ICEAA Board of Director's Meeting
1100 – 1300 | July 10, 2026

Zoom Virtual Meeting
AGENDA
as of July 6, 2026

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1. 11:00 – Introduction & Welcome — Christina Snyder

2. 11:05 – Secretary's Report — Madeleine Teller
    a. **Vote:** approve May 2026 minutes
    b. CPM Absorption Details
    c. **Vote:** Updating bylaws re: nomination by petition

3. 11:30 – Treasurer's Report — Arlene Minkiewicz
    a. **Vote**: approve July 2026 financials
    b. 2024 International Symposium

4. 11:45 – Professional Development Update — Kimberly Roye

5. 12:00 – Module 14 (Contract Pricing) Updates — Sean Wells

6. 12:15 – 2026 Workshop Review — Megan Jones

7. 12:30 – ICEAA External Support — Megan Jones
    a. Marketing consultant for outreach/elevator pitch
    b. Tech consultant for routine improvements/projects

8. 12:30 – 501(c)6 vs. 501(c)3 — Megan Jones

9. 12:45 – Incentivizing Growth — Javier Provencio

10. 12:55 –Action Item Review — Madeleine Teller

11. 1:00 – Plan Next Meeting and Adjourn — Christina Snyder

ICEAA Board of Director's Meeting

12:00 – 4:00 | Monday, 11 May 2026

Zoom Virtual Meeting

DRAFT MINUTES as 5 July 2026

Voting Attendees:

Christina Snyder, Arlene Minkiewicz, Javier Provencio, Carol Dekkers, Brian Glauser, Rich Hartley, Tom Bosmans, Madeleine Teller, Courtney Gray, Cari Pullen, Kimberly Roye, Dave Brown (via Hartley proxy), Irfan Hashmi Kellie Benefiel (via Dekkers proxy), Patrick Casey, Sanath Rajagopal

Non-voting Attendees:

Sharon Burger, Megan Jones, Sean Wells, Kevin Cincotta

Summary:

The board convened to resolve a multi-topic agenda focused on reconciling a loss from a joint 2024 conference, accelerating revenue and certification growth, evaluating potential organizational absorptions, and addressing governance and technology constraints. The board approved a staff-proposed three-payment settlement with SCAF, accepting the immediate first payment and requiring transaction documentation before finalizing subsequent payments.

Finance and reconciliation: staff reported the joint conference lost approximately $30,000. SCAF proposed three equal USD payments totaling roughly $7,628 with an immediate first installment, contrasting with the board's earlier estimate of nearly $17,000. Transfer fees and exchange-rate variability account for much of the discrepancy. The motion to accept the three-payment plan passed with the condition that SCAF provide bank receipts and exchange-rate documentation before second and third payments are accepted; Sanath's vote was awaited before finalizing in one segment.

Training and certification: operations for the current training week are proceeding; a new inflation module will be piloted and a dry run scheduled. Certification metrics show most credential holders have CCA credentials and recertification timing clusters in 2028, prompting agreement to pursue targeted marketing, earlier outreach (up to 18 months), and linkage of conference activities to recertification credits. Staff named Sharon as primary contact for candidate messaging and recertification communication; Maddie and Peter are preparing study schedules, wiki content, and student slides.

Workshops and events: Norfolk workshop results and logistics were reviewed—386 attendees versus a 440 forecast—with multiple sponsors and international/OEM participation. The board examined cost drivers (noting lower Norfolk food costs than Atlanta and continued venue pricing pressure), operational venue issues, and attendee experience concerns. The group discussed

conference scheduling windows, avoiding Easter, Mother's Day, graduations, and requested pricing checks for candidate weeks in 2028.

Strategic positioning and revenue: participants emphasized urgent need for revenue growth, identifying certification as the primary revenue engine. Content gaps were noted in contract pricing and economic analysis modules; participants proposed repackaging updated modules as certifications. Marketing capability and IT limitations were repeatedly identified as critical blockers to scaling revenue (bulk licensing, paywalled archives, secure authentication). The board favored hiring external consultants for marketing and IT but debated budget constraints and lower-cost alternatives (university partnerships, volunteers, in-kind help). They agreed to solicit cost and scope estimates for consultants and IT assessments.

Potential absorptions and partnerships: the imminent bankruptcies of Performance Management and a separate EVM organization were discussed as possible "new homes" for their members/programs. The board weighed strategic fit, liability, and workload risks of absorbing these groups versus pursuing adjacent markets (automotive, OEM, contract pricing). Participants raised concerns about unknown EVM finances and the need for executive committee clarification on what those groups seek.

Governance and bylaws: the group reviewed chapter officer term-limit impacts, the international board petition nomination pathway, and the timing of bylaw changes relative to elections. Concerns about petition candidates bypassing nominating-committee vetting prompted discussion of requiring petition candidates to meet equivalent qualifications or to be allowed only after committee rejection. The board committed to refine amendment language and to circulate a SurveyMonkey vote on the proposed petition restriction.

Operations and technology: recurring operational issues included server and software stability, recent outages, and the inability of current volunteer staff to support scale. The board agreed that IT improvements are necessary for expiring access, paywalls, and corporate licensing capabilities and assigned exploration of external IT resources with defined deliverables and modest initial cost. Megan was thanked for interim website maintenance.

Other operational items: the board discussed modifying the contractual per diem room block requirement (30%) to improve hotel bids, proposing a one-year trial and parallel RFPs with and without the clause and adding post-workshop per diem usage surveys. They are also committed to creating three SCEC committees from volunteer responses, to solicit additional volunteers, to roll Federal CIO Council work into marketing initiatives, and to prepare a nomination information session. The next full board meeting was scheduled as a virtual lunch on July 10.

ICEAA Board of Director's Meeting

12:00 – 4:00 | Monday, 11 May 2026

Zoom Virtual Meeting

DRAFT MINUTES as 5 July 2026

Welcome, quorum count, introductions: Christina Snyder

A quorum is established, and the meeting begins at 12:05 pm. Attendees noted the benefits of an in-person workshop for strategic discussion and accountability despite appreciation for shorter frequent meetings and asked remote participants to report audio issues via chat if needed.

Secretary Report: Madeleine Teller

No comments or edits were suggested for April 2026 minutes, either in advance of the meeting or during. Madeleine reminds the group to please record individual actions and follow up accordingly.

Vote: Motion is raised to approve the January minutes. No further discussion is requested. Seconded and passed.

Treasurer's Report Arlene Minkiewicz

Arlene does not have a financial report to present this meeting as we will not receive the statements from our accountants until next month. She presents an update on the financial status coming out of the ICEAA SCAF workshop. She reminds the group that the joint workshop was in September 2024, with limited attendance at an expensive venue. Due to ICEAA having more liquidity than SCAF, ICEAA fronted more of the funding for the joint workshop. After the conference, there were discussions centered around reconciliation of funds due to ICEAA. SCAF requested that ICEAA investigate the impact of daily exchange rates tracking to when the transactions were made, which Madeleine Teller provided a spreadsheet tracking this information. Madeleine followed up to see if SCAF could meet to discuss it multiple times, as did Arlene when she took over the role of ICEAA Treasurer. Finally, ICEAA representatives were able to meet with the SCAF board, including David Hedley, the treasurer, and Cheryl Latimer. At the last meeting on April 13th, SCAF made a proposal for three payments over time. This slide shows what SCAF and ICEAA paid out, including the total that we expected to receive from SCAF, with the daily exchange rates applied, and the following slide shows SCAF's proposed payment. SCAF identified a number of bank fees that impacted their bottom line, which amounted to the difference between the approximately $17,000 initially identified and the $7,628 they proposed as the repayment figure to be split among three payments, the first of which to be paid immediately.

Christina adds that the delta from the original proposed amount and the amount SCAF countered with seems like more than what could be accounted for in daily exchange rate

fluctuations and bank fees. Madeleine explains that the daily exchange rates did make a significant difference in total, but without full clarity of bank statements and when the money is coming in and out of the accounts this still may not be the correct approach. Additionally, the final conversion of the number at the end is highly determinate upon these daily rates, even with a weighted average accounting for how much was paid at what rate. To her recollection, the delta was less than $10,000, but the bank statements would be the most helpful to ensure full traceability. Arlene is willing to make one more attempt at obtaining the bank statements, but she isn't sure SCAF has them available. Christina points out that we have overlap between the SCAF and ICEAA board, and this is not an act of malice. To her knowledge, ICEAA has a stronger financial position than SCAF and does not want to put an organization we partner with in an untenable position, and recouping ~$7,000 is preferable to recouping nothing, which the group at large agrees with.

Megan reminds the group that this is not the first time this has happened to us, and we need to exercise caution when organizations approach us with conference cost sharing. On the surface, it seems like a sharing of duty in addition to cost, but every decision needs to be made by committee and extends the timeline. Even the initial meeting with SCAF took four months, and then additional time to decide when to put in the call for papers to coordinate schedules. Another consideration is the disparity in cost between SCAF and ICEAA events. The ICEAA workshop is expensive to pay for out of pocket, whereas a SCAF event is typically $0-$50 to attend. To make the joint event with international attendees make sense, it needed to offer additional value, which led to increased costs per attendee. This was likely off-putting to the local base, in addition to non-optimal timing with concurrent fiscal, social, and political events in the UK. We also had an impetus to ensure we could advertise the event during the Minneapolis event in 2024. The board notes that this is more money than SCAF is easily able to expend, even if our opinion is that ICEAA is shouldering more of the financial responsibility.

Arlene reiterates that SCAF has only indicated they will make the first payment immediately and has not yet identified the schedule for the remaining two payments, which Arlene will work with David Hedley to establish.

Christina posits that perhaps we should ask to see their financial statements to get a check of if and when they will be able to pay us. Madeleine doesn't think that it is inappropriate but that we are still unlikely to see the financial disclosures, as we have not yet seen statements even for the documentation of bank fees. She believes Sanath's insight would be helpful here as how best to proceed.

Christina brings up that that in the ICEAA charter when we were founded indicates that we are supposed to have the international conference every four years. By collaborating with SCAF we met a requirement that otherwise would have been more difficult to fulfill and posits how we will meet it in 2028. Megan does not believe that is still a requirement within the current bylaws or charter, and Madeleine agrees that she does not see it in the current bylaws or charter. Further considerations are raised about ICEAA and SCAF's financial positions; although ICEAA may have a stronger financial position than SCAF we need to be cognizant of the precariousness of our own financial position. Outside of this context, we are currently in talks with CPM to absorb their membership, which may also be stretching our limits. There is an additional risk that SCAF may only be able to make the first payment and not be able to pay for the second two installments. Brian proposes adding language that because there is a disparity in what we believe is owed, purely because we don't have the insight into the financials, that we're willing to accept an immediate payment from SCAF and we'll tentatively agree for these next two payments in the amounts of, however, prior to the date of the second payment, we would like to have transparency and also documentation for our bookkeeping. Arlene points out that a schedule should also be determined for the future payments, as there is no current schedule beyond the proposed immediate first payment. The group waits for Sanath to join before voting on the motion.

Vote: Motion is raised to accept the first payment proposed by SCAF, due immediately. SCAF will provide documentation to justify proposed total amount before determining second and third payment amounts and schedule. No further discussion is requested. Seconded and passed.

Professional Development Update: Kim Roye

Kim presents slides. We are down a little bit on renewals from the past few years, but she is refocusing on recertification now that much of the work on the inflation module is complete. We have certifications that are expiring soon, and she wants to start reaching out to those people earlier than we normally do. see in some of the upcoming slides, we have some certifications that are coming up for expiration soon and we want to just try to see if we can pivot a little bit harder to think about how to reach out to those people maybe earlier than we typically do. Christina asks Sean for his insight into what works for WCAC and perhaps Southern California that have a more successful time with engagement and recertification. Does he think it would be too much to assign to the region directors to start nudging their

chapters into action. Sean thinks that with the membership and certification lists, it is not that big of a lift, and they can also help people less familiar with what counts to recertification.

Kim continues that there is no big change to our non-US certification counts. We have administered 73 exams in 2026 so far, compared to 157 exams administered in 2025, and we have 7 PCEA and 1 CCEA exams currently scheduled in 2026. Christina asks Kim to confirm that 2019 was the last year prior to switching to the online exam. Christina notes that people were still using testing at the workshop as an impetus to attend the workshop, and that 2019 had a higher number of exams administered.

Kim expands that when she was looking at expirations of certification to understand who to reach out to first, she saw that 85% of the people who hold certifications have the CCEA, where about 10% have the PCEA. There may be some room there for us to target the more junior analysts that may not sit for both exams to see what we can do better to understand what is stopping them from attempting the exam. 2028 is going to be our largest expiration year for certifications. Kim notes that Sean's approach with WCAC is to reach out three to six months ahead of certifications expiring, but maybe we need to start getting on people's radar even earlier. She suggests that at 18 months we send people a ping their certification is going to expire, and to put it on their radar, at12 months we could provide a list of what units they need for recertification, and at 6 months provide them a bit more information to make all the units that you need for recertification.

Sean adds that the other benefit is that by bringing the need for recertification points to a member's attention earlier, they could plan to go to a workshop, write a paper, present it, and attend a training track to knock out points. Sean wants to revisit people who only take PCEA versus CCEA as he doesn't understand the point of studying all CEBoK to only sit for one of the exams that test for CEBoK mastery.

Megan adds that also to Sean's point is that the certification process is confusing. We must have a flowchart to explain to people how it works. For people who already know what it means, we're doing fine but that is off-putting to people that aren't already part of the ICEAA fold. By making it more complicated it turns off potential new audiences, members, and certified analysts.

Christine thinks that the certification path is a conversation we need to explore, ideally with Kevin Cincotta present. She agrees that when we make the call for papers first may be a good time to start advertising to people with certifications up for renewal to motivate them to contribute a paper or push to attend the workshop, and it creates a targeted marketing

opportunity. Sharon is identified as the key POC for any questions that emerge from the marketing push. Kim will work with Sharon on the messaging. Kim also thinks that targeting managers or higher ups that have many employees coming up for recertification also may be worthwhile.

Action: Sharon will field questions from members and recipients about the targeted certification marketing and recertification requirements. Kim will work with Sharon to draft targeted messaging for certification outreach tied to the conference and recertification points.

Kim briefs the training update for the inflation module. Brian Flynn and Peter Braxton have put in a lot of great work; Brian has focused on the brief that will be presented for the CEBoK inflation module, and Peter has taken the lead on creating the wiki content that aligns with the brief. There was a complete update of the brief, but we still have other goals to which we are working, including finalizing the wiki content and adding additional escalation/inflation questions to the module/exam. Peter is also working on a graphic that helps explain the new inflation guidance.

Kim and the team have been working on communication to test takers about how to be successful in the exam, and Sharon includes that communication when people are accepted as being eligible to take the exam, as well as a notional schedule people can follow for exam preparation. If people are more intentional about study groups and preparing adequately, hopefully success rates will be on par with what we were expecting.

Finally, we have had conversations about the BOE and where we need to go with that product. Hopefully we will get feedback and determine next steps in the coming months.

2026 Workshop Update: Megan Jones

Megan presents slides. The workshop received three gold sponsorships, four silver sponsorships, and 11 other sponsors, of which all but three have booths. Hunatek sponsored our neck wallets, Sirius sponsored the bags, and Take2 will be sponsoring our custom cocktail at the bar tonight, tomorrow, and Wednesday. Our forecast said we would hit 440, but we got 386, which Megan found reasonable, as 440 seemed too high. We had 62 Government attendees this year as opposed to Atlanta's 12, which is very nice. We also got a lot of international attendees from a lot of different countries this time, to include 3 attendees from the Brazilian army, a Galorath employee based out of Germany, many South Koreans, some Taiwanese, a few people from Türkiye, and the Sirius folks representing the UK. We have a strong OEM presence, which we were hoping for as Norfolk is an OEM town. Additionally, food is about half the price as it was in Atlanta. We will feed 386 people for

about the same amount as we spent last year on about 250 attendees. Other wonderful news, the food here is about half the price it was in Atlanta. Megan explains that post-COVID, hotels got rather bullish in their pricing, which presents challenges in choosing a city. Megan points out that since we operate on a cash basis, some of the money we made for the workshop is on the 2025 report. Next year we will be in St. Louis and the call for papers is already up.

ICEAA Strategic Direction: Christina Snyder, Megan Jones

Christina presents slides. She brings up that at the beginning of her term, we discussed the strategic direction that ICEAA would go in, and the landscape has changed even more. After Atlanta, we were nervous and even considered briefly a virtual workshop for 2027. We were apprehensive about Norfolk but the numbers that Megan presented give Christina more confidence for future workshops. However, the expectations of the employees and managers have shifted over the past 15 years that Christina has been a part of the organization. Do we still have the same target audience? Are we meeting the objectives that we originally came up with and should we open the aperture a little bit more as to what the world is, what's available to us, and the idea that maybe we don't have to do it all, we don't have to know it all, there are experts that might be able to help us.

Christina displays bullets from the strategic plan, the top one of which to her is the annual workshop. Even though there were a lot of people not excited about the Norfolk location, we still got good numbers. It doesn't have the totals of Tampa or San Diego, but it's not a destination high on many people's bucket list. Even so, the numbers we got indicate to her that people really do like what ICEAA has as a product, which is this workshop. The second bullet is about maintaining and continuously improving CEBoK with revisions to the current content and adding relevant content. We have done this, with the change to inflation specifically for this year, and we are teaching that at the workshop. However, Christina sees a need to explore more effective ways to curate and constantly expand our body of knowledge, and the way we do it now is a long and tedious process. Modules 5 and 6 both took over a year to update. It would take us 16 years to update all modules, which is not realistic. We also need to maintain high quality certification exams that are passable but still difficult otherwise the CCEA doesn't mean anything. We also need established web-based access to connect members with our resources and especially to prepare them for those certification exams. The final bullet on Christina's strategic plan is about the journal. We're one of the few organizations that still has a peer-reviewed journal that people look to us to come and publish their information. We are a niche career field and there are people who want to get their papers out there.

From this list, Christina considered which products are the most valuable and where are we getting the demand signal from. The annual workshop is the biggest one, but also CEBoK and CEBoK-S, certifications, and the journal. We need to discuss how we can broaden our reach and modernize our products as appropriate.

Sean adds that the archive of papers holds a great deal of value for the members. New ICEAA papers reference other ICEAA papers, which he sees as a positive. Access to the papers isn't something we currently charge for, but he sees the collective body of research and knowledge as a huge asset to the members. Another value ICEAA adds is at the chapter level, particularly at the larger chapters such as WCAC, is the networking and social events. Although it's not a product it is a way to get people in and can potentially feed the other products.

Javier adds that the list is comprised of products we create and output and that another list we should have is generating leads, such as attending other conferences and having a booth and a social media presence. How do we market interest? Is it through a TikTok account? Is it through Instagram? What is it that we can do to feed into these products that we provide. Without having a marketing angle to this, if we go to one of the engineering societies and have a booth, we can potentially pull from their base and have one or two people come and join our organization. Other considerations: How do we get creative with our logo? How do we get creative with making videos? How do we have that marketing strategy to drive folks to join us for the outputs that we generate? These ideas would go on the second list. Marketing branding is what may generate more interest in joining the organization and having people sit for the test. Can we link ourselves to companies willing contracts and plug in data about how ICEAA enabled contract wins? If we can link up with companies like Northrup or Boeing to post with our quotes or our logo included that sort of branding could take us to the next level. Christina agrees with the idea of the second list.

Christina briefly speaks to the organizations that are struggling, such as College of Performance Management and the Naval Postgraduate School. Some organizations are doing okay, and the difference seems to be organizations with Government backing, such as Morris or DAU, which is entirely Government run.

Brian agrees with Javier's statement about how we need to better market ICEAA than we are now. We also need to consider getting an idea of why certain OEMs are getting more involved and how we can see more of that. He also wants to explore the idea of having a 501(c)(3) non-profit designation versus a 501(c)(6). He will resend some information he sent a while back. Technically now when we get a sponsorship fee that is an exhibitor fee, and a

sponsorship fee may be more appealing to more corporations. With the 501(c)(3) status the sponsorship fee would be tax deductible It would also open the doors for pursuing things like grants and other funding sources for developing educational materials, et cetera.

Megan mentions that as a (c)(3) we could also do more lobbying that people talk about to get a CCEA designation added to contracts. Madeleine adds that in her experience, getting the CCEA designation doesn't always involve working with high level leadership but also building relationships and working directly with the Contracting Officer Representatives and direct customers that have a large voice in creating the Statement of Work.

Megan points out that companies with a lot of CCEAs will advocate more for this and bid more people with CCEAs because it is a true metric that can differentiate between bids.

Rich adds that it is a general awareness thing about an organization understanding that putting a CCEA requirement into their contract will serve as a discriminator and increase the likelihood of getting people that are qualified. Typically, when we get a person in the government with a high enough position to see the value of the certification and advocate for it is when we have been successful in the past. Some organizations, such as Air Force, have a list of certifications that they list and it encourages their people to get them, because it helps their career. Megan asks how we plan on getting these high-level Government folks to buy in and support us, because we have been talking about this for years. Christina mentions the Federal Cost Leadership Alliance and how she thought that Chris Massey, Courtney Gray, and Sean Wells had made a good start with the FCLA. Sean sees DOGE as having hurt these efforts, and it's still working even at a reduced level. There have been people within DHS, specifically Coast Guard, who have been able to join WCAC. One issue he has identified is meeting government on their level and where they want to be. We hosted a panel event for WCAC, which got a lot of different contractors out for it, but struggled with getting a federal employee on board, even ones with personal connections to the FCLA. There was a wariness about something coming up that may be perceived as contrary to a mission statement being used against them or their offices.

Megan proposes an idea she had to hire external consultants. She has been at ICEAA for 12 years and has been providing marketing and IT solutions at little to no additional cost. She's able to modify code that she finds online to build things, but the IT infrastructure is not streamlined or easily fixable. We come up with a lot of ideas such as trying to put the archives behind a paywall or give bulk access to CEBoK to companies who want to have ambiguous access to it permanently without unique sign ins that are beyond her IT abilities. We also need to consider how much money do we want to invest in marketing. Do we buy

some lists? Do we hire somebody to come and explain to us what it is we keep trying to do? We have not been able to crack this on our own so far and we need some help. We need to figure out what other pies we can start making money off that won't alienate the government pie or take away from it. But knowing that we can't depend really on the government all the time to come up with money, because it's somebody else's decision that is further up the pipeline than we know. We must hope that somebody who we don't have contact with has money for every one of you to be here. Maybe we can find a market that we can influence and touch and have a little more of a reciprocal customer relationship with rather than just whatever the government is able to give us.

Also, we need to be able to explain what makes ICEAA awesome. What does it do and why is it good and useful. We know this but we can't explain it to people in similar roles that aren't explicitly cost estimators or analysts, such as project managers. Megan sees certification is the engine of this whole association because certification fuels attendance at the workshop to gain recertification points. Membership dues are practically at a loss. If we want to do more things, if you want to have a staff of more than two people that could do bigger things and more things because as is the ICEAA legal department and IT department and marketing department must basically take off the month of April to be the workshop registration department. Additionally, due to having such a small staff, we must rely on volunteer effort and people need to remember it and run with it autonomously.

Additionally, Megan sees the need for a consultant to figure out what things the ICEAA office can do with what we have now so that she and Sharon can start producing things that make ICEAA money. Right now, it takes a year for a group of volunteers to update a single module, because all the volunteers also have other obligations such as work and families. We need to also have realism about what we can do, what resources we have, and who we can reach.

Megan sees the automotive industry as one of the lowest-hanging fruits out there, particularly with the OEM tie and how they still need to estimate things, but she has no idea how to get into that market or if there is another market entirely that we are all overlooking. She and Sharon keep things running, but what is the next most important thing to do and what do we prioritize to keep our organization relevant and above water.

In the context of CPM, they asked us to take over roundtable groups if they are absorbed into ICEAA, and they also have the EVM practitioner's forum that meets nine times a year and writes 15 white papers. CPM's going bankrupt—is this something we need to take on and

how can we expect to profit from those round tables if CPM didn't? And if they didn't, how do we figure out how to make money from that?

Christina adds that CPM has not shared financials, but they have assured us they are going to go through bankruptcy, and we will not assume risks. They are basically looking for a home for their EVM interests. Do we say that we are now primarily focused on cost; we can provide a place for you to present your papers, but we do not have the bandwidth for our board to manage the roundtables and paper production. Is it worth having our name in the ISO, but that isn't a money-making thing and may also increase workload. Christina also notes that she's not sure that there is even an EVM person that ICEAA could give a seat to on the roundtable.

Rich sees the idea of bringing a consultant onboard as having the potential for a lot of value but also a lot of risk. Bringing someone up to speed quickly would be difficult, as we are a niche field and they won't know more about it than we do, and struggles to see the value in targeting, for example, the automotive industry over EVM. He thinks that doing more for compliance and FAR based pricing will bring in more OEMs. Where would we get the money for hiring a consultant and would our time be better spent attracting some of our cousin organizations, such as CPM, and soliciting them for help?

Rich believes that even though CPM is going bankrupt as an EVM organization perhaps their problems can be solved through consolidation, and that we would invest too much time in educating any consultant on our field.

Megan thinks that education will be of lesser import because we currently only pursue one market—existing cost analysts. The point of a consultant would be to pursue additional markets and people outside of our group that have less exposure to what we do.

. Sean thinks that maybe we should be asking who isn't currently failing versus who is. And PMI is still doing great. He wonders if we could have a discussion with them about what they feel has driven their continuing success. He sees that PMI obtaining ISO certification and establishing the standard for project management was the main turning point in their continued relevancy, and ISO certification is something that we may be able to obtain for cost estimating. Sean agrees that EVM is closer to what we do than automotive, because to his knowledge there isn't a huge developmental aspect to cars.

Megan posits who the next group after EVM would be in that case. Even within ICEAA, the EVM community has been dwindling. CPM is down to about 80 members after having a much higher membership for quite some time. Is EVM even a worthwhile market? Sean thinks EVM is low-hanging fruit, and the next low-hanging fruit would be contract pricing.

Megan also wants to make the point that regardless of where we focus our target market expansion, we still have the issue of needing to speak the same language as people we are trying to bring in. We talk across each other using different words to mean the same thing, and that can alienate our audience. Identifying these areas of commonality that we use different nomenclatures for is an opportunity for us to engage people that don't currently realize they could get value from us. Rich reiterates that he believes using the people already within our organization will be more effective for bringing in OEMs.

Christina thinks that we need to figure out the next step with CPM and what caused them to go bankrupt. Was it because they were poorly run? Megan adds we need to find out what they are looking for.

Brian thinks we need to think outside of the box. The Government Contract Pricing Symposium Summit that is essentially run by ProPricer/Deltek used to be huge and may be a bigger draw than the ICEAA workshop. Can we work together with GCPS perhaps? Rich points out they get high end keynotes, but the draw for him is ProPricer, as he has heavy users of ProPricer he sends. Brian thinks it may be worthwhile to consider a booth or other presence there.

Action: Rich to reach out to Charlie Williams to facilitate conversations with the GCPS Summit.

Carol Dekkers adds that Megan has earned our trust in her role over the past 12 years, and she agrees with her about the need for a marketing consultant. We are good at developing cost products, and she endorses Megan's point, but she wants to caution that if we do go down this path, we need to listen to the marketing expert and not override their decisions and think we can do better and polish their product. Christina thinks we need to know what the cost of this would be and thinks that we should investigate it before deciding.

The discussion pivots to hiring an IT consultant. We have a lot of aspirational ideas about how to handle our IP and integrate AI, but Megan is doing IT in addition to her primary duties and does not have the background or bandwidth to implement these ideas.

Cari Pullen understands Rich's perspective about needing to get someone up to speed to be valuable in a consulting role. Cari views the big question with ICEAA succeeding better with

the Government is figuring out how to get certification recognized and/or required in Government training options, even if it is one of multiple ways to meet a requirement. Currently, the only credit Cari has ever received for anything ICEAA related is in continuing education points.

Sanath agrees that we need help with marketing but agrees with Carol that we need to be prepared to listen. We had the conversation several years ago that we need to identify our key revenue source and focus on that. We have multiple products, one of which is certification, another of which is the workshop, and so on. Likely the first thing a marketing professional will do is understand our key revenue source and we as a board need to be prepared not to dismiss what they say and to take action, otherwise it will all be a waste of time, effort, and money.

Kim's concern is that with how nervous we were about even having a 2027 workshop, where will we get money for a good marketing professional to come in and get all they need to do completed in a relatively short time frame. We are all volunteers with full-time jobs currently, so the professionals being paid for this effort will be able to work faster, but money is her main concern.

Megan is hopeful a marketing consultant will take work off the volunteers. She appreciates the effort people put in, but she wants to be able to do more without needing to wait for the BOD and other volunteers to give her direction. If a marketing consultant can better consolidate the message that she has had trouble consolidating out of the board, then she can run with it. She can also run with next steps advised by a consultant and hopefully not need to wait for input or help from the volunteers on who to reach out to or how to refine the market, there would be less churn and more productive work overall. If the volunteers can work on the product and update the modules, and Megan can do the legwork on promotion of the product in parallel, that would be more effective.

Arlene asks if we have considered trading membership benefits to a company for lending us a few hours of a marketing group. They would already know the industry. Megan clarifies that she doesn't need help with coming up with the materials, such as banner ads, et cetera but needs more help with strategic direction. Arlene states that some of the larger companies have strategic marketers on staff. Brian imagines that university students would be knowledgeable in this area also and are frequently seeking projects where they can come up with a marketing plan, design, and implementation. Sean wonders about how we could better use social media.

Megan points out that many of the ideas that we have already come up with require work on the website that she is not able to implement. For example, if we want to see things in our archives it would have to go through a payment processing system, so we would have to have someone who knows how that works and how everything is connected to an ICEAA account and log in. We frequently discuss selling nebulous CEBoK licenses to companies and every solution Megan has devised is not scalable and would fall apart if it became successful. It's not a huge concern that it will take off at this point, but if we become effective at marketing bulk CEBoK licenses, our IT infrastructure will not be able to handle it. She further clarifies that, for example, if Amazon wanted a number of licenses, we would give them a login and now every employee at Amazon could theoretically have access to the wiki, as we can't monitor simultaneous log ins on the same account. Every year a company asks about a bulk CEBoK license where they don't have to specify who is using it and how many people are using it.

If, for example, Boeing wants 300 licenses for 300 people and asks for a code to be used 300 times for separate emails, due to the way the website and wikis are built, that's not really something she can do. The wiki is its own site and has a redirect login once you are in your ICEAA account, and there is one log in for all users although it can't be seen from the user end and nobody has access to the password.

Kevin points out that a better immediate use of our money would probably be an IT consultant to redo the infrastructure and do things we have talked about in the past, such as putting papers behind a wall or better structuring for bulk certification. Brian points out that this also may be something we could ask universities to help with. Megan thinks that spending money on this would lead to better accountability and give us the leverage to demand completion of the work.

Action: Arlene will evaluate hiring external consultants to assess IT, marketing, and revenue opportunities for the association

2028 Workshop — Megan Jones

Megan discusses the 2028 workshop. Christina and Megan inform the group that one of the things that makes us very unattractive to hotels and makes the average member pay more is that we must have 30% of rooms set aside for government per diem. Generally, there are people that are not government employees using this rate and it costs every single person more. Some companies also make people stay off site to get the per diem rate. Hotels will not charge the rate more than what it is on Expedia, but it must be more than government per

diem to make up the difference for the per diem rooms. The is a calculus that the hotels do when we ask for the per diem rate, and we would have more hotels bidding on us without the 30% of rooms at per diem requirement. The difference between per diem and the booking rate would likely come down without that 30% set aside.

Megan adds that the GSA rates are unreasonable. The Norfolk one is $110 and the going rate for rooms at the Norfolk Marriott is $300 on Expedia. Hotels are not excited about selling rooms at the per diem rate, and they spread the loss for the per diems onto the block rate which defers the cost of the per diem rooms to the rest of the attendees. If that spread bumps it above the Expedia rate, they know that people will just book through Expedia and the hotel won't get the credit for it. This is why we don't get to go to cities like Nashville and Austin that people want to go to. Since we can't convince the GSA to update per diem rates to be more realistic, we need to decide if it is worth it for us or if we want to have a greater selection of hotels.

Kevin agrees that we don't need the per diem rooms, because hotels have their own block of per diem rooms that are not a part of the ICEAA block that Government employees can request.

Megan also wants to add that the Government attendees typically wait until the last minute to book the hotel because it takes them time to get the approvals. By this time, the per diem block is already gone, and she can't hold per diem rooms available for people until the last minute. Kevin suggests at least cutting the number of per diem rooms from 30% because that is not commensurate with Government participation. Megan clarifies that the contractors camping on the per diem rates would make it impossible for any Government folks to get a room at per diem, because at least some of the rooms are used appropriately.

Megan wonders if the contractors that take the per-diem rooms would not stay in the conference hotel at that point. Would we lose a guaranteed 30% of the 1,000 nights we need to avoid hotel attrition fees. Last year the 30% wasn't filled until the end of the rate period, because a company that is normally a big offender of abusing the per diem block negotiated their own block rate. This year, they just took the ICEAA per diem rate rooms. Madeleine comments that even getting closer to the per diem rate on the block rate would help prevent companies from seeking out their own block rates.

Megan adds that another wrinkle is that hotels have been outrageously overpriced over the past few years. We could use every advantage we can to get hotels to bid on us at all and we still may not get many hotels willing to host us. We are not attractive to hotels because we

have low room commitment and a lot of space requirements, and we're here for a long time. We are right at the sweet spot because the room downstairs will fit 400-450 people. If we got up to 500 in this hotel, we would have had to move the exhibit hall somewhere else, and we prefer having it all in one spot. We are too big for a lot of hotels. The biggest way Megan sees us to open more opportunities with hotels is the per-diem room rates.

Megan proposes asking her hotel person if she is worth sending out one RFP with the 30% per diem block in it and one that doesn't and seeing if it makes a lot of difference. Thinking back on some of the rejections we've gotten from hotels are due to them not offering per diem rooms, being too busy, or too small. And that is only from the people who take the time to say no, thank you versus not responding.

Christina thinks we would still have people trying to use their CAC cards to get per diem rates if it was less than 30% blocked off, but lowering the number would be okay if it was only the federal employees pursuing those rooms.

Megan adds the hotels say they don't want to do *any* per diem rooms, but they may be more amenable if it is less than 30%. There is also a factor of how desperate they are to book rooms.

Kevin adds that we can try it for one year and it doesn't have to be a forever commitment. Courtney suggests creating some off-the-shelf materials we can provide that show a cost benefit analysis of staying at the workshop hotel and not needing Ubers or a rental car. Christina adds that it's difficult because she uses the Government people staying at the hotel as a selling point to her leadership.

Megan will explore what things open to us with the possibility of getting rid of those. And if it's not opening enough to make the shakeup worth it, then she won't shake it up.

Action: Megan will explore the potential for removing per diem requirements, including asking their hotel contact to issue two RFPs: one including the 30% per diem requirement and one without it to compare hotel responses and rates.

Participants opened by reviewing calendar conflicts for the conference, focusing on Easter, Mother's Day, graduations, and Memorial Day weekend as primary constraints. Courtney had researched Easter dates for the next 12 years and the group discussed preferring late April or early May to avoid conflicts while noting occasional problematic years. The team evaluated moving the conference earlier to late April or early May to avoid conflicts with graduations and Mother's Day. For 2028, Megan will ask for the pricing and seeing if there's any

difference between the week of that would be the 9 through the 11th versus the 16th through the 18th.

2:30 –Bylaws and Officers Christina Snyder, Megan Jones

Christina addresses the bylaws and would like to have a meeting next month with the board on two issues. The first is that there is a lot of work for a professional organization of our size, and we really can burn out volunteers out because we have a hard time finding people willing to do the work. Within I believe it's within the bylaws that people term out of their chapter roles. The problem with that being especially in the chapters besides DC and SoCal, is that there might only be four people in that region that want to do that work. And if that's the case, our own bylaws are stopping people who would be happy to sit there and still fill their president role. Megan adds that she has had several chapters contact her and ask if they can have someone run for another term, because they can't find anyone else to run. She gives them leniency in these cases as it is better to have a three-term chapter president than not have a chapter at all. We can be more flexible with the chapters, but we need to stick with the bylaws obviously for this board. She doesn't think it's worth a whole overhaul of the whole chapter bylaws thing but more acknowledging the scenario with the board's blessing. She would like to continue to encourage the chapters to follow the spirit of their bylaws versus the letter of them to avoid chapters having to close. She confirms that everyone is on board.

The second issue is the petition process that we have. We have talked about this in the past but tabled for a future date on how we handle petitions at the international board level. The board examined the petition nomination pathway that permits candidates with 25 signatures to bypass the nominating committee vetting after the slate is published, traced the provision's origin to the SCEA-ISPA merger, and discussed amending bylaws to require petition candidates to meet the same qualifications or to restrict petitions to cases where the nominating committee rejected a candidate.

The petition nomination process allows any candidate with 25 signatures to appear on the ballot after the nominating committee publishes its slate, which board members view as a bypass of vetting and propose amending to require equal qualifications or limits tied to nominating-committee rejections.

Participants raised concerns that petition slates could be used to exclude specific candidates and described the desire for an inclusive process that avoids a "mean girl" dynamic. They discussed safeguards such as requiring prior rejection before petitioning onto the ballot to prevent gaming the system.

A petition onto the ballot should be allowed only after a candidate has been formally rejected by the nominating process to reduce exclusionary slate behavior.

The group confirmed that bylaw changes can be approved by the board without full membership approval and agreed to refine the amendment language and circulate it by email for a vote, using SurveyMonkey as the voting mechanism. Christina also would like to have a meeting for the nomination cycle for board to answer questions about what it is like to serve and to talk about our individual roles.

Action: Madeleine, Megan, and Christina to develop amendment language for voting and circulation.

Action: Christina to organize a meeting for potential Board of Directors' nominees

Action Item Review: Madeleine Teller

Madeleine reviews the action items and gets updates on all the action items from the group.

Plan Next Meeting & Adjourn Christina Snyder

The board agrees to hold their next meeting in person on Friday, July 10 from 11:00AM-1:00 PM with lunch preceding. A motion to adjourn is raised, seconded, and approved. The meeting adjourns at 3:59 pm EST.

New Actions from May 11, 2025

IT Actions:

- Action (May 2026): Arlene will evaluate hiring external consultants to assess IT, marketing, and revenue opportunities for the association. Potential IT improvements include developing an AI Language Model to pull from our repository of documentation, moving articles behind a paywall, and reworking website infrastructure to better handle log ins and bulk CEBoK sales.

Marketing actions:

- Action (May 2026): In addition to the initiatives in Christina's strategic plan, create a second list of marketing initiatives to generate leads via social media, networking, et cetera
- Action (May 2026): On a recurring basis, Madeleine to organize input from board and membership regarding any other conferences people are attending
- Action (May 2026): Rich to reach out to Charlie Williams to facilitate conversations with the GCPS Summit.
- Action (May 2026): Sharon will field questions from members and recipients about the targeted certification marketing and recertification requirements. Kim will work with Sharon to draft targeted messaging for certification outreach tied to the conference and recertification points.

Other

- Action (May 2026): Megan will explore the potential for removing per diem requirements, including asking their hotel contact to issue two RFPs: one including the 30% per diem requirement and one without it to compare hotel responses and rates.
- Action (May 2026): Madeleine, Megan, and Christina to develop amendment language for voting and circulation.
- Action (May 2026): Christina to organize a meeting for potential Board of Directors' nominees

Outstanding Actions

- Action (April 2026): Christina Snyder will reach out to Rich Hartley offline to request a written testimonial about CEBoK applicability for mid-career training
    - Discussion: Christina will work with Rich to get verbiage
    - Status: In progress
- Action (April 2026): Arlene will review other accounts and confirm there are no remaining concerns beyond the Alabama matter
    - Discussion: Arlene will do a final check

    - Status: In progress
- Action (April 2026): Resolution of SCAF payments to ICEAA for 2024 joint workshop
    - Voted on a way forward at May Board meeting to accept payment plan and propose a schedule
    - Status: In progress
- Action (April 2026): Kimberly Roye will finalize the inflation module edits
    - Discussion: The updates are complete for the purposes of the workshop, but will keep open to track with workshop feedback and revisit at July 10 meeting.
    - Status: In progress
- Action (November 2025): Christina to meet with Kim, Kevin, and Kellie to evaluate the status and direction of the inflation module updates.
    - Discussion: The module is not ready for official sign off until additional edits and updates are finished and a finalization procedure needs to be determined.
    - Status: In progress
- Action (April 2026): Christina will follow up with the CPM board to ask about sharing their financials and past program records.
    - Discussion: There is a meeting planned for the following week with CPM to determine what they are asking from us. Madeleine and Megan reached out to CPM to get further information and documentation from them.
    - Status: In progress
- Action (March 2026): Christina will reach out to Karen Mourikas/OEM COG about doing a preview of the BOE module to gauge interest.
    - Discussion: Christina will work with Karen and gauge interest on LinkedIn following the workshop
    - Status: In Progress
- Action (November 2025): Megan to create a summary for the website and announce Frank's emeritus membership on LinkedIn, with an announcement to follow in May at the workshop.
    - Discussion: Madeleine will summarize Bill's prior inputs with AI and get to Bill for approval
    - Status: In progress:
- Action (May 2025): Christina to meet with the chapter presidents and region directors to ask who plans to stay in office for some time to determine if the chapters can take on more responsibility with providing online resources.
    - Discussion: Christina and Kellie spearheading effort to engage with chapters and regions; Sean/Christina coordinating working sessions with chapters and region directions, Sean has done a great informative session on this. Chapter engagement will be a recurring action.
    - Status: In Progress

- Action (May 2025): Christina to meet with the chapter presidents and region directors to ask who plans to stay in office for some time to determine if the chapters can take on more responsibility with providing online resources.
    - Discussion: Christina and Kellie spearheading effort to engage with chapters and regions; Sean/Christina coordinating working sessions with chapters and region directions, Sean has done a great informative session on this. Sean wants to brainstorm on an ongoing basis with chapter presidents. Chapter engagement will be a recurring action.
    - Status: In Progress

Completed Actions:

- Action (October 2025): Patrick to research/work on developing an AI Language Model to pull from our repository of documentation
    - Discussion: Patrick has done research and put together a proposed plan. Slides to be presented at a future board meeting. We will roll this into a new action with the IT consultant.
    - Status: Closed
- Action (October 2025): Megan to research moving articles behind a paywall
    - Discussion: Putting this on hold as it is a high-effort, potentially high-cost project that won't have quick returns. Any further work with the site developer will be presented at a future board meeting, if relevant. We will roll this into a new action with the IT consultant.
    - Status: Closed
- Action (May 2025): Madeleine & Sanath – Develop a schedule of training events, conferences, along with POCs for each in order to find new places where we can establish a presence/make contacts/etc. (MT). Provide information/contacts for DMSM International Conference in September (SR)
    - Discussion: Madeleine researched workshops, and Megan traded a table at the EVMP conference for a table at the Norfolk Workshop. Sanath provided contacts for Website for DMSM is DPMC 2025. They have stopped responding to international enquiries but open to US federal and US citizens. Megan suggested a marking budget. Closing action and moving to marketing actions.
    - Status: Closed
- Action (November 2025): Brian Glauser will reach out to the Federal CIO Council to seek their support and backing for the ICEAA initiatives.
    - Discussion: This will roll into the list of marketing initiatives.
    - Closed
- Action (January 2026): Christina will forward the email about absorbing CPM to the board, incorporate any feedback, and reach back out to them for further clarification of questions
    - Discussion: Christina will requested past financial statements of past several years to assess risk
    - Status: Closed
- Action (March 2026): Arlene will follow up with Sanath and SCAF regarding the ongoing discussions and updates related to the joint SCAF/ICEAA workshop
    - Discussion: Arlene to meet again with SCAF on April 13 to get further documentation from SCAF. Closing as a new motion approved on payment plan.
    - Status: Closed

- Action (April 2026): Megan Jones will update the exam accommodation policy wording to remove the "first" attempt limitation and clarify that valid documentation permits accommodation while retaining retake fees and limits.
    - Discussion: The policy has been updated
    - Status: Closed
- Action (April 2026): Sharon Burger will continue to accept and process accommodation requests with supporting documentation from licensed medical professionals and apply the reasonableness test described by the board.
    - Discussion: None further
    - Status: Closed
- Action (March 2026): Megan Jones will provide a breakdown of monthly expenses for the old and new office spaces in the next meeting.
    - Discussion: Monthly expenses will be about 50% of prior office expenses
    - Status: Closed
- Action (March 2026): Arlene will reach out to the Alabama chapter one last time to try to obtain proof of account closure.
    - Discussion: Arlene received documentation from the chapter that they are no longer holding the scholarship money and have withdrawn funds/closed out other account
    - Status: Closed
- Action (November 2025): Sanath will facilitate communications with David Hedley from SCAF for a response regarding the follow-up discussion initiated by Madeleine and Megan.
    - Discussion: Arlene met with SCAF; another action will cover status
    - Status: Closed
- Action (November 2025): Kimberly Roye will collaborate with Sharon Burger to develop a strategy for communicating best practices for successful test takers to those eligible for certification exams, as well as potential video marketing strategies
    - Discussion: Kim will add context explicitly spelling out benefits of attending the in-person training, in addition to sending a YouTube link to the future test takers of the video that she and Jennifer Scheel made about ICEAA test prep at the workshop. Kim has provided language and videos are available on ICEAA's Youtube
    - Status: Closed
- Action (October 2025): Christina to meet with Kim, Kevin, and Megan to discuss bundling the training videos and exam registration, and what appropriate pricing would be.
    - Discussion: People that purchase the training videos will receive a voucher for exam registration worth $150
    - Status: Closed
- Action (October 2025): Megan to work with Bill Haseltine, the nominator for Frank Flett for the emeritus membership, to obtain a writeup that accurately details Frank Flett's

accomplishments. The nomination was amended, voted on, and approved at the 21 November Board Meeting

- Action (October 2025): Kim to look at the make-up of who is taking the ICEAA exam (known people in our field versus unknown people in different fields) and report back
- Action (October 2025): Madeleine will provide her study plan for CCEA testing to Kim and the board.
- Action (May 2025): Sanath to connect Kellie with his colleague at Cranfield University in the UK to collaborate on developing a course for a master's certificate in cost estimating. Sanath, Kellie, Tim, and Dave to prepare a whitepaper on what the program would look like, what it means for our IP, and what other effort would be required from ICEAA for the board to present at the next meeting. Cranfield University dropped this proposal as they no longer have funding due to a government cap.
- Action (August 2025): Megan Jones will start working towards moving the organization into a co-working space come January. Megan has signed a lease on a spaceand we are on track to move in January.
- Action (August 2025): Megan Jones will investigate the possibility of adding a phone number recovery option for account logins to improve user experience.
- Action (May 2025): Megan to investigate our options for meeting insurance to protect our investments based on commitments for a Workshop.
    - Discussion: Megan sent an email to our insurance agent asking if they have access to meeting insurance and outlining our needs. The agent will get back to us. Meeting insurance covers things like weather, law-restricted travel, and other things that are already included in our contracts. Meeting insurance does not cover low attendance or lack of attendance due to attendees' employers' unwillingness to pay for it, and will not be worthwhile. Closing action.
- Action (August 2025): Christina Snyder/Megan Jones/Courtney Gray to spread the word about falsified certifications; Christina will bring up at the all-member meeting and reach out to leadership of member companies; Megan will add to the newsletter and run anything by the lawyer as needed. Courtney to reach out the Chris Massey to communicate on the Government side.
- Action (August 2025): Megan Jones will open registration for the Norfolk Workshop after Labor Day and ensure that all links are available by October 1.
- Action (August 2025): Madeleine Teller will follow up with everyone prior to the next board meeting to check in on the status of action items.
- Action (May 2025): All/Madeleine – Provide Megan with more pointed answers about what ICEAA means to us. More specific and quantifiable benefits are needed versus feel-good language. This applies to all board members, outgoing and incoming but Madeleine to take the lead on wrangling people
    - Discussion: Megan has sent the question to the board members with a suspense date of 9/15. Will check the status the week of 22 September. Closing action, answers were provided

- Action (May 2025): Christina and Courtney (or the 2027 Workshop Chair) to investigate the costs of adding a hybrid option to a 250-person event in the Washington DC area.
    - Discussion: Courtney has done some research on hybrid options, but it is difficult to obtain much data without setting up a meeting with a coordinator or a mock contract. Megan also reassigns this action to herself. We will revisit this after obtaining more information over the summer. Closing action, a DC workshop does not seem feasible currently
- Action (July 2025): Javier to spearhead the effort of figuring out the business model for the BOE training.
    - Discussion: Javier will start this effort. Christina to take over and find a project manager for this effort. Closing this action
- Action (May 2025): Sanath to create a working group to determine paths forward for the Software SIG and CEBoK-S and present options for the board to vote upon.
    - Discussion: Discussed earlier in July 11 meeting; this is still outstanding. Sanath presented at the October board meeting and a vote on his plan was held, and his planned restructure and rebranding was approved
- Action (May 2025): Courtney to set up a meeting this summer with current and past ICEAA sponsors for a discussion on valuable benefits for their Workshop sponsorship, and how to encourage additional sponsoring.
    - Discussion: The meeting has not yet been set up; Megan reassigns the action to herself. Megan has met with the sponsors for feedback and the sponsorship packages have been released.
- Action (July 2025): Christina to plan a side meeting prior to the next ICEAA meeting for the path forward on pay walling our models with Megan and anyone on the board interested in the discussion.
    - Discussion: Patrick and Megan to work on the backend and prepare a small sample of paywalled articles to see and understand what tools are readily available to us, Christina to set up a group of volunteers to help determine path forward, the group will also look into other sites that have implemented paywalls for papers and report back on their architecture and implementation. Closing this action to separate into two separate activities, paywalled articles and AI learning model.
- Action (April 2025): Madeleine to send a letter to all chapters notifying them that if they have a bank account, it must be closed by September 1, 2025 with instructions on how to return funds to ICEAA. The chapters will be informed of the process to request funds directly from ICEAA.
    - Discussion: Four or five bank accounts remain, several chapters closed out already. One of the remaining chapters has a scholarship fund from a donation that needs to be resolved. Megan will potentially need backup from the board to close out the final accounts, regional directors to reach out to the respective

chapters in their region that have not closed out their accounts. Christina will work to close out the last holdout; closing this action and opening a new one.

- Action: Sharon Burger to provide data on the current schedule of people planning to sit for a certification exam for the next six months.
  - Discussion: Sharon has completed this and it was briefed in the Professional Development Update
- Action (July 2025): Christina to reach out to Chris Massey and Cari Pullen about what government participation might look like in 2027.
  - Discussion: Christina will follow up with Cari and Courtney to better investigate. Closing action and creating a new one.
- Action (July 2025): Megan to look into overdraft insurance among other current coverages, and compare to Carol's information about IFPUG's coverage
  - Discussion: Megan has cashed in a CD and we have sufficient cash on hand; potential overdrafts did not become an issue
- Action (May 2025): Kellie, Kevin, and Kimberly to prepare a list for the board by July 31 of the updates necessary to the Inflation module and the edits to other modules that will be required as a result of those edits.
  - Discussion: Plan was sent out by July 31 and approved by the Executive committee
- Action (May 2025): Megan to create a list of questions for ICEAA board members to answer on their experience with ICEAA and what they most value for the purpose of generating marketing material.
  - Discussion: Megan has created the questions and sent to the board

Recap

- The College of Performance Management (CPM) is shutting down due to bankruptcy and has proposed that ICEAA take over several of the programs and benefits CPM offered to their members
- Their initial proposal was shown to the board at our May meeting
- The Executive Committee had a call with key CPM leadership to discuss details and asked for additional information
- CPM is closing down soon and would like to announce to their membership that ICEAA is taking over their services

Proposed LinkedIn Announcement

To College of Performance Management (CPM) members and individuals who enjoy CPM's LinkedIn site, CPM is closing its door, but prior to the final door closure we want to let you know that many of the benefits of CPM will not be disappearing.

Some of these benefits will be part of the International Cost Estimating and Analysis Association (ICEAA), which is the association that CPM recommends members and those who have enjoyed some of the benefits of CPM including in-person conferences, webinars including CPM and The Tariff-Free Think Tank (brought to us by Steve Wake from the United Kingdom) called the Global Conversation Club that is offered once a month, ability to contribute to ISO standards in project, programme, and portfolio management and an earned value track in the in-person conferences.

Proposed LinkedIn Announcement (continued)

Given that CPM is transferring so many of their member benefits and benefits for the larger performance management community to ICEAA, CPM encourages their members and benefit-enjoying persons to join ICEAA. Both associations are for the international community and are about creating spaces for members to grow, gain training and education, have opportunities to volunteer to benefit the member community, and to network with the global community that focus on cost estimating, analysis, earned value and overall performance management.

Yes, you will see many of the faces and names you have grown accustomed to seeing associated with many of these activities because we still care about performance management and all the supporting fields. Please join many of the leadership of CPM and become a member of ICEAA to continue to gain from the benefits you have enjoyed and to explore other benefits that ICEAA has cultivated as offerings for members.

We look forward to continuing to interact with this community, and to grow with you in knowledge.

1. Which benefits will CPM transfer to ICEAA and what costs/effort are involved?

- Recognition on the global stage for participation in ISO standards. Ability to garner global insight from those standards to improve ICEAA's standards for acceptance by a global audience and to possibly developed advanced standards for advanced certifications. Leading associations currently participating are: PMI, IPMA, AACEi, and GAAP. None to date have expressed any threat to their processes or certifications. PMI has noted it has allowed them to improve their offerings and bring insight into many integration aspects of what their members do. **What is necessary is using Zoom or Teams to support meetings and a location on the site for materials that must be shared.** CPM has never charged members for participating. Other organizations do, but participation is not as enthusiastic.

1. Which benefits will CPM transfer to ICEAA and what costs/effort are involved?

- **Global Conversation Club again is no cost**. Steve Wake from the UK and I have been doing this webinar once a month for almost 3 years. Average attendance is between 25 and 55 people. Subjects are wide-ranging and speakers include many of ICEAA's members globally. **The session lasts one (1) hour and includes about 20 minutes of Q & A.** A sampling of those attending include leaders from Manchester and Oxford universities, BASF corporation, Lockheed corporation, and several small consulting firms from the US.

1. Which benefits will CPM transfer to ICEAA and what costs/effort are involved?

- CPM's library of ISO material: Again, this benefit is free**. It just needs something like SharePoint or another site to support it.** When ICEAA members express they want to be included on the Mirror Committee for ICEAA access will be granted to the materials. This access has proven useful for students, professors, and corporate leaders. The benefit to those members who wish to participate actively is the ability to see material and to engage in meetings, document reviews, and to transfer knowledge to the organization or their organization.
- CPM's library of videos: Again, the benefit is free. It will need to be activated with members and especially leaders in the organization to establish new material. **It does require someone to curate. We used a volunteer who was quite good with the YouTube interface.**

1. Which benefits will CPM transfer to ICEAA and what costs/effort are involved?

- Wealth of leaders in earned value management and the various supporting or integrating fields: CPM has members and leaders interested in continuing to engage in papers and chairing sessions. The reach of these people is broad and global. **They could when integrated into ICEAA bring new speakers and papers to the forefront.**
- CPM's library of material: **CPM has a library of papers and newsletters that can be turned over to ICEAA.** CPM has copyright on some of the material and in other cases the copyright is shared with the authors. It just needs something like SharePoint or other site to support it.

1. Which benefits will CPM transfer to ICEAA and what costs/effort are involved?

- CPM's membership: While the membership is currently small due to inability to afford in-person forums, the reach of CPM to past members and others is broad. CPM's LinkedIn site boasts around 800 members. **Through an announcement of which you have a preview, those members can be redirected to the ICEAA site** . CPM can provide individuals who can provide material to engage the members.
- CPM's past sponsors: I have not contacted the sponsors because I have not had the go ahead from ICEAA. **CPM had 15 active sponsors and some 10 others who supported small activities**. I will contact them and suggest they offer sponsorship for ICEAA. Many will see the benefit, especially the training organizations in the field of earned value management.

2. We request the past 5 years of financial records to understand how these programs have materially benefitted the organization

- **The financial records cannot be supplied per our attorney since the organization is going through bankruptcy.** The records as I have stated show the impact of covid and government layoffs, firings and closure of some offices. There is no money as it will be given to the sole creditor, the Small Business Administration for the loan that was to help with the covid situation. **Unfortunately, the pandemic was never declared by Florida where the conference was to be held so CPM lost an investment of $32 K and revenue over $125K times 2 for the 2 years no conference could be held.** The hotel refused to extend for another year.

3. ISO Program Involvement

What is required of ICEAA to participate in the ISO program, do we need to attend meetings and if so, how frequently, and what is the approximate number of hours that our volunteer(s) would be expected to contribute.

- ICEAA as stated would establish an ICEAA Mirror Committee of members who desire to participate. **Many of the members from CPM will continue in their role including me, if ICEAA desires.** I have over 30 years in ISO and understand the processes and requirements. **No funds are required; no Board members have to be involved.** However, I do suggest that ICEAA be regularly updated. Supporting meetings once a month through the meeting tool used by ICEAA would be required, but it should not mean an additional cost. It will be a new volunteer option for ICEAA members.

4. ISO Participants and the ICEAA Board

Will the participants in the ISO program be reporting on their activities to the ICEAA Board? Are there any potential conflicts of interest or prohibitions to sharing information with the board?.

- As stated, yes reporting will be done. What I have done in the past is make the slides for the meetings of the Mirror Committee available for the CPM Board. In fact, through those presentations four (4) of the Board members began participating. **What will not be done is providing the documents to the Board absent their participation in the Mirror Committee. We must submit the names of individuals desiring to be on the various Working Groups who will receive all the documents for that Working Group.** No publishing to the broader membership is allowed, but knowledge of activities, need for experts, thrust of the documents, and ability to have presentations at various conferences is allowed.

5. Global Conversation Club Content

We will need to review the topics and content of Steve Wake's program before committing to sponsoring it, please provide a link or confirm that these are the correct links

- The topics for the conference that Wake's organization and CPM provide are determined one or two months ahead of the presentation. Samples of the webinars are DOE's use of AI for reporting earned value, AI to develop schedules, cognitive behavior studies and their impact on scheduling, cost estimating in the UK government, etc. **I took over the lead for this activity from a prior CPM Chair.**
- Wake's other program, which is focused on earned value management is not part of the GCC. His other program is the EVA one and is offered in the UK twice a year. The spring program is a two-day event, and the summer one is a one-day event. **CPM has participated in that event, but does not own it or have direct impact in its offerings.**

6. Global Conversation Club vs. Steve Wake Program

Is the Global Conversation Club different than the Steve Wake program? What is involved in the Conversation Club and are we expected to join/and or participate in the weekly live conversations?

- **Board members and others would not need to be involved in the GCC, if they do not want to be involved.** I can continue to support and develop this event. The webinars are monthly. 2nd Tuesday of each month with July and November off.

7. Can you please provide the membership list prior to our July 10 meeting?

- I will attempt to provide the current membership list, but with the caveat that no contact to members be made until the package from CPM is accepted. I will need that agreement.

8. EVM Working Group

ICEAA does not currently have an EVM working group so I don't have a POC at this point for your members to start engaging with. Would CPM want to start one and how do they envision it working?

- I will attempt to provide the current membership list, but with the caveat that no contact to members be made until the package from CPM is accepted. I will need that agreement.

9. EVM Track at Workshop

Currently, at our annual workshop, we have an EVM track if there are enough EVM focused presentations selected to support it. Would CPM be expecting an EVM track at the workshop each year?

- As far as expecting an annual EVM track, I would think it would depend on ICEAA's vision, but the expectation currently is that CPM's membership could support it.

10. IP2M METRR Group

- CPM is currently trying to find out if the IP2M METRR group want to continue. Barry Levy has been leading the effort. **It is a tool to review the effectiveness and support future performance of earned value and other performance metrics**. Again, this effort is no cost.

ARTICLE II–NOMINATION AND ELECTION OF OFFICERS AND DIRECTORS

Section A: Election of Officers and Directors shall be by secure ballot by current ICEAA members.

Section B: Prior to 15 October of the year before an election, the President, with the approval of the Board of Directors, shall appoint a Nominating Committee consisting of the Past President, as chairperson, and four (4) or more members representative of the overall membership. If the office of past president is vacant, another Member shall be appointed as chairman.

Section C: To be eligible to run as an officer or director, an individual must:

1. be an ICEAA member in good standing for a minimum of six months prior to the 15 October opening of the nomination period] or have served on an ICEAA committee, in a chapter leadership role, or on a task force
2. in the case of Region Directors, members may only run for a position in the region they were affiliated with as of six months prior to the 15 October opening of the nomination period

Section D: The Nominating Committee shall be responsible for:

1. confirming nominees' membership status
2. selecting one or more nominees for each office,
3. obtaining the written consent of each nominee to serve and participate, if elected
4. obtaining the written consent of each nominee to maintain their membership throughout the term, if elected, and
5. securing biographical data for each nominee.

The entire slate of candidates, complete with biographical data, shall be sent by the Nominating Committee to the Secretary prior to 15 January.

Section E: No later than 1 February, the Nominating Committee's slate of candidates, complete with biographical data, shall be made available to the membership along with information regarding nominations by petition.

Section F: Candidates rejected by the Nominating Committee override the Nominating Committee's decision by collecting a petitions signed by at least twenty-five (25) Members. [Increase to 100?] The petitioners shall be responsible for:

1. confirming nominees' membership status
2. obtaining in writing the agreement of the nominee to serve if elected,
3. securing the biographical data of the nominee,
4. obtaining the written consent of each nominee to maintain their membership throughout the term, if elected, and
5. submitting the petitions, the agreement, and the biographical data to the Secretary no later than1 March.

Section G: The official ballot shall be open to each member via secure ballot process designed by the Board by 15 March. Each voter shall properly signify on the ballot the voter's choice for the various Officers and Directors, and submit their ballot. Ballots may be either electronic or paper, with voting concluding on 15 April. In the event of paper ballot voting, ballots date stamped after 15 April or received after 25 April will not be counted.

Section H: In all voting conducted by ballot to the entire membership:

1. Each member in current standing as of the 15 March opening of the voting period shall have one vote.
2. Members may only vote in the Region Director election for the region in which they were affiliated as of the opening of the voting period on 15 March. Chapter/Region affiliation may not change between 15 March and 15 April

3. Votes provided in person, via mail and via electronic media will be considered equal.
4. A valid vote is defined as one received by either in hard copy (in person or mail) or electronic media.

Section H: The ballots will be counted and the results reported to the Board of Directors by 1 May. Those candidates receiving the greatest number of votes cast shall be elected. In case of a tie vote, the office shall be filled by vote of the Board from among those candidates tied for the office. The President shall see that the entire membership is advised of the election results.

Final wording as approved

the Secretary prior to 15 January.

Section E: No later than 1 February, the Nominating Committee's slate of candidates, complete with biographical data, shall be made available to the membership along with information regarding nominations by petition.

Section F: Candidates whose nominations are not accepted by the Nominating Committee ~~Other nominations for elected office may be made by petition~~ may attempt to secure a spot on the ballot by collecting a petitions signed by at least twenty-five (25) Members. The petitioners shall be responsible for:

1. confirming nominees' membership status
2. obtaining in writing the agreement of the nominee to serve if elected,
3. securing the biographical data of the nominee,
4. obtaining the written consent of each nominee to maintain their membership throughout the term, if elected, and
5. submitting the petitions, the agreement, and the biographical data to the Secretary no later than1 March.

ICEAA International Cost Estimating and Analysis Association

Treasurer Report

Arlene Minkiewicz

Balance Sheet as of July 6, 2026

Investments	Balance (Sept 2024)	Balance (Nov 2024)	Balance (Jan 2025)	Balance (July 2025)	Balance (Sep 2025)	Balance (Jan 2026)	Balance (April 2026)	Balance (July 2026)	Mature	APY Rate
PFCU 4339703-56-5	$ 36,622	$ 36,942	$ 37,430	$ 38,705	$ 38,421	$ 38,884	$ 39,111	$ 39,459	Jun-26	3.66%
PFCU 4566018-56-2	$ 94,971	$ 95,663	$ 96,718	$ 98,178	$ 99,045	$ 100,207	$ 100,774	$ 101,665	Feb-27	3.55%
PFCU 4717076-56-8	$ 41,905	$ 41,424	$ 41,860	$ 42,486	$ 42,872	$ 43,390	$ 43,632	$ 43,969	Feb-27	3.10%
PFCU 4717077-56-6	$ 41,656	$ 41,990	$ 42,432	$ 43,066	$ 42,458	$ 43,982	$ 44,228	$ 44,569	Feb-27	3.10%
PFCU 7047946-56-6	$ 49,912	$ 49,563	$ 50,127	$ 51,069	Cashed	Cashed	Cashed	Cashed		
PFCU 7664998-56-9	$ 56,913	$ 57,306	$ 57,902	$ 58,805	$ 59,302	$ 59,968	$ 60,391	$ 60,766	Mar-27	3.40%
Money Market & Cash	$ 515	$ 515	$ 515	$ 515	$ 1,775	$ 1,776	$ 1,776	$ 1,776	n/a	
Subtotal	$ 322,494	$ 323,403	$ 326,984	$ 332,824	$ 283,873	$ 288,207	$ 289,912	$ 292,204		

	Balance (Sept 2024)	Balance (Nov 2024)	Balance (Jan 2025)	Balance (July 2025)	Balance (Sep 2025)	Balance (Jan 2026)	Balance (April 2026)	Balance (July 2026)
Eagle Checking Balance	$ 137,942	$ 104,733	$ 117,909	$ 94,554	$ 86,159	$ 93,513	$ 243,991	$ 83,529

	Balance (Sept 2024)	Balance (Nov 2024)	Balance (Jan 2025)	Balance (July 2025)	Balance (Sep 2025)	Balance (Jan 2026)	Balance (April 2026)	Balance (July 2026)
Total Liquidity	$ 460,436	$ 428,136	$ 444,893	$ 427,378	$ 370,032	$ 381,720	$ 533,903	$ 375,733

Jan-May 2026 Actuals and 2026 Estimate

Activity	2023 EOY Actual	2024 EOY Actual	2025 EOY Actual	Actual as of May 1, 2026	2026 Estimate as of July 6, 2026
2025 Workshop		$ 23,300	$ 28,302	$ -	$ -
2026 Workshop			$ 44,300	$ 38,497	$ 70,000
2027 Workshop				$ (14,000)	$ 30,000
UK Workshop		$ (34,943)	$ -	$ -	
QED (paid) Webinars	$ 75	$ 50	$ 100	$ 50	$ 100
PCEA/CCEA Certification	$ 34,675	$ 33,880	$ 27,178	$ 21,705	$ 35,000
SCEC Certification	$ 1,750	$ 3,895	$ 2,970	$ 700	$ 3,267
Online Exam (Mettl)	$ (1,029)	$ (1,020)	$ (1,020)	$ (1,020)	$ (2,040)
CEBoK 1.2 + Videos	$ 8,298	$ 13,230	$ 7,475	$ 13,245	$ 19,700
CEBoK-S Sales	$ 11,461	$ 10,970	$ 9,195	$ 14,225	$ 20,500
ICEAA World & Journal	$ (9,452)	$ (10,853)	$ (9,994)	$ (3,982)	$ (9,000)
Advertising	$ (2,020)	$ 1,748	$ 1,479	$ 423	$ 1,600
Membership: Mgt & Support	$ 106,613	$ 109,643	$ 121,984	$ 77,052	$ 150,000
Chap Support & Outreach	$ (986)	$ (1,358)	$ (2,593)	$ (775)	$ (2,500)
Interest & Other Income	$ 10,097	$ 14,488	$ 11,682	$ 4,047	$ 12,000
Staffing & Contractors	$ (222,264)	$ (236,932)	$ (241,989)	$ (104,601)	$ (258,928)
Office Operations + IT	$ (84,222)	$ (81,219)	$ (70,532)	$ (33,122)	$ (65,000)
TOTALS	$ (15,549)	$ (19,355)	$ (71,463)	**$ 12,444**	**$ 4,699**

ICEAA International Cost Estimating and Analysis Association

2026 Workshop Review

Megan Jones

ICEAA

ICEAA 2026

Thanks to our sponsors & exhibitors

HERREN

2026 Gold Sponsor

QUANTECH services, inc {The Sum of Quality}

2026 Gold Sponsor

NORTHROP GRUMMAN

2026 Gold Sponsor

BOEING

2026 Silver Sponsor

SPA SYSTEMS PLANNING & ANALYSIS

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TECOLOTE RESEARCH

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ACEIT Automated Cost Estimating Integrated Tools

AUGUR

Ferryfield The Risk People

GALORATH

NSI THE SOLUTIONS COMPANY

KBR

HUNATEK A HUNA TOTEM COMPANY

PROJSTREAM THINK FORWARD

regulus group

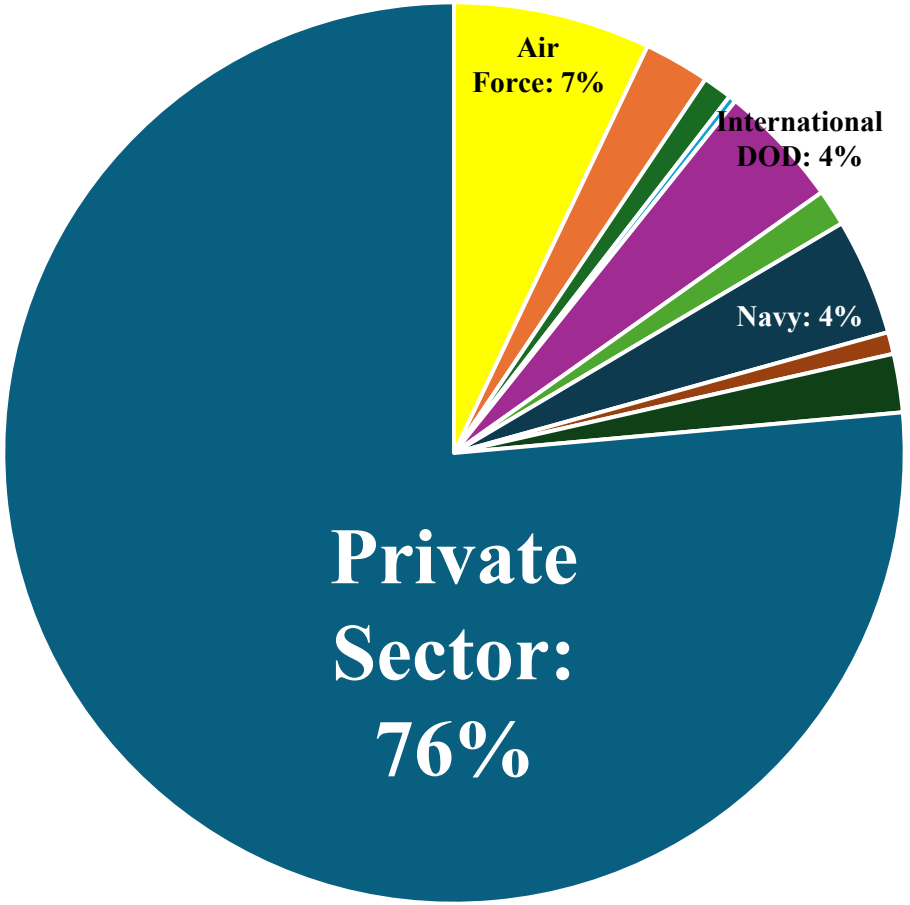
SIRIUS ANALYSIS

take progressive minds. creative solutions.

ICEAA 2026

Gov/International Attendees

Air Force	27	7%
DOD/DHS/Military	9	2%
DOE/NNSA	4	1%
Intl Civil	1	0%
Intl DOD	17	4%
NASA/JHU	5	1%
Navy	16	4%
Other Civil	3	1%
Private Intl	8	2%
Private Sector	292	76%
	382	

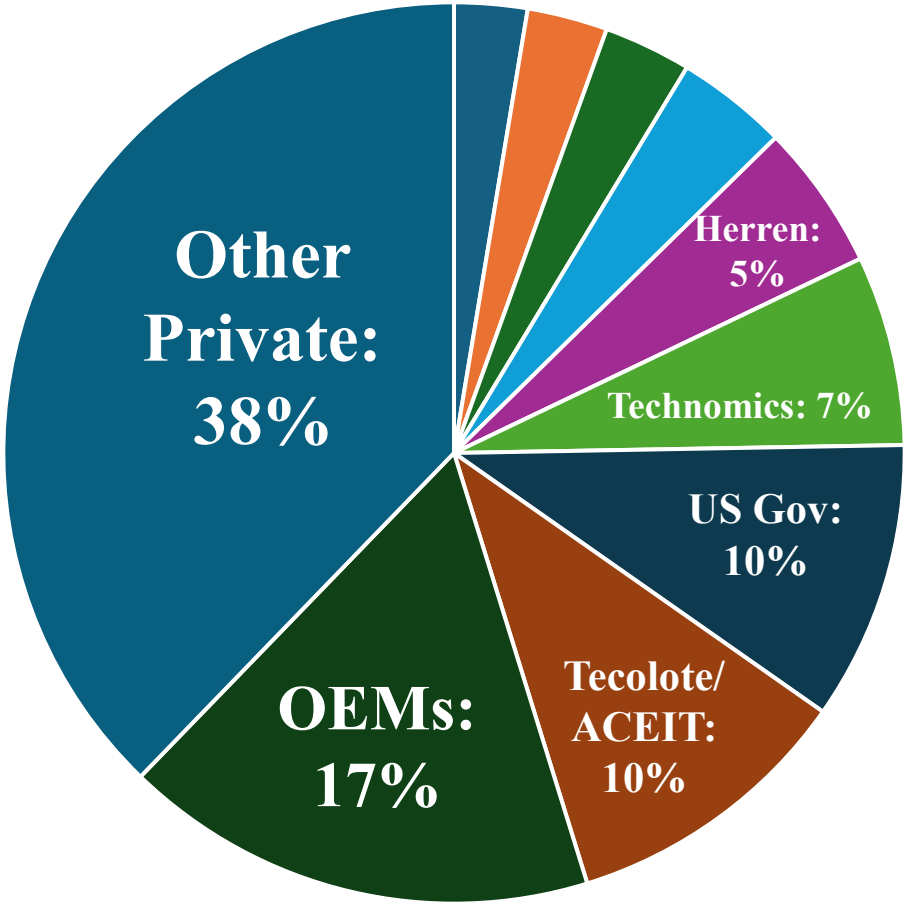


International Attendance

- Brazil: 3
  Brazilian Army
- Canada: 4
  Technomics, Enbridge
- Germany: 1
  Galorath
- South Korea: 8
  Defense Acquisition Program Administration
  Korea Institute for Defense Analyses
  Korea Research Institute for Defense Technology Planning and Advancement
- Taiwan: 5
  Taiwan Ministry of National Defense
- Turkey: 4
  Turkish Aerospace Industries, Secretariat of Defence Industries
  Turkish Engine Industry
- United Kingdom: 5
  Sirius Analysis, Ferryfield

Private Sector Attendees

US Gov	37	10%
International	18	4%
OEMs	64	17%
Augur	10	3%
SPA	11	3%
Quantech	12	3%
Herren	20	5%
Technomics	26	7%
Tecolote/ACEIT	40	10%
Other Private	144	38%



US Government Representation

- Air Force Cost Analysis Agency (AFCAA)
- Air Force Life Cycle Management Center (AFLCMC)
- Air Force Installation and Mission Support Center (AFIMSC)
- Air Force Economics and Business Management Directorate (SAF/FMCE)
- USMC Programs & Resources, Program Analysis & Evaluation
- NGA-CAPE
- Space Systems Command (SSC)
- Department of Energy (DOE)
- Johns Hopkins University Applied Physics Laboratory
- NASA
- NNSA
- NAVAIR
- Naval Nuclear Laboratory
- Naval Surface Warfare Division
- US Navy
- US Census Bureau
- Government Accountability Office

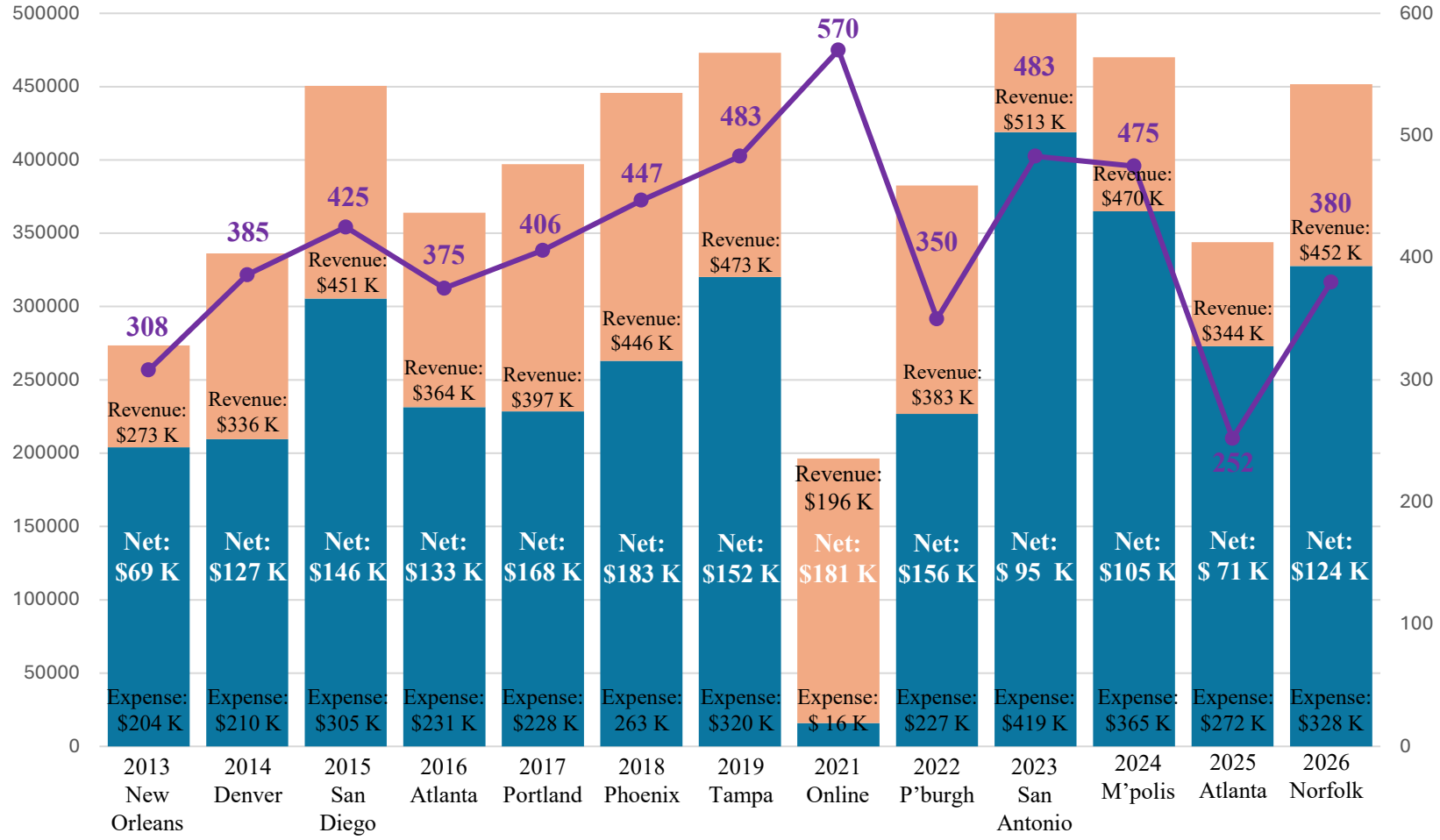
Estimated Final Revenue

	381 attendees
Expenses	
Avg. Other Expenses	$ 30,000
Avg. Audio Video + mics	$ 70,000
Food & Service (avg x 400)	$ 228,500
Total estimated expenses	$ 325,000
Revenue	
Approx. Reg Total	$ 345,000
2025 Anticipated Sponsorship	$ 108,000
Total estimated revenue	$ 453,000
Net	**$ 128,000**

Sponsorship	
Platinum x1	$ 0
Gold x3	$ 36,000
Silver x4	$ 30,000
Booths x9	$ 36,000
Other sponsorships (badges etc)	$ 6,000
	$ 108,00

ICEAA 2026

Historical Revenue/Expense

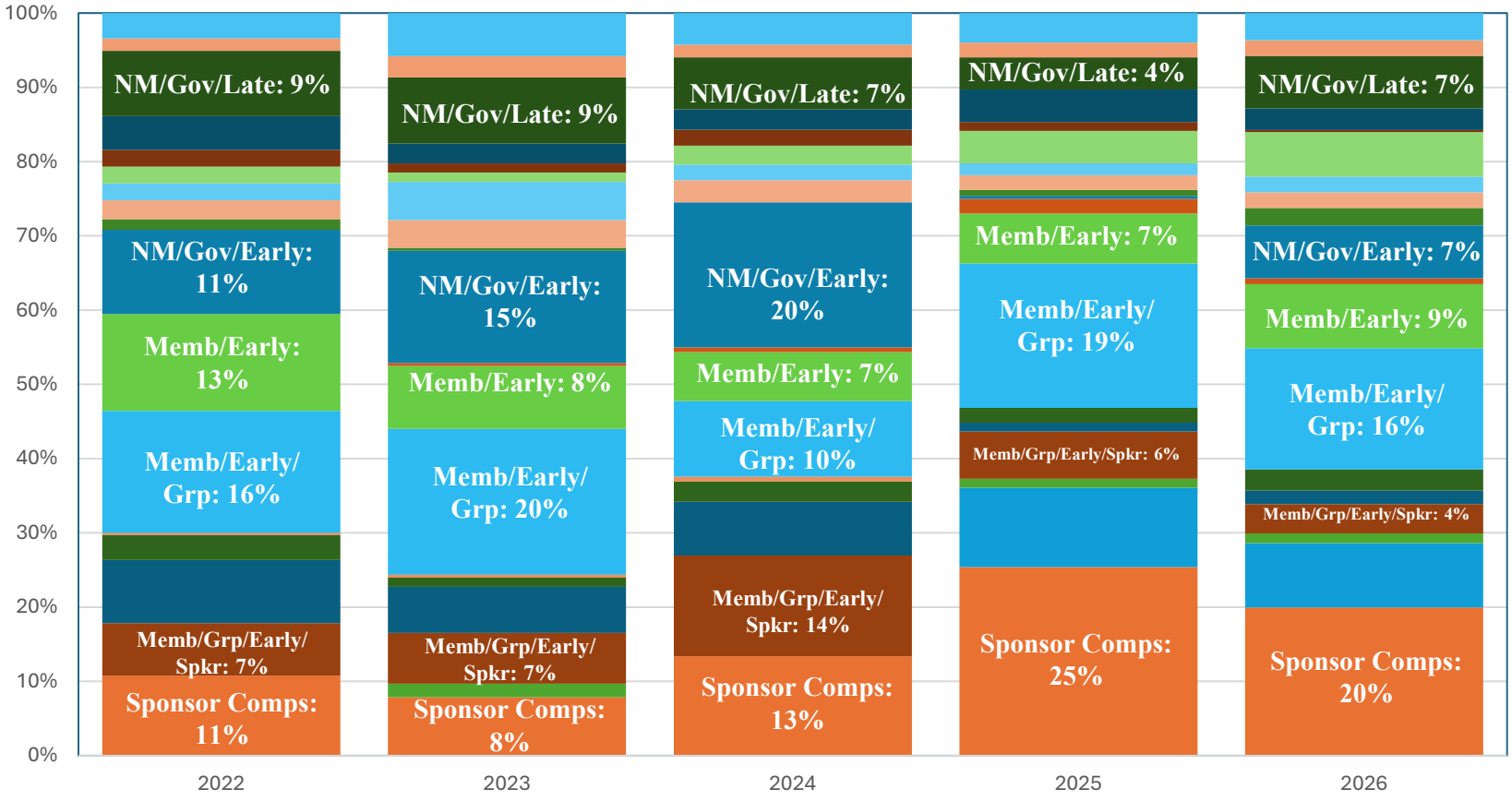


ICEAA 2026

Registration Breakdown

Ticket	Number	Percentage	Rate	Revenue
Sponsor Comp	64	17%	$ -	$ -
University	11	3%	$ -	$ -
Booth	1	0%	$ 400	$ 400
Group Sponsor Rate	33	9%	$ 855	$ 28,215
Gov Member Early Spkr	5	1%	$ 890	$ 4,450
Mem Group Early Spkr	15	4%	$ 955	$ 14,325
Mem Gov Early	7	2%	$ 990	$ 6,930
Mem Early Speaker	11	3%	$ 995	$ 10,945
Mem Early Group	62	16%	$ 1,055	$ 65,410
Mem Early	33	9%	$ 1,095	$ 36,135
NM Group Early	3	1%	$ 1,110	$ 3,330
NM Gov Early	27	7%	$ 1,145	$ 30,915
NM Early Spkr	9	2%	$ 1,150	$ 10,350
NM Gov Late	8	2%	$ 1,190	$ 9,520
NM Group Late	8	2%	$ 1,210	$ 9,680
NM Early	23	6%	$ 1,250	$ 28,750
Mem Group Late	1	0%	$ 1,255	$ 1,255
Mem Late	11	3%	$ 1,295	$ 14,245
NM Gov Late	27	7%	$ 1,345	$ 36,315
NM Group Late	8	2%	$ 1,410	$ 11,280
NM Late	14	4%	$ 1,450	$ 20,300
	381	Weighted Average:	$ 899.61	$ 342,750

Registration Breakdown History



ICEAA 2026

Registration Breakdown History

Ticket	2022	2023	2024	2025	2026
Sponsor Comp + Booth	11%	8%	13%	25%	20%
Group Sponsor Rate	0%	0%	0%	11%	9%
Gov Member Early Spkr	0%	2%	0%	1%	1%
Mem Group Early Spkr	7%	7%	14%	6%	4%
Mem Gov Early	8%	6%	7%	1%	2%
Mem Early Speaker	3%	1%	3%	2%	3%
NM Gov Early Speaker	0%	0%	1%	0%	0%
Mem Early Group	16%	20%	10%	19%	16%
Mem Early	13%	8%	7%	7%	9%
NM Group Early	0%	0%	1%	2%	1%
NM Gov Early	11%	15%	20%	0%	7%
NM Early Spkr	1%	0%	0%	1%	2%
Memb Gov Late	3%	4%	3%	2%	2%
NM Group Late	2%	5%	2%	2%	2%
NM Early	2%	1%	3%	4%	6%
Mem Group Late	2%	1%	2%	1%	0%
Mem Late	5%	3%	3%	4%	3%
NM Gov Late	9%	9%	7%	4%	7%
NM Group Late	2%	3%	2%	2%	2%
NM Late	3%	6%	4%	4%	4%

Average Expenses, 2018-2026

	Total Expense	Attendees	Total Expense/ Attendee
2018	$ (262,993)	447	$ 588
2019	$ (320,226)	483	$ 663
2022	$ (221,519)	350	$ 633
2023	$ (418,997)	483	$ 867
2024	$ (370,201)	475	$ 779
2025	$ (272,914)	252	$ 1,083
2026	$ (327,714)	380	$ 862
Average	**$ (313,509)**	**410**	**$ 765**

ICEAA 2026

2026 Rates vs. Proposed 2027

	2026 Early	2026 Late	2027 Early	2027 Late
ICEAA Members	$ 1,095	$ 1,295	$ 1,145	$ 1,345
Non-Members	$ 1,250	$ 1,450	$ 1,300	$ 1,500
Member & Government Employee	$ 990	$ 1,190	$ 1,040	$ 1,240
Non-Member Government Employee	$ 1,145	$ 1,345	$ 1,195	$ 1,395
Member 5+ Group	$ 1,055	$ 1,255	$ 1,105	$ 1,305
Non-Member 5+ Group	$ 1,210	$ 1,345	$ 1,260	$ 1,460
Sponsor Rates:				
Add 5-14	$ 1,055	$ 1,055	$ 1,095	$ 1,095
Add 15-19	$ 955	$ 955	$ 1,010	$ 1,010
Add 20+	$ 855	$ 855	$ 915	$ 915

Run an FY26 special for 2026 rates until September 30?

ICEAA 2026

Ironistic

ICEAA International Cost Estimating & Analysis Association

ICEAA

Website and Development Support

June 15, 2026

Executive Summary

Why Are We Here?



ICEAA serves as the international non-profit organization dedicated to advancing, encouraging, promoting and enhancing the profession of cost estimating and analysis, through the use of parametrics and other data-driven techniques.

Over the years, the association has worked to elevate its digital presence and overall tech stack to the benefit of its members, staff and industry as a whole, and ICEAA is now looking for a strong partner to provide ongoing reliable development support.

Ironistic is that partner!

Ironistic specializes in website development and marketing, and we have the experience with dozens of association websites that will enable ICEAA to continue to evolve for many years to come.



Executive Summary

Why Are We Here?

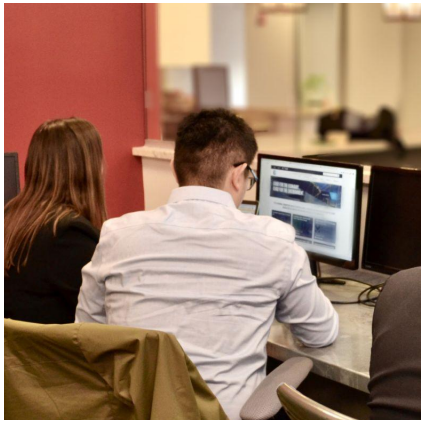
Ironistic is excited to elevate ICEAA's online presence across all of your digital properties. Specific goals for this project include:

- **Regularly perform maintenance and security audits** to make any updates or implement any security measures the sites may need.
- **Provide 24x7 monitoring of ICEAA website** with proactive communication and escalation protocols.
- **Deliver superior development service** for any development activity and plug-in integration that ICEAA may request.
- **Addressing fundamental needs and best practices** for the website – includes SEO services, usability reviews, reliable hosting, and more.
- **Providing a positive IMPACT for ICEAA across the board.**

Who We Are

Introducing Ironistic







We are a full-service development and marketing agency headquartered in Alexandria, VA, with offices in Scottsdale, AZ, and Grand Junction, CO. Founded in 2012 by industry veterans who identified a need for world-class marketing & communications solutions for small to mid-sized businesses, Ironistic was built on a commitment to true partnership and personalized service. With industry experience dating back to 1996, we take a client-first approach—delivering tailored solutions that drive real results while ensuring every client is valued and heard.





All full time staff are U.S.-based and experts in digital production, marketing, and strategy. We have extensive experience across industries, including retail, healthcare, government, manufacturing, and more.

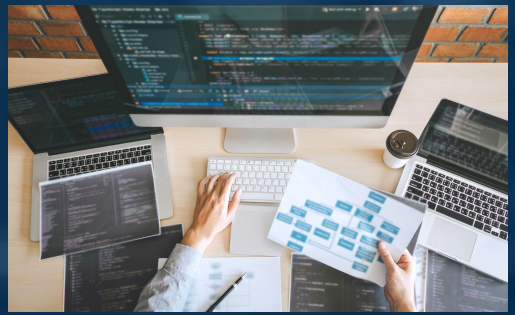
Who We Are

Core Expertise



CREATIVE

- Graphic Design
- Website Design & UX Development
- Video Production
- Print Design and Production
- Podcast



WEBSITE DESIGN & DEVELOPMENT

- UX/UI Design & Mobile Optimization
- Custom Website & App Development
- E-commerce & Database Integration
- Content Management Systems (CMS)
- Intranet & Extranet Solutions
- Ongoing design and development support services



SECURE & RELIABLE HOSTING

- 24/7 Support & Maintenance
- Website Updates & Security
- Plugin, Theme & Software Updates
- Redundant servers with 99.9% guaranteed uptime

Who We Are

Core Expertise



CONSULTING

- Brand Development
- Internal Capabilities and Workflow Analysis
- Tech Stack Audit
- Marketing & Sales Strategy
- Market Research
- Competitor Analysis



MARKETING

- Pay-Per-Click
- SEO/GEO
- Programmatic Advertising
- Social Media
- Content Marketing
- Email Marketing
- CTV
- Podcast and Streaming Audio
- Out of Home & Digital Out of Home
- Direct Mail
- Experiential



PUBLIC RELATIONS

- Media placement
- Press Releases
- Event Management
- Crisis Management
- Community Outreach

Who We Are

Our Approach

DATA DRIVEN & STRATEGIC

Solutions that enhance brand identity while driving measurable business growth.

COLLABORATIVE & CUSTOMIZED

Tailored to each client's business objectives for seamless execution.

PROVEN EXPERIENCE

Trusted by brands like WhiteHouse.gov, Toyota Financial Services, and Cedars Sinai Medical Center.



Who We Are

Our Culture



CLIENT FIRST

The essence of our culture embodies collaboration and empowers the client-focused mindset we bring to each project.

Active Listening:
We take the time to understand your unique challenges, goals, and vision to create meaningful solutions.

Customization:
Every strategy is tailored specifically to your needs, industry, and target audience for maximum impact.

Transparency:
We maintain open, honest communication, keeping you informed and involved every step of the way.

Adaptability:
We stay agile and responsive, adjusting strategies to fit your evolving business and market conditions.

Measurable Results:
Our focus is on delivering clear, data-driven outcomes that drive real growth and success for your business.

Ironistic Key Differentiators

At Ironistic, we don't just build websites or run campaigns—we become an extension of your team. Since 2012, we've worked with organizations of all sizes to deliver real, measurable results through strategic thinking, seamless execution, and a deep commitment to partnership. Our goal isn't just to check boxes; it's to elevate your brand holistically across all marketing and digital touchpoints. Here's what sets us apart from other agencies:

- **Long-Term Stability:** With more than 13 years in business, Ironistic brings proven longevity and trustworthiness in an ever-evolving industry.
- **True Strategic Partnership:** We go beyond project execution—collaborating closely, offering strategic guidance, and aligning with your long-term goals.
- **A Deep Bench of Experts:** Our team spans multiple disciplines, giving you access to a full range of marketing, creative, and technical specialists.
- **No Boundaries Communication:** We're accessible and responsive—no gatekeeping, no delays. Reach out anytime.
- **One-Stop Shop:** From brand strategy and web development to digital marketing, PR, and hosting—we handle it all under one roof.
- **Operational Efficiency:** Our integrated services reduce vendor management headaches and accelerate project timelines for better ROI.

Learn more about how we can power your growth at ironistic.com.



Who We Are

Our Impact

Started by internet professionals with more than 30 combined years of website experience, our staff experience includes projects such as Whitehouse.gov, FanDuel Careers, Toyota Financial Services, Instacart, NFL, Common Ground Alliance, Foley Family Wines, Whole Foods, T.M. Cobb, and hundreds of small and medium sized companies, associations, and nonprofits.































Scope of Work



Scope of Work

Website(s) Audit and Onboarding

As a first step, Ironistic will complete a security and performance audit of the WordPress websites to identify and mitigate any immediate technical or security issues. This includes items such as:

- Review backend code for upgrades or out-of-date issues
- Install security elements to ensure stability moving forward
- Set strict permissions on folders - Reduce the risk of hackers gaining access to the site
- Deny direct access to key files via Permissions and HTTP requests
- Remove the default admin user and ensure password strength is adhered to
- And that's just the start, we'll also implement strategies to improve load speed and more...

Please note: we can complete these audits on a regular basis for your website(s) to ensure compliance and optimal performance.



Scope of Work

Ongoing Website Support

With the audit complete, we will remain on retainer with you regarding any design, development or hosting requirements. Our staff of professionals can readily assist in making additional changes/modifications to your website on an ongoing basis. But don't worry; this isn't a "use or lose" retainer for you. These hours roll month-to-month and can be used for any type of work, at any time, as long as you are an Ironistic client. For this website, we recommend a retainer of ten (10) hours per month to start, and these hours can be used for:

- CMS platform updates
- Plugin updates
- Security audits
- Design changes
- Content entry
- Hosting issues
- New functionality
- Troubleshooting
- Interactive elements
- And more



Scope of Work

Ongoing Website Support

More about our IQ Department....

Clear, organized lines of communications will be vital for the ongoing success of ICEAA website and for ICEAA-Ironistic partnership. We understand the nature of the site and how the various changes/updates could be anything from onsite development changes to staff training to new creative elements. The staff assigned to ICEAA project understands this environment, and we have installed flexible communication tools to mitigate some of these challenges.

Regular Face-to-Face Meetings – Headquartered here in Alexandria VA, we are readily available to meet face-to-face at ICEAA location.

Face-to-Face Virtual Meetings – Utilizing tools such as Google Meet, ICEAA can see if Ironistic support is online and available and quickly launch a quick face-to-face discussion.

Slack – We can create a dedicated Slack channel for ICEAA staff to readily reach out to the IQ Team.



Scope of Work

Ongoing Website Support

Traditional Communications – Of course, the traditional means of communication are readily available as well! ICEAA can reach our staff quickly via phone and a designated email account. These are constantly monitored, allowing us to respond quickly and efficiently.

Availability – Ironistic staff is available during normal business hours – 8:30 a.m. to 6:00 p.m. EST – and we adhere to the standard Federal Holiday calendar. After hours, weekend, and holiday support are available as well but may incur additional after hour charges.

Response Time and Policies – The following are typical standards for response time and next steps.

- Ironistic will provide 24/7 monitoring of website uptime with timely reporting of any issues identified.
- Acknowledgement of request typically within 1-2 business hours.
- For requests estimated at under 2 hours, we complete the work per the request typically within 72 hours or less.
- For requests estimated 2-10 hours, we first confirm LOE and receive approval from client and then schedule the work for completion. Typical turnaround time is 1-2 weeks unless escalation is necessary..
- For requests over 10 hours, we create an addendum with scope and timeline details and treat as an effort outside of the retainer.

Timeline and Milestones

Pricing

Any additional third party costs may require additional charges.

Website Audit **(5 hours)**	$875
Ongoing Website Support Retainer *(10 hrs/mo at $175/hr)*	$1,750/mo

Here is our typical breakdown for hourly rates
Non-retainer rate: $195/hr
Retainer rate: $175/hr

Chris Foss
Ironistic

ICEAA

Thank you!

Project Scope

Terms and Conditions

OVERVIEW

The Iron Group (hereafter “Agency”) has submitted the above proposal to **ICEAA**, (hereafter “Client”) for the completion of the new web technologies with the following terms and conditions.

PROPRIETARY RIGHTS

Client, without exception, will retain all rights in and to its respective sites, marks, properties, branded materials, and other proprietary materials such as content, copyrights, trademarks, trade secrets, patents and confidential information. Client does and without exception will always have or be granted access to any property on any platform created or managed by Agency on behalf of Client, including any login credentials or passwords required for such access. Agency is hereby granted non-exclusive, unlimited license to use the materials provided by Client, including trademarks and copyrights, images and relevant content for the purposes of advertising or communicating on behalf of Client.

REPRESENTATIONS / WARRANTIES / ASSUMPTIONS

Client represents and warrants that the advertising materials, branded materials and other content provided are not false or misleading; do not contain any untrue, defamatory, harmful, abusive, vulgar or obscene materials; are in compliance with all applicable laws; and do not infringe upon the rights of any other party, including but not limited to copyrights, trademarks, privacy rights, moral rights, trade secrets, patents and any other rights. Client also warrants and represents that it has the unrestricted and exclusive right to such materials.

Client guarantees any elements of text, graphics, photos, designs, trademarks, or other artwork provided to Agency for any design, website or outbound communications are owned by Client, or that Client has received permission from the rightful owner(s) to use each of the elements, and will hold harmless, protect, and defend Agency from any liability or suit arising from the use of such elements. Client agrees that Agency is not responsible for changes made to any property (or to content related to, hosted with or deployed by any engaged third party) by parties other than Agency, including those that adversely affect any property, or Client in any way.

Client agrees that ownership of the intellectual property created during this project does not transfer from Agency to Client until project fees due to Agency as described in this agreement are paid in full by Client.

Agency makes no warranties that the provision of Services will be free from errors or that the use of Services will be uninterrupted. AGENCY SPECIFICALLY DISCLAIMS ALL EXPRESS AND IMPLIED WARRANTIES, INCLUDING BUT NOT LIMITED TO WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, AND NON-INFRINGEMENT ON THE RIGHTS OF THIRD PARTIES. IN NO EVENT SHALL AGENCY BE LIABLE, WHETHER IN CONTRACT, TORT (INCLUDING NEGLIGENCE) OR OTHERWISE, FOR ANY INDIRECT, INCIDENTAL, OR CONSEQUENTIAL DAMAGES (INCLUDING LOST SALES OR PROFIT, LOST DATA, BUSINESS INTERRUPTION OR ATTORNEYS' FEES), EVEN IF NOTIFIED IN ADVANCE OF SUCH POSSIBILITY.

Project Scope

Terms and Conditions

ASSUMPTIONS

- Issues of confidentiality, client relationships, and discussion regarding proprietary products, services, or relationships, in addition to documents created as part of this consulting relationship, as well as all branding materials, graphics, images and likenesses, are assumed as and remain the property of Client.
- Agency assumes the full support and cooperation of Client in this project. This is necessarily a collaborative effort that will require contributions of time and effort from both Agency and Client. Further, we assume that Client or the Client's designee will review and sign off on work or tasks in a timely manner so that the work can proceed on schedule.
- The costs included in this Agreement are provisional and adjustable in regard to total project scope and, upon acceptance of this proposal, may be altered with an addendum to the original agreement, subject to approval by both parties in writing, with respect to scope-of-work expansion desired by Client.
- Consideration for any travel outside of the Washington DC metropolitan area by Ironistic deemed necessary by Client, will be provided by or reimbursed by Client to Agency, in total, including travel, lodging, car rental, and per diem for reasonable meals and other fees incurred.

IMAGERY

Photography and image use is an important copyright issue in the United States, and we will undoubtedly leverage various photos and images for the Client as part of our development and marketing efforts. Ironistic recommends three approaches for this.

1. Client provides the images to us, with the understanding that the image is not restricted by copyright or for commercial use.
2. Ironistic conducts the photo research through an authorized 3rd party such as istock and purchases the image on Client's behalf. Cost for this is $25/image for image research time. Images are for web use only. Source files remain property of stock company unless purchased directly by client.
3. Ironistic sources the image from a free 3rd party such as https://pixabay.com/. Note: while Pixabay states these images are 100% free of copyrights and authorized for commercial use, any erroneous use of the images would fall on the Client.

INDEMNIFICATION

Client will indemnify and hold Agency harmless from and against any claims, suits, threats, demands, settlements, actions, cause of action, liabilities, obligations and all other matters, including but not limited to court costs, attorneys' fees, witness fees, settlement fees, and all other direct and indirect expenses and losses that may occur arising from the breach of any of the representations and warranties that Client has made to Agency and otherwise arising directly or indirectly from Agency's provision of the aforementioned Services.

FORCE MAJEURE

Agency will not be responsible for any failure or delay in performance hereunder that is directly or indirectly related to acts of God, storm, natural disaster, acts of terrorism, acts of war, utility outages or interruptions, transmission failure, server failure, strike, lockout, health emergency, familial health emergency, or any other situation beyond the control of Agency.

Project Scope

Terms and Conditions

TERMINATION
Agency or Client may terminate the Agreement with 30 days' prior notice of termination in writing. If work on any part of the project has already begun at the time of termination, Agency will retain the initial payment due on the Effective Date in consideration for resources, planning, and logistical efforts necessarily applied to the project to begin work. No provision is made for refunds, nor will any provision be made for refunds. By entering into this Agreement, Client acknowledges and agrees that all payments are non-refundable. Upon termination, Agency will make available any and all information required for administrative control of all technological assets belonging to Client.

DEFAULT
If Client is in default of this Agreement, Client agrees to pay Company's attorney fees and court costs to recover monies due or otherwise enforce this Agreement. Client also agrees to pay any other cost or expenses of repossession collection or realization on any security including any attorney fees and court costs to the extent not prohibited by applicable law.

CONFIDENTIALITY
If, in connection with the performance of Services, Agency receives information concerning Client which is not in the public domain, such information will be considered confidential and proprietary, and Agency shall not disclose such information to any third party without the express written consent of Client, except to other persons or entities with whom Agency may contract to assist in the performance of Services under this Agreement, provided such persons or entities shall agree in writing to honor this confidentiality restriction.

PAYMENT TERMS
The Iron Group will perform all assigned tasks in a workmanlike manner. Invoices will be net 30 with the full cost due upon order. Project services will be invoiced 50% upon order and 50% upon delivery of beta. Hosting and maintenance services will be billed the 1st of each month. Any required non-local travel and expenses is not included and will be invoiced separately.

ENTIRE AGREEMENT
This Agreement (and any Exhibits or Appendices hereto) constitutes the entire agreement and understanding between the parties with respect to the subject matter hereof. It supersedes and replaces all previous discussions, negotiations, and understandings between the parties. This Agreement may only be amended by a written amendment signed by authorized representatives of both parties or the parties themselves. If any provision of this Agreement is held to be invalid, illegal or unenforceable, the remaining portions of this Agreement shall remain in full force and effect and construed so as to best effectuate the original intent and purpose of this Agreement.

GOVERNING LAW
This Agreement shall be construed in accordance with the internal laws of the State of Virginia, or an agreed upon neutral state, without regard to conflict of laws rules. Venue shall be in a court of competent jurisdiction in the State of Virginia (or agreed upon neutral state), and both parties expressly consent to jurisdiction in such courts.

501(c)6 vs. 501(c)3

501(c)6 *current*

- Professional associations, trade groups, chambers of commerce, and business leagues
- Exists to benefit the general public
- **Can deliver direct member benefits, advocacy, and industry training**

501(c)3 *proposed*

- Charitable, educational, or religious organizations
- Exists to benefit an industry, profession, or collective business interest
- **Must avoid private benefit or industry-focused programs**

ICEAA International Cost Estimating and Analysis Association

https://bankingcrowded.com/all-blogs/501c6-vs-501c3/

501(c)6 vs. 501(c)3

501(c)6 *current*

- Donations are not tax-deductible as charitable gifts
- Membership dues are typically tax-deductible as business expenses
- Can engage in unlimited lobbying related to its mission
- Can participate in limited political activity
- Programs may focus on advocacy, professional development, or industry advancement

501(c)3 *proposed*

- Donations are tax-deductible for donors
- Strict limits on lobbying
- Absolutely no political campaign activity
- Must demonstrate public benefit
- Revenue **must directly support charitable programs**

https://bankingcrowded.com/all-blogs/501c6-vs-501c3/

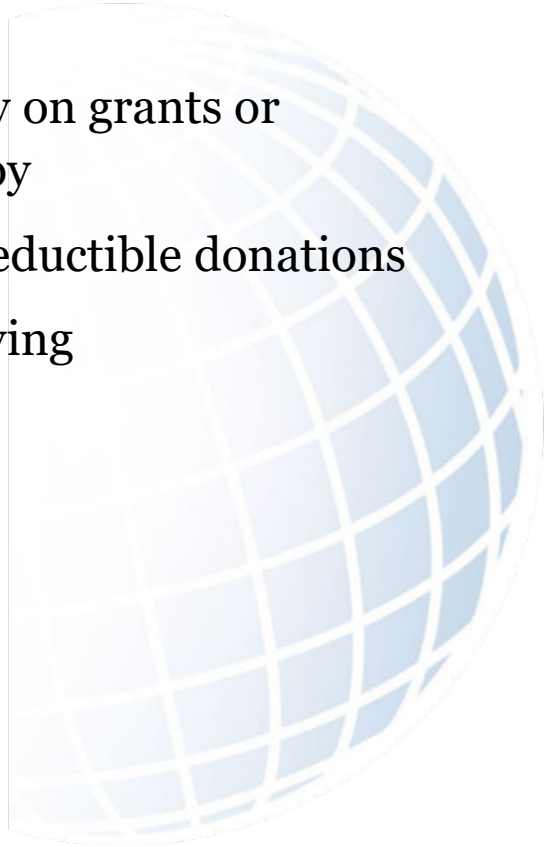
Which is right for your organization?

501(c)6 *current*

- Represent businesses
- Advocate for an industry
- Provide certifications, networking, or member benefits
- Operate through chapters
- Host conferences or trade shows

501(c)3 *proposed*

- Provide charitable services to the public
- Rely heavily on grants or philanthropy
- Need tax-deductible donations
- Avoid lobbying



https://bankingcrowded.com/all-blogs/501c6-vs-501c3/

Can an Organization Have Both a 501c6 and a 501c3?

Yes—and many associations do. A 501c6 may create a related 501c3 foundation to:

- Accept tax-deductible donations
- Offer scholarships
- Fund public education programs
- Support research initiatives

This dual-entity structure expands fundraising opportunities and creates clear boundaries between member-serving work (501c6) and public-serving work (501c3).

https://bankingcrowded.com/all-blogs/501c6-vs-501c3/

IRS Qualified Sponsorship Payment

IRC Section 513(i) defines a “qualified sponsorship payment” as any payment made by any person engaged in a trade or business with respect to which there is no arrangement or expectation that such person will receive any substantial return benefit other than the use or acknowledgement of the name or logo (or product lines) of such person's trade or business in connection with the activities of the organization that receives such payment. Such use or acknowledgement does not include advertising such person's products or services (including messages containing qualitative or comparative language, price information, or other indications of savings or value, an endorsement, or an inducement to purchase, sell, or use such products or services).

https://www.irs.gov/charities-non-profits/advertising-or-qualified-sponsorship-payments

Exclusions from Qualified Sponsorship Payments

Section 1.513-4(b) states that a qualified sponsorship payment does not include:

- Any payment if the amount of such payment is contingent upon the level of attendance at one or more events, broadcast ratings, or other factors indicating the degree of public exposure to one or more events,
- Any payment which entitles the payor to the use or acknowledgement of the name or logo (or product lines) of the payor's trade or business in regularly scheduled and printed material (periodicals) published by or on behalf of the exempt organization that is not related to and primarily distributed in connection with a specific event conducted by the payee organization, or
- **Any payment made in connection with any qualified convention or trade show activity**. (The term "convention and trade show activity" means any activity of a kind traditionally conducted at conventions, annual meetings, or trade shows (IRC Sec. 513(d)(3)(B)).

https://www.irs.gov/charities-non-profits/advertising-or-qualified-sponsorship-payments

Response from our lawyer:

Expense, especially "too expensive" is relative to your finances and the upside of making this change.

I'd estimate a few thousand dollars in legal time, depending how many questions your Board would have and whether the IRS throws roadblocks in your way (unlikely). Basically, you'll have to rewrite and file revised Articles. I'd recommend restated Bylaws to reflect the new charitable purpose and guidance from the Board in terms of details Minutes regarding the change. No new tax returns should be required, however the admin side of tax filings, and impact on your specific returns, is beyond my experience so you might want to run this past your CPA firm as well.

Here's how you know

IRS

Advertising or qualified sponsorship payments?

Issue title:

Advertising or Qualified Sponsorship Payments? Determining whether corporate sponsorship payments received or solicited by an exempt organization are qualified sponsorship payments as described in section 513(i).

Description:

The term "unrelated trade or business" does not include the activity of soliciting and receiving qualified sponsorship payments.

IRC Section and Treas. Regulation:

IRC Sec. 513(c) – Advertising

IRC Sec. 513(i) – Qualified Sponsorship Payments

Treas. Reg. 1.513-4 – Certain sponsorship not unrelated trade or business

Resources (court cases, Chief Counsel advice, Revenue Rulings, internal resources):

Rev. Rul. 67-246 holds that where a transaction involving a payment is in the form of a purchase of an item of value (advertising), the presumption is that no gift has been made.

Rev. Rul. 77-367 depicts an organization formed to create and operate a replica of an early American village. The organization qualifies for exemption even though a corporation which donated the land and a substantial percentage of the organization's support benefits by having the village named after it and by having its name associated with the village through both the corporation's and the organization's advertising. The corporation financially assists the organization in publishing informational and publicity pamphlets and in publishing the results of historical research carried on by the staff of the organization. In each publication so financed, the

corporation is given credit for its financial support. It was held that although the corporation benefits by having the village named after it, by having its name associated with the village in conjunction with its own advertising program, and by having its name mentioned in each publication of the organization that it finances, such benefits are merely incidental.

Analysis:

Background

Corporate sponsorship represents a significant funding source for tax exempt organizations and an important business strategy for taxable corporations. Sponsorship creates corporation identification with charitable activity. This type of identification is valuable to corporations.

Sponsorship payments received by tax-exempt organizations has been an issue that the Service had struggled with in the past. The Service originally tried to address the issue by focusing on the nature of the services provided by the exempt organization rather than the benefit received by the sponsor, and distinguishing advertising, which is an unrelated trade or business activity from acknowledgements, which are not UBIT. In 1997, the issue was addressed by adding section 513(i), which governs the treatment of certain sponsorship payments by providing that “qualified sponsorship payments” are not subject to unrelated business income tax.

Issue

The problem presented by the issue of corporate sponsorships is distinguishing qualified sponsorship payments and the associated acknowledgment of donors from the sale of advertising, and thus the payment being treated as unrelated business income.

Law

IRC Section 513(i) defines a “qualified sponsorship payment” as any payment made by any person engaged in a trade or business with respect to which there is no arrangement or expectation that such person will receive any substantial return benefit other than the use or acknowledgement of the name or logo (or product lines) of such person's trade or business in connection with the activities of the organization that receives such payment. Such use or acknowledgement does not include advertising such person's products or services (including messages containing qualitative or comparative language, price information, or other indications of savings or value, an endorsement, or an inducement to purchase, sell, or use such products or services).

Exclusions from qualified sponsorship payments

Section 1.513-4(b) states that a qualified sponsorship payment does not include:

- Any payment if the amount of such payment is contingent upon the level of attendance at one or more events, broadcast ratings, or other factors indicating the degree of public exposure to one or more events,

- Any payment which entitles the payor to the use or acknowledgement of the name or logo (or product lines) of the payor's trade or business in regularly scheduled and printed material (periodicals) published by or on behalf of the exempt organization that is not related to and primarily distributed in connection with a specific event conducted by the payee organization, or
- Any payment made in connection with any qualified convention or trade show activity. (The term "convention and trade show activity" means any activity of a kind traditionally conducted at conventions, annual meetings, or trade shows (IRC Sec. 513(d)(3)(B)).

To the extent that a portion of a payment would (if made as a separate payment) be a qualified sponsorship payment, such portion of such payment and the other portion of such payment shall be treated as separate payments. See section 513(i)(3)

Analysis

Treasury Regulation 1.513-4 provides explanation and interpretation of IRC Section 513(i). The Regulation's definitions of key elements of IRC Section 513(i) offer guidance to assist in distinguishing normal fundraising and the associated acknowledgement of donors (or sponsors) from the sale of advertising.

Qualified sponsorship payments

Qualified sponsorship payments are not unrelated business income. Treas. Reg 1.513-4(c)(1) defines a qualified sponsorship payment" as any payment of money, transfer of property or the performance of services, by any person engaged in a trade or business, where there is no arrangement or expectation that the person will receive any substantial return benefit in exchange for the payment.

The Regulations apply to all forms of corporate sponsorship activities and not just single events. Sponsored activities may include a single event, a series of related events, an activity of extended or indefinite duration, and/or continuing support of an exempt organization's operation. A payment may be a qualified sponsorship payment regardless of whether the sponsored activity is related or unrelated to the organization's exempt purpose(s).

Advertising

Advertising is defined in Treas. Reg. 1.513-4(c)(2)(v) as any message or other programming material which is broadcast or otherwise transmitted, published, displayed or distributed and which promotes or markets any trade or business or any service, facility or product. Advertising includes messages containing qualitative or comparative language, price information or other indications of savings or value associated with a product or service, an endorsement or an inducement to purchase, sell or use the sponsor's company, service, facility or product.

Distribution of a sponsor's product by the sponsor or the exempt organization to the general public at the sponsored event, whether for free or for remuneration is not considered an inducement to buy, sell or use.

Advertising does not include acknowledgements.
Acknowledgements are the mere recognition of sponsorship payments and may include sponsor logos and slogans (that do not contain comparative or qualitative descriptions), sponsor locations and telephone numbers, value-neutral descriptions (including displays or visual depictions) of a sponsor's product-line or services and sponsor brand or trade names, and product service listing. The effect of an acknowledgement is identification of the sponsor rather than the promotion of the sponsor's products, services or facilities. Logos or slogans alone are considered acknowledgements as they do not contain comparative or qualitative descriptions.

A message that contains comparative or qualitative descriptions does not meet the definition of a qualified sponsorship and is advertising. A single message that contains both advertising and acknowledgement is advertising

Substantial return benefit

Treas. Reg. 1.513-4(c)(2) provides that if there is an arrangement or expectation that the payor will receive a substantial return benefit with respect to any payment, then only the portion of the payment that exceeds the fair market value of the substantial return benefit is a qualified sponsorship payment. However, if the exempt organization does not establish that the payment exceeds the fair market value of any substantial return benefits, then no portion of the payment constitutes a qualified sponsorship payment.

Substantial return benefit is defined Treas. Reg. 1.513-4(c)(2)(ii) as any benefit other than a use or acknowledgement (explained below) or disregarded benefits. A benefit is disregarded if the aggregate fair market value of all the benefits provided to the payor during the organization's taxable year is not more than 2% of the amount of the payment.

Treas. Reg. 1.513-4(c)(2)(ii) provides that benefits include, but are not limited to:

- Advertising (as defined above)
- Exclusive provider arrangements that limit the sale, distribution, availability, or use of competing products, services or facilities in connection with an exempt organization's activity generally results in a substantial return benefit. See Treas. Reg. 1.513-4(c)(2)(vi)(B) for definition. However, an arrangement that acknowledges the payor as the exclusive sponsor of an exempt activity, or the exclusive sponsor representing a particular trade, business or industry, generally, does not result in a substantial return benefit. (The difference here is exclusive sponsor versus an exclusive provider.)
- Goods, facilities, services or other privileges
- Rights to an intangible asset such as a trademark, patent, logo or designation of the exempt organization

Treas. Reg. 1.513-4(c)(2)(iv) provides that a substantial return benefit does not include the use or acknowledgement of the name or logo (or product lines) of the payor's trade or business in connection with the activities of the exempt organization. Use or acknowledgement does not include advertising (as described above) but may include:

- Exclusive sponsorship arrangements (as opposed to exclusive provider arrangements described above)

- Logos or slogans that do not contain qualitative or comparative descriptions of products, services, facilities or company
- A list of payor’s locations, telephone numbers or internet address
- Value-neutral descriptions including displays or visual descriptions of product lines and/or services
- Brand or trade names and product or service listings

Logos or slogans that are part of a payor’s identity are not considered to contain qualitative or comparative descriptions. Mere display or distribution, whether for free or for remuneration, of a payor’s product at the sponsored activity is not considered an inducement to purchase, sell or use the payor’s product.

Issue indicators or audit tips:

Review contracts for sponsorship payments to determine if:

- The “sponsor” received any substantial return benefit. Payments are contingent upon the level of attendance.
- The payment entitles the payor to the use or acknowledgement of the name or logo (or product lines) of the payor's trade or business in periodicals.
- The payment is made in connection with any qualified convention or trade show activity
- An exclusive provider arrangement exists.

Determine if the use or acknowledgement contains:

- qualitative or comparative language
- price information
- indications of savings or value
- an endorsement or an inducement to purchase, sell, or use such products or services.

Page Last Reviewed or Updated: 30-Jan-2026

ICEAA Membership 2020-2026

	Jan 21	Mar 21	Jun 21	Sep 21	Feb 22	May 22	July 22	Sep 22	Feb 23	May 23	Sep 23	Jul 24	Sep 24	Jan 25	Jul 25	Sep 25	June 26
TOTAL MEMBERSHIP	1298	1336	1424	1340	1254	1296	1248	1218	1194	1629	1191	1304	1318	1269	1237	1203	**1248**
Atlanta	8	10	10	8	6	7	5	5	5	10	7	11	9	10	15	15	17
Australia	35	34	40	39	41	44	44	42	43	58	56	53	63	45	42	40	28
Baltimore	15	15	16	15	16	17	18	19	16	22	12	18	17	16	13	13	12
Canada	91	86	88	82	56	71	70	70	72	107	63	68	63	56	48	48	68
Central Florida	16	18	18	18	19	21	19	21	20	29	22	19	17	19	20	17	17
Central VA	31	32	34	31	30	27	25	25	24	32	21	20	19	18	20	18	15
Dayton OH	45	47	50	48	46	47	43	43	48	59	40	39	41	41	42	39	36
DC Metro	461	470	490	442	437	443	421	406	390	536	379	400	400	383	384	365	400
Detroit	14	15	20	18	18	17	18	21	24	26	21	15	17	15	13	14	17
Greater Alabama	32	33	41	40	40	39	37	35	37	48	39	42	39	34	30	29	31
Hampton Roads VA	14	14	13	12	11	11	11	12	12	16	11	8	8	9	8	8	12
Houston	11	12	12	10	9	9	9	8	7	10	6	11	12	10	9	9	6
Lone Star TX	9	11	12	12	13	13	13	12	10	15	13	18	17	9	12	13	15
Mid-Atlantic	9	10	12	11	11	13	12	14	14	22	14	14	14	12	15	13	20
New England	74	72	73	69	49	58	56	53	51	68	46	63	62	60	52	51	55
Northwest	7	6	7	5	7	7	7	6	10	12	10	12	11	11	8	5	10
Northwest Florida	8	7	8	12	10	10	12	12	9	15	8	9	9	9	7	7	3
Pike's Peak	19	18	19	22	20	20	19	18	15	18	17	15	13	15	15	16	15
Rocky Mountan / Denver	15	20	20	23	19	20	18	17	13	22	10	21	20	22	20	19	17
San Antonio TX	6	6	7	6	6	5	3	2	4	6	6	8	10	9	7	7	8
San Diego	39	37	44	44	36	35	31	27	24	41	23	32	35	44	47	48	47
So Cal	94	108	117	115	101	107	101	98	86	118	91	98	92	89	94	92	88
St. Louis Gateway	13	12	12	12	10	9	8	11	10	12	10	9	8	8	8	7	10
Twin Cities	6	6	7	6	6	6	6	5	5	6	2	2	2	2	2	2	2

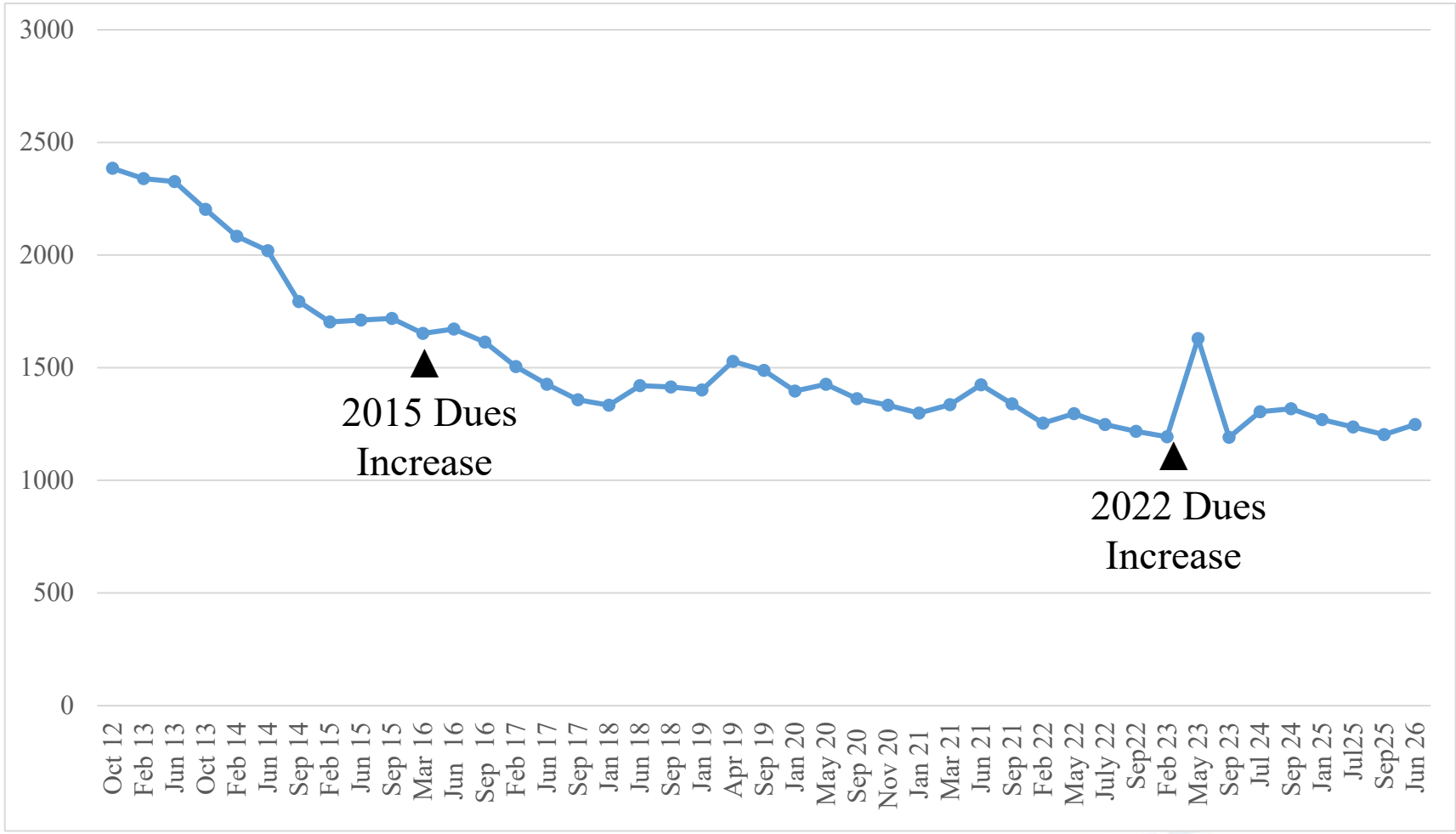
ICEAA Membership 2020-2026

	Jan 21	Mar 21	Jun 21	Sep 21	Feb 22	May 22	July 22	Sep 22	Feb 23	May 23	Sep 23	Jul 24	Sep 24	Jan 25	Jul 25	Sep 25	June 26
No Chapter/Other Int'l	225	236	252	238	235	238	240	235	244	320	263	299	321	323	306	308	299

ICEAA Membership 2020-2026

	Nov 20	Jan 21	Mar 21	Jun 21	Sept 21	Feb 22	May 22	July 22	Sep 22	Feb 23	May 23	Jul 24	Sep 24	Jan 25	Jul 25	Sep 25	June 26
TOTAL MEMBERSHIP	1334	1298	1336	1424	1340	1254	1296	1248	1218	1194	1191	1304	1318	1269	1237	1203	**1248**
Augur Consulting												11	11	11	13	8	10
BAE/Ball Aerospace	16	16	17	17	16	16	27	24	24	17	21	13	10	16	15	13	21
BAH	46	42	38	37	36	29	27	26	27	25	32	36	38	34	31	30	28
Cobec	45	48	47	49	49	40	41	41	41	46	42	38	37	37	34	33	29
Galorath	21	22	25	24	24	19	22	19	19	21	15	12	13	16	13	14	11
Herren	25	13	10	11	12	12	11	11	12	33	31	37	37	42	33	33	32
HunaTek							11	9	8	10	9	10	9	8	8	7	14
Kalman & Company, Inc.	9	9	8	13	12	10	10	10	10	13	12	11	10	11	7	4	7
Lockheed Martin	17	14	15	15	17	13	13	14	14	12	12	8	8	8	9	10	10
L3 Harris										11	12	13	13	17	16	16	12
MITRE	14	14	17	20	20	15	15	13	10	9	10	9	9	9	8	7	8
Northrop Grumman	15	14	17	21	23	22	24	22	19	11	12	14	15	18	20	18	13
Quantech Services	52	46	45	44	38	25	31	26	24	24	17	28	28	29	26	27	25
Raytheon/RTX	11	11	12	12	12	11	10	11	11	10	11	11	25	25	25	23	7
Sierra Nevada Corp													14	17	11	18	7
Sirius Analysis (UK)														10	10	12	11
SPA (MCR)	15	15	13	16	15	15	16	16	15	13	15	14	14	14	13	12	8
Technomics	177	174	177	178	152	127	119	108	98	62	68	69	85	85	98	89	111
Tecolote	113	113	131	139	124	125	136	132	125	131	129	149	142	139	152	142	140
The Boeing Company	21	18	16	18	17	17	17	16	17	14	21	23	25	21	24	20	28
Unison	14	15	16	16	14	11	9	8	6	7	9	6	6	6	6	4	5

State of the Association: Membership Trends 2012-2026

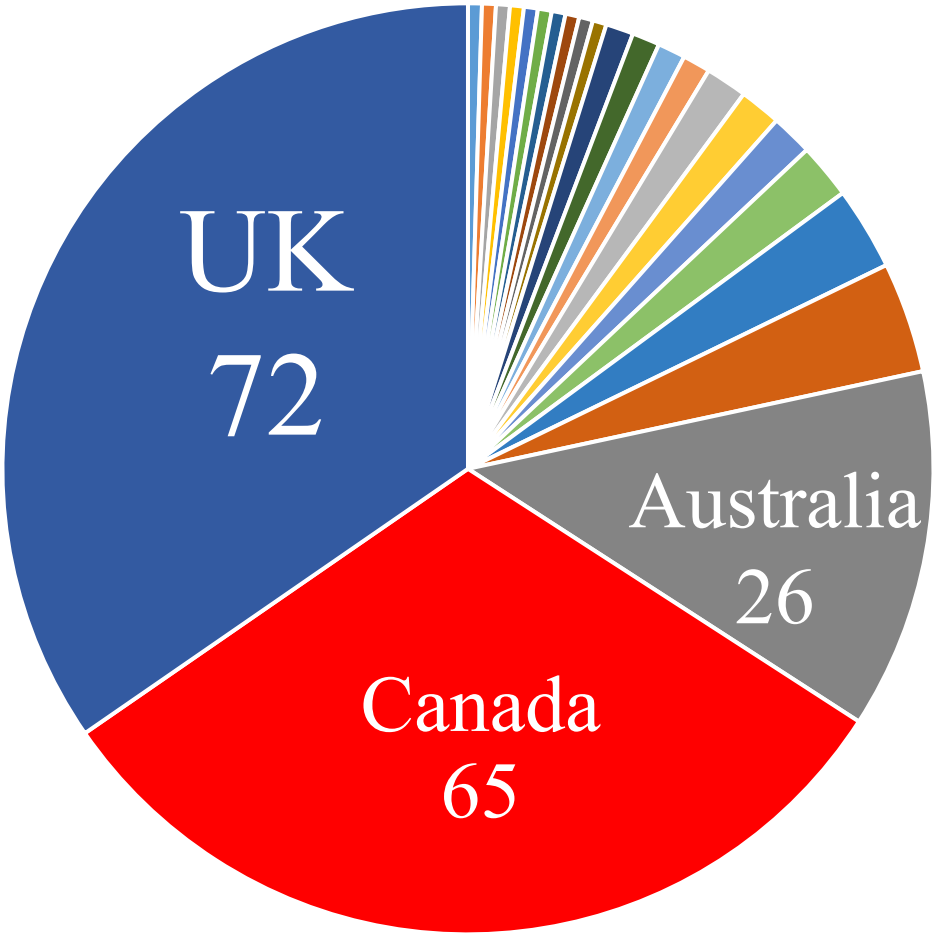


ICEAA International Cost Estimating and Analysis Association

as of June 1, 2026

State of the Association: International Membership

72	UK
65	Canada
26	Australia
8	Korea/SK
6	Germany
4	Netherlands
3	China
3	India
3	Italy
2	Bahrain
2	Belgium
2	France



1	Angola
1	Austria
1	Botswana
1	Brazil
1	Denmark
1	Luxembourg
1	Saudi Arabia
1	Sri Lanka
1	Switzerland
1	Turkey

ICEAA International Cost Estimating and Analysis Association

as of June 1, 2026

Government Employees *(estimated)*

	May 2022	July 2022	Sep 2022	Feb 2023	May 2023	Sep 2023	July 2024	Sep 2024	Jan 2025	Jul 2025	Sep 2025	Jun 2026
DoD et al	24	16	16	11	24	14	18	23	11	15	17	13
Air Force	80	71	70	69	99	64	80	72	72	60	58	49
Navy	21	19	19	20	27	14	14	13	17	14	14	12
Army	10	12	11	12	14	13	7	11	8	9	7	6
Coast Guard	4	4	4	3	3	3	2	2	2	2	2	6
NASA/JHU	22	20	16	18	22	18	27	25	20	17	20	18
MDA	8	9	9	7	10	5	5	5	5	2	2	2
State/Local	1	1		1	1	0	3	2	2	1	1	1
DHS	17	17	17	18	17	10	13	12	14	12	12	10
DOE/NNSA		13	15	15	17	13	5	6	9	8	8	7
FAA			8	8	8	6	7	6	6	3	2	2
Misc Civil	17	18	11	10	10	9	12	11	13	10	6	7

Total US Government Employees (est.) **135**

Total Membership as of 6/1 **1248**

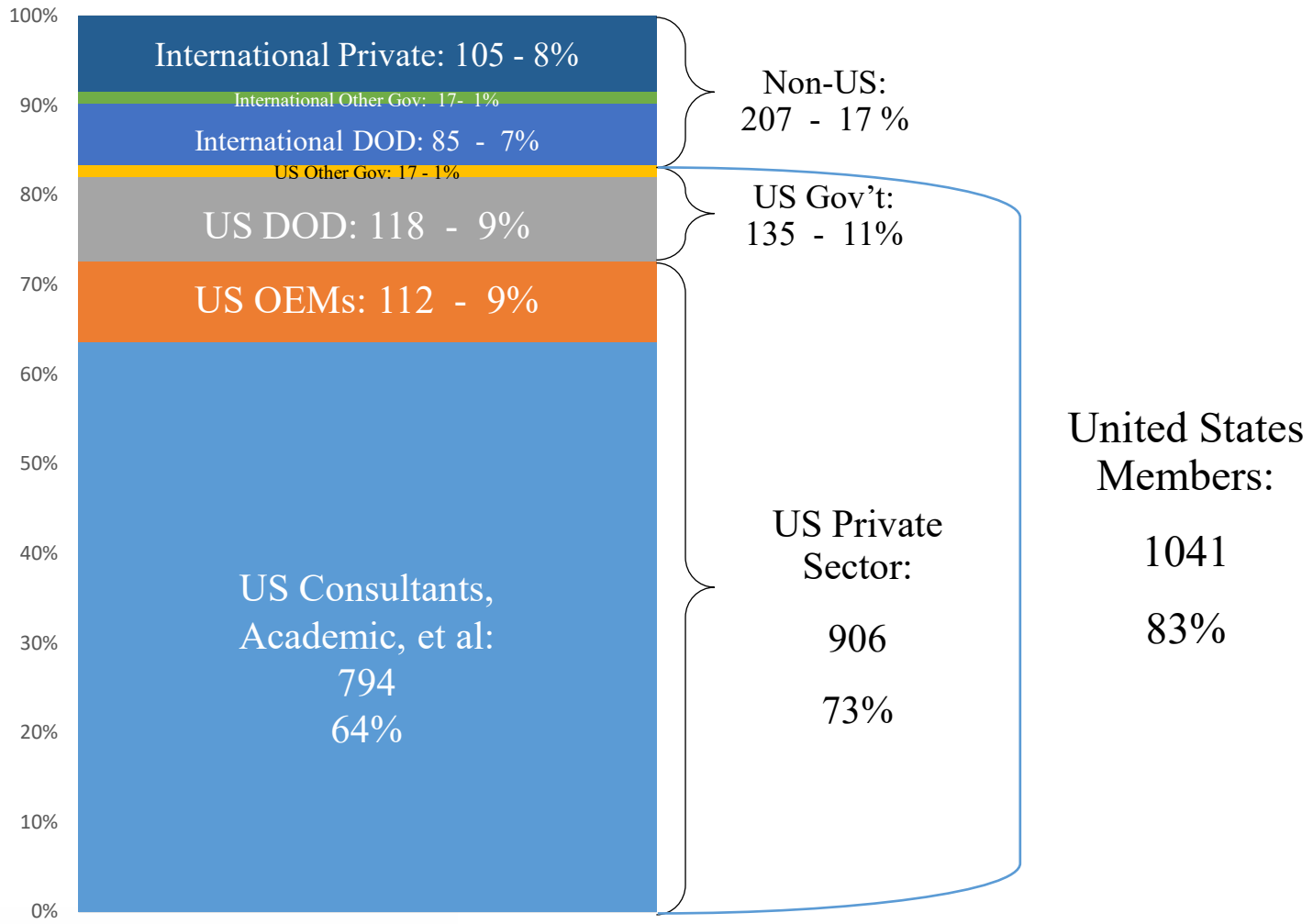
Percentage of Membership: 10.8%

Jan18	25%	Dec21	14.9%
May18	23%	Feb22	15.4%
Sep18	25%	May22	15.8%
Feb19	24%	July22	16.1%
Apr19	15%	Sep22	16.3%
Sep19	15%	Feb23	15.9%
Jan20	16%	May23	15.4%
May20	16%	Sep23	14.7%
Sep20	15%	July24	14.8%
Nov20	14.5%	Sep24	14.6%
Jan21	13.6%	Jan25	14.6%
Mar21	14.4%	Jul25	12.8%
Jun21	14.5%	Sep25	12.6%
Sep21	15.4%	Jun26	10.8%

ICEAA International Cost Estimating and Analysis Association

as of June 1, 2026

Membership Composition



ICEAA International Cost Estimating and Analysis Association

as of June 1, 2026