



Annual Report from the Board 2018-2019



2018 Tour of Biodesign Buildings on the Tempe Campus

This report is for distribution at the Annual Meeting
April 4, 2019, 11:30 a.m.
Walter Cronkite Building – ASU Downtown Campus

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ASURA BOARD AND OFFICERS

2018-2019 (outgoing)

Officers

President - Tara Fuchs Roesler
 Vice President – Jan Thompson
 Past President – Jeri Meeks
 Secretary - Pat Schneider
 Treasurer – Barry Brun

2019-2020 (incoming)

Officers

President - Jan Thompson
 Vice President – Carl Cross
 Past President - Tara Fuchs Roesler
 Secretary – Pat Schneider
 Treasurer – Barry Brun

Board Members (term expires)

Anthony Brazel (4/2019) Barry Brun (replaced Bill Moor who -----resigned 10/9/2018) (4/2020) Jay Q. Butler (4/2019) Jeffrey Chapman (4/2021) Jean Duncan (4/2021) Jo Faldtz (4/2021) Jo Madonna (4/2021) Barry McNeill (replacing Betty Landon -----who resigned 3/15/2018) (4/2020) Jeri Meeks (4/2019) Don Nilsen (4/2020) Tara Fuchs Roesler (4/2019) Pat Schneider (4/2020) David Schwalm (4/2019) Bill Stasi (replaced Kathleen Renshaw ---who resigned on 10/9/2018) (4/2020) Jan Meyer Thompson (4/2021)

Board Members (term expires)

Barry Brun (replaced Bill Moor who -----resigned 10/9/2018) (4/2020) Jane Carey (4/2022) Larry Carlson (4/2022) Evelyn Cesarotti (2022) Jeffrey Chapman (4/2021) Carl Cross (4/2022) Jean Duncan (4/2021) Frank Koonce (4/2022) Jo Madonna (4/2021) Barry McNeill (replacing Betty Landon -----who resigned 3/15/2018) (4/2020) Connie McNeill (replacing Jo Faldtz who -----resigned 3/15/2019) (4/2021) Don Nilsen (4/2020) Tara Fuchs Roesler (extra year as -----Past President) (4/2020) Pat Schneider (4/2020) Bill Stasi (replaced Kathleen Renshaw ---who resigned on 10/9/2018) (4/2020) Jan Meyer Thompson (4/2021)
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Ex-officio Members

Judith Cato, Human Resources
 Carl Cross, University Club
 Don Nilsen, Emeritus College
 John Davis, Alumni Assoc.
 Phil Vandermeer, University Senate
 Cody Conrad, University Affairs
 Katie Aguilar, University Staff Council

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 Cody Conrad, University Affairs
 Katie Aguilar, University Staff Council

ASURA OFFICE CONTACT INFORMATION

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PRESIDENT'S MESSAGE

Submitted by Tara Roesler



As this year's ASURA President I am pleased to present the 2018-2019 Annual Report. ASURA has had an incredibly productive and successful year. It is amazing to me that an association that depends solely on the volunteer efforts of its members is able to accomplish so much to advocate for retirees, support and contribute to the community, and offer a broad range of programs and activities that are of interest to the members. As you review this document, I believe you will share my appreciation for what our members have accomplished through their individual efforts and within their chosen

committees.

MEMBERSHIP: We are encouraged that last year's membership policy change to provide free, automatic first year membership to all new retirees is bearing fruit. Membership numbers in the categories of 0 to 2 years and 3 to 5 years of membership have grown significantly and renewal percentages remained high. Our website continued to evolve, offering comprehensive organizational information as well as links to relevant resources and affiliated organizations. The *Prime Times* newsletter kept everyone current on ASURA happenings and our *E-News* blasts provided our membership with timely relevant news and opportunities for involvement.

EVENTS: Our Luncheon and Special Events Committee outdid themselves with a kickoff Pizza party, a fall luncheon, a holiday potluck and an ice cream social – creating wonderful networking opportunities for our community. In response to member requests, the seminar series for this year was geared to helping all of us face some of the challenges and opportunities of retirement. The first seminar, Healthcare Open Enrollment and Medicare informed members about the changes in our healthcare options. On a slightly lighter note, the second seminar taught us “Container Gardening” including information on sun exposure, container selection, soil blend, plant selection and water. Lastly the third seminar, “Re-organizing & De-cluttering,” was particularly important to retirees facing the challenges of downsizing. Our Annual Meeting will feature a timely, and informative talk by Professor Chris Callahan, Dean of the Walter Cronkite School of Journalism and Mass Communications on *The Future of Journalism*. Our Travel Committee continued to offer outstanding international, statewide and local trips.

COMMUNITY OUTREACH: ASURA representatives provided an information table at three ASU staff appreciation BBQ days and ASU Day at the Capital, increasing our organization's visibility and accessibility. ASURA Adopt-a-Family and Scholarship service projects utilized this organization's time and talent for the best possible reason – to help others. The families we help every year are uplifted by our efforts. The Video History Project team continued to work on preserving the memories of ASU retirees, building on the past 16 years of recordings. Elmer Gooding and Kathy Church, in conjunction with ASURA and the Emeritus College, are developing a list of the next candidates to be interviewed.

GOVERNMENT/HEALTH INSURANCE LIAISONS: Our Government and Health Insurance Liaisons continued to do the herculean job of tracking and reporting on legislative bills and insurance plan changes that could affect retirees. There's a lot to watch and we appreciate their efforts. Our Liaisons are also participating in the Community and Legislative Partners in Aging meetings. Sponsored by the Governor's Council on Aging, these meetings will bring together a caucus of Arizona Senators, Representatives and community partners to discuss challenges facing Arizona's seniors.

As I handover the ASURA Presidency to the very capable Jan Thompson, I would like to thank the Executive Committee, Board members, Committee and Sub Committee Chairs and Ex-Officio members for their service this year and recognize outgoing Board Members Tony Brazil, Jay Q. Butler, Jeri Meeks and David Schwalm. Going forward, there are many volunteer opportunities and we would love to have you - please contact our new President Jan Thompson at jmt6000@gmail.com and her Board members including next year's new Board Members Jane Carey, Larry Carlson, Evelyn Cesarotti, Carl Cross, and Frank Koonce to get started!

Tara E. Roesler, ASURA President
e-mail: troes7718@msn.com

OFFICE VOLUNTEERS

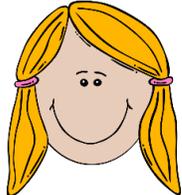
Submitted by Linda Van Scoy and Nancy Lesko

ASURA is fortunate to have an amazing staff of volunteers who keep our organization running smoothly. We currently have 7 regular staff and 4 substitute volunteers who handle the day to day office operations. The staff work closely with our Business Manager, Carolyn Minner, who insures business transactions are handled through the ASU Foundation. Carolyn takes care of all purchasing, ASURA mailings and maintains the membership data base and e mail distributions lists. We couldn't be efficient without the help of Barry McNeill who updates the web site with upcoming events and keeps us current on utilizing Wild Apricot to manage event registrations.

Staff duties include greeting the public in person and on the phone, assisting board members and committee chairs with scheduling meetings, reserving rooms, handling event registrations, overseeing the book donations and pick up, processing membership renewals and payments. The office staff is regularly called upon to direct retirees to proper sources of information within ASU and to outside agencies, when appropriate.

Our office hours are 9-12 and 1-4 Monday through Thursday, CLOSED Fridays. If you are interested in being a regular Office Staff volunteer or a substitute to cover for regular volunteers when needed, please contact us.

Below is a pictorial listing of our dedicated volunteers. Also, check out the website to view a brief bio on each of our office staff. <https://asura.asu.edu/OfficeStaff>.

 <p>Nanci Beardsley Monday Morning</p>	 <p>Bev Buddee Monday Afternoon</p>	 <p>Gail Horney substitute</p>	 <p>Nancy Lesko Tuesday Morning</p>	 <p>Dorothy Meunier substitute</p>
 <p>Carolyn Minner Business Manager</p>	 <p>Jeannette Robson Wed. Afternoon</p>	 <p>Tara Roesler Wed. Morning</p>	 <p>Bonnie Scheall Thur. Afternoon</p>	 <p>Helen Seaton substitute</p>
 <p>Linda Van Scoy Tues. Afternoons</p>	 <p>This could be you Thursday Morning</p>			

GOVERNMENT LIAISONS

The Government Liaison Committee acts as an agent of the Board to provide 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 Committee is charged to exert influence on targeted agencies as approved by the ASURA Board and in consultation with the Arizona State University Retirees Association (ASURA) Officers.

Legislative Liaison Committee

Submitted by Jeri Meeks,



Team: Jeri Meeks, Lobbyist, Tara Roesler, Lobbyist, Pat Schneider, William Stasi, Gary Anderson, Larry Mankin

The 54th Legislature First Regular Session opened on January 14, 2019 and per Governor Ducey's State of the State address his priorities for this year are complex water reform, the repeal of legislative immunity, the return of his school safety plan to prevent gun violence in schools and implementing budget practices that boost the state's rainy-day fund. The governor's top priority, and his urgent call to action for lawmakers, is to act on a multi-state drought plan to address declining water levels in the Colorado River and avoid water shortages in the valley as soon as 2020.

At the ASU Legislative Advocacy Breakfast on January 15, 2019 Dr. Crow touted ASU's top 100 Universities and #1 in Innovation rankings and spoke about ASU's legislative priorities for the next year. ASU continues to support a Resident Student funding model that promotes Arizona resident student growth. The universities are again asking that the State support 50% of the average in-state tuition, a raise from the current 34%. The related senate bill (1518) has stalled, but the appropriation process is not finished. Dr. Crow also advocated for the university's ability to select its own health care plan providers, independent of the state systems, and proposed changes to the retirement system to allow some employees to pick between the Arizona State Retirement System (ASRS) and an Optional Retirement Plan (ORP). To date, we do not see any bills supporting this change.

ASURA Lobbyists Tara Roesler and Jeri Meeks are attending Community and Legislative Partners in Aging (a.k.a. Senior Caucus) meetings at the Arizona Capitol this legislative season. Sponsored by the Governor's Council on Aging, these meetings bring together a caucus of Arizona Senators, Representatives and community partners to discuss challenges facing Arizona's seniors. The January meeting addressed *Detecting, Preventing and Addressing Abuse in Residential Care Facilities*. In response to this discussion, two bills went forward requiring consistent AHCCCS approved caregiver training in assisted living facilities. The February meeting addressed *Honoring Healthcare Wishes in Arizona*. This was an informative discussion between lawmakers, police, fireman, EMS representatives and nonprofit health information exchange (HIE) panelists. All were in agreement that these professionals are relying on relatives to provide documented do not resuscitate (DNR) or end-of-life wishes and that it would be very beneficial for responders to have those wishes, along with medical records, available before they met the patient. Efforts are being made to make this information available to responders through a health information exchange database. March, April and May Caucus topics are in the works.

ASURA hosted a table at the 33rd Annual ASU Day at the Capitol on Tuesday Feb 19th at the Wesley Bolin Memorial Plaza. It was a beautiful day and they had a great turnout. We had many conversations with our legislators as well as ASU department staff and researchers about our organization's accomplishments. We thanked our local elected officials for supporting ASURA in past and the upcoming legislative sessions.

ASURA also attended a *Save Your Pension* seminar sponsored by the Arizona Education Association and Arizona Retirement Security Coalition. This seminar addressed retirement for teachers and other public employees. Four presentations were given that addressed the advantages and disadvantages of both the public pension fund (defined benefit) and optional retirement (defined contribution) programs. The National Public Pension Coalition, Arizona State Retirement System, National Conference on Public Employee Retirement Systems and National Education Association provided information from studies being done, by each organization, on the cost and value of defined

benefit plans. These retirement organization studies show that a defined benefit plan such as ASRS has provided its members a better return on investment over the past 10 years.

The Arizona Board of Regents (ABOR's) expressed interest in moving away from the state retirement system has not only garnered our attention but prompted several meetings and presentations by ASRS, Arizona Education Association (AEA)-Retired and the Arizona Retirement Security Coalition this spring. In addition, ASRS introduced twelve bills this Legislative session. At the time this report is being written we are watching these active bills:

- ✓ **HB2007** – ASRS; political subdivision plans; adjustments – Makes changes to Arizona State Retirement System (ASRS) statues regarding political subdivision and contribution errors
- ✓ **SB1018** – ASRS; compensation; definition – Redefines compensation for members whose membership begins on or after January 1, 2020.
- ✓ **SB1079** – ASRS; long term disability program – Authorizes ASRS or its contracted administrator to investigate information related to the falsification of information or records related to the Long-Term Disability (LTD) Program.
- ✓ **HB2373** – tax corrections act of 2019 – Corrects errors and obsolete language, addresses blending problems and provides clarifying changes to the tax statutes of the Arizona Revised Statues.
- ✓ **HB1261** – lobbyist; filings; attestations – Requires lobbyist registration and expenditure reporting forms submitted to the Secretary of State to be filed under penalty of perjury, rather than under oath or with a notarized form.
- ✓ **HB2054** – electronic wills; requirements – Modifies requirement for electronic wills and witnesses.
- ✓ **SB1016** – ASRS; ineligible contributions; unfunded liability – Mandates an employer who participates in ASRS to pay the unfunded liability for contribution on compensation that in ineligible by statute or rule.
- ✓ **SB1017** – ASRS; paying interest; authorization – Prohibits ASRS from paying interest on any amount paid to a member, an alternate payee or an employer unless specifically authorized by statute.
- ✓ **SB1010** – ASRS; waiting period; repeal – Repeals statute that prohibits a state employee from becoming a member of ASRS before the 27th week of employment.
- ✓ **SB1356 and SB1244** – assisted living; caregivers; training – Modifies specified assisted living facility caregiver training and testing requirements. Adds training, competency and test methodology standards developed by AHCCCS to the assisted living facility training program. Specifies that a person who has completed training and competency requirements developed by AHCCCS for in-home direct care workers satisfies the training requirement for assisted living facility caregivers, with certain exceptions.

We are pleased to have Pat Schneider joining our Government Liaison team this year to help monitor the bills as they move through the legislative process. Dick Jacob attends Arizona State Retirement System (ASRS) Board meetings and will keep the Board and our members informed on ASRS legislation. My sincerest thanks to our team of volunteer legislative watchdogs as well as my on-call experts Alan and Dick. You do a great service to this organization! I would also like to thank the Board and ASURA members who have asked good questions, made us aware of pertinent news and shown an interest in this process.

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Legislative Liaison Committee Chair
and Registered Arizona Lobbyist
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Tara Roesler
Legislative Liaison &
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Gary Anderson
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ASRS Activities

Submitted by Dick Jacob



The ASURA report year, the ASRS fiscal year and the AZ legislative sessions not being in synch, this report will of necessity be incomplete. Nevertheless, since this appears to be a relatively inactive legislative session re ASRS issues I do not anticipate any significant addenda. I have attended all but one ASRS Board of Trustees meeting since July 1, 2018.

The most important action by ASRS this year, in terms of its effect on current members, is the significant reduction in monthly health care premiums for those who choose to be insured under the ASRS-United Healthcare plans. This reduction is due to (a) real reduction in premium cost affected by diligent negotiations on the part of ASRS staff, and (b) return to members of premium recovery by ASRS over the past several years as part of the agreement with United Healthcare that limits the amount of profit they could take after outlay. This has been detailed in my previous reports.

The ASRS Pension Fund remains in relatively good health at about 72% funding and good gains over the past two years. The Fund balance is at approximately \$40B. The ASRS Board is still undermanned at 7; State law prescribes a membership of 9. Meetings of the Board have become more infrequent, shorter and less interesting to the observer in that some items, such as appeals and operations reports, have been relegated to committee. On the other hand, salient data are readily available.

There seems to be less activity surrounding the agency regarding future Board of Regents participation. It is my opinion that there are significant inhibiting factors to a large employer leaving the system that cause second thoughts or delay. In spite of some uneasiness among other ASRS observers regarding legislative attempts to disrupt the integrity of the system, I do not anticipate any real movement in this direction during the present and upcoming legislative sessions. I believe ASRS's political and legal positions to be strong.

I intend to continue monitoring ASRS on behalf of ASURA.

Dick Jacob
ASRS Legislative Liaison
e-mail: rjjacob@cox.net

2019 ADOA Health Insurance Annual Report

Submitted Tara Fuchs Roesler



The ADOA retiree health insurance program open enrollment ran from Monday, October 22 - Friday, November 9, 2018 with the changes taking effect on January 1, 2019. Unlike 2017, this years' enrollment was a passive enrollment requiring enrollees to do nothing if they were satisfied with their current plans.

What changed:

- **Premiums increased:** For the Exclusive Provider Organization (EPO) and Preferred Provider Organization (PPO) plans, rates rose by 3%, effective January 1, 2019.
- **New EPO Deductible:** The EPO medical plan will have a deductible of \$100 for individuals and \$200 for families. That meant participants will have to pay \$100 or \$200 in qualified out-of-pocket expenses before the plan begins to pay.
- **New Pharmacy Provider for Medicare Eligible Members – VibrantRx,** Medicare GenerationRx changed to VibrantRx (PDP). New prescription cards were mailed in November 2018 to use starting in January 2019.

Rates:

Medical Without Medicare

	EPO PLAN	PPO PLAN
Retiree Only	\$671.87	\$934.73
Retiree + One	\$1,571.47	\$2,276.20
Family	\$2,117.58	\$2,489.20

Medical with Medicare

	EPO PLAN	PPO PLAN
Retiree Only	\$500.79	\$893.94
Retiree + One (both Medicare)	\$994.77	\$1,785.61
Retiree + One (one Medicare)	\$1,160.19	\$1,971.42
Family	\$1,321.08	\$2,243.34

Dental

	Cigna DHMO	Delta Dental PPO Plus Premier
Retiree Only	\$8.52	\$35.94
Retiree + Adult	\$17.04	\$75.63
Retiree + Child	\$16.59	\$60.48
Retiree + Family	\$25.54	\$118.26

Vision

	Advantage Program	Discount Program ¹
Retiree Only	\$3.99	\$0.00
Retiree + Adult	\$12.94	\$0.00
Retiree + Child	\$12.76	\$0.00
Retiree + Family	\$16.10	\$0.00

¹ MembersthatchoosenottoenrollintheAdvantageVisionCareProgramwillautomaticallybe enrolled in the Discount Plan at no cost.

Tara Roesler
ASRS Health Insurance Liaison
e-mail: troes7718@msn.com

2019 ASRS Health Insurance Annual Report

Submitted Tara Fuchs Roesler



The ASRS retiree health insurance program open enrollment period ran from Thursday, November 1 - Friday, November 30, 2018 with plan changes going into effect on January 1, 2019. This years' enrollment remained a passive enrollment requiring enrollees to do nothing if they were satisfied with their current plans.

UnitedHealthcare continues to be the sole provider through the Arizona State Retirement System.

Medicare Plans: Every retiree and dependent currently on the Senior Supplement plan was seamlessly converted from the Senior Supplement Plan to the Group Medicare Advantage and Prescription Drug (MAPD) PPO Plan. The medical and prescription benefit structure of the new PPO plan was designed to be the same or better than the current Senior Supplement plan, while reducing the member's total out of pocket costs.

Non-Medicare Plans: These plans were unchanged but will also see a slight rate reduction for 2019. All other health plan coverage and carriers remained the same for the 2019 plan year.

2019 Medical Plan Premiums

UnitedHealthcare Premiums - RETIREE-ONLY COVERAGE - The chart below shows the single coverage monthly premiums, effective January 1, 2019 and the monthly savings over the 2018 rates. This is the first year the ASRS has introduced the benefits from the Retrospective Rate Agreement. The RRA provides for a set level of retention of revenues by the health insurance provider with any surplus revenues to be returned to the ASRS. This agreement was implemented in 2011 and subsequent look-backs at revenues vs. medical costs and expenses have resulted in a return of dollars to the ASRS. The funds have been set aside to be applied to market-rate premiums, thus providing retirees a lower premium than they would otherwise be required to pay. The complete listing of the monthly medical premiums can be found in the Retiree Group Health Insurance Enrollment Guides on the ASRS website Healthcare page.

Rates - Retiree – Only Coverage	New 2019 Reduced Premiums	Total Monthly Savings
Choice 1 Single	\$925	\$8
Choice 2 Single	\$885	\$8
Choice 3 Single	\$803	\$8
Navigate 1 Single	\$869	\$8
Navigate 2 Single	\$819	\$8
Navigate 3 Single	\$745	\$8
Choice Plus Single HMO (Out of State)	\$1,329	\$10
Medicare Advantage HMO Single	\$97	\$125
Medicare Advantage PPO Single (Previously Senior Supplement Plan)	\$167	\$184

2019 Dental Plan Premiums

Sun Life Financial	Single Coverage	Member + 1 Dependent	Member + 2 dependents or more
Freedom Advance (High Option) (<i>Nationwide coverage</i>)	\$35.82/month	\$71.49/month	\$101.17/month
Freedom Basic (Low Option) (<i>Nationwide coverage</i>)	\$16.82/month	\$35.56/month	\$65.10/month
Prepaid DHMO Dental Plan 220 with Ortho (<i>Available in Arizona only</i>)	\$13.96/month	\$23.34/month	\$39.23/month
Heritage Secure w/SBA (<i>Available in Arizona only</i>)	\$10.61/month	\$17.41/month	\$26.90/month
Prepaid (<i>Available in CA, CO, FL, GA, KS, MO, NE, NV, NM, OH, OK, OR, TX and UT</i>)	\$10.21/month	\$17.27/month	\$27.24/month

Tara Roesler
ASRS Health Insurance Liaison

e-mail: troes7718@msn.com

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

Submitted by Joan Leard



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

The Tempe family consists of grandparents who have adopted two granddaughters ages 16 and 10. The social worker wrote, “they live on minimal income in a trailer in Tempe.”

The ASU family consists of a mother who is a senior at ASU graduating in Spring 19 with a BS in Family and Human Development. She is married with a blended family of five children and served 16 years in the Army. Her spouse is attending CGCC full time working toward a degree in Social Work.

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

Joan R Leard

ASURA Adopt-A-Family Chair

e-mail: joan.leard@gmail.com

Video History Project

Submitted by Dave Scheatzle



Leadership: The Video History Project is in its 19th year. Starting in 2001, it was chaired for 5 years by June Payne, then for 2 years by Bob Francis. During these first seven years, June and Bob managed a contract with Agave Productions to record 48 interviews. Starting in 2008, Linda Van Scoy chaired the project for 6 years while we developed our in-house recording and editing capabilities. In 2014, Dave Scheatzle became Chair and worked to develop our on-line capabilities at the ASU Library Repository.

Interview Progress: The Video History Project has completed 120 interviews. The first 48 interviews were accomplished under a contract with Pam Stevenson of Agave Productions. Initial funding for the Project came from the ASURA Operating Budget, then from a grant from the ASU Foundation. To continue with interviews, we raised money by conducting fund-raising golf tournaments. In time, we anticipated that money could go further if we were to purchase our own equipment and develop our own in-house capabilities to record and edit. Since then, 72 interviews have been done in-house. Those who have been interviewed are listed on the ASURA Website <https://asura.asu.edu/videohistoryinterviews> under Projects/Video History Interviews. Of the 120 completed interviews, 72 (48 from Agave and 24 done In-House) have been uploaded to the ASU Library Digital Repository where the Retirees Association has a “Collection” (<https://repository.asu.edu/collections/199>).

You can watch any of these 72 interviews by going to the list of interviews on the ASURA website (see above) and clicking on the (full video) link (in red) for the interview of interest. Also, 106 of the interviews have short clips from the interview. These are generally 2 to 3 minutes where the person has told an interesting story during their interview. To view these clips, click the (video clip) link (in red).

Barry McNeill has been most active in editing and developing standards for including metadata with the completed edits. Metadata provides the capability to search for topics contained in the interviews.

Donations: We received \$535 in donations during membership renewals for the Video History Project. An additional \$258 has been received from book sales.

Equipment:

- **Computers - hardware and software.** We have three relatively new iMac computers with iMovie editing software. For our editors who use their personal Windows computers, we pay a rental fee for the use of Adobe Premiere video editing software (for Windows operating systems). This will be an on-going expense since the Premiere editing software can no longer be purchased, only rented.
- **Cameras and Interview Studio Equipment** – Our studio space and equipment are quite adequate for continuing our editing efforts.
- **Selection Committee:** Elmer Gooding and Kathy Church have agreed to co-chair the Committee to develop the next list of candidates. Our next interview, with Brian Foster, is scheduled for mid-April. If you would like to suggest persons to be considered, please use one of the email addresses below as follows: Elmer Gooding (elmer.gooding@asu.edu) or Kathy Church (kathy Church (kchurch12@cox.net))

Personal note: I have been involved with the video history project since 2004 and Project Chair since 2014 (5 years). With the April 2019 Annual Meeting, I am stepping down as Chair. I hope to continue on the Team to assist/advise. I would like to thank other members of the Video History Team for their support. Linda Van Scoy, John McIntosh, Roger Carter, Barry McNeill, Becky Reiss, Carl Cross and Elmer Gooding. We also receive technical support from Connie McNeill and administrative support from Carolyn Minner.

Dave Scheatzle,
Chair, ASURA Video History Project
P. O. Box 873308
Tempe, AZ 85287-3308
Or e-mail to scheatzle@asu.edu

Scholarship Committee

Submitted by Joy Shearman



The Scholarship Committee is chaired by Joy Shearman. The committee, comprised of ASU retirees along with the chair, met in April and selected Jennifer Beth Pelloni as the 2018-2019 Scholarship Recipient to receive \$10,000.00. Ms Pelloni resides in San Diego, CA, and is a single mom with twin boys. Her major is in Family and Human Development. She is certified as an Advanced Sign Language Interpreter and has worked for the Deaf Community Services of San Diego. Her goal is to “create a place where these children can learn and thrive in their natural language, interact with others who are like them, as well as be around adult role models who use their language.” She will be speaking at our Annual Meeting on April 4th, 2019.

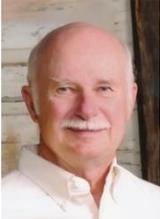
Serving on the committee allows members to participate in the lives of current students in all our campuses and to see what unusual and diverse life stories these students bring to the university. These students now come from all ASU College campuses and online from other states. Since they are reentry students, they all face extra challenges in completing their undergraduate degrees and graduate studies. The scholarship, funded by contributions from our members for that purpose, from book sales, from earnings on the scholarship endowment fund, and from the operations budget, will provide \$10,000 for the next academic year of 2019-2020. The amount of this scholarship can vary and depends a lot on the contributions and book donations of retired faculty and others.

Scholarship Committee members review applications each year, seriously considering all the scholarship requirements of academic achievements, community involvement, professional goals and need. Volunteering to be a member of this committee gives members the unique opportunity to be a part of making a difference in the lives of students. That, from the beginning, is the purpose of this ASURA Scholarship.

Joy Shearman
ASURA Scholarship Committee Chair
e-mail: joyrn@cox.net

EVENTS COMMITTEE

Submitted by Barry McNeill



The Events Committee was chaired by Barry McNeill. The committee 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 – John Brock; Seminars – Bev Buddee; Luncheons and Special Events – Jean Duncan & Bonnie Scheall.

Coordination of Calendar of Events

During the late spring of 2018, the various committee chairs were asked to determine a tentative schedule for the events that the committees planned to offer during 2018-2019. 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 the Meet & Greet and 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.

Promotion of Events

Eighty-three percent of our members requested and received email notifications for all ASURA organized events unchanged from last year. All events were published on the ASURA events website and any member with an internet connection could register online by visiting this website. Further, past event stories continued to be added to the ASURA website (<https://asura.asu.edu>). We continued to advertise activities not organized by ASURA but which might be of interest to our members, e.g., Emeritus College Short Talks luncheons, New Frontiers, ASU Book Group, etc.

For the seventeen percent of our members who do not want or cannot receive email event notification an upcoming calendar of activities was published in each issue of *Prime Times*. In addition to the calendar *Prime Times* carried past event stories and promotional material for upcoming events.

Barry McNeill
ASURA Events Committee Chair
barry_mcneill@outlook.com

Luncheons and Special Events

Submitted by Bonnie Scheall and Jean Duncan



The Luncheon and Special Events Committee organized the following four events this past year: the Meet and Greet Pizza Party, a fall luncheon, the Holiday Potluck and Bake Sale and a spring Ice Cream Social.



The Luncheon and Special Events Committee organized the following events this past year: the Meet and Greet Pizza Party, the 2018 Fall Luncheon, the Holiday Potluck and Bake Sale, and the 2019 Spring Ice Cream Social. The members of this committee included Marjorie Garrity, Carol Taylor-Tassone, Jo Madonna, Trudy Perez, Anthony Brazel, Bonnie Scheall, and Jean Duncan.

Meet and Greet Pizza Party (September 7) \

The Meet and Greet Pizza Party and pre-party panel continues to be AURA’s most attended event – over 70. As was done last year the pizzas and drinks were located in the small room next to the larger classroom where pizzas were consumed.. As usual the pre-party panel discussion of what you would have liked to know before you retired continued to generate lively discussions.

2018 Fall Luncheon (October 30)

Nearly 50 members and guests attended the ASURA Fall Luncheon at Friendship Village in Tempe. Those lucky enough to attend were treated to a delightful hour of updates and information from Colleen Jennings Roggensack, Vice President of Cultural Affairs and Executive Director of ASU Gammage

Holiday Potluck and Bake Sale (December 14, 2018)

ASURA Holiday Potluck and Bake Sale was a rousing success with approximately 60 in attendance. The abundance of wonderful food and renewed friendships was enjoyed by all. The Bake Sale table was a huge success, raising \$219 to help support ASURA's various programs and activities. Many thanks to the helpers who were there to set-up and break-down this annual event.

2019 Spring Ice Cream Social (March 6, 2019)

The 2019 Spring Event was our first ever Ice Cream Social. . Approximately 40 attendees added assorted toppings to ice cream to create their favorite sundae. Rita's on Mill did a fantastic job of supplying guests with all the goodies. The Phoenicians Chorus was scheduled to sing a few songs and educate us about this unique vocal musical style, but unfortunately due to sickness, they were unable to attend. Hopefully the Ice Cream Social will become an Annual event to be enjoyed by all.

Additional Note: Several members of this committee cleaned, organized, and inventoried the supply closet on the second floor.

Bonnie J. Scheall
ASURA Luncheons Committee Co-Chair
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Jean Duncan
ASURA Luncheons Committee Co-Chair
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Seminars

Submitted by Beverly Buddee



Members of the Seminar Committee included Beverly Buddee and Trudy Perez as co-chairs, Jay Q. Butler, Jeffrey Chapman, and Patricia Schneider. Five seminars were presented during the 2018-2019 FY.

Friday, September 7 – Panel discussion, *What I Wish I Had Known Before I Retired*, was held prior to the New Member Meet & Greet. Panel members included Larry Carlson, Jeff Chapmen, and Ruth Jones.

Thursday, October 4 – Open Enrollment Health Care Seminar, Tempe History Museum. Speakers included Julie Lockwood from ASRS, Matthew DeLeon from ADOA, and Rob Foster from AARP who talked about the ABCD's of Medicare.

Thursday, January 17 - Container Gardening. Speaker Ryan Jerrell, owner of Dig It Gardens in downtown Phoenix, shared valuable information about sun exposure, container selection, soil blend, plant selection, and watering.

Thursday, February 21, Spring Cleaning/Downsizing. Speaker Valerie Preuss, owner of A Place in Time, L.L.C., shared valuable tips regarding re-organizing and de-cluttering our lives and homes.

Thursday, March 21, Estate Planning. Stephanie Bivens of Bivens & Associates, P.L.L.C., spoke on the topics of estate planning and probate avoidance, as well as elder law issues for baby boomers to be aware of for their parents and themselves in the future.

Respectfully submitted,
Beverly Buddee, Co-Chair, Seminar Committee

e-mail: buddee@asu.edu

Travel

Submitted by John Brock



The Travel Committee organized the following four travel adventures, three local and one international

Local Events

November 15, 2018 Biodesign Building Tour – Tempe Campus.

On Thursday November 15, thirty-eight ASU Retirees and their guests participated in a tour of programs on what we called ASU “East” facilities. The buildings east of McCallister Street, along Rural Road on the ASU Tempe Campus house programs and research that many retirees did not know existed. The group visited the **School of Earth and Space Exploration (SEASE)** and were treated to a 3-D video of earth, neighboring planets and satellites in near space in the Marston Theater. We were then given a lobby tour and informed on the development of a satellite being built solely at the School to be launched in 2020 to explore a large asteroid near Jupiter. A model of that satellite will soon be on display in the lobby of **SEASE**. Being a public university, just stop by the building and see the displays. The group then met with persons representing research and projects in Biodesign buildings A, B and C. We saw a video, which is available to visitors in the lobby of Biodesign-B that explains ongoing research into designer vaccines, use of genetic information for disease treatment and biological mechanisms for cancer treatment, vaccines for Ebola, and enhancing the productivity of photosynthesis.

March 23, 2019 Rhythm Cats Dinner and Show – Malt Shop Oldies

Participants will slide back in years and relive those wonderful years of Malt Shop Oldies, performed by Rhythm Cats. The evening will begin with a Grand Buffet dinner complete with a salad bar and dessert. This will then be followed by an evening of Rock and Roll Oldies, songs we sang while dancing at the sock hop or driving in our car.

April 4, 2019 Tour of Tovrea Castle

Twelve ASURA members will tour the castle and gardens to find out the answer to these and other interesting tidbits. The tour will begin in the visitor center with a short video highlighting the history of the Castle. Next, we will board carts and be driven around the property where they will see the unique cactus gardens and outdoor features. The carts will then travel to the Castle where participants have an opportunity to go back in time and learn about the man inspired to build the castle and the people that made it their home.

International Trip

September 24-October 12, 2018 Ancient Kingdoms: Thailand, Laos, Cambodia

A group of 14 ASURA members and their friends recently traveled to four nations in southeast Asia: Cambodia, Laos, Thailand and Vietnam. The group visited small villages in forests in Cambodia, watched and learned as the men and women did their daily chores. Participants also saw many bomb craters in the jungles from the Vietnam war, learned that there are still many mines and bombs buried in the jungle floor, still killing people if they don't stay on the trail. Additionally, the group toured many incredible temples, mosques, and museums, especially, Angkor Wat, built in the jungle as a Hindu temple in the 12th century. Lastly, we remembered when Saigon was being evacuated by the US forces! The TV shots showed many, many people ... ambassadors, military commanders, regular citizens ... climbing a long ladder to get to the top of a tall building. US helicopters were flying back and forth, trying to evacuate as many people as possible. Participants stood there and looked at the building, recalling the scenes on TV.

John Brock

ASURA Travel Committee Chair

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FINANCE COMMITTEE

Submitted by Barry Bruns



The members of the 2018-2019 Finance Committee were Barry Mc Neill, chair, Barry Bruns, Carolyn Minner, Bill Moor, and Jerry Snyder.

At the October Board meeting the committee presented the results of its annual review of expenditures. The committee found that revenues and expenditures were reasonable and consistent with the budget and in agreement with applicable ASU Foundation records. The full report is included with the October minutes.

In October 2017, the Board approved raising the ASURA scholarship to \$10,000. The financial condition of the Board has stabilized over the last few years and consequently this same amount was approved for fiscal 2018/2019.

A review of the Friends of Phoenix Library book sale program showed a steady but small income being provided for the ASURA Scholarship and the Video History project. Identifying and recommending methods of implementing new approaches for improving financial activities of the Board is on going.

Barry Bruns
ASURA Finance Committee Chair
e-mail: barry.bruns@asu.edu

Book Sale

Submitted by 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 sells the donated books on-line, retains a 15% commission and splits the sales proceeds with ASURA every quarter. Friends started selling ASURA-donated books in July 2011. Donors deliver their books to the ASURA office and sign a gift donation form, which is forwarded to the ASU Foundation. The Foundation sends each donor a gift receipt/ thank-you letter.

When he was the Chair of the ASURA Membership Chair, Elmer Gooding 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 a form to complete if they have books to donate. David Schwalm meets with imminent retirees at this time.

Mary Stevens is the ASURA contact for donors to arrange for receipt of their books. In 2014, Linda Van Scoy arranged for the use of the Community Services Building room 257 as a storage room for donations. Board member and office volunteer, Jeannette Robson, arranged with Alpha Graphics to provide free, empty boxes to ASURA for our books. At this time, Linda Van Scoy notifies Friends when boxes are needed and Friends delivers available boxes when they books pick our donated books from our storeroom.

In 2013, the Board approved a suggestion from Connie McNeill, Chair of the ASURA Website and Database Committee, to enclose a book donation form with new and renewal applications to notify more people about the program.

In 2017, Friends asked ASURA to notify donors to avoid overloading boxes with books and to leave sufficient room to cover or close each box. We also wanted to notify donors that they could get empty boxes from the office. Connie McNeill revised the book donation form on-line and in print and the ASURA web page to include this language.

Another welcome development in 2017 was the offer from current ASURA Vice President Tara Roesler and her husband and Larry Carlson, former ASURA Board member and current Health Insurance Liaison to pick up books when a donor is physically unable to deliver books to the ASURA office. Our gratitude to these volunteers for offering this very valuable service. This year, Larry has made several book deliveries from donors who were unable to deliver their books. Our donors and ASURA thank you, Larry for this invaluable service!

With Business Manager, Carolyn Minner’s able assistance, the proceeds realized for each fiscal year since the Program began are: (rounded)

Year	Amount
7/-12/2011	\$72
2012	\$1,092
2013	\$468
2014	\$718
2015	\$1,486
2016	\$1,297
2017	\$877
2018	\$1,257
Total 2011-2018	\$7,267

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

Many thanks to Connie McNeill, Carolyn Minner, Linda Van Scoy and Jeannette Robson for their continuing assistance with the program.

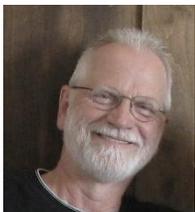
Mary Stevens
ASURA Book Donations Chair
e-mail: marystevens0@gmail.com

MEMBERSHIP AND COMMUNICATIONS COMMITTEE

The Membership and Communications Committee chaired by Dave Schwalm is an “umbrella” committee made up of the chairs of five subcommittees. The sub-committees and their chairs are: Membership, Dave Schwalm, E-News, Barry McNeill, Prime Times, Jeannette Robson, Obituaries, Becky Reiss, and Database, Website & Technology, Connie McNeill. Dave Schwalm chaired the committee.

Membership

Submitted by Dave Schwalm



As voluntary organizations like ASURA have been experiencing severe declines in membership, we have been working over the last few years to stop the bleeding or, better yet, to increase our membership.

1. We have continued to have an ASURA representative speak to all new retirees at the sessions run by Human Resources for all new retirees on “Finalizing Your Retirement.”

Our representatives offer a 10-15-minute presentation on ASURA's history and its educational, communication, social, entertainment, benevolent, and travel activities.

2. Two or three years ago, we introduced a policy of automatically giving all new retirees a free introductory membership for the first year of retirement to encourage them to sample ASURA activities and services.
3. We have developed a strategic series of reminders, sent both by email and US Mail in a timely manner, to encourage introductory members to become paying members and continuing members to continue.
4. While trying to keep from overwhelming our members' mailboxes, we have supplemented Prime Times with an occasional Enews Letter as needed.
5. Connie and Barry McNeill have been working to make our web page interesting and user friendly.
6. Our events committees and subcommittees are constantly working to offer a rich, diverse, and interesting menu of activities to increase member participation.

We are tracking the impact of these various efforts but are not ready to attempt a comprehensive report. We have stopped the decline in membership. We appear to have a decent increase in membership since 2016, but we need to monitor the persistence of Introductory Members for another year to measure the true impact. We are also happy to see a measurable increase in the number of members who participate in ASURA activities.

Thanks to all who are working to make our organization relevant, strong, and successful.

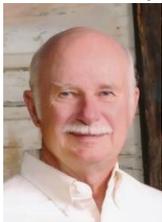
Dave Schwalm

Membership Committee Chair

e-mail: David.Schwalm@asu.edu

E-News

Submitted by Barry McNeill



The E-News editor is part of the Membership and Communications Committee. Seventy-five percent of the membership receive the monthly email which is sent shortly after each Board meeting, September through May. The goal of E-News is to keep members apprised of current, time sensitive items, e.g., topics from latest Board meeting, calendar of upcoming events, the need for volunteers for a research project, etc. I try to keep a light tone and add a link to some page in the ASURA website to encourage members to use the site.

Barry McNeill

E-News Editor

e-mail: barry_mcneill@outlook.com

Prime Times Newsletter

Submitted by Jeannette Robson



The ASURA newsletter, *Prime Times*, is published three times a year and contains news and photographs about ASURA activities and people as well as information articles of general interest to its members.

ASURA members may not be aware of all the organization's activities and, through the *Prime Times* as well as the ASURA website and E-News blasts, are kept updated on the many opportunities allotted its membership:

- Adopt-a-family, Video History, ASURA Scholarship, and Book Donation projects;
- international and regional travel opportunities;
- luncheons, seminars, and workshops; and
- monitoring of activities related to Arizona legislation and the ASRS and ADOA retirement benefits.

Through very informative articles and updates on the various legislative and health insurance/Medicare issues, ASURA Government and Health Insurance Liaison volunteers have done an exceptional job relating what's going

on in Arizona and how it pertains to retirees. We always encourage our members to suggest other items of interest they would like to have covered in the *Prime Times*.

Current information on the ASURA board members, committee chairs, and its great office staff is also included in each issue. Articles of past and upcoming activities and events sponsored by the ASURA are special features of the newsletter along with information on upcoming travel and other events for our member's consideration.

The Spring 2017 newsletter premiered its first "Advertisement" section which offers home computer services, housing services, living support services, insurance, financial and estate planning services, etc., that includes at least a 5% discount off the total cost for ASURA members. We always encourage our members to be active and stay healthy and to that end have included, for the first time, an advertisement in the Spring 2019 issue for a "Certified Personal Trainer" to assist in that effort.

Past *Prime Times* issues from fall 2010 through spring 2019 are available on-line at <https://asura.asu.edu/PrimeTimes>. Beginning with the summer 2015 issue, those members who had signed up to receive association e-mail notifications are also being sent the monthly "ASURA E-News" email that includes an easy link to the on-line **color** version of the *Prime Times* newsletter. Black & white paper copies continue to be mailed through ASU Mail Services.

Jeannette Robson, Designer/Editor
e-mail: jrobson@asu.edu
Jeannette Robson

Obituaries

Submitted by Becky Reiss



ASURA e-mails edited obituary notices of people who were at some time ASU employees, spouses or partners of employees, or people who had a significant (non-student) connection to ASU. The notices are also posted on the ASURA website and a list of those who have passed away, date of death and affiliation with ASU is published in the next issue of the ASURA newsletter *Prime Times*. If the deceased was a member of ASURA, a letter of condolence is sent to the deceased member's surviving spouse or partner stating that the deceased member's ASURA membership rolls over to the surviving spouse or partner. The ASURA President and Membership Chair are also given the opportunity to add any comments of their own.

Becky Reiss
Obituary Notifications Volunteer
e-mail: rrreiss@gmail.com

Website

Submitted by Connie McNeill



Linda Van Scoy maintained the Video History pages, Carolyn Minner the obituaries, Barry McNeill the past events, Bev Buddee and Pat Schneider the Board meeting minutes, and Barry and I the rest of the pages on our website.

Over 22,000 people visited our website last year. Outside of our home page, by far the greatest number of hits occur on our technology tips pages, as these are easy to find for students and others. Our obituaries pages are the next most frequently accessed, and the video history interviews pages next.

This year I changed the look of the Wild Apricot portion of our website – the events and membership portion - to more closely match the ASU standard and the rest of our site. I also made changes in response to weekly reports I receive about errors, accessibility problems, or security problems on our most-used website pages. The UTO made several changes to the underlying software used for our website and I applied those to our site so that it stays up to date.

Photo Gallery Maintenance

During the year Barry and I added event photos and volunteer portrait-type photos to the ASURA photo gallery, which can be reached from our website. The photos were taken by Elmer Gooding, Dave Scheatzle, Don Nilsen, Barry McNeill and others. We thank all those who send us photos, so we can have this pictorial record of our activities and volunteers. The *Prime Times* designer/editor uses photos from the gallery in preparing each issue, and we use them on our website.

Membership & Events Database

We use Wild Apricot software, which is web-based, to manage our membership and our events. Carolyn Minner maintains the membership records and she also generates the monthly membership report that is presented to the Board from the information in the database. Carolyn and Barry set up new events using information provided by events committee chairs. The office staff enters event registrations for people who do not register themselves online.

I make any changes to the way membership processing works and Barry McNeill typically implements any changes in the way event processing works. This year there were no policy changes that required modification to the processing rules and no requests for additional or different information to be collected and maintained for members. Wild Apricot made some improvements in event handling features, and Barry took advantage of some of those in setting up our events. I made routine updates to the automated e-mails and the enrollment forms and did troubleshooting when problems came up. Barry and I both made changes to instructions we provide for those who are helping maintain the content of our website, membership database, and events set-ups.

Connie McNeill
Web & Database Committee Chair
e-mail: mcneill@cox.net

TREASURER'S REPORT

Submitted by Barry Bruns



Table 1 in the Annual Report Appendix shows the current fiscal year budget and operating expenditures for ASURA through February 28, 2019. As has been true for previous years Carolyn Minner, the ASURA Business Manager, has does an excellent job of keeping track of our expenditures and income and has prepared this report each month.

The overall budget picture for ASURA remains somewhat tight but is looser than in prior years. The main operating account began the new year with a \$36,077 carry forward balance, providing a reasonable cushion for fiscal 2018/2019. The 2018/2019 budget was developed during the summer with input from various Board members with the objective of preserving as much of the carry forward as possible, and was approved at the October Board meeting. This budget projects a year end balance \$32,293, thus maintaining a reasonable carry forward into next year.

ASURA continues to receive excellent support from ASU in the form of financial resources (\$7,000) and office and meeting space. This critical support allows ASURA to better service its many ongoing projects. The scholarship endowment began the year with \$60,760. These funds are invested on behalf of ASURA by the ASU Foundation, with our primary goal being long-term growth. While growth is our desired goal, due to current financial conditions, the Board has approved the use of the endowment earnings to fund current scholarship expenses until the Board's financial situation improves.

While our financial situation remains tight, ASURA continues to remain in good financial condition. With the varied support from ASU and our totally volunteer staff, ASURA will be able to continue to offer its many excellent program and services.

Barry Bruns - ASURA Treasurer
e-mail: barry.bruns@asu.edu

Appendix to Annual Report 3018-2019
Table 1
Financial Report for Fiscal Year 3018-2019 as of 2/28/2019

Account Categories	Proposed Budget	Actual YTD Amount
ASURA Operations		
ASURA Operations - Income		
Balance Forward	36,077	36,077
Current Year Revenue		
Event Registration Fees & Donations Collected	1,920	1,309
Membership Dues	14,000	6,780
General Operations Donations	1,600	780
Holiday Bake Sale 2017	200	229
5% Gift Assessment	-780	-382
Transfer from Adopt-A-Family	0	1,484
Total ASURA Operations Current Year Revenue	16,940	10,200
ASURA Operations - Expenses		
<i>Printing and Mailing Costs</i>		
Membership Drive	700	258
<i>Event Costs</i>		
Annual Meeting	0	0
Paid Events	1,920	1,243
Meet & Greet Luncheon	475	372
Holiday Potluck & Fundraiser	20	0
<i>Other Operations Costs</i>		
Scholarship Award	7,600	7,600
Business Luncheons & Service Appreciation	150	300
Technology Services	3,429	3,297
Office Equipment & Supplies	250	544
Seminars	105	355
Lobbyist Registration Fee	0	0
Foundation Transaction Fees	75	69
Transfer to Adopt-A-Family	1,000	1,000
Adopt-A-Family Christmas Gifts	0	1,484
Total ASURA Operations Expenses	15,724	16,521
Increase (Decrease) in Fund Balance for Current Year	1,216	-6,321
Uncommitted ASURA Operations Funds	37,293	29,756

Appendix to Annual Report 3018-2019
Table 1
Financial Report for Fiscal Year 3018-2019 as of 2/28/2019

General University Allocation (HR)		
Balance Forward	469	469
Current Year Allocation	7000	7000
Total General University Current Year Revenue	7,469	7,469
Expenses Charged to Allocation		
Annual Report	100	0
Bylaws & Ballots	250	212
Annual Meeting	1,440	0
Office Equipment & Supplies	500	44
Prime Times Fall/Spring/Summer	2,400	2,996
Room Fees	300	0
Copier/FAX Equipment Annual Lease	921	634
Membership Drive	700	390
Technology Services	258	258
8.5% Administrative Service Charges	600	385
Total Subsidized Expenses	7,469	4,920
Uncommitted General University Funds For Operations	0	2,550

Special Projects		
Special Projects - Income		
Balance Forward	184	184
Current Year Revenue		
Friends/Phx Library Book Sale Net Income	1,100	1,035
Total Special Projects Current Year Revenue	1,100	1,035
Special Projects - Expenses		
Transfer out 1/2 of Book Sale Income to Scholarship	550	518
Transfer out 1/2 of Book Sale Income to Video History	550	518
Foundation Transaction Fees	55	13
Total Special Projects Expenses	1,155	1,048
Increase (Decrease) in Fund Balance for Current Year	-55	-13
Uncommitted Special Projects Funds	129	171

Adopt-A-Family		
Adopt-a-Family - Income		
Balance Forward	756	756
Current Year Revenue		
Adopt-A-Family Donations	1,000	395
5% Gift Assessment	-50	-20
Transfer from Operations	1,000	1,000
Total Adopt-A-Family Current Year Revenue	1,950	1,375
Adopt-A-Family - Expenses		
Holiday gifts	2,000	2,011
Total Adopt-A-Family Expenses	2,000	2,011
Increase (Decrease) in Fund Balance for Current Year	-50	120
Uncommitted Adopt-A-Family Funds	706	120

Video History		
Video History - Income		
Balance Forward	6,353	6,353
Current Year Revenue		
Video History Donations	1,250	535
Transfer in 1/2 of Book Drive Proceeds from Spec Proj	550	518
5% Gift Assessment	-63	-27
Total Video History Current Year Revenue	1,737	1,026
Video History - Expenses		
Equipment & Supplies	3,850	65
Electronic Storage Space	382	389
Transcripts for Interviews (15 @ \$150)	0	0
Total Video History Expenses	4,232	454
Increase (Decrease) in Fund Balance for Current Year	-2,495	572
Uncommitted Video History	3,858	6,925

Scholarship Endowment Fund		
Scholarship Endowment Principal (40003616)		
Balance July 1	60,760	60,760
Invested Funds Gain (-Loss)	4,000	2,462
Payout to Endowment Spending - FY18	-1,800	0
Current-Year Contributions	1,900	589
Foundation Management Fees	-780	-818
Total Scholarship Endowment Principal	64,080	62,993
Scholarship Endowment Spending (70003616)		
Balance July 1	2,414	2,414
Payout from Endowment Principal - FY18	1,800	0
Transfer from Special Projects (Book Sale Proceeds)	550	518
ASU Scholarship	-2,400	-2,400
Total Scholarship Endowment Spending	2,364	532
Total Scholarship Endowment	66,444	63,525

Counts	As Of 3/5/2019	As Of 3/5/2018	This Yr -Last Yr	More Counts	As Of 3/5/2019	As Of 3/5/2018	This Yr -Last Yr
Current-year Members	714	700	14	By Former Employment Category			
Renewals from prior years (any prior year)	482	443	39	Faculty and Faculty w/ Admin Appt	298	285	13
Introductory members	232	257	-25	Academic Professional	41	45	-4
Paid for the current year, now deceased	2	2	0	Staff	185	184	1
				University Staff (Service Professional)	155	156	-1
Last Year's Members - Not Renewed	213	96	117	Administrative	35	30	5
Members last year, now deceased	5	9	-4				
				Having an Arizona Address	663	652	11
By Retired-from Organization				Level of Activity			
Retired from ASU	696	678	N/A	Checked at least one volunteer area	133	125	8
Retired from another university	3	2	N/A	Attended at least one event this year	177	163	14
Former ASU employee, retired elsewhere	4	3	N/A	Attended an event ever	341	311	30
Still employed at ASU	11	17	N/A	Logged in to Members-only Site (ever)	185	165	20
				Made an additional donation this yr	161	134	27
By (Approx.) Time Since First Joining				Non-members in Database			
In Introductory Period	232	257	-25	Was a member at some time	277	167	110
Members for 0-2 Years (excl Introductory)	53	32	21	Never a member	340	476	-136
Members for 3-5 Years	71	65	6				
Members for 6-10 Years	123	138	-15				
Members for more than 10 Years	235	208	27				
By Communications They Want to Receive¹							
Upcoming Event Announcements (e-mail)	605	589	16				
Obituary Notices (e-mail)	296	299	-3				
Prime Times (US Post)	654	640	14				
Other ASURA Communications (e-mail)	544	535	9				
None of The Above	8	8	0				

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.

Note: Since membership enrollment forms are mailed in May, we begin processing them, with associated dues and donations, before the start of the membership/fiscal year. Therefore it is not possible to use these counts to determine the correct dollar value of membership dues in the current fiscal year.

