



Annual Report from the Board 2013-2014



Attendees at ASURA Seminar, January 23, 2014

This report is for distribution at the Annual Meeting
April 12, 2014, 1:00 p.m.
ASU Tempe Campus, Memorial Union Alumni Lounge

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ASURA BOARD AND OFFICERS

2013-2014 (outgoing)

Officers

Barry McNeill, President
Bill Moor, Past President
Jo Madonna, Vice President
Glenn Irvin, Secretary
Barry Bruns, Treasurer

Board Members (term expires)

Art Ashton (4/2014)
Barry Bruns (4/2014)
Barbara Bradford Eschbach (4/2014)
Cecelia Fiery (4/2016)
Elmer Gooding (4/2015)
Karen Hammann (4/2016)
Glenn Irvin (4/2016)
Dick Kelly (4/2015)
Gary Kleemann (4/2015)
Jo Madonna (4/2016)
Barry McNeill (4/2015)
Bill Moor (4/2014)
Jeannette Robson (4/2014)
Bill Stasi (4/2015)
Jan Thompson (4/2016)
Hal White (4/2016)

Ex-officio Members

Sheree Barron, Human Resources
Jim Fordemwalt, University Club
Elmer Gooding, Emeritus College
Rhonda McClintock, Alumni Assoc.
Trudy Perez, University Staff Council
Abby Polito, Public Affairs
Thomas Schildgen, University Senate
Barbara Shaw-Snyder, Public Affairs

2014-2015 (incoming)

Officers

Jo Madonna, President
Barry McNeill, Past President
TBD, Vice President
Glenn Irvin, Secretary
TBD, Treasurer

Board Members (term expires)

Joyce Hartman Diaz (4/2017)
Cecelia Fiery (4/2016)
M.J. "Jack" Fouquette (4/2017)
Elmer Gooding (4/2015)
Karen Hammann (4/2016)
Glenn Irvin (4/2016)
Dick Kelly (4/2015)
Ruth Kingsley (4/2017)
Gary Kleemann (4/2015)
Jo Madonna (4/2016)
Barry McNeill (4/2015)
Trudy Perez (4/2017)
Bill Stasi (4/2015)
Jan Thompson (4/2016)
Rick Wall (4/2017)
Hal White (4/2016)

Ex-officio Members

Sheree Barron, Human Resources
Jim Fordemwalt, University Club
Elmer Gooding, Emeritus College
Rhonda McClintock, Alumni Assoc.
TBD, University Staff Council
Abby Polito, Public Affairs
TBD, University Senate
Barbara Shaw-Snyder, Public Affairs

IMPORTANT CONTACT INFORMATION

ASURA OFFICE (480) 965-7668
P.O. Box 873308 FAX: 480-965-7807
Tempe, AZ 85287-3308
<http://asura.asu.edu>

ARIZONA STATE RETIREMENT SYSTEM (602) 240-2000 or
3300 North Central Ave 1-800-621-3778
Phoenix, AZ 85012
<https://www.azasrs.gov/>

ARIZONA DEPARTMENT OF ADMINISTRATION (602) 542-5008 or
100 North 15th Ave, Suite 103 1-800-304-3687
Phoenix, AZ 85007
<http://www.benefitoptions.az.gov/>

OFFICE VOLUNTEERS



Carolyn Minner



Carol Moore

Carolyn Minner, our volunteer Business Manager, handles all purchasing, mailing and other business transactions for the Association. She also maintains the membership database and the e-mail distribution lists. Carol Moore recruits, trains and coordinates our Front Desk volunteers, in addition to serving a shift on the Front Desk herself.

Our dedicated Front Desk staff volunteers keep our office running smoothly, and they cheerfully help everyone who interacts with the ASURA. Office hours are Monday through Friday, 9 a.m. to noon and 1 to 4 p.m.



Carol Berg
Monday morning



Maxine LaRoux
substitute



Joan Leard
substitute



Nancy Lesko
Wednesday
morning



Dorothy Meunier
substitute



Jeannette Robson
Monday
afternoon



Bonnie Scheall
Thursday morning



Helen Seaton
substitute



**Anna Marie
Shivers** Friday
morning



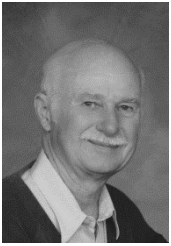
Linda Van Scoy
Tuesday
afternoon



Mary Williams
Thursday
afternoon

We always welcome any and all assistance from those interested in getting involved. If you are interested in joining our volunteer staff, please contact us at (480) 965-7668.

PRESIDENT'S MESSAGE



The Bylaws specify that the President “shall ensure that an Annual Report is generated for distribution to the membership at the Annual Meeting”. What follows is a report from all the committee chairs. A review of the report shows that the Association has been quite active this past year and for the most part has been successful in carrying out its various programs and activities: membership is up, seminar attendance is up, the Video History Project has close to 96 interviews.

Barry McNeill

During the September Board meeting I articulated the following four strategic goals that I thought the Board should consider:

- Increase Membership
- Better Serve Our Members
- Review Community Outreach Portfolio, and
- Ensure Long Term Health of the Association.

These goals were not new ones but I thought it was important to spell them out to remind the Board of what I believe are some of its most important duties.

To get data to help the Board address the strategic goals the Board approved surveying our membership as well as those who have never joined and those who have joined and dropped. You can read more about the survey in the next section of the report. I felt the financial health of the Association was not something a survey would help address and I asked the Finance Committee to review the issues of financial health and report to the Board. They did this, and you can read about that in the Financial Committee Report.

Aside from the financial health, keeping a flow of volunteers into the Association is maybe the next most important component of long term health for the Association. This year I could not find volunteers to take on the responsibilities of the ASRS Legislative Liaison or ASRS Health Liaison. We briefly had a good Legislative Liaison but she had to opt out when she returned to full time employment and I could not find any volunteer to replace her.

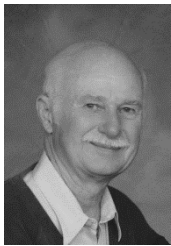
The issue of getting volunteers was discussed during the October and November Board Meetings. Promoters and barriers to getting and keeping volunteers were generated. There are numerous barriers: travel distance to meetings, competition with other organizations, the perceived level of effort required, lack of interest or knowledge in the assignments, having to learn new skills, etc. There are fewer obvious promoters but it was clear that if you can match a person's interests with the task that is a recipe for success, i.e., the work has to be “fun” for the volunteer. One outcome was highlighting of the process that committee chairs and Board Officers can use to find the names of members who have indicated an interest in volunteering on their membership forms.

So what is next? I got several things started but a year is a pretty short period of time and none of the efforts has been completed. The following work still needs to be done:

- Prepare a report on the survey results to help the Board with the four strategic goals.
- Operationalize the financial health ideas developed by the Finance Committee.
- Take a hard look at each of the four strategic goals given the data from the survey.
- Develop short term emergency plans to address the temporary loss of the Business Manager, the Office Manager, and the Technology Manager. We had a period this year where our Business Manager was called away for an extended period of time. We muddled through reasonably well but I believe a predefined process would be beneficial.

I have enjoyed my year as President and believe I have helped the Association move forward but only time will tell.

MEMBERSHIP SURVEY



Barry McNeill

The Board approved developing three surveys, one for members, one for those who had dropped membership, and one for those ASU retirees who had never joined ASURA. Four question writing groups were created, headed by Elmer Gooding, Bill Moor, Gary Kleemann, and Glenn Irvin. After each group had created a set of possible questions the four question group leaders and I reviewed the questions and developed a consistent format.

After looking at several possibilities including Google and Toulna's Quick Survey we selected SurveyMonkey® as the best product for our survey and the Board approved a one year subscription. I created three surveys using the questions and question format agreed to by the question group leaders. The Never Joined and Lapsed Member surveys were both one page long; the Member survey was nine pages long.

Once the surveys were completed they were tested. SurveyMonkey® has an option to print a copy of the surveys and that is what was done to test the paper version of the Never Member, Lapsed Member, and Member surveys. Five members of the ASURA Office tested the online version of the member survey, the remainder of the testing was done during the December Board meeting. The testing uncovered a few minor issues. The main concerns related to the format of the paper member survey. Since there was nothing that I could do using the SurveyMonkey® to address these concerns it was necessary to create a MS Word version of the member survey.

The surveys were ready to go in early January and the Never Joined and Lapsed Member surveys were mailed. The mailing included a stamped return envelope. Table 1 shows we mailed surveys to 485 ASU retirees who had Arizona addresses, had retired within the past three years, and had never joined ASURA. The table also shows that we mailed 251 surveys to members with Arizona addresses who had been members at some time during the past five year but had not renewed their membership.

It was decided to hold off on the member survey until the members had received their spring *Prime Times* which had an article explaining what we were trying to accomplish with this survey. On February 15 I sent 412 e-mail invitations to take the survey online to members who accept e-mail. At the same time 192 paper surveys were mailed to those members who do not accept e-mails; as with the previous mailing we included a stamped return envelope.

Table 1 – Data on Surveys Sent & Returned

Survey Type	Number Sent	Number Returned	% Returned
Never Joined – US Post Invitation	485	49	10.1
Lapsed Member – US Post Invitation	251	61	24.3
Member – e-mail Invitation	412	119	28.9
Member – US Post Invitation	192	45	23.4

The return rates for the surveys are shown in Table 1. The return rates for the Never Joined and Lapsed Member surveys are well above my expectations; I was not sure we would get any from the Never Joined group. The Member returns are not quite up to what we would like and a second invitation was sent out in mid-March.

The analysis of the data has just begun and will not be finished until sometime this summer at which time a report can be prepared for use by next year's Board.

COMMUNITY OUTREACH COMMITTEE

The Community Outreach Committee identifies and promotes opportunities for members to donate or volunteer resources to better our community. It also oversees outreach programs designated by the Board. The committee currently oversees three projects and coordinates with and supports activities of two other ASU organizations.

The projects are: Adopt-a-Family, Video History Project, and Scholarship. The organizations with whom we coordinate are the Emeritus College and the University Club. Reports from the chairs of these outreach efforts follow.

Adopt-a-Family Program



Joan Leard

Two families were adopted for this school year; one family of four from the Tempe Elementary School District #3 and one family of four from ASU.

The Tempe family consists of a father, a daughter 20, a daughter 5 and a son 17. The social worker wrote, "This family is so hard working with great kids and so in need. They are so humble it is hard to get them to tell me what we can get for them".

The ASU family consists of a mother with daughters 5 and 3 and a son 2. The mother works part time and attends ASU full time working on a degree. She loves music which she finds very therapeutic. She says, "the children are very active and like to go outdoors and enjoy nature as well as have books read to them at bedtime".

The funds used for these purchases come from ASURA member donations and the ASURA treasury. With your help we will continue to give two families struggling with education for a better life a helping hand. Please continue to donate so we may keep this outreach program alive and well for many more years.

Video History Project



Linda Van Scoy

The video crew and the committee consists of Roger Carter, Elmer Gooding, Richard Haefer, John McIntosh, Ann Patterson, Becky Reiss, Dave Scheatzle, and Linda Van Scoy, committee chair. To date, the Video History Project has completed 96 interviews, 48 of which have been done in house. (See complete listing below.)

As mentioned in the last *Prime Times*, we have also added 25 additional video clips to the ASURA web site and those can be easily viewed from your computers. Just go to the Video History page on our web site and click on "video clip" behind the person's name (see below) and voila, you can enjoy a 1-3 minute clip from the full interview.

We are enjoying the permanent studio space we acquired in the CSB building and have conducted several interviews there. We can, however, easily be mobile and conduct interviews "offsite" whenever needed. We purchased a recent aerial map of ASU and the surrounding area that has been enlarged and mounted to use as an additional backdrop for our interviews. We also added a second camera for the interviews which allows us to switch between a wide angle of the participants, and a portrait view of the interviewee when editing

The Golf Tournament held in November was quite successful and netted \$1500 for the Video History Project. We were also pleased to see so many generous donations to the project (\$125) through the membership renewals and thank those of you who contributed to this worthy cause!

We have had a series of meetings with University Archives staff and presented a proposal to add our videos to the Library's Digital Repository. The ASU Libraries digital projects committee met to discuss our request and the committee was unanimous in their support. They felt that the interviews represent important content relevant to Arizona State University that should be archived, and made digitally available. The next step will be to develop a Memoranda of Agreement or Understanding with the Library. In addition we have ongoing conversations with Mark Tebeau, Director of Public History, to "partner" with his unit and utilize some of the students in his program to help us with editing interviews during the summer months. Mark has suggested that

“we” index the interviews. This would allow for a quick search of clips on a specific topic in order to build a story on a particular topic from multiple interviews.

The video crew and the committee work very hard volunteering their time to schedule, conduct and edit the interviews and the success of the Video History Project rests on their shoulders. We welcome additional volunteers at any time, so if you would like to help let us hear from you. This is my last year as Chair of the Video History Committee. I plan to remain on the committee but am turning the reigns over to Dave Scheatzle, effective after the April Annual Meeting, so it will be in good hands!

Just a reminder, DVD interviews are available to check out from the ASURA office or may be requested by mail. Contact the office at 480-965-7668 to make arrangements for either option. We would also like to remind the membership that we invite nominations for individuals to be interviewed. Send the name, department and a brief justification to:

Linda Van Scoy
ASURA Video History Project
P. O. Box 873308
Tempe, AZ 85287-3308
Or e-mail to lvs@asu.edu

Below are the DVDs that are available with the exception of those with an asterisk, which are being edited and will be available in the near future. Video clips are available for many of the interviews.

- | | | |
|--|-----------------------------------|-----------------------------------|
| 1. Allen, Charles*(video clip) | 27. Gisolo, Margaret | 52. McNeill, Connie*(video clip) |
| 2. Backus, Charles (video clip) | 28. Glick, Milton (video clip) | 53. McSheffrey, Gerry |
| 3. Bardwyck, Loretta | 29. Gooding, Elmer (video clip) | 54. Metha, Arlene |
| 4. Barnhill, Robert * | 30. Gordon, Leonard | 55. Meunier, John* |
| 5. Betz, Mat (video clip) | 31. Greathouse, Betty | 56. Miller, Victor J. |
| 6. Bogart, Quentin* | 32. Grigsby, Eugene | 57. Montiel, Miguel* |
| 7. Branstetter, Ellamae | 33. Hardt, Ann | 58. Moore, Carleton (video clip) |
| 8. Brown, Brent (video clip) | 34. Harrison, Mernoy*(video clip) | 59. Morrell, George (video clip) |
| 9. Bruns, Barry* | 35. Hastings, Vernon* | 60. Mulhollan, Paige (video clip) |
| 10. Burgess, Hugh * | 36. Huizingh, William | 61. Murra, Dick |
| 11. Campbell, Rudy (video clip) | 37. Jacob, Dick* | 62. Nelson, Russell |
| 12. Coor, Lattie | 38. Jankowski, Dan* | 63. Oliver, Robert |
| 13. Crowder, Troy (video clip) | 39. Kajikawa, Bill | 64. Ostrom, Lonnie (video clip) |
| 14. DeGraw, Bette* | 40. Kigin, Denis | 65. Parker, Clyde (video clip) |
| 15. Dotts, Don (video clip) | 41. Kinsinger, Jack (video clip) | 66. Payne, June*(video clip) |
| 16. Doyle, Roy (video clip) | 42. Krahenbuhl, Gary*(video clip) | 67. Penley, Larry (video clip) |
| 17. Durand, Barbara* | 43. Kush, Frank (video clip) | 68. Peplow, Bonnie |
| 18. Edwards, John | 44. Land, Floyd * (video clip) | 69. Peterson, Val* |
| 19. Ellis, Bob | 45. Lessard, Beth | 70. Pittman, Anne M. (video clip) |
| 20. Elmore, James (video clip) | 46. Lewis, William * | 71. Prust, Zeke*(video clip) |
| 21. Eschbach, Darel* | 47. Linton, Marigold* | 72. Rapp, James*(video clip) |
| 22. Eschbach, Barbara* | 48. Lombardi, Eugene (video clip) | 73. Rice, Ross |
| 23. Fearon, Hal | 49. Mason, Bruce | 74. Richards, Gale |
| 24. Fisher, Marvin | 50. Matheson, Alan | |
| 25. Fleming, Robert "Coach" * (video clip) | 51. McHenry, Al | |
| 26. Fuchs, Jack* | | |

- | | | |
|-------------------------------------|---------------------------------|-----------------------------------|
| 75. Sackton, Frank (video clip) | 83. Smith, Dean (video clip) | 91. Wells, Linda* |
| 76. Salerno, Nick (video clip) | 84. Snyder, Jerry* | 92. Winkles, Bobby (video clip) |
| 77. Scannell, Ed* | 85. Storad, Conrad*(video clip) | 93. Wright, Madelyn (video clip) |
| 78. Schabacker, Joseph (video clip) | 86. Turk, Rudy (video clip) | 94. Wurzburger, Marilyn* |
| 79. Scheatzle, Dave* | 87. Umberson, George | 95. Zafra, Victor * |
| 80. Schneider, Anne* | 88. Van Scoy, Linda | 96. Roundtable discussion: |
| 81. Schwada, Wilma | 89. Weigend, Guido (video clip) | Brent Brown, Russell |
| 82. Shell, Leon (video clip) | 90. Weschler, Louis * | Nelson & Frank Sackton |

Scholarship Committee



Sue Blumer

This year's ASURA Scholarship Committee was composed of Sue Blumer, Co-chair, Cecelia Fiery, William Glaunsinger, Betty Greathouse, Lester Hendrickson, Alan Johnson, Betty Ludlow, and Joy Shearman, Co-chair. The committee was pleased to award the 2013-14 reentry scholarship to Tomas Espinosa, who is majoring in mechanical engineering on the Tempe campus after his transfer from Phoenix College. Espinosa offered a superb academic record, significant community service, and focused academic and career goals.

In his personal statement, Espinosa described his interest in energy technology and the "need to continue to provide efforts in the electrification of rural regions worldwide in order to decrease poverty and unhealthy living conditions." His community service includes meeting and mentoring political refugees from Yemen, Iraq, Iran, and other countries and the "unique learning experience" from this diversity exposure. He has performed volunteer community service in the historical downtown Phoenix area to remedy vandalism and to provide home health care and other help for the elderly and disabled.

The ASURA scholarship, which provides \$10,000 for the academic year, is a powerful means to help one student at a time. To meet the reentry criteria, students must have been out of high school at least five years and have completed no more than one semester at ASU after that time. The scholarship is funded by contributions from our members for that purpose, from fundraising events such as the golf tournament and book sales, from earnings on the scholarship endowment fund, and from the operations budget. As tuition continues to increase, the need for good scholarships also grows.

Scholarship Committee members take their jobs seriously, spending long hours in reviewing the applications. As the committee members represent many different departments and disciplines in ASU, so too do the scholarship recipients represent diverse interests and background. During the past few years, they have majored in performance art and art history, economics, supply chain management, computer information systems, social work, gerontology, and psychology. They represent all four ASU campuses and come from a wide geographic area. The scholarship recipients also give a short talk at the annual meeting about their academic, community, and career interests, providing all of our members a chance to share in the lives of current students.

EVENTS COMMITTEE



Jo Madonna

The Events Committee was chaired by the ASURA vice president Jo Madonna. It is an “umbrella” committee made up of the chairs of the various event subcommittees and its purpose is to provide for the coordination of dates and activities between these subcommittees. These committees and the chairs are: Travel – Gary Anderson; Seminars – Jan Thompson; Luncheons and Special Events – Barbara Bradford Eschbach; Golf Tournament – Dave Schwalm; Retiree’s Day – Barry McNeill.

During the late spring of 2013, the various committee chairs were asked to determine a tentative schedule for the events that the committees planned to offer during 2013-14. The committees were asked to spread the events throughout the year and to keep in mind the already established dates for some events, such as Retirees Day and the Annual Meeting.

The Events Committee chair reviewed the dates and plans in order to identify and resolve possible scheduling conflicts. This information was shared with the various committee chairs and the activity calendar of activities was established

An upcoming calendar of activities was published in each issue of *Prime Times* throughout 2013-14. In addition to the calendar, committees submitted articles about upcoming events and activities for each issue of *Prime Times* to help keep ASURA members informed about all of the opportunities that would be held before the next issue.

Each committee also took full advantage of the Wild Apricot Software that ASURA utilizes to reach out to its members who are able to receive e-mail correspondence. Electronic announcements, invitations and reminders were sent out for every event. The use of Wild Apricot allows for enhanced promotional materials to be sent, including eye-catching photos and graphics that are more appealing than what is possible in simple e-mails. The use of Wild Apricot also allows ASURA members to opt to register on-line.

Luncheons and Special Events



Barbara Bradford Eschbach

The 2013/2014 Luncheons and Special Events Committee consisted of the following: Beverly Reinhart, Joyce Hartman Diaz, Trudy Perez and Barbara Bradford Eschbach (Chair).

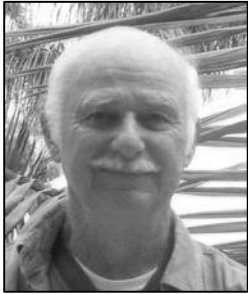
The first luncheon of the year was the Fall Meet & Greet Pizza Party, held on Wednesday, 9/11/13 at CSB. This event was well-attended by 66 people, all of whom seemed to love eating Free Pizza. This year’s pizza party was the third time to hold this kick-off party, the cost of which is subsidized by ASURA. While the pizza luncheon is the reason to come together, it is a valuable social event where members (new and previous) can come together to catch-up on “What I did on my summer vacation!” It was also an opportunity to introduce all members of the Board and committee chairs. Board members and committee chairs had the opportunity to announce events already planned for the year, as well as to recruit attendees/members to get involved with the various committees and/or events.

The second luncheon of the year was the Fall Luncheon, held on Thursday, 11/15/13, in the Skirm Auditorium of Friendship Village Tempe (FVT). This was the second luncheon held at Friendship Village in an effort to engage/include the numerous ASU retirees who reside at FVT but may be unable to travel elsewhere for ASURA events. This luncheon brought together 43 members and their guests for lunch, conversation, social interaction and music. The musical program was provided by pianist/composer Richard Palalay and vocalist Lyn Jackson. FVT graciously provided shuttle service to/from a nearby parking lot for the non-residents. Due to its popularity and success, this luncheon has now become an annual event and is already scheduled for 2014/2015 on November 14, 2014.

The third luncheon of the year was another standing/annual event: The Holiday Potluck & Bake Sale! As has been done for years, this luncheon was held at CSB. All attendees came with wonderful contributions toward the luncheon (appetizers, entrees, desserts). The Bake Sale was held for the first time in December 2012; so this year's sale was the second time to do so. The Bake Sale successfully raised \$167, and everyone who attended, approximately 67 individuals, went home well-fed, happy with their purchases and in a holiday mood!

The final luncheon for 2013/2014 will be a luncheon and wine tasting with a professional sommelier provided by our host venue: Dvine Bistro & Wine Bar in Chandler. This event will be held on Thursday, May 15, 2014.

Retirees Day



Barry McNeill

The 21st Retirees Day Retirees Day Committee included Don Dotts, Barbara Bradford Eschbach, Karen Hammann, Wilma Mathews, Barry McNeill (chair), Carol Taylor-Tassone, and Hal White. The committee prepared a program, see below, similar to last year's program with three sessions each with three presentations and a luncheon program. Unfortunately the registration for the event was far below what was expected and the event was cancelled.

The committee meet in March to discuss how to move forward. Before making any decisions about next year it was agreed to meet with the Seminar Committee to discuss possible options

Proposed 2014 Retirees Day Program

- *Current Research Efforts at the Institute of Human Origins* by Dr. William H. Kimbel, Director of The Institute of Human Origins and Virginia M. Ullman Professor of Natural History and the Environment
- *Jazz from A to Z* by Ms. Marcie Hutchinson School of Historical, Philosophical and Religious Studies
- *The Case for Alien Life* by Dr. Steve Desch, Assoc. Professor School of Earth & Space Exploration
- *Resilience and Rebuilding: Indigenous Nations in the Modern American West* by Professor Donald L. Fixico, Distinguished Foundation Professor of History in the School of Historical, Philosophical & Religious Studies
- *Genetics and Conservation of Desert Plants in the Highlands, Lowlands and Wetlands* by Dr. Shannon Fehlbeg, Conservation Biologist, Desert Botanical Garden in Phoenix
- *The Future of Space Exploration* by Dr. Srikanth Saripalli, Assist. Professor School of Earth & Space Exploration
- *Traditional Knowledge Shapes Sustainability Thinking* by Professor Simon J. Ortiz, Regents Professor of English,
- *Is our K-12 education keeping up with today's students and the future they face?* by Dr. Sybil Francis, Executive Director of the Center for the Future of Arizona
- *The Ethics of the Techno-Human Transformation* by Dr. Braden R. Allenby, President's Professor & Lincoln Professor of Engineering and Ethics, School of Sustainable Engineering
- *50 Years of ASU Gammage* by Colleen Jennings-Roggensack, Executive Director for ASU Gammage & Assistant Vice President for Cultural Affairs, luncheon program.

Seminars



Jan Thompson

Four seminars were delivered by the Seminar Committee, chaired by Jan Thompson. Other members of the committee were George Stelmach, Gary Kleemann with consultation from Art Ashton, Phyllis Primas, & Patricia Moore, ASURA Health Insurance Liaisons.

September 11, 2013 – ASURA Panel discussing *Things I Wish I had Known When I Retired*

This was the second year the seminar committee organized a panel discussion on lessons learned for newly retired members. The session was held the hour before the fall Meet & Greet Pizza Party.

October 17, 2013 -- Health Care Seminar: Medicare-ADOA-ASRS Open Enrollment - 62 attendees

This was an ambitious three hour seminar with a total of 5 presenters.

- David Parra, Arizona AARP representative, and volunteers Greg and Lisa Lane, presented overviews of Medicare and the new Affordable Care Act. Their PowerPoint presentations and printed information were well-crafted, detailed, and much appreciated by attendees.
- Raquel Lind, ADOA open enrollment manager, presented information on ADOA open enrollment and any annual changes.
- Pat Klein, ASRS open enrollment manager, presented information on ASRS open enrollment and any annual changes.

January 23, 2014 Living Arrangement Options for Seniors—65 attendees

Martha Batista and Stephen Chung of Assisted Transition, a professional senior living and care referral company, presented an excellent seminar on living arrangement options ranging from independent senior living to skilled nursing facilities. Detailed descriptions of each category were provided, along with cost ranges and comparisons and advice on choosing optimal arrangements for individual situations.

March 20, 2014 - Wellness for Seniors: Backs, Bones, Muscles and More! – 60 attendees

Four professors from the ASU School of Nutrition and Health Promotion presented a collaborative seminar covering a variety of health topics of interest to seniors. Professors Pamela Swan, Cheryl Der Ananian, Jared Dickinson, and Rick Hall discussed back health, stretching, fall prevention, the role of nutrition in building bone and muscle health, choosing an exercise program, arthritis issues, and more.

Travel



Gary Anderson

The ASURA Travel Committee had seven very energetic, talented experienced members this year. The members were: Judy Hellala, Helen Seaton, John Brock, Norm Perrill, Jim Fordemwalt, Gary Kleemann, and Gary Anderson, Chair. The Committee met monthly at the Tempe Public Library.

The Committee's goals are to provide a range of travel opportunities for the ASURA membership. The Committee has twice conducted surveys among the Association membership to gain information about such travel factors as: destination, modes of travel, length of travel, types of travel, cost of travel, etc. This information from the members was used as a guide in planning the various travel events.

Generally, the Committee follows this formula in planning travel opportunities for an academic year: 1-3 local one day trips in the Valley, 1-2 multi-day trips in the state or region and 1-2 international trips.

This year we have conducted three local trips, a two-day state trip and an international trip. In the fall we went to the Mining Camp Restaurant to help sing along with the Kingston Trio. Later we had a wonderful Christmas

music concert with the Spirit of Phoenix Men's Choir. The start of spring and spring training led to an informative and entertaining tour of Chase Field, home of the Diamondbacks. April will see the very fun choo-choo ride on the Verde Canyon Railroad, with an overnight in the haunted Jerome Grand Hotel. And finally, a group of 'Belugas' will be off to Russia in mid-May, arriving in St Petersburg, boarding a river boat and cruising the Volga for two weeks, arriving in and touring Moscow before returning to Arizona.

Plans are already in the works for some outings in the fall of 2014. One will be a day trip to Tovrea Castle, an iconic landmark in Phoenix and the second will be a multi-day trip to the Four Corners. This will be a head-shaker, camera clicker trip to the spectacular marvels of Monument Valley, Canyon de Chelly and the Four Corners area. Get in line, we're on the road again.

Non ASURA Event Participation

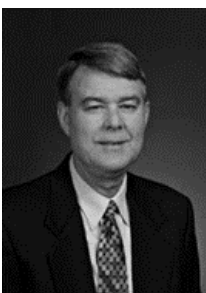


Jo Madonna

This past year ASURA members represented our organization in quite a few events sponsored by other ASU affiliated organizations. Participation in these events was done in support of these organizations and to raise awareness about ASURA as a viable part of the university community.

- KAET Fund Drive - On August 3, 2013 Mary Stevens and Bill Moor coordinated a group of eight of our members and two non-members to staff some of the phone lines at one of KAET's fund drives. Another group participated on March 15, 2014 and ASURA plans to participate again in the future.
- Faculty/Staff Fair - On September 18, 2013, ASURA vice president Jo Madonna staffed a table and answered questions about ASURA at this event which is sponsored by the University Staff Council. This event is designed to help make faculty and staff aware of various organizations, events and benefits available to them at ASU.
- ASU Legislative Agenda Breakfast – on January 14, 2014 ASURA President Barry McNeill and Board Member Bill Stasi attended this event at which ASU President Crow spoke about ASU and its future.
- ASU Day at the Capitol – On February 11, 2014, ASURA had a table at this annual luncheon and ASU organization fair. The event was held on the Senate Lawn at State Capitol and is sponsored by the ASU Alumni Association to make legislative staff and elected officials more aware of the university and its programs.
- ASU Staff BBQ – on February 26, 2014 ASURA President Barry McNeill and ASURA member and office staff volunteer Nancy Lesko staffed a table at this Tempe Campus event and provided information about our organization to attendees. This event is designed to recognize the ASU employee contributions to the university.

FINANCE COMMITTEE



Barry Bruns

The members of the 2013-2014 Finance Committee were Barry Bruns, chair, Connie McNeill, Carolyn Minner, Mary Stevens, and Jerry Snyder. The committee is the home to the various fund raising events held during the year which includes the Book Sale and the Golf Tournament. The committee also oversees the annual review of the Association's books. Finally the committee prepared a report on the financial health of the Association.

Conducting the Annual Review of ASURA Expenditures in 2012/13

The following report was prepared by Jerry Snyder and presented to the Board during its November meeting where it was accepted.

Per ASURA Bylaws, Article VI.A.4, the Finance Committee conducted the annual review of expenditures of the Association for reasonableness and consistency with the budget. The following documents were reviewed: ASURA Annual Event Report for FY 2013, ASURA Financial Report 7/1/2012 through 6/30/2013 (consisting of the following accounts: Operations, Public Affairs Allocation, Special Projects, Adopt-A-Family, Video History, History Book, and Scholarship Endowment Fund), and the applicable Banking Summaries prepared by the ASURA and the related ASU Foundation prepared Balance Sheets/Income Statements for each of these accounts. The Finance Committee unanimously agreed that the revenues and expenditures of the Association in 2012/2013, after consideration of the comments/explanations on the ASURA Financial Report, were reasonable and consistent with the budget and in agreement with the applicable ASU Foundation records. The Committee also verified that the ASURA ending cash balances agreed with the underlying Foundation records.

It was noted that the Public Affairs Allocation was underspent by \$1,200 due to late receipt after the end of the fiscal year of invoice for the copier/Fax equipment annual lease. Arrangements have been made for this annual payment for future years to be charged to the Public Affairs Allocation Account at the start of each fiscal year and not at the end of the fiscal year, so that expenses related to the fiscal year are definitely charged to that fiscal year and not to another fiscal year due to possible late receipt of an invoice.

Financial Health of the Association

The Finance Committee met to discuss the strategic goal concerning the financial health of ASURA. The Committee discussions covered three areas: Definition of financial health, negative financial impacts on ASURA and, the scholarship endowment.

The Finance committee recommended the following definition of “Financial Health”: ASURA would be considered financially healthy if current year revenue is greater than current year expense and there is an “adequate cash reserve”. An adequate cash reserve is defined as an amount equal to the current scholarship amount plus one-half of prior year expenses. Using FY 2014 as an example, the required cash reserve would be \$23.5K (\$10K for the scholarship and one-half of prior year expenses of \$13.5K). The cash reserve would be used in the event of large unforeseen (unbudgeted) expenses or loss of income. The reserve would be used to cover these and then replenished as possible.

The Committee felt the most significant negative impact to ASURA would be a drop in membership. A decline in membership over a 5 year period of 25% would be a serious problem. They also discussed the Golf Tournament and felt that although it does provide some extra funding, it would not cause a large impact if it were not held.

The Committee discussed the Scholarship Endowment at great length. The consensus of the group is that the endowment should be grown which lead to a discussion of the following two issues: The Scholarship Spending Account, and Scenarios on Growing the Endowment.

Scholarship Spending Account

Annually the Foundation, using a five year rolling average of endowment performance, calculates what fraction of the endowment can be used to pay the scholarship. The Foundation then places that amount of money in a Foundation account named the Scholarship Spending Account. Money in the Scholarship Spending Account can only be used to fund the scholarship or be reinvested in the scholarship endowment. The committee felt reinvestment in the endowment was the correct use of this money.

Scenarios on Growing the Endowment

To fund a scholarship of \$10K would require, under current conditions, a principal of around \$285K. Assuming an average return of 7% and current gift levels, it would take about 9 years to reach \$100K, 19 years to reach \$200K and 24 years to hit \$285K. These calculations include only investment returns and current gifts. It would be possible to speed up the growth if, for example, after computing our adequate cash reserve, it is determined that we have an excess, this amount could transferred to the endowment. For this year, that difference is about

\$15K. If this amount were added to the endowment, \$100K would be achieved in 6 years, \$200K in 16 years and \$285K in 21 years. Taking this one step further, our current fund balance is projected to increase \$3K for this year. If we assume this amount would be generated each year and were added to the endowment, \$100K would be reached in 4 years, \$200K in 12 years and \$285K in 17 years.

The Foundation's Endowment earnings are reasonably good, and very consistent with overall capital market returns, having earned 12.4% for fiscal 2013, but only 7.6% over the last 10 years, which included several poor investment return years, resulting in the overall, long term slightly conservative, and assumed future investment rate of 7%.

Based on the committee report the Board approved during its March meeting the following motions:

- approval of the definition of financial health given in the committee report,
- approval of the need to allocate, i.e. investing in the Scholarship endowment, purchasing equipment beyond that approved in the budget, funding a new project / activity, etc., any cash reserves exceeding the "adequate cash reserve" as defined in the committee,
- approval of reinvesting the Scholarship Spending Account back into the scholarship endowment, and
- approval to ask the Treasurer, Business Manager, and Chair of the Finance Committee to develop and implement a report to present the budget and the financial health of the Association to the Board at its September meeting.

Book Sale



Mary Stevens

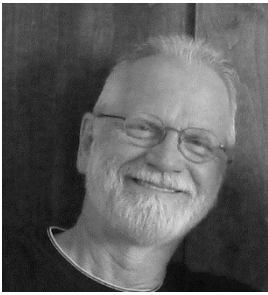
In 2011, the ASU Foundation/ASURA entered into an agreement with a local non-profit organization, Friends of the Phoenix Public Library ("Friends"). Per the agreement, Friends sell books donated by our members, other ASU retirees and anyone else who wishes to donate. Friends sell the donated books on-line and splits the proceeds with ASURA. ASURA has continued the book sales program with Friends. Elmer Gooding ASURA Membership Chair, made an arrangement with the ASU Human Resources Department to have a representative of ASURA attend meetings of ASU employees who are retiring within a few months. During the meetings, attendees receive information about the donated book sales program and receive a form to complete if they have books to donate. Mary Stevens and Bill Moor are the ASURA contacts for donors to arrange for receipt of their books. Donors complete a gift form when they donate books. The form is provided to the ASU Foundation, which sends each donor a gift receipt/ thank-you letter.

Last year, the Board approved Connie McNeill's suggestion to enclose a book donation form with new and renewal applications. As a result, ASURA received an increased number of books after the May application mailing and second mailing in August.

Proceeds from the book sale are transferred to the ASURA Special Projects account and are used to support ASURA's annual scholarship and the Living History Video Project.

Between July 1, 2013 and March 31, 2014, ASURA received \$254.51 in proceeds from book sales.

Golf Tournament



Dave Schwalm

This year's Golf Tournament committee consisted of Dave Schwalm, Chair, Dave Scheatzle, Mernoy Harrison, and Gary McGrath.

ASURA held its 7th Annual Veterans' Day Golf Tournament on 11 November, 2013, at ASU's Karsten Golf Course. Fifty-three golfers played in this "scramble" tournament. Lynda Van Scoy, Jack Sarrett, and Bonnie Scheall were there to greet and register participants. A BBQ lunch followed the tournament, and emcee Gary McGrath awarded the golf prizes and conducted the drawing for the raffle. Each participant received a small door prize at the conclusion of the ceremony. The proceeds of the tournament, about \$2600 were divided equally between the ASURA's Living

History Video Project and our annual scholarship program.

We want to thank our "Major Sponsor" Sun Devil Campus Stores, our "Buffet Sponsor" Friendship Village, and our three "Hole Sponsors" Aramark, Arizona State Credit Union, and Sundt Construction. Other supporters include Karsten Golf Course, ASU Gammage, ASU Athletics, Paul Matson, Fernando Morales, Susan Galbraith, Jim Newell, Kelli Nemec, Golfsmith, and all of the ASURA office volunteers who managed registration and finances. Special thanks are due to Karsten Director of Golf Daryl Crawford and his staff.

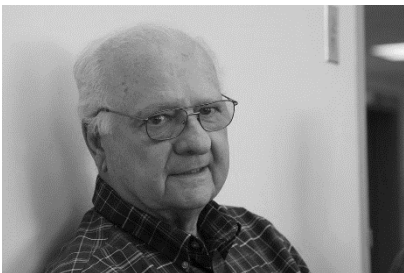
GOVERNMENT LIAISONS

The Government Liaison Council acts as an agent of the Board to provide liaison and advocacy in relation to the Arizona State Legislature, the Arizona State Retirement System (ASRS) and such other agencies as the Board may designate. Per the ASURA Bylaws, the Council is charged to exert influence on targeted agencies as approved by the ASURA Board and in consultation with the ASURA officers. We had a State Legislative liaison for part of the year but were never able to find a volunteer to cover the ASRS issues.

HEALTH INSURANCE LIAISONS

The ASURA Bylaws specify two Health Insurance Liaisons, one for ADOA and one for ASRS. We had three members working on the ADOA issues but were not able to find someone to work on the ASRS issues

ADOA Health Insurance Program



Art Ashton

There were three ADOA Health Insurance Liaisons. The lead liaison was Art Ashton who was assisted by Patricia Moore, Phyllis Primas.

The Benefits Services Division of the Arizona Department of Administration offers the Benefits Options program for State employees, retirees, their spouses and dependents. The Benefit Options program offers health, dental and vision plans for ASURA members and their families. Information about these plans is available at 602-542-5008 or <http://benefitoptions.az.gov>.

The rates have remained stable in all programs. ADOA did shift prescription coverage to Medicare GenerationRx that is funded by Medicare and ADOA with a minimum disruption in the change. The fall open enrollment period allowed members to make changes in their election for the 2014 plan year. Our ASURA, ASRS and ADOA Health Insurance Open Enrollment Seminar featured representatives from each of these organizations and from AARP which provided very informative information on supplemental plans, Medicare

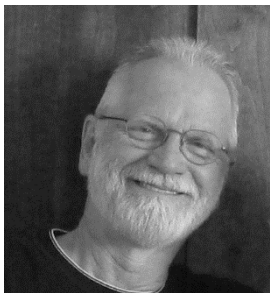
Advantage Plans and the Affordable Care Act. In addition, Benefit Expos were held by ADOA where ASURA members could receive free flu shots, free health screening and talk to health insurance providers.

Benefit Options continues to offer a more expensive PPO plan that provides out-of-network benefits that may be important to members seeking maximum out-of-town and/or out-of-network specialist flexibility. The more popular EPO plan provides the similar benefits in-network at a much lower cost.

It is difficult to predict what future changes might occur in Medicare and the State self-funded health insurance plans. For 2015 the ADOA will be rebidding it's plans, this is done every five years. Comparing the coverage of the ADOA EPO plan with Medicare Advantage plans offered by affinity organization like AARP or most health insurance providers is difficult. After careful evaluation, the plan that most meets your needs is best for you. If you are considering not participating in the ADOA plan it is recommended that you, at least, retain one of their dental plans because this keeps open the option of returning to the ADOA health insurance plans at the next open enrollment period.

The Affordable Care act (Obama Care) is being monitored in terms of how it may impact our members. Important provisions like young adult coverage, pre-existing condition, preventive care, eliminating lifetime limits and curbing insurance cancellations have been implemented. In Arizona, the Governor and Legislature approved Medicaid expansion under the Affordable Care Act. This has been covered extensively in the press and, in the main, does not directly affect our retirees. Medical coverage is now available to hundreds of thousands of Arizonians who are under 133 percent of the poverty level with the Federal government picking up most of the cost.

MEMBERSHIP AND COMMUNICATIONS COMMITTEE



Dave Schwalm

The Membership and Communications Committee, chaired by Dave Schwalm is an “umbrella” committee made up of the chairs of four subcommittees. The subcommittees and their chairs are: Membership, Dave Schwalm, Prime Times, Wilma Mathews & Jeannette Robson, Obituaries, Becky Reiss, and Database, Website & Technology, Connie McNeill. Dave Schwalm chaired the committee.

Membership

This year ASURA continued the practice of making a brief recruiting pitch at each pre-retirement sessions conducted by HR. The trifold promotional flyer that summarizes the purposes and activities of the organization was refined. This will complete our first full year of offering free membership to new members; there are currently 72 Introductory Members. It will be interesting to see how many of these new members will choose to enroll as full members.

Membership continues to be a concern. The member survey discussed earlier in this report will hopefully help ASURA build its membership. Table 3 in the Appendix shows a number of membership totals for the 2014 Membership year. A review of the table shows:

- Total membership has increased this year, the first in several years.
- The renewal rate for past members is down slightly but the number of Introductory Members is way up.
- Over a third of our members have been members for more than 10 years.
- The number of members attending events is down, which is a concern and it is hoped the member survey will shed some light on this issue.

Prime Times Newsletter



Wilma Mathews

The *Prime Times*, ASURA's official newsletter, contains news, information and pictures related to the ASURA membership and its activities. The black & white newsletter is published and mailed to the members during the fall, spring and summer. We also publish an on-line color copy version of the *Prime Times* at <https://asura.asu.edu/PrimeTimes>. Visit the website and view the issues from fall 2010 through spring 2014.



Jeannette Robson

ASURA members may not be aware of all the organization's activities: Adopt-a-Family, the ASURA Scholarship, the Video History Project, international and regional travel opportunities, luncheons, seminars, and many other activities related to legislation and retirement benefits. We hope that the *Prime Times* reports encourage more members to volunteer for the various committees and to register for the many event offerings.

Also included is current information on the ASURA Board members, committee chairs, and the great volunteers that staff the front office. We continue to also include obituary notices of our late friends and colleagues, all graciously compiled by Becky Reiss. Full notices are available on the ASURA website as well.

This past year we began including a "Calendar of Events" in each issue to give up-to-date information on all the upcoming ASURA events. Please take the time to review the calendar, make a few selections, and join in the fun!

Obituaries



Becky Reiss

ASURA continues to send ASU employee obituaries by e-mail to those members who request them. The notices are also posted on the ASURA website. In September it was decided to send condolence letters to deceased ASURA member's serving partner. It was further decided to roll over the membership to the surviving partner. Before the condolence letter is sent out the President and Membership Chair are asked if they know the deceased and would like to add something to the letter.

Database, Website and Technology Equipment Report



Connie McNeill

Last year's implementation of Wild Apricot meant that this year's activities in the database area were directed at less major improvements, and on maintenance. Wild Apricot is web-based membership software that we are using to manage our membership records, our events, and our e-mail communications. We pay a very reasonable annual fee (\$1,200) for the software.

Database accomplishments by Carolyn Minner, Barry McNeill and me:

- May, June and July 2013: We successfully conducted our first membership drive after Wild Apricot implementation. There were a few problems, but nothing "fatal". This year's drive should be smoother, as a result of problems found and corrected last year.
- Credit card payments for event registrations were available for several events, with the cooperation of our colleagues in the ASU Foundation for a New University. There is a several-week lead time on setup by the Foundation, so not all events were able to accept credit card registration payment.

- September 2013: We established improved procedures for handling membership and records in the database when there is a death. Becky Reiss took on responsibility for handling the associated data entry. She is also sending letters to any known surviving partner with our condolences, and apprising him/her of the “automatic” transfer of membership to them.
- We began collecting health insurance plan information for our members, so that the health insurance liaison people and seminar planners might be able to target some programs and communications. We also made a few other minor changes to our enrollment forms and database to maintain consistency with ASU, e.g., added “on-line” to campuses, changed employment category “service professional” to “university staff.
- We implemented some improvements to the monthly Membership Report that is presented to the Board.
- February 2014: We implemented the new Board policy on renewals: renewals processed between January 1 and June 30 have membership valid through June of the following calendar year. This aligns our policy for renewals with our policy for introductory memberships.

Website accomplishments:

- Carolyn Minner, Linda Van Scoy, Nancy Lesko and Barry McNeill continued to very efficiently maintain portions of the website content.
- August 2013: I added a feature to our website that allows us to highlight new and revised information on the menus that appear on the left and right of every page, so that people will be alerted when there is something new to see.
- September 2013: I published both association history books, “A Decade of Success” and “A Second Decade of Success” on our website. The latter is published with color pictures, although the printed version is in black and white. To do this, I created a digital copy of the first book from a printed copy – we did not have access to a digital copy from its original publication.
- Barry McNeill and I added and updated many documents on policies, procedures, and “how to” that are intended to make tasks easier for committee chairs, office staff, and other ASURA volunteers. These documents are available on a restricted access portion of our website, so that their presence doesn’t confuse people who don’t need or want the information. There is also a new page available from the menu on our home page called “For our Volunteers”. It is intended to help volunteers find the documentation that they need from among all that is now available.
- Summer 2013: I completed implementation of our web-based photo gallery, and also implemented two software upgrades to it during the year. I was the photo editor for our new association history book, “A Second Decade of Success”, published in the summer, and I used the photo gallery as the source for photos included in the book. A change made by ASU to the server that houses the gallery required that I find and document a replacement for the software we had been using to upload photos to the gallery.
- I implemented upgrades to the software that the main website is based on. Most significantly, in July 2013 I replaced the module used to log in with ASURITE credentials – this was important to those people who are maintaining content, because the old module was very unreliable.

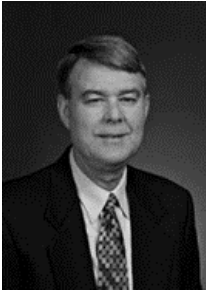
Technology Equipment:

- March 2013: At the Board’s request, I developed a recommendation for a color printer to be purchased for the office. Its primary use is for printing our tri-fold ASURA brochure, but it can also be used for other things when having color is important. It is a laser printer, and toner is quite expensive, so there is reason to restrict its use somewhat. The printer was purchased and installed in May – it is an HP LaserJet Pro 400 Color M451dw. It was installed by Julian Mejia, who provides tech support to all of Public Affairs.
- December 2013: At the request of the Events Committee Chair Jo Madonna, I developed a recommendation for a wireless microphone system that could be used at events held in CSB 330. I purchased this for the Association, and with Barry McNeill’s help performed initial setup on it.
- November and December 2013: To assist the Events Committee, I developed step-by-step instructions on how to use the equipment in CSB 330 and how to use the wireless microphone system: the documentation is available on the restricted-access portion of our Wild Apricot site.

Looking ahead:

- In February 2014 I learned that ASU is phasing out its website hosting service – which we are using for our ASURA website. ASU has contracted with a commercial hosting service that we can use instead. I will need to move our site to the new host by July 1, it seems. This should help get the rust off of my brain, as it looks as though there is plenty new to learn. The new hosting service is for fee – probably \$20 per month.
- The picture gallery will also need to be moved off the server. Work on moving the gallery will be done after the website move is well underway.

TREASURER'S REPORT



The overall budget picture for ASURA is very good. The main operating account began the new year with a \$38,600 carry forward balance, providing an excellent cushion for fiscal 2013-2014. The 2013-2014 budget was developed during the summer with input from various board members and was approved at the first board meeting in September.

The new budget projected revenue of \$25,100 and expenses at \$22,300, which would provide a net increase in the account balance of \$2,800 at year-end. To date, the budget is tracking nicely with actual activity.

Barry Bruns

ASURA continues to receive excellent support from ASU Public Affairs in the form of financial resources and office and meeting space. This support from ASU Public Affairs allows ASURA to better service its many ongoing projects.

The golf tournament held in November, 2013 provided \$1,300 for the ASURA Scholarship and a like amount for the Video History Project. It is anticipated the golf tournament will be held next year and with more time to secure new sponsors, it should be able to provide even more funding for these projects.

ASURA has begun new efforts to revamp and improve the budgeting process, see the report from the Financial Committee earlier in this report. The first task was to take a long term look at the organizations financial health, and a definition was created and approved by the Board.

Table 2 in the Report Appendix show the current budget and operating expenditures for ASURA through February 2014.

Account Categories	Approved Budget	Actual YTD Amount	% of Approved Budget
ASURA Operations - Income			
Balance Forward	38,591	38,591	
Current Year Revenue			
Events Registration Fees & Donations Collected	5,000	2,033	41%
Membership Donations ("Dues")	18,000	4,170	23%
General Operations Donations	2,000	1,300	65%
Sale of University History Book	100	51	51%
Total ASURA Operations Current Year Revenue	25,100	7,554	
ASURA Operations - Expenses			
Printing and Mailing Costs			
Events	0	34	
Annual Report	100	0	0%
Survey, Bylaws & Ballots	800	343	43%
Membership Drive	900	357	40%
Event Costs (exclusive of Advertising)			
Paid Events	5,000	2,278	46%
Meet & Greet	400	425	106%
Seminar - All Costs	40	22	55%
Annual Meeting Refreshments	600	0	0%
Holiday Potluck & Fundraiser	50	0	0%
Retiree's Day - Presenter & Guest Lunches	200	0	0%
Retiree's Day - MU Room Fees	750	0	0%
Other Operations Costs			
Scholarship Award	8,123	8,123	100%
Business Luncheons/Staff Appreciation	800	0	0%
Membership Database	1,000	1,091	109%
Office Equipment & Supplies	1,000	1,826	183%
Service Appreciation Gifts	500	0	0%
AROHE Membership Dues	100	60	60%
SurveyMonkey	0	300	
Transfer to Adopt-a-Family account	1,000	1,000	100%
Foundation Management Fees	900	180	20%
Total ASURA Operations Expenses	22,263	16,038	
Increase (Decrease) in Fund Balance for Current Year	2,837	-8,484	
Uncommitted ASURA Operations Funds	41,428	30,107	
Public Affairs Allocation			
Opening Balance	7,000	7,000	
Printing & Mailing Costs			
Member Survey	0	1,109	
Membership Drive	1,500	684	46%
Envelopes and Other	1,391	1,388	100%

Account Categories	Approved Budget	Actual YTD Amount	% of Approved Budget
Prime Times	2,500	1,641	66%
Other Public Affairs Operations Costs			
Conference Room Chairs	109	27	25%
Copier/FAX Equipment Annual Lease	1,500	1,306	87%
Total Subsidized Expenses	7,000	6,155	
Uncommitted PA Funds For Operations	0	845	
Special Projects			
Special Projects - Income			
Balance Forward	2,295	2,295	
Current Year Revenue			
Fall Luncheon	0	112	
Spirit of Phoenix	0	60	
Bake Sale Income	200	167	84%
Friends/Phoenix Library Book Sale Net Income	500	255	51%
Golf Tournament	9,000	7,275	81%
Total Special Projects Current Year Revenue	9,700	7,869	
Special Projects - Expenses			
Golf Tournament	6,000	4,667	78%
Transfer 1/2 golf tournament net revenue to Endow. Scholar.	1,500	0	0%
Transfer 1/2 golf tournament net revenue to Video History	1,500	0	0%
Foundation Management Fees	400	215	54%
Total Special Projects Expenses	9,400	4,882	
Increase (Decrease) in Fund Balance for Current Year	300	2,987	
Uncommitted Special Projects Funds	2,595	5,283	
Adopt-A-Family			
Adopt-a-Family - Income			
Balance Forward	529	529	
Current Year Revenue			
Adopt-A-Family Donations	521	605	116%
Transfer from Operations	1,000	1,000	100%
Total Adopt-A-Family Current Year Revenue	1,521	1,605	
Adopt-A-Family - Expenses			
Adopt-A-Family	2,000	1,248	62%
Foundation Management Fees	50	12	24%
Total Adopt-A-Family Expenses	2,050	1,260	61%
Increase (Decrease) in Fund Balance for Current Year	-529	345	
Uncommitted Adopt-A-Family Funds	0	874	
Video History			
Video History - Income			
Balance Forward	5,382	5,382	

Account Categories	Approved Budget	Actual YTD Amount	% of Approved Budget
Current Year Revenue			
Video History Donations	1,000	125	13%
1/2 net revenue from Golf Tournament	1,500	0	0%
Total Video History Current Year Revenue	2,500	125	
Video History - Expenses			
Production	5,000	15	0%
Equipment	150	544	363%
Foundation Management Fees	150	3	2%
Total Video History Expenses	5,300	562	
Increase (Decrease) in Fund Balance for Current Year	-2,800	-437	
Uncommitted Video History	2,582	4,945	
History Book			
History Book - Income			
Balance Forward	388	388	
Current Year Revenue			
History Book Donations	105	145	138%
Total History Book Current Year Revenue	105	145	
History Book - Expenses			
History Book	0	98	
Foundation Management Fees	0	3	
Total History Book Expenses	0	101	
Increase (Decrease) in Fund Balance for Current Year	105	44	
Uncommitted History Book	493	432	
Scholarship Endowment Fund			
Scholarship Endowment - Principal			
Endowment Balance July 1	43,286	43,286	
Invested Funds Gain (-Loss)	4,300	3,200	74%
Transfer to Scholarship Endowment - Spending	-1,000	-1,260	126%
Foundation Management Fees	-600	-660	110%
Transfer from Scholarship Endowment - Spending	1,000	0	0%
Current-Year Contributions	1,800	635	35%
Total Scholarship Endowment Principal	48,786	45,201	
Scholarship Endowment - Spending			
Balance July 1	1,877	1,877	
Payout from Endowment	1,000	1,260	
Reinvest in Endowment	-1,000	0	
Scholarship Support from Endowment	-1,877	-1,877	
Total Scholarship Endowment Spending	0	1,260	
Total Scholarship Endowment	48,786	46,461	

ASURA Membership Totals – 2014 Membership Year

Counts	As Of 3/4/2014	As Of 3/8/2013	This Yr -Last Yr	More Counts	As Of 3/4/2014	As Of 3/8/2013	This Yr -Last Yr
Current-year Members	612	588	24	By Former Employment Category			
Renewals from prior years (any prior year)	540	544	-4	Faculty and Faculty w/ Admin Appointment	279	276	3
Introductory members	72	44	28	Academic Professional	40	38	2
Paid for the current year, now deceased	7	1	6	Staff	190	186	4
				University Staff (Service Professional)	72	61	11
Last Year's Members - Not Renewed	65	118	-53	Administrative	30	25	5
Members last year, now deceased	6	14	-8	Having an Arizona Address	552	529	23
By Retired-from Organization				Level of Activity			
Retired from ASU	599	N/A	N/A	Checked at least one volunteer area	80	59	21
Retired from another university	0	N/A	N/A	Attended at least one event this year	145	141	4
Former ASU employee, retired elsewhere	0	N/A	N/A	Attended an event ever	274	317	-43
Still employed at ASU	13	N/A	N/A	Logged in to Members-only Site (ever)	77	41	36
				Made an additional donation this year	189	47	142
By (Approx.) Time Since First Joining				Non-members in Database			
Members for 0-2 Years	97	94	3	Was a member at some time	329	311	15
Members for 3-5 Years	125	162	-37	Never a member	864	830	34
Members for 6-10 Years	170	122	48				
Members for more than 10 Years	220	210	10				
By Communications They Want to Receive¹							
Upcoming Event Announcements (e-mail)	431	385	46				
Obituary Notices (e-mail)	347	315	32				
Prime Times (US Post)	590	578	12				
Other ASURA Communications (e-mail)	415	393	22				
None of The Above	6	5	1				

¹All members receive the annual Board of Directors ballot, and membership renewal notices. Those with e-mail addresses also receive confirmation notices (by e-mail) about renewal, event registrations, and donations.