Campus A makes an administrative decision, such as an employment action for Campus B. An employment practices claim is filed. The claim will be allocated to Campus B.
3. **Auto Liability:**
 - State-owned vehicle – Allocated to the campus that owns the vehicle.
 - Personal or rental vehicle used on state business – Allocated to the home campus of the employee driver, unless the operation of the vehicle is clearly in service of the non-home campus.

CSURMA ORIENTATION MEETING WITH CSU CAMPUSES

ISSUE: The CSU has several new Campus VPs; therefore, it is recommended that the Program Administrator begin scheduling a new round of CSURMA Orientation Meetings.

RECOMMENDATION: The Program Administrator asks the Committee to discuss scheduling of the CSURMA Orientation Meetings providing direction as appropriate.

FISCAL IMPACT: Unknown at this time. All travel expenses incurred by Chancellor's Office staff would be reimbursed by CSURMA.

BACKGROUND: None.

PUBLICATION: None.

ATTACHMENT(S): None.

AIME PROGRAMS UPDATE

ISSUE: The Athletic Injury Medical Expense (AIME) program continues to address the insurance and risk management needs of its members.

The Executive Committee Liaison for AIME, will report on the activities of the AIME Committee.

RECOMMENDATION: This item is for information only; no action is required on this item at today's meeting.

FISCAL IMPACT: None.

BACKGROUND: AIME is designed to cover medical expenses arising from injuries to student athletes while practicing or competing in inter-collegiate sports programs of the university.

PUBLICATION: None.

ATTACHMENT(S): None.

AORMA PROGRAMS UPDATE

ISSUE: The Auxiliary Organizations Risk Management Alliance (AORMA) continues to address the insurance and risk management needs of its members. All Auxiliary Organizations in Good Standing purchase insurance coverage through the AORMA.

The AORMA Chair, will report on the activities of the AORMA Committee.

RECOMMENDATION: No action is required on this item at today's meeting.

FISCAL IMPACT: None.

BACKGROUND: The AORMA was first marketed to CSU Auxiliary Organizations in 1998. Since that time, the program has grown from 12 members to 86 members, and represents 100% participation.

PUBLICATION: None.

ATTACHMENT(S): None.

CSURMA COMMITTEE MEMBER PROFESSIONAL DEVELOPMENT

ISSUE: Policy and Procedure No. 12 states, “it is in the best interest of the Authority that individuals who serve on the CSURMA Executive Committee are knowledgeable of the administrative workings of joint powers authorities and risk management practices, procedures, and insurance markets. It shall be the policy of the CSURMA to fund annually travel for Executive Committee Members who elect to attend professional development training and conferences ...” Eligible programs include risk management related courses and attendance at conferences such as PARMA, CAJPA, PRIMA, URMIA, or other similar professional conferences.

RECOMMENDATION: No action is required; this item is for information only.

FISCAL IMPACT: If the Board of Directors adopts a budget that includes travel expenses for Executive Committee professional development, then travel during the applicable fiscal year will be approved and reimbursed. Allowable expenses include registration costs up to \$1,500 and travel expenses.

BACKGROUND: Additional information can be found directly on the associations’ websites.

- www.urmia.org - University Risk Management and Insurance Association
- www.parma.com - Public Agency Risk Management Risk Management Association
- www.primacentral.org - Public Risk Management Association
- www.cajpa.org - California Association of Joint Powers Authorities
- www.agrip.org - Association of Governmental Risk Pools
- www.cwcworkcomp.org - California Coalition on Workers’ Compensation

PUBLICATION: None.

ATTACHMENT(S):

- a. Policy and Procedure No. 12 – CSURMA Committee Member Professional Development

CSURMA

POLICY AND PROCEDURE NO. 12

ADOPTED: March 24, 2011, March 21, 2014, January 10, 2016, October 28, 2022

EFFECTIVE: March 24, 2011; October 24, 2025

SUBJECT: CSURMA COMMITTEE MEMBER PROFESSIONAL
DEVELOPMENT

Should there be any discrepancy between this document and either the JOINT POWERS AGREEMENT or BYLAWS, the JOINT POWERS AGREEMENT and BYLAWS will govern.

POLICY:

It is in the best interest of the Authority that individuals who serve on the CSURMA Executive Committee, including the Treasurer, Security-Auditor and CSURMA supporting Office of General Counsel, are knowledgeable of the administrative workings of joint powers authorities and risk management practices, procedures, and insurance markets. It shall be the policy of the CSURMA to fund annually travel for Executive Committee Members, and CSURMA's Treasurer, Security-Auditor and supporting Office of General Counsel, who elect to attend professional development training, and conferences and underwriter meetings as described in this Policy and Procedure.

PROCEDURE:

1. If the Board of Directors adopts a budget that includes travel expenses for Executive Committee professional development, then travel during the applicable fiscal year will be approved and reimbursed pursuant to this Policy and Procedure.
2. The Executive Committee member may submit to the Secretary-Auditor a written request to attend a professional development program. Eligible programs shall include risk management related courses, underwriter meetings and attendance at conferences such as PARMA, CAJPA, PRIMA, URMIA, NACUBO, WACUBO or other similar professional conferences.

Allowable Expenses

- a) Registration cost of registering for the Professional Development conference in the amount not to exceed 2,500.00, and
 - b) Travel Expenses pursuant to CSURMA Policy and Procedure No. 17 – Travel Reimbursement.
3. The Attendee will provide the Executive Committee or Board of Directors with a verbal or written report of information gained from the professional development program attended.

CSURMA MEETING CALENDAR

ISSUE: The Program Administrator includes a current copy of the CSURMA meeting calendar in every agenda.

RECOMMENDATION: No action is requested on this item.

FISCAL IMPACT: None.

BACKGROUND: None.

PUBLICATION: None.

ATTACHMENT(S):

- a. 2025-2026 Meeting Calendar

FY 2025/26 CSURMA MEETING CALENDAR

JULY 2025				AUGUST 2025				SEPTEMBER 2025			
Date	Time	Committee	Location	Date	Time	Committee	Location	Date	Time	Committee	Location
30-31	11:00 AM	AORMA Officers Retreat	Yorba Linda			AOA EC	TBD	2	10:00 AM	NEW AORMA Member Orientation	Zoom
								2	11:00 AM	NEW EC Member Orientation	Zoom
								3	2:00 PM	AORMA	Irvine
								4	9:00 AM	AORMA LRP	Irvine
								5	8:30 AM	EC	Irvine
OCTOBER 2025				NOVEMBER 2025				DECEMBER 2025			
Date	Time	Committee	Location	Date	Time	Committee	Location	Date	Time	Committee	Location
16	10:00 AM	New BOD Member Orientation	Zoom			AOA EC	TBD	4	10:00 AM	AORMA	Zoom
24	8:30 AM	EC	Long Beach					5	8:30 AM	EC	Irvine
24	10:30 AM	BOD	Long Beach								
27	8:30 AM	AIME	Zoom								
JANUARY 2026				FEBRUARY 2026				MARCH 2026			
Date	Time	Committee	Location	Date	Time	Committee	Location	Date	Time	Committee	Location
TBD	8:30 AM	AIME	Zoom					5	2:30 PM	EC	Irvine
11	3:30 PM	EC (AOA Conference)	Oakland					6	8:30 AM	EC LRP	Irvine
11-13		AOA Annual Conference	Oakland								
APRIL 2026				MAY 2026				JUNE 2026			
Date	Time	Committee	Location	Date	Time	Committee	Location	Date	Time	Committee	Location
				7	1:30 PM	AORMA	Long Beach	TBD		AOA EC	TBD
				8	8:30 AM	EC	Long Beach				
				8	10:30 AM	BOD	Long Beach				
					8:30 AM	AIME	Zoom				

AORMA = Auxiliary Organizations Risk Management Alliance Committee

AIME = Athletic Injury Medical Expense Committee

AORMA LRP = AORMA Long Range Planning Meeting

AOA = CSU Auxiliary Organizations Association

BOD = CSURMA Board of Directors

EC = CSURMA Executive Committee

EC LRP = EC Long Range Planning Meeting

FY 2025/26 LONG RANGE PLANNING GOALS

ISSUE: Each year the Executive Committee conducts a Long Range Action Planning meeting to gauge progress and to re-evaluate where efforts should be focused.

RECOMMENDATION: This item is for information only; no action is requested.

FISCAL IMPACT: No fiscal impact is expected from today's meeting.

BACKGROUND: The CSURMA Executive Committee adopts the FY 25/26 Long Range Planning goals to be accomplished. The Committee will receive a report from Staff on the assigned responsibilities and deadlines of the FY 25/26 Long Range Planning goals.

PUBLICATION: None.

ATTACHMENT(S):

- a. FY 25/26 CSURMA Long Range Action Plan

FY 2025/26 CSURMA LONG RANGE ACTION PLAN					
GOAL	ACTION / TASK		STAFF	DEADLINE	STATUS
LRP-1	Energized Equipment				
SRM - Amy to Manage	1.	Develop SOP for Mechanical, Medium, High Volt, Look/Tag – Consultant Bids - Looking at LOTO agreement with Master Lock	PA, SRM	Aug-24	In Process
	2.	Work on MEA to Resource Consultants	PA, SRM	Oct-24	Completed
	3.	Student Project Safety Manual for Same	PA, SRM	Aug-25	Completed
	4.	Energized Electrical Equipment Resource Guide (draft out for review)	PA, SRM	Aug-25	Completed
LRP-2	Create Acceptance of Risk / Informed Consent Document to be Use When Students are Engaged in Experiential Learning				
SRM - Amy to Manage	1.	Review the use of the CSU liability waiver and provide clarification between (1) voluntary experiential learning with lack of CSU oversight, and (2) course required internships at the direction and control of faculty.	PA, SRM	Jun-21	Completed
	2.	Review Executive Order 1064 and provide clarification as to the statement included, "if the internship placement is not required as part of the student's academic program, the student must complete the liability waiver form..."	PA, SRM	Jul-21	In Process
	3.	Provide guidance at the campus level.	PA, SRM	Sep-22	Pending
	4.	Create acceptance of risk / informed content document to use when students are engaged in experiential learning.	PA, SRM	Oct-24	Pending
	5.	Update the CSU Waiver Handbook.	PA, SRM	Oct-25	
	6.	Provide guidance at the campus level either in person or via announcement of updated resources available.	PA, SRM	Oct-25	
LRP-3	Evident ID				
Mimi	1.	Present proposal to EC for final approval	PA, EC	May-25	Completed
	2.	Introduce Evident ID services to the BOD	PA, BOD	May-25	Completed
	3.	Begin the implementation process	PA, SRM	May-25	
	4.	Roll out and monitor services	PA, SRM	Jun-25	
LRP-4	Combat Sports				
Amy	1.	Send survey to all Campuses and Auxiliaries to gather information (tournaments, for-profit, 3rd party sponsorship, etc.)	PA	Apr-25	Completed
	2.	Analyze the data	PA, SRM	May-25	Completed
	3.	Evaluate coverage options, available or otherwise	PA	Jun-25	Completed
	4.	Review with Rating Plans Task Group	PA, SRM	Jul-25	Completed
LRP-5	AI Campus Security Survey				
Amy	1.	Poll all campuses for existing AI security	PA, SRM	May-25	Completed
	2.	Share information between campuses	PA, SRM	Jun-25	Completed
	3.	Discuss systemwide AI security with subject matter expert	PA, SRM	Nov-25	
	4.	Provide a formal recommendation to the EC	PA, SRM	Mar-26	

FY 2025/26 CSURMA LONG RANGE ACTION PLAN						
GOAL	ACTION / TASK			STAFF	DEADLINE	STATUS
LRP-6	Process for Identifying Complex Claims Process					
Mimi	1.	Create a flow chart for each coverage program outlining the claims process		PA	Jul-25	
	2.	Identify within the flow chart the appropriate "claims service champion" for each coverage program		PA, SRM	Jul-25	
	3.	Add to the CSURMA Service Calendar		PA	Jul-25	
	4.	Distribute, annually, the flow chart to all Campuses and Auxiliaries		PA, SRM	Dec-25	
PARKING LOT - ONGOING OR FUTURE PROJECTS						
GOAL	ACTION / TASK			STAFF	DEADLINE	STATUS
PL-1	Systemwide Roof Assessment and Fall Protection / Prevention - Development of Resource Guide					
Zachary	1.	In exchange for funding CSU Sacramento's roof assessment and fall protection, the inspector will be asked to create a resource guide to be available to all CSU Campuses.		SRM	N/A	Ongoing
	2.	Resource Guide Completed		SRM	N/A	Completed
BOD: CSURMA Board of Directors CABO: CSU Chief Administrators and Business Officers CO: Chancellor's Office CPDC: CO Capital Planning Design & Construction EC: CSURMA Executive Committee OGC: CSU Office of General Counsel PA: CSURMA Program Administrator SRM: CSU Systemwide Risk Management						

CSURMA ADMINISTRATIVE SERVICE CALENDAR

ISSUE: This item is provided as information to advise the Executive Committee of the various recurring administrative activities and when they take place over the course of the year. It includes items noting when they appear before the Executive Committee and Board of Directors. It is to be provided for information with each agenda packet.

RECOMMENDATION: It is recommended that the Executive Committee review the CSURMA Administrative Service Calendar and provide direction to staff as appropriate.

FISCAL IMPACT: No direct fiscal impact is expected.

BACKGROUND: None.

PUBLICATION: None.

ATTACHMENT(S):

- a. CSURMA Administrative Service Calendar

CSURMA SERVICE CALENDAR

DRAFT

CSURMA Administrative Service Calendar			
#	Task	Staff	Status
JANUARY 2025			
1	Executive Committee Nominations <i>Chair to appoint the EC Nominating Committee at January EC meeting</i> <i>EC election at the May BOD meeting</i>	Mimi Long	Completed
2	State Filing - Statement of Facts – Roster of Public Agencies - file with Secretary of State	Tevea Him	Completed
3	State Filing - Joint Powers Authority - file with Secretary of State - As Needed	Tevea Him	Completed
4	State Filing - Financial Statement to the County Auditor and State Controller	Tevea Him	Completed
5	Treasurers' Bond	Van Rin	Completed
6	Announce the new AORMA Committee open seats on the AORMA Committee at the AOA Conference	Mimi Long	Completed
7	FORM 700 - JPA ADMIN sends Form 700 to CSURMA FILERS	Tevea Him	Completed
8	AORMA Member Budget Letter (January Letter)	Mimi Long	Completed
CSURMA AOA CONFERENCE		Mimi Long	
CSURMA EC Meeting		Mimi Long	
AIME Committee Meeting		Stacey Weeks	
FEBRUARY			
#	Task	Staff	Status
1	AORMA Liability Program - Reinsurance Recovery / EPL Deductible Recovery at Dec 31st	Mimi Long	Completed
MARCH			
#	Task	Staff	Status
1	Review of all CSURMA Policies and Procedures (odd in odd years / even in even years)	Mimi Long	Completed
2	Chancellor's Office Services Budget Proposals	Tevea Him	Completed
3	CSURMA Budget	Mimi Long	Completed
4	CSURMA Mid-Term Budget (Review Variance Report w/ EC)	Mimi Long	Completed
5	CSURMA Master Investment Policy	Tevea Him	Completed
6	Review and adoption of Applicable Integrated CSU Administrative Manual Policies	Tevea Him	Completed
7	Review and adoption of CSURMA's Data Security Policies	Tevea Him	Completed
8	CSU International Programs Funding	Amy Lightner	N/A
9	Campus Liability, AORMA Liability, AIME and Campus WC - Risk Pool claims audit (every odd year) <i>Req approval of auditor's proposal at the March, 2025 meeting (no approval required for WC)</i> <i>Complete the audit review June - August, 2025</i> <i>Present results at September, 2025 EC & AORMA meetings</i> <i>Present results at October, 2025 BOD meeting</i>	Mimi Long	Completed
10	Campus Risk Pools Funding Status Report (using 12/31 financials)	Mimi Long	Completed
11	Auxiliary Service Provider Report	Tevea Him	Completed
12	Campus Programs RPTG <i>Appoint RPTG committee at March, 2025 EC meeting;</i> <i>Schedule in-person RPTG meeting in July, 2025;</i> <i>Schedule follow-up virtual meeting in August, 2025;</i> <i>Present Results at September, 2025 EC meeting for FY 2026/2027 rating</i>	Mimi Long	Completed
13	Forward to the AOA EC the slate of nominees to fill the open seats on the AORMA Committee	Mimi Long	Completed
14	Completion of the Form 700 – Statement of Economic Interest	Tevea Him	Completed
15	Campus Benchmarking Report	Mimi Long	Completed
16	CSURMA Operational Review <i>Request approval to perform audit at September, 2026 EC meeting</i> <i>Present results at March, 2027 EC meeting</i> <i>Present results at May, 2027 BOD meeting</i> <i>Present results at May, 2027 AORMA Meeting</i>	Mimi Long	N/A
17	Property Appraisals, Begin the Process in 2028	Mimi Long	N/A

CSURMA SERVICE CALENDAR

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#	Task	Staff	Status
	CSURMA EC Meeting	Mimi Long	
	CSURMA EC LRP Meeting	Mimi Long	
APRIL			
#	Task	Staff	Status
1	JPA ADMIN verifies BOD Campus Primary and Alternate representative remain in place by	Tevea Him	Completed
2	Election for AORMA Committee term beginning on July 1st (election closes April 30)	Tevea Him	Completed
3	Workers' Compensation Scorecard - Receive report from Sedgwick and distribute	Claims Admin	Completed
MAY			
#	Task	Staff	Status
1	Approval by BOD Resolution allowing Treasurer to invest or reinvest funds (P/O Budget	Tevea Him	Completed
2	Approval of Conflict of Interest Code by BOD every even-number year - File with FPPC as required	Tevea Him	Completed
3	Approval of Long Range Action Plan for upcoming fiscal year	Mimi Long	Completed
4	Campus Risk Pools Funding Status	Mimi Long	Completed
5	Executive Committee Nominations	Mimi Long	Completed
	<i>Chair to appoint the EC Nominating Committee at January EC meeting</i>		
	<i>EC election at the May BOD meeting</i>		
6	Adoption of the CSURMA Operating Budget	Mimi Long	Completed
7	CSURMA Quarterly Investment Report	Tevea Him	Completed
8	Announce AORMA Committee members for the new term beginning July 1st	Tevea Him	Completed
9	Send out appointment letters to the newly elected AORMA Committee members for the term beginning on July 1st	Tevea Him	Completed
10	Send out appointment letters to the newly elected Executive Committee members for the term beginning on July 1st	Mimi Long	Completed
11	CSURMA Operational Review	Tevea Him	N/A
	<i>Request approval to perform audit at September, 2026 EC meeting</i>		
	<i>Present results at March, 2027 EC meeting</i>		
	<i>Present results at May, 2027 BOD meeting</i>		
	<i>Present results at May, 2027 AORMA Meeting</i>		
	AIME Committee Meeting	Stacey Weeks	
	CSURMA BOD NMO Meeting via Teleconference	Amy Lightner	
	AORMA Committee Meeting	Mimi Long	
	CSURMA EC Meeting	Mimi Long	
	CSURMA BOD Meeting	Mimi Long	
JUNE			
#	Task	Staff	Status
1	AORMA Liability Program - Reinsurance Recovery / EPL Deductible Recovery	Van Rin	Completed
2	Request COI from all vendor's	L. Wallace	in process
	<i>Expiring Contract: Agility - July 15, 2025 (Extended to 7/15/26)</i>	Mimi Long	Completed
	<i>Expiring Contract: Alliant Loss Control Services - June 30, 2025 (Extended to 6/30/28)</i>	Mimi Long	Completed
	<i>Expiring Contract: CO Overhead Costs - June 30, 2025 (Extended to 6/30/26)</i>	Mimi Long	Completed
	<i>Expiring Contract: Employers Group Service Corp - Expires June 30, 2026</i>	Mimi Long	N/A
	<i>Expiring Contract: Praesidium - June 30, 2026</i>	Mimi Long	N/A
	<i>Expiring Contract: Sedgwick - June 30, 2030</i>	Mimi Long	N/A
	<i>Expiring Contract: Witt O'Brien's, LLC - June 30, 2026</i>	Mimi Long	N/A
	<i>Expiring Contract: UC RSS - May 7, 2026</i>	Mimi Long	N/A
	<i>Expiring Contract: Black Swan (Empathia, Inc.) - June 30, 2027</i>	Mimi Long	N/A
	<i>Expiring Contract: Ventiv / iVos - June 30, 2026</i>	Mimi Long	N/A
	<i>Expiring Contract: CO Systemwide Professional Development (AORMA online training) - Continuous</i>	Mimi Long	N/A

CSURMA SERVICE CALENDAR

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#	Task	Staff	Status
JULY			
#	Task	Staff	Status
1	OCIP #3 - CGL & WC - Expiration Date: December 31, 2022 - 2027	Amy Lightner	Completed
2	Financial audit prep with KPMG	Van Rin	Completed
3	Send to CSU Accounting the approved dividends and allocation of program costs for invoicing	Van Rin	Completed
4	Send out AORMA invoice to all members	Van Rin	Completed
5	Request Workers' Compensation and Liability loss runs @ 6/30 – Forward to Actuary	Mimi Long	Completed
6	Actuary Campus Liability Deductible Credits, based on June 30, 2025 losses. New deductibles 26/27, 27/28, 28/29	Mimi Long	Completed
7	Request Liability (EPL check register) for minimum EPL deductible calculation for upcoming fiscal year	Tevea Him	Completed
8	Final FY Payroll - request from Chancellor's Office	Mimi Long	Completed
9	Process the Liability and Workers' Compensation dividend checks and forward to Alliant for distribution	Van Rin	Completed
10	Distribute the Liability and Workers' Compensation dividend checks	Van Rin	Completed
11		Tevea Him	Completed
12	Request final audited payroll from all Workers' Compensation program members for expired year		
12	Survey legal counsel compensation and recommend to AORMA a fair and equitable maximum allowable hourly rate, 2025 (Review again in 2027)	Mimi Long	Completed
13	Workers' Compensation Scorecard - Receive report from Sedgwick and distribute (annual for AORMA)	WC Consult	Completed
14	Campus Programs RPTG	Mimi Long	Completed
	<i>Appoint RPTG committee at March, 2025 EC meeting;</i>		
	<i>Schedule in-person RPTG meeting in July, 2025;</i>		
	<i>Schedule follow-up virtual meeting in August, 2025;</i>		
	<i>Present Results at September, 2025 EC meeting for FY 2026/2027 rating</i>		
15	AORMA Programs RPTG	Mimi Long	N/A
	<i>Appoint RPTG committee at December, 2025 AORMA Committee meeting;</i>		
	<i>Schedule in-person RPTG meeting in July, 2026;</i>		
	<i>Schedule follow-up virtual meeting in August, 2026;</i>		
	<i>Present Results at September, 2025 EC meeting for FY 2027/2028 rating</i>		
AORMA Officers Retreat		Mimi Long	Completed
AUGUST			
#	Task	Staff	Status
1	Send out letter regarding Campus Appointment of CSURMA Board of Directors Members and Alternate	Tevea Him	In Process
2	Send out letter to regarding Claims Settlement Authority Annual Confirmation	Tevea Him	In Process
3	Send out letter to regarding Foreign Travel Authority Confirmation	Tevea Him	In Process
4	CSURMA Quarterly Investment Report for EC Meeting	Tevea Him	Completed
5	Calculate additional premium or return premium for each Workers' Compensation program member based on the audited payroll	Mimi Long	Completed
6	Receipt of Actuarial Studies	Mimi Long	Completed
	<i>Forward to Systemwide Risk Management and Accounting Team</i>		
7	Calculate each member's minimum EPL deductible for the upcoming program term	Tevea Him	Completed
8	Complete Target Surplus Funding Report	Mimi Long	Completed
9	UIP - Process EDD Statement of Reimbursable Benefit Charges for the period ending 6/30	Tevea Him	Completed
10	Completion of the Public Self-Insurer's Annual Report for CSURMA (must be filed with the state by Oct 1st.)	Mimi Long	Completed
11	Campus Programs RPTG	Mimi Long	Completed
	<i>Appoint RPTG committee at March, 2025 EC meeting;</i>		
	<i>Schedule in-person RPTG meeting in July, 2025;</i>		
	<i>Schedule follow-up virtual meeting in August, 2025;</i>		
	<i>Present Results at September, 2025 EC meeting for FY 2026/2027 rating</i>		

CSURMA SERVICE CALENDAR

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#	Task	Staff	Status
12	AORMA Programs RPTG <i>Appoint RPTG committee at December, 2025 AORMA Committee meeting; Schedule in-person RPTG meeting in July, 2026; Schedule follow-up virtual meeting in August, 2026; Present Results at September, 2025 EC meeting for FY 2027/2028 rating</i>	Mimi Long	N/A
SEPTEMBER			
#	Task	Staff	Status
1	Adoption of CSURMA Executive Committee, Board of Directors, and AORMA Committee meeting calendars	Tevea Him	Completed
2	Actuarial Reports	Mimi Long	Completed
3	Risk Pools Funding Status Report	Mimi Long	Completed
4	Proposed Campus, AIME and AORMA Dividends	Mimi Long	Completed
5	Rates and Gross Funding Campus and AORMA Coverage Programs	Mimi Long	Completed
6	AORMA Liability Program - Reinsurance Recovery (verify w/ Carl Warren)	Van Rin	Completed
7	CAJPA Fall Conference and Training Seminar -South Lake Tahoe		
8	Campus Workers' Compensation Program Safety National Aggregate Stop Loss Report - Present to EC in Sept	Tevea Him	
9	Prepare invoices or checks for the Workers' Compensation payroll audit	Van Rin	Completed
10	CSURMA Quarterly EPL Deductible Recoverys ending September 30 (Begin Task)	Van Rin	In Process
11	Completion of the AORMA Committee (September Letter) updating all AORMA members on the funding and dividends approved for the upcoming fiscal year	Mimi Long	Completed
12	Annual Exposure Surveys to Members - all aviation, CLIP, Med Mal, watercraft, AORMA renewal app, AORMA Liability App	Tevea Him	In Process
13	Campus Benchmarking Report	Amy Lightner	
14	Campus Programs RPTG <i>Appoint RPTG committee at March, 2025 EC meeting; Schedule in-person RPTG meeting in July, 2025; Schedule follow-up virtual meeting in August, 2025; Present Results at September, 2025 EC meeting for FY 2026/2027 rating</i>	Mimi Long	Completed
15	AORMA Programs RPTG <i>Appoint RPTG committee at December, 2025 AORMA Committee meeting; Schedule in-person RPTG meeting in July, 2026; Schedule follow-up virtual meeting in August, 2026; Present Results at September, 2025 EC meeting for FY 2027/2028 rating</i>	Mimi Long	N/A
16	CSURMA Operational Review <i>Request approval to perform audit at September, 2026 EC meeting Present results at March, 2027 EC meeting Present results at May, 2027 BOD meeting Present results at May, 2027 AORMA Meeting</i>	Mimi Long	N/A
17	Campus Liability, AORMA Liability, AIME and Campus WC - Risk Pool claims audit (every odd year) <i>Req approval of auditor's proposal at the March, 2025 meeting (no approval required for WC) Complete the audit review June - August, 2025 Present results at September, 2025 EC & AORMA meetings Present results at October, 2025 BOD meeting</i>	Mimi Long	Completed
18	AORMA WC - Risk Pool claims audit (every even year) Complete the audit review June - August, 2026 Present results at September, 2026 AORMA meetings Present results at October, 2026 BOD meeting	Mimi Long	N/A
	AORMA Long Range Plan meeting	Mimi Long	
	AORMA New Committee Member Orientation meeting	Mimi Long	
	AORMA Committee Meeting	Mimi Long	
	CSURMA EC Orientation Meeting	Mimi Long	

CSURMA SERVICE CALENDAR

DRAFT

#	Task	Staff	Status
	CSURMA EC Meeting	Mimi Long	
OCTOBER			
#	Task	Staff	Status
1	CSURMA Annual Report (Stewardship)	Mimi Long	Completed
2	CSURMA Tri-Fold based on June 30 financials	Mimi Long	Completed
3	AORMA Estimated Workers' Compensation payroll	Tevea Him	Completed
4	Government Compensation Report (request from CSU Accounting)	Tevea Him	
5	Campus Liability, AORMA Liability, AIME and Campus WC - Risk Pool claims audit (every odd year)	Mimi Long	Completed
	<i>Req approval of auditor's proposal at the March, 2025 meeting (no approval required for WC)</i>		
	<i>Complete the audit review June - August, 2025</i>		
	<i>Present results at September, 2025 EC & AORMA meetings</i>		
	<i>Present results at October, 2025 BOD meeting</i>		
6	AORMA WC - Risk Pool claims audit (every even year)	Mimi Long	N/A
	<i>Complete the audit review June - August, 2026</i>		
	<i>Present results at September, 2026 AORMA meetings</i>		
	<i>Present results at October, 2026 BOD meeting</i>		
	AIME Committee Meeting	Stacey Weeks	
	CSURMA BOD Meeting	Mimi Long	
	CSURMA EC Meeting	Mimi Long	
NOVEMBER			
#	Task	Staff	Status
1	Review CAJPA Accreditation Standard for new or reoccurring item	Mimi Long	
2	FORM 700 - Campus Risk Pool Administrator sends request to campus president to confirm appointments of primary and alternate representative to BOD (Note: AORMA Representatives are maintained through their election process)	Tevea Him	
3	Send campus risk pool renewal budget (Early Bird Renewal Letter)	Mimi Long	
4	Campus Risk Pool Deductible - Effective In (2026, 2029)	Mimi Long	N/A
5	Review volunteer losses within the AORMA Workers' Compensation program (review at December meeting)	Tevea Him	
6	UIP - Process EDD Statement of Reimbursable Benefit Charges for the period ending 9/30	Tevea Him	
DECEMBER			
#	Task	Staff	Status
1	Vendor Survey - Review List of Vendors and Work on Recipients	L. Wallace	
2	CSURMA Cash Flow Statement at Sept. 30th	Mimi Long	
3	AORMA Liability Program - Reinsurance Recovery (verify w/ Carl Warren)	Mimi Long	
4	Quarterly Risk Management Report for Systemwide Risk Management	Dan Howell	
5	Financial Audit - mail to Secretary of State and County Auditor	Tevea Him	
6	CSURMA Quarterly EPL Deductible Recoveries	Van Rin	
7	AORMA Programs RPTG	Mimi Long	
	<i>Appoint RPTG committee at December, 2025 AORMA Committee meeting;</i>		
	<i>Schedule in-person RPTG meeting in July, 2026;</i>		
	<i>Schedule follow-up virtual meeting in August, 2026;</i>		
	<i>Present Results at September, 2025 EC meeting for FY 2027/2028 rating</i>		
	Expiring Contract: Enterprises Rent A Car - Update Rates for the new year	Tevea Him	
	Expiring Contract: Alliant Insurance Services (Brokerage Agreement) - December 31, 2029	Mimi Long	N/A
	Expiring Contract: Alliant Insurance Services (Program Admin Agreement) - December 31, 2029	Mimi Long	N/A
	Expiring Contract: Carl Warren & Company - December 31, 2026	Mimi Long	N/A

CSURMA SERVICE CALENDAR

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#	Task	Staff	Status
	<i>Expiring Contract: HSR (AIME and Club Sports) - December 31, 2027</i>	Amy Lightner	N/A
	<i>AORMA Committee Meeting</i>	<i>Mimi Long</i>	

CSURMA EXECUTIVE COMMITTEE AND STAFF CONTACT LIST

ISSUE: Attached is a list of CSURMA Executive Committee members and the Program Administrators.

RECOMMENDATION: It is recommended that members review the list at each meeting for accuracy, making revisions as appropriate. If there are any changes, please contact Tevea Him at thim@alliant.com.

FISCAL IMPACT: None.

BACKGROUND: An accurate and current contact list facilitates better communication among Committee Members and Staff.

PUBLICATION: None.

ATTACHMENT(S):

- a. CSURMA Executive Committee and Staff Contact List

CSURMA EXECUTIVE COMMITTEE MEMBERS

Effective at July 1, 2025

Seat	Member	Position	Campus	Organization	E-Mail	Telephone Number
Chair	Scott Apel	Vice President and Chief Financial Officer, Administration and Finance	Long Beach	California State University Long Beach	scott.apel@csulb.edu	562-985-1658
Vice Chair	Rose McAuliffe	Vice President for Business & Finance	Stanislaus	California State University, Stanislaus	rmcauliffe@csustan.edu	209-667-3077
CSU Seat #1	Mike Beatty	Executive Director, Risk & Safety Services	San Francisco	San Francisco State University	mbeatty@sfsu.edu	415-338-1124
CSU Seat #2	Jeff Wilson	Vice President of Administration and Finance, CFO	San Francisco	San Francisco State University	wilsonjd@sfsu.edu	415-338-2521
CSU Seat #3	Colin Donahue	VP, Administration & Finance	Northridge	California State University Northridge	colin.donahue@csun.edu	818-677-2333
CSU Seat #4	Lynniece Warren	Executive Director of Risk Management	San Bernardino	California State University, San Bernardino	Lynniece.Warren@csusb.edu	951-963-1546
AORMA Seat #5 - Chair	Chuck Kissel	Executive Director	Fullerton	CSU Fullerton Auxiliary Services Corporation	ckissel@fullerton.edu	657-278-4101
AORMA Seat #6 - V Chair	Bill Olmsted	Executive Director	Sacramento	University Union Operation of CSUS, Inc.	olmsted@csus.edu	916-278-2242
Treasurer	Robert Eaton	Assistant Vice Chancellor, Financing, Treasury, and Risk Management	Chancellor's Office	California State University, Office of the Chancellor	reaton@calstate.edu	562-951-4572

CSURMA Service Matrix			
Coverage	Contact	E-Mail Address	Office
JPA Program Administrator – Alliant Insurance Services, Inc.			
Alliant Claims Consulting	Elaine (Kim) Tizon	elaine.tizon@alliant.com	415-403-1458
	Diana Walizada	dwalizada@alliant.com	415-403-1453
	Robert Frey	rfrey@alliant.com	415-403-1445
Certificate of Insurance Requests	La Shaunda Wallace	lashaunda.wallace@alliant.com	415-403-1489
	Tevea Him	thim@alliant.com	415-403-1416
CSURMA Budget	Mimi Long	mlong@alliant.com	415-403-1423
Form 700	Tevea Him	thim@alliant.com	415-403-1416
General AORMA Coverage Questions (Auxiliary Organizations only)	Van Rin	vrin@alliant.com	415-403-1408
	Mimi Long	mlong@alliant.com	415-403-1423
	Daniel Howell	dhowell@alliant.com	415-403-1426
General CSURMA Coverage Questions (CAMPUS only)	Van Rin	vrin@alliant.com	415-403-1408
	Amy Lightner	amy.lightner@alliant.com	415-403-1457
	Daniel Howell	dhowell@alliant.com	415-403-1426
General Risk Management Questions (AORMA)	Van Rin	vrin@alliant.com	415-403-1408
	Mimi Long	mlong@alliant.com	415-403-1423
	Daniel Howell	dhowell@alliant.com	415-403-1426
General Risk Management Questions (Campus)	Van Rin	vrin@alliant.com	415-403-1408
	Daniel Howell	dhowell@alliant.com	415-403-1426
	Amy Lightner	amy.lightner@alliant.com	415-403-1457
Risk Pool Rating Plans (AORMA)	Mimi Long	mlong@alliant.com	415-403-1423
Risk Pool Rating Plans (Campus)	Mimi Long	mlong@alliant.com	415-403-1423
Website and Technology Questions	Tevea Him	thim@alliant.com	415-403-1416
	La Shaunda Wallace	lashaunda.wallace@alliant.com	415-403-1489
	Myron Leavell	mleavell@alliant.com	415-403-1404
Workers' Compensation Claims Consultant	Deanna Jacona	deanna@hudsonclaimsconsulting.com	530-605-7152

Contacts by Coverages			
ADWRP (Alliant Deadly Weapon Response Program)	Van Rin	vrin@alliant.com	415-403-1408
	Mimi Long	mlong@alliant.com	415-403-1423
AIME	Stacey Weeks	sweeks@alliant.com	415-403-1448
	Amy Lightner	amy.lightner@alliant.com	415-403-1457
AMVP (Alliant Mobile Vehicle Program)	La Shaunda Wallace	lashaunda.wallace@alliant.com	415-403-1489
	Yvonne Killian	yvonne.killian@alliant.com	916-643-2748
Boiler & Machinery Program - AORMA	Van Rin	vrin@alliant.com	415-403-1408
	Mimi Long	mlong@alliant.com	415-403-1423
Boiler & Machinery Program - Campuses	Van Rin	vrin@alliant.com	415-403-1408
	Amy Lightner	amy.lightner@alliant.com	415-403-1457
BRIP (Builders Risk Insurance Program)	Shadi Jalali	shadi.jalali@alliant.com	949-433-8238
	Amy Lightner	amy.lightner@alliant.com	415-403-1457
	Mimi Long	mlong@alliant.com	415-403-1423
Club Sports / Intramurals	Stacey Weeks	sweeks@alliant.com	415-403-1448
	Amy Lightner	amy.lightner@alliant.com	415-403-1457
CPL (Contractors Pollution Liability)	Shadi Jalali	shadi.jalali@alliant.com	949-433-8238
CSU Medical Malpractice Coverage	Van Rin	vrin@alliant.com	415-403-1408
	Amy Lightner	amy.lightner@alliant.com	415-403-1457
CSU Rocketry Program	Van Rin	vrin@alliant.com	415-403-1408
	Mimi Long	mlong@alliant.com	415-403-1423
Cyber Liability	Van Rin	vrin@alliant.com	415-403-1408
	Mimi Long	mlong@alliant.com	415-403-1423

CSURMA Service Matrix			
Coverage	Contact	E-Mail Address	Office
DRIP (Drone Insurance Program)	Van Rin	vrin@alliant.com	415-403-1408
	Mimi Long	mlong@alliant.com	415-403-1423
FAAAP (Fine Arts, Artifacts & Archives Program)	PJ Skarlanic	pskarlanic@alliant.com	415-403-1455
Fidelity-Crime Program	Van Rin	vrin@alliant.com	415-403-1408
	Mimi Long	mlong@alliant.com	415-403-1423
Foreign Travel Program	Van Rin	vrin@alliant.com	415-403-1408
	Yvonne Killian	yvonne.killian@alliant.com	916-643-2748
	Amy Lightner	amy.lightner@alliant.com	415-403-1457
Inland Marine	Van Rin	vrin@alliant.com	415-403-1408
	Yvonne Killian	yvonne.killian@alliant.com	916-643-2748
	Mimi Long	mlong@alliant.com	415-403-1423
Non-Owned Aviation Liability	Van Rin	vrin@alliant.com	415-403-1408
	Mimi Long	mlong@alliant.com	415-403-1423
OCIP (Owner Controlled Insurance Program)	Pamela Quiroz	pamela.quiroz@alliant.com	213-443-2469
	Jim Holobaugh	jholobaugh@alliant.com	214-273-3156
OPPI (Owners's Protective Professional Insurance)	Amy Lightner	amy.lightner@alliant.com	415-403-1457
PAI (Participant Accident Insurance)	Tevea Him	thim@alliant.com	415-403-1416
	Van Rin	vrin@alliant.com	415-403-1408
SAFECLIP (Student Academic Field Experience for Credit Liability Insurance Program)	Van Rin	vrin@alliant.com	415-403-1408
	Amy Lightner	amy.lightner@alliant.com	415-403-1457
Special Events Insurance	Yvonne Killian	yvonne.killian@alliant.com	916-643-2748
	Van Rin	vrin@alliant.com	415-403-1408
SPLIP (Student Professional Liability Insurance Program)	Van Rin	vrin@alliant.com	415-403-1408
	Amy Lightner	amy.lightner@alliant.com	415-403-1457
Trustee's E&O & Fiduciary Liability	Amy Lightner	amy.lightner@alliant.com	415-403-1457
	Mimi Long	mlong@alliant.com	415-403-1423
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