



April 8, 2025 **May 1, 2025**

Barnaby Peake  
Executive Director, Associated Students Inc.  
&  
Megan Bell, PhD  
Executive Director, University-Student Union  
California State University, Los Angeles  
5151 State University Drive  
Los Angeles, CA 90032

**Re: Student Programs, Services, Fees, and Experience Analysis REVISED**

Dear Ms. Bell & Mr. Peake:

Thank you for reaching out to Brailsford & Dunlavey ("B&D") to discuss your thoughts towards at understanding the value that programs, services, fees, and experience provided by the Associated Students, Inc. ("ASI") and University-Student Union ("U-SU") at California State University, Los Angeles ("Cal State LA" or the "University"). We are excited to once again be able to assist Cal State LA on important student projects, having worked with the University for other projects in the current evaluation of wellness and recreation needs for the campus. From working with more than 800 universities and colleges across the country, we recognize the importance of understanding the critical role student governments, student union facilities, and their programs play on a campus toward supporting recruitment, retention, and a host of other student and educational outcomes. My own passion for these programs and services is strong, having been chair of Cal Poly's University Union Advisory Board and ASI officer in 2002/2003.

Understanding and predicting the needs of current and future students has always been a challenge, one that is especially important as we serve Gen Z, the most rapidly changing generation ever studied, and plan for future students, Gen Alpha. Both groups of these students' needs are different than previous students served and speak directly to the programs, services, amenities, community enhancing places offered on university campuses, largely informed by their parent's consumer behaviors and expectations of an exemplary, holistic educational experience. Cal State LA must make data-driven decisions with these factors in mind while developing short- and long-term plans for the student experience.

Now more than ever, Cal State LA must consider the synergies necessary to support a world-class education and student experience. A comprehensive look at the entire student experience to identify the synergies between programs, services, and spaces is critical in resource allocation decisions. Brailsford & Dunlavey ("B&D") is guiding these types of plans at institutions across the country such as Cal Poly, University of Delaware, University of Cincinnati, and Scripps College. Additionally, our work across a range of student-focused university assets provides us with a wealth of experience in the planning and programming of student life on campuses. We also understand that we must be thinking about the students of today as well as the future generations of students and the unique needs and desires of each group.

This letter proposal outlines our planning efforts to determine the best path forward for the joint ASI and U-SU effort (the “Analysis”).

Based on our conversations we have developed an Analysis that would address the following key questions:

- ◆ Are the current mission and vision of ASI and the U-SU still relevant?
- ◆ How well do ASI and the U-SU achieve strategic objectives?
- ◆ What is the ideal engagement strategy for the short- and long-term?
- ◆ What services, resources, programs, and amenities must be provided to support the University’s mission and strategic objectives? What items are critical to current students?
- ◆ How well do current U-SU facilities meet the needs of students and future students?
- ◆ How can the delivery of services, programs, and support to students be optimized? How will this change for future populations / headcount?
- ◆ What policies and financial restructuring should be considered for modification or addition? What are the financial implications of making the needed changes?
- ◆ What opportunities exist for ASI and the U-SU to assist the University’s strategic efforts towards student recruitment, persistence, and retention through programs and services?
- ◆ What are the financial implications of making the recommended changes to create the ideal Cal State LA student experience and the recommended fees to meet the budgetary expectations?
- ◆ What strategies exist to potentially modify any fees?

We believe that it is important for ASI and the U-SU to view this planning effort not just as an opportunity to understand demand for services, programs, and spaces, but also as a method to establish a long-term path for continued operational success. The development of new mission and vision statements, with a clear financial plan to address current and future needs will position ASI and the U-SU in a strong position to direct their own future. It is important to note that proper planning is key. At this point, we recognize that improvements may not result in physical space or fee increase but could focus solely on the programmatic and organizational improvements needed to best serve current and future students. The recommendations may include a physical expansion to the existing or other campus facilities. The following pages outline B&D’s proposed work plan for this effort.

## Student Programs, Services, Fees, and Experience Analysis

Components of the Analysis include the following:

### Phase I – Vision and Objectives

- ◆ **Project Initiation:** The initial step in our process will be to review requested documents and data, tour campus facilities, meet with ASI and U-SU staff and board members, as well as University administrators. The kickoff meeting will establish initial criteria, sequence of meetings, and planning for broader campus engagement in fall 2025.
- ◆ **Linking Mission and Vision to Project:** In order for ASI and the U-SU to advance a targeted new reality for Cal State LA, the criteria and objectives for success must be defined according to the organization's own values and culture. It is also important for ASI and U-SU to understand the role of its programs and facilities at Cal State LA and gaps the University may have in achieving its targeted new reality. To that end, B&D will facilitate its Strategic Asset Value work session with key project stakeholders from the University to identify strategic objectives. The session will establish how to align the University's culture, mission, and vision with plans for potential development of an improved ASI and U-SU. By placing institutional and ASI and U-SU missions at the forefront of any decision, B&D offers a process that will create an implementable plan that enhances the student life experience while advancing the University's broader strategic plan.
- ◆ **Preliminary Analysis:** As part of the market analysis, a detailed demographic and student enrollment trends analysis will be conducted in an effort to understand how population sizes and changes impact the current facilities, programs, and services. B&D will conduct benchmark analyses of student union facility size and comparable ASI programs within its internal database as well as Cal State LA's position within the CSU for union/rec fees (student body center fee), ASI fee (student body fee), and total student fees. Finally, this analysis will include a high-level facilities review of the U-SU to understand potential short- and long-term investment needs.
- ◆ **Campus Partner Interviews:** In partnership with ASI and the U-SU, B&D will facilitate interviews with key campus stakeholders with a vested interest in the student experience, both state-side as well as other campus auxiliaries. Interviews with campus partners will include those who are integrally involved, and other adjacent student support operations to gain a qualitative perspective of how the different departments operate and what their needs are. B&D will also meet with other University administrators to better understand how student life facilities, programs, and services can better support the University's broader objectives (i.e., recruitment, retention, alumni relations).
- ◆ **Peer Benchmarking:** B&D will conduct benchmark analyses of eight to ten (8-10) peer institutions, focusing on student life assets and their adjacencies as well as in-person, hybrid, and virtual program and service offerings and any partnerships in such efforts. Points of comparison will include metrics such as institution type, size of the campus, residential distinction, student life culture, relationship with local community, campus spirit, student traditions that integrate students to the collegiate environment, and other factors. B&D will work with Cal State LA to identify the

best list of peers, such as urban universities, for analysis which could range from cross-applicants to aspirant universities.

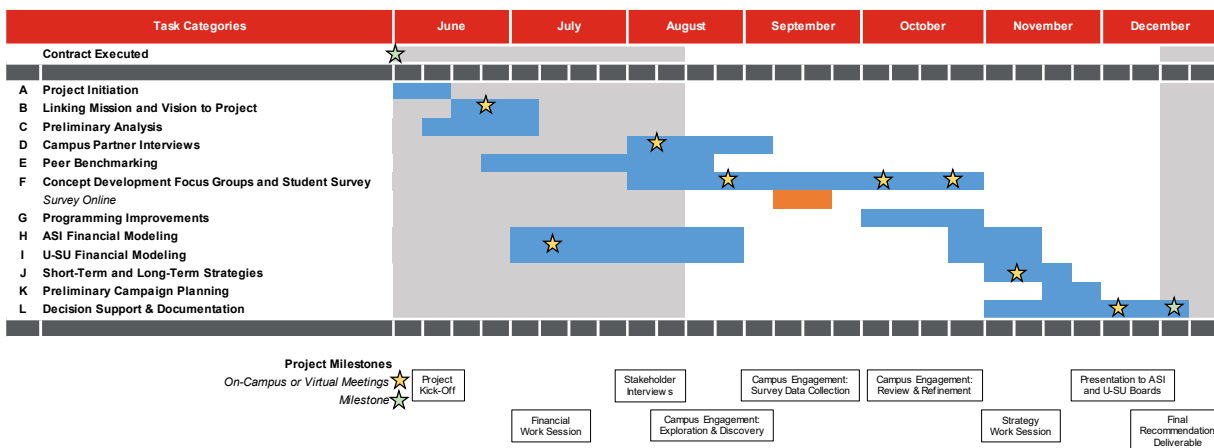
- ◆ **Concept Development Focus Groups and Student Survey:** To understand the value and need of ASI and U-SU programs, services and facilities, engagement must be developed with students in mind. As such, B&D will conduct a series of focus groups (up to 8) with students to understand what they desire in terms of ASI and U-SU programs, services, experience, and general campus life. We will also conduct a town hall or large-scale forum for more engagement opportunities. The project team will work in conjunction with project stakeholders to develop a web-based survey to be distributed to all Cal State LA students. The survey will assess student satisfaction with existing ASI and U-SU programs and services, as well as the off-campus activities. Future preferences will also be derived from student survey results. The information gathered in the focus groups and survey are used to inform B&D's demand model.
- ◆ **Programming Improvements:** The qualitative and quantitative analyses, along with B&D's expertise, will provide direction on programmatic areas of improvement for ASI and the U-SU. These improvements will look at overall activities, outcomes, costs, and staffing requirements.
- ◆ **ASI Financial Modeling:** The study body fee fund and operations will be modeled in a 20-year pro forma that looks at all revenues and costs associated with the program. The baseline model will project out the current modeling assumptions and the prospective challenges in maintaining a feasible operation. This detailed analysis will evaluate a range of options for improvements and changes to understand impacts to net operating income and student fee levels. Detailed inputs including past budgets, staffing levels, programming levels and more will be integrated into the modeling.
- ◆ **U-SU Financial Modeling:** B&D will develop a financial model (encompassing the full student body center fee fund) that will utilize the base program and capital budgets developed in this Analysis and add additional elements including staffing projections (full-time professionals and student employees), non-personnel costs, and potential speculative revenue, along with other campus fees in order to generate a 20-year pro forma. This proforma will be built upon historical budgets for the U-SU. For any capital projects, this pro forma will identify the full costs of operating the project along with the associated debt payments and debt service coverage ratios which will be evaluated by the campus and CSU system. The model will generate the student fee levels required to support the operation and amortization of any potential expansion.
- ◆ **Short-Term and Long-Term Strategies:** B&D will establish key program, services, and experiential elements that ASI and the U-SU should focus on over short- and long-term initiatives for optimization of existing elements and what may necessitate any increases.
- ◆ **Preliminary Campaign Planning:** Assuming that sufficient value is present with any improvements to ASI and U-SU programs, services, and potentially facilities with a potential fee increase, B&D will assist ASI and the U-SU in understanding the pros and cons of a referendum or alternative consultation process. Preliminary timelines and milestones will be developed with ASI

and U-SU leadership in line with Cal State LA fee policies. Components of the timeline include administrative requirements, student campaign/committee recruitment, material development, student engagement, and other activities that are required prior to active campaigning.

- ◆ **Decision Support and Documentation:** Fostering a culture of communication and collaboration is critical to the success of any new facility. As ASI and U-SU's advisor, B&D will carefully manage the decision-making process as the recommendation is enhanced. The B&D team will conduct regular meetings with the project committee and student boards to be sure that student leaders are owning the process and driving direction. The Analysis and recommendations will be provided in a briefing document to ASI and the U-US which will memorialize the decisions made through the process of the Analysis. During this effort, the evaluation towards a future fee campaign (referendum or alternative consultation) will be completed and a direction determined to best align with the targeted outcomes.

## SCHEDULE

B&D is ready to kick-off the project in June of 2025 and upon contract execution from ASI and the U-SU and anticipates completing the proposed work plan in approximately seven (7) months recognizing that ASI and the U-SU will need time to discuss and have board actions on future steps like fee campaigns during the Spring 2026 term. The summer of 2025 will focus on the initial analysis, engagement planning, benchmarking and other data analysis, as well as stakeholder engagement. The fall 2025 term would primarily focus on the engagement efforts on campus as noted in the work plan. Initial board meetings presenting findings would occur at the start of the Spring 2026 semester. Successfully completing the project within the specified timeline will be contingent upon ASI and the U-SU responding to data, information, decision, and meeting requests in a timely way and allocating the appropriate staff resources to the project.



## COMPENSATION

B&D strives to provide fees that are aligned with the value that we create. We would like to emphasize that there is a clear and fair rationale to setting our fees. You should feel that you have received great value and B&D should have had ample resources to deliver our best effort through an efficient process. When we set a fixed fee, we: a) estimate the cost of completing the effort in terms of team member hours to the best of our ability, and, b) consider the extent to which there is uncertainty around our key assumptions or whether we lack the ability to control key circumstances.

In accordance with this philosophy, B&D proposes the establishment of a fixed-fee contract amount totaling \$140,410 in professional fees to complete the work plan outlined above plus reimbursable expenses not to exceed \$5,000. Expenses include travel to campus, survey hosting, etc. The expenses do not include any survey incentives or budget for engagement incentives which ASI and the U-SU may wish to consider.

In addition to the fixed fee, B&D recommends including a time and materials (T&M) "sidecar" of \$25,000 for additional work that may arise throughout the planning efforts. This sidecar is not included in the base scope as shown in the chart below. No charges will be applied to this sidecar without explicit permission from ASI and the U-SU. This contingency mechanism will ensure that the necessary work may continue without interruption due to contractual change order delays, and may include, but not be limited to:

- ◆ Additional campus visits;
- ◆ Work related to student experience functions outside of the Analysis scope
- ◆ Additional internal Cal State LA socialization or external neighborhood/community meetings beyond the assumed scope included in the Analysis;
- ◆ Other unforeseen efforts necessary for the completion of the work.

Task Categories	Total
<b>Student Programs, Services, Fees, and Experience Analysis</b>	
<b>A Project Initiation</b>	<b>\$4,240</b>
<b>B Linking Mission and Vision to Project</b>	<b>\$7,600</b>
<b>C Preliminary Analysis</b>	<b>\$9,820</b>
<b>D Campus Partner Interviews</b>	<b>\$9,690</b>
<b>E Peer Benchmarking</b>	<b>\$10,120</b>
<b>F Concept Development Focus Groups and Student Survey</b>	<b>\$33,420</b>
<b>G Programming Improvements</b>	<b>\$8,610</b>
<b>H ASI Financial Modeling</b>	<b>\$10,820</b>
<b>I U-SU Financial Modeling</b>	<b>\$10,820</b>
<b>J Short-Term and Long-Term Strategies</b>	<b>\$8,510</b>
<b>K Preliminary Campaign Planning</b>	<b>\$6,360</b>
<b>L Decision Support &amp; Documentation</b>	<b>\$20,400</b>
<b>Total Professional Fees</b>	<b>\$140,410</b>
<b>Estimated Reimbursable Expenses</b>	<b>\$5,000</b>
<b>Total Professional Fees + Reimbursable Expenses</b>	<b>\$145,410</b>

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Barney and Megan, thank you again for the opportunity to present this overview of our services. If you have any questions or need additional information, please feel free to call me at (949) 236-4001.

Sincerely,



Matthew Bohannon  
 Vice President