



# Annual Report from the Board 2019-2020



2019 Annual Meeting Tour of Walter Cronkite Building Downtown Campus

This report is for publication at the Annual Meeting  
April 17, 2020

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**ASURA BOARD AND OFFICERS**

2019-2020 (outgoing)

Officers

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

2020-2021 (incoming)

Officers

President – Carl Cross  
 Vice President – Larry Edmonds  
 Past President – Jan Thompson  
 Secretary – Jan Carey  
 Treasurer – Jill Massara

Board Members (term expires)

Board Members (term expires)

Barry Bruns (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)	Jane Carey (4/2022) Larry Carlson (4/2022) Evelyn Cesarotti (2022) Jeffrey Chapman (4/2021) Carl Cross (4/2022) Jean Duncan (4/2021) Larry Edmonds (4/2023) Kathy Guun (4/2023) Mark Henderson (2023) Frank Koonce (4/2022) Jo Madonna (4/2021) Jill Massara (4/2023) Connie McNeill (replacing Jo Faldtz who -----resigned 3/15/2019) (4/2021) Trudy Perez (2023) 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.  
 Shirley Rose, University Senate  
 Kendra Burton, University Affairs  
 Katie Aguilar, University Staff Council

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 TBD, University Senate  
 Kendra Burton, University Affairs  
 Katie Aguilar, University Staff Council

**ASURA OFFICE CONTACT INFORMATION**

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## **PRESIDENT'S MESSAGE**

Submitted by Jan Thompson



As your 2019-2020 ASURA President, I am pleased and proud to present this Annual Report of this year's accomplishments and activities. Most of this report, including my President's message below, was written in early March 2020--before the devastating coronavirus crisis impacted all of us in unprecedented ways. Our scheduled Annual Meeting was replaced by a "virtual meeting" via ENews and this Annual Report will also be presented via ENews and posted on our website.

Nevertheless, this has been a remarkably productive year for ASURA and we have much to celebrate! Please stay safe, healthy and "socially distanced" for now. I look forward to reuniting with all of you in September!

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The report reflects a vigorous year of growth during which we continued our primary mission of serving the interests of all retirees in an ever-increasing number of ways. My sincere thanks to our outstanding all-volunteer officers, board members, committee chairs, ex officio members, office staff and members for their many contributions to our success this year. Your dedication, hard work, and positive attitudes are at the heart of our organization and we are proud of all of you!

One of our goals for this year was to increase the visibility of ASURA across all campuses and in the greater community. I believe we've made good progress in achieving this goal on a number of fronts. Our monthly PRE-retirement seminars on Social Security, Medicare, and related topics are now reaching active ASU employees across all 4 campuses both live and remotely through the use of ZOOM technology. We've begun advertising these offerings in Insight, thus increasing awareness of ASURA to the broader University. These seminar videos, as well as information from our outstanding regular Seminar series, are posted on our ever-expanding website-- a rich source of information and interface with the ASU Emeritus College and many other organizations. And, as always, ASURA's reach extended to the community through our successful Adopt-a-Family, Book Drive, and Scholarship programs.

This year ASURA joined the Association of Retirement Organizations in Higher Education (AROE) and will cohost AROE's national conference with the Emeritus College at ASU in October 2020, expanding our visibility on a national scale. We promoted ASURA with exhibit tables at ASU Staff Council BBQ's on Polytechnic, West and Main campuses, spreading the good word on our organization and recruiting new Introductory Members. For the first time, ASURA was invited to introduce our organization at a ZOOMED multi-campus University Senate meeting. And three of our board members enthusiastically represented ASURA in February at ASU Day at the Capitol.

Our legislative and health care liaisons were active all year in attending State Legislature, ASRS, ADOA, Tri-University and Governor's Council on Aging meetings and provided important information on pending legislative bills and policy changes which might impact our membership. Their detailed reports were made available through ENews, Prime Times and on our website. A big thank you to all involved in these vital efforts!

ASURA broke new ground this year when growing attendance at some of our events exceeded capacity limits at CSB and necessitated moving to new venues: the Arizona Heritage Center (October Health Care Seminar) and Ability360 (September Meet and Greet, Holiday Potluck, and Annual Meeting). Growing membership and increased attendance were among our goals and we seem to be accomplishing these well! But with growth come new future challenges in budgeting for rental costs, finding appropriate venues within geographical limits, and involving more new members in leadership roles.

Finally, one of my goals for us was to have fun this year and to "Celebrate Prime Times" together. From our September Meet and Greet pizza party, to learning why our dogs love us, to singing along with John Denver hits, we've learned and celebrated often and had lots of opportunities to renew old friendships and make new ones. A big thank you to our excellent Seminar, Travel, and Luncheon/Events Committees for making all these good times happen! Special thanks to our outgoing officers and board members—Barry Bruns, Pat Schneider, Barry McNeill, Don Nilsen and William Stasi. I know our success will continue under the leadership of incoming President Carl

Cross, Vice President Larry Edmonds, Treasurer Jill Massara, Secretary Jane Carey, and 3 more outstanding new board members: Kathy Gunn and Mark Henderson, and Trudy Perez. I wish them, and all of you, a very happy and healthy summer.

See you in the Fall!

Jan Thompson  
ASURA President

**PICTURE HIGHLIGHTS FROM THE PAST YEAR**



Kartchner Caverns Group SE AZ Trip - May



Meet and Greet Pizza Party – September



Fall Luncheon – November



Holiday Potluck & Bake Sale – December



January Seminar on what not told as you age



ASU Day at the Capital

**OFFICE VOLUNTEERS**

Submitted by Linda Van Scoy and Nancy Lesko

The ASURA Office volunteers are a dedicated group of ladies who manage the day-to-day operations of our organization. This includes handling event registrations, processing payments for membership renewals and for paid events, assisting board members and committee chairs with scheduling meetings and reserving rooms. The staff also assists with the book donation program including scheduling book pickups and processing the forms required by the ASU Foundation. Many of these tasks require working closely with our Business Manager, Carolyn Minner. Carolyn takes care of all of our purchasing needs, is responsible for ASURA mailings, maintains the membership data base and distributions lists and processes business transactions with the ASU Foundation. Much of the work on our various events is done through the Wild Apricot Program and Barry McNeill keeps us current on this process as well as updating our Web site for upcoming events.

The office is staffed Monday through Wednesday from 10-4 and Thursday from 9-3 with 2 shared shifts each day. **We are closed on Fridays.**

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>.

 Nanci Beardsley Monday Morning	 Bev Buddee Monday Afternoon	 Gail Horney substitute	 Nancy Lesko Tuesday Morning	 Dorothy Meunier substitute
 Carolyn Minner Business Manager	 Jeannette Robson Wed. Afternoon	 Tara Roesler Wed. Morning	 Bonnie Scheall Thur. Morning	 Helen Seaton substitute
 Jan Shore substitutue	 Linda Van Scoy Tues. Afternoons	 Sharon Wielert Thur. Afternoon		

## 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 Ginny Sylvester



Two families were adopted by ASU Retirees Association this year. One family, selected by Tempe Elementary School District #3, is a family with 3 boys and a single mother. The boys are ages 8, 12 and 13 and were in need of new clothes, shoes and underwear which we provided. Each boy also got a game or toy that they wanted. The mother was given gift cards to Sprouts, a favorite store she usually can't afford to shop in. The other family, an ASU student, is a blended family with 6 children. The mother currently attends ASU and the father is a community college student who will be transferring to ASU. The children range in age from 4 – 9 and we purchased clothes, along with home necessities and food gift cards for Fry's. We were able to give each family a food card at Thanksgiving and Christmas, and even managed to get each family a food card during the COVID-19 shut down in March. I'd like to thank my helpers, Henry Stevens and Judy May.

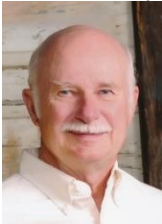
Ginny Sylvester

ASURA Adopt-A-Family Chair

e-mail: [Ginny.Sylvester@asu.edu](mailto:Ginny.Sylvester@asu.edu)

### Video History Project

Submitted by Barry McNeill



**Leadership History:** The Video History Project is in its 18<sup>th</sup> year. Starting in 2002, 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 49 interviews. Starting in 2009, Linda Van Scoy chaired the project for 6 years while the project developed its in-house recording and editing capabilities which was made possible by the four fund raising golf tournaments which netted over \$70,000. In 2014, Dave Scheatzle became Chair and worked to develop our on-line capabilities at the ASU Library Repository. In 2019 Barry McNeill took over the chair.

The committee is composed of following four subcommittees, one for each of the major tasks.

- **Interview Selection/Scheduling:** **Kathy Church, Elmer Gooding**, Bonnie Eckard (new), Les Hendrickson (new), Jeri Meeks Tara Roesler, and Linda Van Scoy
- **Interview Production:** **Dave Scheatzle**, Roger Carter, John McIntosh, and Linda Van Scoy
- **Editing:** **Barry McNeill**, Roger Carter, Elmer Gooding, Jeri Meeks, John McIntosh, Dave Scheatzle, Tara Roesler, Linda Van Scoy
- **Data Management:** **Carl Cross** and Barry McNeill

**Interview Status:** The Video History Project has, to date, completed 127 interviews. A review of the table below shows

- ASURA has produced a significant number of interviews, 78
- Four new interviews were done last year
- All the Agave Productions interviews are available in the ASU Digital Repository (<https://repository.asu.edu/collections/199>)
- Fewer than half of the ASURA produced interviews are available in the Repository



Status of Video History Project Interviews

Item	Interview Done By	
	Agave Productions	ASURA In-house
Interview Dates	July 2002 to December 2007	April 2009 to Present
Interviews	49	78
New Last Year	0	4
In Repository	49	36
Not in Repository	0	42

The Interview Selection/Scheduling subcommittee was invigorated and quite active this past year with the arrival of some new members. They scheduled four interviews in 2019 and have another scheduled for March of 2020. Considering the last interview was done in December 2016 this was quite a nice change.

The Interview Production subcommittee dusted off the equipment and filmed the interviews without missing a beat. They are looking into the feasibility of attaching the camera to a monitor to give the videographer a better sense of where the camera is pointing.

The Editing subcommittee has been working on reducing the backlog of unedited interviews. With the reduction of editing by the old guard editors, and the slow pace in getting new editors up to speed, reducing the backlog has turned out to be long drawn out process. The subcommittee was able to get the four interviews done this past year edited and into the Repository. As part of the effort to get new editors the subcommittee developed a number of checklists to help guide the editing process.

On a more positive note the Database subcommittee has been working with Pat Schneider and Evelyn Cesarotti to add Abstracts and Table of Contents to those interviews in the Repository that are missing this important information. Most of the Pam Stevenson interviews fall into this category. The interviews of Coor, Crowder, Dolbert, Dotts, and Doyle have all been updated. If you would like to help the project and at the same time learn some interesting things about ASU contact Barry McNeill.

The Database subcommittee has also worked hard to develop standards for the metadata, e.g., an abstract, associated with an interview. Metadata helps users search for topics and story sources of interest. Dictionaries of acceptable values to use for characterizing the stories told in the interviews, e.g., Campuses/Polytechnic, and of acceptable interviewee titles, e.g., faculty, administration have been developed.

Barry McNeill,  
Chair, ASURA Video History Project  
barry\_mcneill@outlook.com

**Scholarship Committee**

Submitted by Joy Shearman



The Scholarship Committee is chaired by Joy Shearman. The committee, comprised of ASU retirees along with chair, met in April and selected Francis Marie Romero, as the 2019-2020 Scholarship Recipient to receive \$10,000.00. Ms. Romero resides in Casa Grande, AZ, is a single mom of two young boys, nine and seven, and is working full time. She is a full-time senior student at ASU Downtown Campus, in Health Care Compliance and Regulations. This will lead to her becoming a Certified Health Data Analyst, hopefully where she is working now as Quality Management Coordinator. Ms. Romero's long-term career goal is to work for Medicare as a Recovery Audit Contractor (RAC). She will be speaking at our Annual Meeting in April 2020.

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. Since they are reentry students,

these students 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 2020-2021.

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 Jo Madonna



The Events Committee was chaired by Jo Madonna. Event promotion, website publication and the posting of event follow-up reports were managed, coordinated and performed 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.

### Coordination of Calendar of Events

During the late spring of 2019 the various subcommittee chairs were asked to determine a tentative schedule for the events that the committees planned to offer during 2019-2020. 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. Of this group, twenty-seven percent attended at least one ASURA event during the past 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 events, Friends of ASU luncheons, 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.

Jo Madonna  
ASURA Events Committee Chair  
jomadonna@cox.net

### Luncheons and Special Events

Submitted by Jean Duncan



The Luncheon and Special Events Committee organized the following four events this past year: the Meet and Greet Pizza Party, the Fall Luncheon, the Holiday Potluck and Bake Sale and the ASU Women’s Basketball Game. The members of this committee included Carol Taylor-Tassone, Jo Madonna, Chet Duncan, and Jean Duncan.

### **Meet and Greet Pizza Party (September 10)**

The Annual Meet and Greet and pre-party panel continues to be ASURA's most attended event - approximately 90 individuals. This event was held in the Conference Center at Ability360 on Washington Street in Phoenix, giving us enough space to host this record setting number of attendees. The first part of the program was the panel discussion of current ASURA members who have been retired for a relatively short time and discussed "Things I Wish I Had Known When I Retired". At the conclusion of the panel session, attendees had a chance to mingle with each other while enjoying pizza and cookies.

### **2019 Fall Luncheon ((November 7)**

The ASURA Fall Luncheon was held at Oregon's Restaurant in Old Town Scottsdale. Approximately 40 attendees enjoyed a delicious Italian buffet.

The event presenter, Dr. Clive Wynne, is Professor of Psychology and founding Director of the Canine Science Collaboratory at Arizona State University. Dr. Wynne talked about the extensive research he has conducted and has now documented in his new book "Dog is Love" (published in September 2019).

### **Holiday Potluck and Bake Sale (December 6)**

The ASURA Annual Holiday Potluck was held at Ability360, Phoenix. This event is traditionally popular with ASURA members and this year nearly 50 people attended. Members enjoyed the chance to catch up with old friends and to meet new ones.

Delicious potluck items were enjoyed by everyone in a relaxed and festive atmosphere. Over \$150.00 was collected from the Bake Sale to be used to help support ASURA's various programs and activities.

### **ASU Women's Basketball Game (January 12)**

Approximately 10 ASURA attendees watched Arizona State women's basketball make school history at this game by beating the second of two top-five ranked teams in back to back games. Unranked Arizona State stunned the unbeaten No. 3 Oregon State by a score of 55-47, at Desert Financial Arena two days after upsetting No. 2 Oregon, 72-66, on Friday. Of course Sparky was on hand to visit and help cheer on the team. Go Devils!

Jean Duncan

ASURA Luncheons Committee Co-Chair

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### **Seminars**

Submitted by Beverly Buddee



Members of the Seminar Committee included Beverly Buddee, Jay Q. Butler, Jeffrey Chapman, and Patricia Schneider. Five seminars were presented during the 2019-2020 FY.

Friday, September 10, 2019 – 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 Chapman, and Ruth Jones.

2019 – Open Enrollment Health Care Seminar, Arizona Historical Society Museum. Speakers included Jenna Golab from ASRS, Tracie Carruthers from ADOA, with updates on plan changes for their respective agencies, and Rob Foster from AARP who talked about the ABCD's of Medicare.

Thursday, January 16, 2020 – 10 Things Nobody Tells You As You Age. Speaker Elaine Poker-Yount, Director of Care Management and Community Liaison for Education and Outreach for the Visiting Angels East Valley, shared valuable information regarding dealing with aging parents. Topics in the top 10 list included physical, mental and emotional signs that indicate help is needed, legal documents and directives to have in place, hospice, and understanding home health.

Thursday, February 13, 2020 – Elder Law and Preparing for Passing. Speaker Stephanie Bivens, CELA, Esq., principal attorney of Bivens & Associates, P.L.L.C., and a Certified Elder Law Attorney, noted that Elder Law is

best defined by who receives service rather than any specific type of legal services. She then identified the top 10 estate planning mistakes, talked about long term care, what it is, who will need it, the cost and options for paying for it. ZOOM web conferencing was introduced at this seminar.

The Thursday, March 19, 2020 seminar– Email, Tech Tools, presented by Connie McNeill, ASURA’s Technology Manager – had to be cancelled due to the Novel Coronavirus pandemic. The seminar will be rescheduled for next year.

Respectfully submitted,  
Beverly Buddee  
Chair, Seminar Committee

### **Travel**

Submitted by John Brock



The ASU RA travel committee held four events in 2019.

- First was at the Star Theater in Mesa for a dinner and show with music by the Rhythm Cats. The music was “Malt Shop Oldies” featuring music from the 1950s and 1960s. About 24 ASU RA members and friends attended that event.
- In April several ASU RA members toured the Tovrea Castle. Ticket for that site are difficult to obtain. For example, we were not able to obtain any for 2020, but will have 24 for the spring of 2021.
- Third, in May, several members did an international trip to Spain and Portugal. That trip was arranged with Overseas Adventure Travel. Our committee got very good reports about that adventure.
- In May we had a fourth activity to southern Arizona arranged with “Detours” a Tempe based travel company. Day one of that trip, we visited the San Xavier del Bac mission, then went to the Titan Missile Museum, had a great lunch in Tucson that featured the Sonoran hot dog, and then on to the Pima Air Museum. We stayed over night in Benson. The second day we visited the Karchner Cavern State Park and after a lunch at a special place in Sonoita we visited a couple of wineries and say the nice desert grasslands of southern Arizona. Twelve ASU RA members made that trip. The ASU RA

Travel Committee meets on the first Tuesday of the month at the Tempe Public Library at 2 PM near the coffee shop. It is easy to be a committee member, just show up.

John Brock  
ASURA Travel Committee Chair  
e-mail: [john.brock@asu.edu](mailto:john.brock@asu.edu)

### **FINANCE COMMITTEE**

Submitted by Barry Bruns



The members of the 2019-2020 Finance Committee were Barry Bruns, chair, Barry Mc Neill, Carolyn Minner, and Jerry Snyder.

At the November 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 2019/2020.

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 ongoing

Barry Bruns  
ASURA Finance Committee Chair  
e-mail: [barry.bruns@asu.edu](mailto: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 online, retains a 15% commission and splits the sales proceeds with ASURA annually. 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.

ASU Human Resources invites members of the ASURA Board to meet with imminent retirees to present information on ASURA, including the book donation program.

Mary Stevens is the ASURA contact for donors who have books to donate. In 2014, Linda Van Scoy arranged for the use of the Community Services Building room 257 as a storage room for donations. On request, Friends provides empty boxes for our use.

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 online 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, current ASURA Board member and Health Insurance Liaison to pick up books when a donor is physically unable to deliver books to the ASURA office. Larry made several pick-ups again this year. Our gratitude to these volunteers for offering this very valuable service. With ASURA Business Manager, Carolyn Minner’s able assistance, the proceeds (rounded) realized for each fiscal year since the Program began are shown in the table on the next page.

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

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

Mary Stevens  
ASURA Book Donations Chair  
e-mail: [marystevens0@gmail.com](mailto:marystevens0@gmail.com)

**Annual Receipts from Book Sales**

<b>Year</b>	<b>Amount (\$)</b>
7/-12/2011	72
2012	1,092
2013	468
2014	718
2015	1,486
2016	1,297
2017	877
2018	832
2019	1,425
<b>TOTAL 2011-2019</b>	<b>8,267</b>

**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.

**Government Liaison**

Submitted by Jeri Meeks



Legislative Liaison Committee: Tara Roesler-Lobbyist, Jeri Meeks-Lobbyist, Pat Schneider, Larry Carlson, William Stasi

The 54<sup>th</sup> Legislature Second Regular Session opened on January 13, 2020. Per Governor Ducey’s State of the State address, his priorities for this year are: securing the state’s water future, expanding economic opportunities while preparing against future economic downturns, keeping students safe, protecting public safety while reducing prison populations and investing in public education – with a focus on results, resources and reforms. At this writing, we are 60 days into the legislative session. The initial 581 bills have been slimmed down considerably, with some new and possibly provocative bills introduced late in the session using the “strike all” option. With an ambitious goal of finishing in 100 days, the Legislators recognize that there’s still a lot to do in this session and the Governor has yet to support a budget.

Dr. Crow spoke about the University’s *New Economy Initiative* at ASU’s Legislative Advocacy Breakfast, held on January 10, 2019. Along with touting ASU’s academic and research achievements, he introduced the university’s *New Economy Initiative* designed to improve the state’s workforce and support a healthy economy. Each university will develop a Workforce Readiness Initiative, Arizona State University will expand engineering education and research, adding five science and technology centers; Northern Arizona University’s focus will be in healthcare, including mental and behavioral, which is the largest growing private industry in Arizona; University of Arizona will focus workforce development initiatives in its medical schools and space exploration, planetary defense, national security and asteroid exploration centers. In support of the New Economy Initiative, ABOR’s

FY20-21 budget appropriation ask is \$100M, in addition to the \$35M for operations. If approved, Arizona State University would receive \$46M of the \$100M.

ASURA Lobbyists Tara Roesler and Jeri Meeks, Pat Schneider and new retiree Suzanne Bias are attending the Governor's Community and Legislative Partners in Aging meetings again this year. 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. Please see our related article in this Annual Report for a recap of this year's discussions.

Under a gray sky, filled with low-hanging, rain-heavy clouds, ASURA hosted a table at the 34<sup>th</sup> Annual ASU Day at the Capitol on Tuesday Feb 11<sup>th</sup> at the Wesley Bolin Memorial Plaza. Although not as well attended as in past years, this event provided a chance to interact with our legislators, tout ASURA accomplishments and thank our local elected officials for supporting ASU in past and in the upcoming legislative sessions. We were very pleased when Dr. Crow stopped by to chat! And, as always, ASU colleges and departments offered a great display of current programs and innovations. It's always fun to see what's new at the University.

This legislative session our eyes were on bills supporting the Arizona State Retirement System (ASRS) Health Insurance change to a self-insured model, senior care education, oversight and licensure and ABOR's appropriation request. In addition, we are watching a House bill of particular concern to ABOR, allowing community colleges to award four-year baccalaureate degrees.

At this time, ASURA is watching:

SB1033 - ASRS; self-insurance program  
SB1034 - ASRS; required distribution  
HB2113 - ASRS; employer; member; contributions  
HB2357 - ASRS; self-insurance program  
SB1505 - nursing supported group homes; licensure  
HB2549 - adult protective services; audit; appropriation  
HB2550 - DHS; long-term care facility surveyors  
HB2793 - group homes; monitoring; appropriation  
SB1283 - appropriation; emergency shelter bed; seniors  
HB2790 - baccalaureate degrees; community colleges

Also, in this election year, there are many bills actively circulating through the House and Senate affecting voting rights and citizen initiatives. Contact your current legislators and tell them what you think!

Last, but certainly not least, it's an election year! Please engage in your local, state and federal elections. Do your research and VOTE!

We are pleased to have a growing team of ASU Retiree Association Legislative Watchdogs monitoring the bills as they move through the legislative process, attending retiree related meetings and conferences and working with state and local representatives. My thanks to Tara Roesler, Pat Schneider, William Stasi, Larry Carlson, Dick Jacob, Suzanne Bias and all of our members who bring issues affecting retirees to our attention.

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## **Governor's Council on Aging**

Submitted by Jeri Meeks,



Team: Jeri Meeks, Lobbyist, Tara Roesler, Lobbyist, Pat Schneider, Suzanne Bias

The ASU Retirees Association was pleased to be invited to the Governor's Council on Aging meetings at the Capital Building again this year. These hour-long meetings, presented by a caucus of legislators, service providers and non-profit organizations, discuss social issues affecting seniors and the disabled. The objective of these presentations is to stimulate discussion with an audience of representatives from retiree organizations, service organizations, emergency service providers such as police and firefighters and concerned citizens.

At this writing we have attended three Council meetings; Transportation for Aging Arizonans: Current Challenges and Rising Opportunities; Prescription Drugs: Available Cost Savings Programs, State and Federal Efforts addressing the Cost of Prescription Drugs; Utilities: Cost Saving Programs/Solutions for People on a Fixed Income. ASURA has posted the complete minutes of each meeting on our website at <https://asura.asu.edu/GovernorsCouncilOnAging>. Here's a quick recap of this year's meeting:

September 13, 2019 **Transportation for Aging Arizonans: Current Challenges and Rising Opportunities.** Presenters included representatives from AHCCCS, City of Phoenix Dial-a-Ride Program, Lyft, Northwest Valley Connect, Valley Metro's Accessible Transportation division and non-profit ELAINE. The speakers presented their current ADA compliant door-to-door, on-call, concierge and share-a-ride programs for seniors and disabled individuals. Non-profits Northwest Valley Connect and ELAINE have a focused audience; Northwest serves Sun City and Sun City West exclusively and ELAINE primarily serves the homeless community.

When it was time for questions, Firefighters in the audience spoke up about gaps in service, stating that they are called out on hundreds of calls each month for a "fall call" or a "lift assist" when a senior or disabled passenger is left on the curb and cannot get to their front door without assistance. Firefighters are also called when motorized scooters run out of charge. They don't have a way to charge the scooter, but these emergency responders must resolve the issue. Lastly, some drivers for these programs speak with a thick accent and many passengers have reported communication issues.

November 12, 2019 **Prescription Drugs: Available Cost Savings Programs, State and Federal Efforts addressing the Cost of Prescription Drugs.** Presenters included representatives from AARP Arizona and the Area Agency on Aging. Prescription drug costs have become a real kitchen-table issue and have stimulated legislative action at the federal level. AARP representative Marie Kenney discussed house bill HR.3, which establishes a fair price negotiation program, protects the Medicare program from excessive price increases and establishes an out-of-pocket maximum cost for Medicare Part D. Senate bills S. 1497 caps prescription cost and S. 977 requires transparent pricing. Also, in December 2019 President Trump, along with the U.S. Department of Health and Human Services and the U.S. Food and Drug Administration, issued a notice of proposed rulemaking (NPRM) that, if finalized, would allow for the importation of certain prescription drugs from Canada.

Area Agency on Aging representative Bill Cave provided information about various federal and state programs offering reduced prescription costs such as the State Health Insurance Program (SHIP), Low Income Subsidy (LIS), Medicare Saving Program (MSP), and reduced discounts through Blue Cross and Blue Shield.

January 21, 2010 **Utilities: Cost Saving Programs/Solutions for People on Fixed Incomes.** For this information-packed discussion we had representatives from APS, SRP, SW Gas, City of Phoenix Water, Tucson Electric Power (TEP), Arizona Alliance for Retired Americans and Wildfire. Each of the power suppliers detailed their bill discount and assistance programs – which were very similar. All companies require the customer to provide a SNAP card, showing that they qualify for food assistance, or documentation demonstrating that their income is 150-200% of the federal poverty guidelines. Also, each company has "medically fragile household" and "safety net" programs, which prevent discontinued power if the bill is not paid on time but require the customer to register within their company's system. And each power company has a dedicated customer service phone line



with trained counselors to assist customers and community partners for wellness checks and social services assistance.

Arizona Alliance of Retired Americans representative Dora started her talk by saying “If aging isn’t your issue – it will be.” She reminded us that the average state retirement payout is \$20K annually, just slightly over the threshold that would make a retiree eligible for a power company’s discount programs. Nonprofit Wildfire is an AARP partner and works with 30+ organizations to provide low income assistance through the federal Low-Income Home Energy Assistance Program (LIHEAP).

When it came time for questions the Firefighters again stepped up with great questions, asking how emergency responders could contact the power companies directly if they arrived at a house where the power had been turned off or equipment was not working. Unfortunately, no representative rallied with a good answer. Another question pertained to data collection; why weren’t the power companies pro-actively asking customers for personal information that would help them qualify customers for discount programs and a medically fragile classification? The power companies all responded that they were cognizant of privacy issues and it was their policy not to ask. That said, all power company representatives acknowledged that there is low program participation due to poor communication.

February 25, 2020: **House Ad Hoc Committee on Abuse and Neglect of Vulnerable Adults - Next steps and findings from the committee.** With the number of Arizona seniors growing exponentially in the next decade, and in response to the 2019 Hacienda rape incident, the Governor’s Office put together an Ad Hoc Committee to study the abuse of vulnerable persons. As you can imagine this is a huge topic, so this Committee refined its study to abuse and neglect in facilities. In response to this study, several bills have been introduced this legislative session addressing licensing and oversight of care facilities.

Per the Arizona Department of Health Services (DES) there is a big bubble of seniors heading Arizona’s way between 2020-2026. DES estimates that over 30,000 additional caregivers will be needed. Policy makers are discussing how to leverage state resources to best serve and protect this population, whether they are living alone, at home with professional or family caregivers or in licensed assisted living facilities.

The Committee acknowledged that not all “bad” or negligent care is the result of criminal activity. Some of the reported problems result from a lack of caregiver training, disproportionate caregiver to senior ratios and constant caregiver turnover due to burnout. The Committee agreed that additional appropriations for, and coordination of, training and resources for caregivers is essential. But some abuse is the result of purposeful neglect. To that end many of the policy bills this session address frequent background checks, licensure renewal criteria and facility monitoring and audits.

The representative from AZ Commission for the Deaf and Hard of Hearing stated that deaf persons are the most vulnerable because they may not be able to communicate their needs. Committee members agreed that many senior complaints are ignored or considered unbelievable due to dementia. Advocates, whether family or professional, are essential. Public awareness also assists with advocacy; the Arizona Statewide Independent Living Council representative spoke about the power of digitized survivor stories.

All Committee members agreed that the legislative focus should be on prevention and accountability but acknowledged that getting policy bills passed is a challenge. Each participating agency is actively studying inter-agency improvements and producing recommendations. They were happy for the discussion, but all agreed that what’s really needed is action.

#### Upcoming Meetings:

- March 17, 2020 - Falls
- April 28, 2020 - Alzheimer’s and Dementia - updates on legislation, research and supports for families and patients of Alzheimer’s Disease

- May 1, 2020 - AZ Broadband Strategic Plan – Helping Aging Arizonans, rural communities and telemedicine opportunities
- August 18, 2020 - Long term care facilities and group homes; insight from Administrators and caregivers
- November 17, 2020 – Diabetes and Insulin

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Suzanne Bias  
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### ASRS Activities

Submitted by Dick Jacob



With the reduced schedule of Board of Trustees meetings and a revision of Board agendas that placed several functions in the hands of staff and committees, I found it useful to attend only two meetings during the current report year.

The Board still is two members shy of its legislated size, and there appears to be no hurry on the part of the Governor to fill those vacancies. Agency activity in new directions was minimal during the year. Notable are the items I covered in my report on the November 15 meeting (see below.) The

January 31 meeting had a minimal agenda and I did not attend it. I do plan to attend the March 29 meeting, but it is outside the submission window for this report.

Items of ASURA interest are:

1. A Board decision that the amortization period for future unfunded liabilities (or gains) has been reduced from 30 years to 25 years. This means essentially that any future relative losses (or relative gains) will be reflected quicker, therefore enabling the Fund to be fully funded over a shorter period of time.
2. The actuarial report by the firm Gabriel, Roeder, Smith & Company included the information that the Fund's market value return over the 2019 fiscal year was 6.3% and the Fund's actuarial return was 8.2%. This relatively strong performance follow two exceptionally high annual market value returns in 2017 (13.6%) and 2018 (9.6%). The actuarial forward-looking assumption was changed, as reported recently, from 8.0% to 7.5%.
3. Year-to-date (June 30, 2019 forward to November 30, 2019) return was estimated at 2.5% cumulative (un-annualized), with a Fund balance of \$41.8B. Current year-to-date return is estimated to be approximately 5.7%. Calendar year 2019 return is estimated to be approximately 15.6%. [Note: these values have undoubtedly undergone significant modification given the market behavior since March 1.]
4. There is as yet no legislative movement in the current session to redefine ASU's or the BoR's relationship with ASRS.

Dick Jacob  
ASRS Legislative Liaison  
e-mail: [rjjacob@cox.net](mailto:rjjacob@cox.net)

## 2019 ADOA Health Insurance Annual Report

Submitted Larry Carlson



The ADOA retiree health insurance program open enrollment ran with changes taking effect on January 1, 2020. 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, 2020.
- New EPO Deductible: The EPO medical plan will have a deductible of \$200 for individuals and \$400 for families. That meant participants will have to pay \$200 or \$400 in qualified out-of-pocket expenses before the plan begins to pay.
- Pharmacy Provider for Medicare Eligible Members – VibrantRx, Non-Medicare - MedImpact

For new retirees, besides the ASRS and ADOA plans, a third option is available. COBRA coverage can be a cost-effective alternative which continues your current ASU coverages for up to 18 months without changes. Because the risk pool is healthier, the premiums may save new retirees a significant amount of money especially if they are covering dependents. Active employees considering retirement need to check carefully with their HR department before they retire to see if this option would work for them.

Larry Carlson

ADOA Health Insurance Liaison

e-mail: [azorion@gmail.com](mailto:azorion@gmail.com)

## 2019 ASRS Health Insurance Annual Report

Submitted Tara Fuchs Roesler



The Arizona State Retirement System held a series of two meetings (January 13 and January 21) to explain their proposal to self-insure the group health insurance plans they oversee.

### During the first meeting, presenters explained:

1. "A self-insured group health plan (or a 'self-funded' plan as it is also called) is one in which the plan sponsor assumes the financial risk for providing health care benefits to its participants."
2. Why the Arizona State Retirement System was considering self-insurance.
  - a. Premium reduction.
  - b. Ability to fund monthly fluctuations in claims liability throughout the year thus maximizing cash flow advantages.
  - c. More control over benefit design, utilization reporting, monitoring, evaluation and transparency.
  - d. Reasonable and predictable claims experience.
3. The major differences between Fully Insured and Self-Insured Plans
  - a. Member savings versus profit.
  - b. Risk and margin factored when setting premium under self-insured plans and included as part of the premium in fully-insured plans.
  - c. Premium taxes not assessed on self-funded plan.
4. ASRS experience with self-insurance.
  - a. ASRS Long-Term disability program.
  - b. Pension plans (share similar core principles).
5. Coverage, benefits or other changes.
  - a. Plan design changes are an option for both fully insured and self-insured plans.
  - b. Would continue the kind of changes beneficial to ARSR members such as lower maximum out of pocket limits and deductible and co-pay modifications for the non-Medicare medical plans.
  - c. Self-insured and Fully-insured plans contract with carriers to utilize their network of providers. Therefore, no greater risk of having to change doctors than with existing fully-funded plans.
  - d. No change planned for appeals process.

**During the second meeting, presenters discussed:**

1. What ASRS programs can be self-insured:

	Non-Medicare	Medicare
Medical	FI/SI	Medicare Advantage FI Only
Pharmacy	FI/SI	FI/SI
Dental-PPO	FI/SI	
Dental-DHMO	FI/SI	

FI = Fully Insured

SI = Self-Insured

2. ASRS estimated annual savings by category (projected Dental Savings were not presented):

	Non-Medicare	Medicare
Medical	\$5 M	Not Applicable
Pharmacy	\$5 – \$7 M	\$30 - \$40 M
Total	\$40 M - \$52 M	

3. ASRS presented a premium reduction illustration:

	Current Premium	Proposed Premium
Projected Medical Claims	\$560	\$560
Admin/Risk	\$70	\$70
Projected Rx Claims	\$170	\$120
Taxes/Fees	\$33	\$0
Profit	\$13	\$0
<b>Total Premium</b>	<b>\$846</b>	<b>\$750</b>

4. ASRS next steps:

- a. Engage market via the Request for Proposal process
  - i. Dental RFPs asking for proposals for self-insured and fully-insured plans (received 1/15/20 and under review)
  - ii. Medical and Pharmacy RFP for self-insured and fully-insured plans (bids anticipated March 2020)
- b. Obtain passage of necessary Legislation to clarify ASRS' authority to self-insure: SB1033 ASRS Self Insurance Program: <https://apps.azleg.gov/BillStatus/BillOverview/72580>
- c. Decision making in the late spring/early summer (Health Insurance Advisory Committee members volunteering to participate in the RFPs).
- d. Communication and preparation late summer and early fall for November open enrollment.

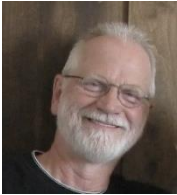
Tara Roesler  
ASRA Health Insurance Liaison  
e-mail: [troes7718@msn.com](mailto:troes7718@msn.com)

**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



This year we have continued to monitor the membership of the ASU Retirees Association to determine the longer-term impact of our efforts to increase and stabilize membership and membership participation in organization activities. Voluntary organizations in general have been struggling over the last 5 years. We continue to recruit members through presentations to pre-retirees at live sessions held by Human Resources, distribution of an attractive flyer about our activities, and timely contact through mail and email. Several years ago, we started automatically enrolling all qualified retirees for a free membership for the first year, and we are working very hard to increase the number of “free” members who choose to become “paying” members. We keep all members, new and old, informed of our activities and send them copies of our print publication *Prime Times* three times a year. We are also working constantly to refresh our activities with suggestions and requests from our members. We will continue to work on ideas to keep the organization interesting for its members.

We are maintaining a healthy membership (around 725), but we are interested as well in increasing the numbers who participate in our various activities and in the management of the organization by serving as officers, presenters, and office volunteers. I really want to thank the office volunteers who keep the place hopping. Special thanks to Carolyn Minner who produces our monthly membership report and generally keeps an eye on things.

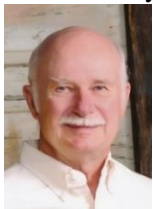
Dave Schwalm

Membership Committee Chair

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## 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.

This past year I added an archive of old E-news issues to the ASURA website. So if you want to read some old E-News story go to the E-new Archive page (<https://asura.asu.edu/EnewsArchives>) in the ASURA website and select the desired issue and story.

Barry McNeill

E-News Editor

e-mail: [barry\\_mcneill@outlook.com](mailto: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 volunteer 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 included, for the first time, an advertisement in the Spring 2019 issue for a "Certified Personal Trainer" to assist in that effort. If you have any friends or business associates interested in taking advantage of our free advertising, please refer them to <https://asura.asu.edu/PrimeTimesAdvertising> for further information.

Previous *Prime Times* newsletters, beginning with the fall 2010 through spring 2020, are available on-line at <https://asura.asu.edu/PrimeTimes>. Starting 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 which includes an easy link to the on-line **color** version of the *Prime Times*. Black & white paper copies still continue to be mailed to our membership through ASU Mail Services.

Jeannette Robson, Designer/Editor  
e-mail: [jrobson@asu.edu](mailto:jrobson@asu.edu)

### **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](mailto: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, Pat Schneider the Board meeting minutes, and Barry and I the rest of the pages on our website.

Over 24,700 people visited our website last year, with over 52,800 unique page views. We had about 500 pages on our website that were accessed at least once. We have a total of about 750 pages, of which about 50 are for internal use, i.e., not viewable by the public. 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 rest of our pages had fewer than 200 “hits” each. This does not count, of course, uses of our video history interviews from the ASU Library.

As usual I 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 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. Barry sets 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](mailto:mcneill@cox.net)

### **Emeritus College Liaison Report**

Submitted by Don L. F. Nilsen



Joe Carter is the new Dean of the ASU Emeritus College; Bill Verdini is the Outgoing Dean. Dick Jacob is the Founding Dean, Elmer Gooding is the Associate Dean, Bill Glaunsinger is the Assistant Dean for the Division of Science, and Don Nilsen is the Assistant Dean of the Division of the Humanities. The Emeritus College Executive Committee holds a monthly meeting in Old Main.

The Emeritus College continue to have a monthly Colloquium, monthly Short Talks in the Private Dining Room of Friendship Village (second Tuesday of each month) and an annual Symposium.

Bill Glaunsinger organizes and hosts a workshop for Arizona students selected at the State’s various science fairs to represent Arizona at the International Science and Engineering Fair (ISEF). Emeriti faculty critique the student’s posters and presentations and make suggestions on how the students might improve their presentation. The number of students receiving awards at ISEF has increased since the inception of this program.

The Emeritus College

- partners with the Barrett Honors College so that a member of the Emeritus College teaches an honors class once per semester,

- partners with Project Humanities (Neal Lester),
- sponsors a writing academy (Babs Gordon), and
- holds an Art Walk at the ASU Downtown Campus showing art done by ASU Emeritus College Professors.

Sarah Hudelson is now the editor of the Emeritus College Newsletter (quarterly) and Dick Jacob is the editor of Emeritus Voices (semiannual).

The College teaches courses for Osher and does presentations around the valley for such organizations as New Frontier (at Mesa Community College), New Adventures (Chandler-Gilbert Community College), Sagewood, Sun City, Sun City West, Arizona Humanities Council, etc. Gary Kleemann is preparing a book of subjects that can be taught by Emeritus College Professors in the Valley of the Sun and elsewhere.

Don L. F. Nilsen  
Assistant Dean, Division of the Humanities  
ASU Emeritus College, Co-Founder of ISHS  
<http://www.humorstudies.org/>

## **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 March 31, 2020. As has been true for previous years Carolyn Minner, the ASURA Business Manager, has done 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 \$36,854 carry forward balance, providing a reasonable cushion for fiscal 2019/2020. The 2019/2020 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 September Board meeting. This budget projects a yearend balance of \$31,424, 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 \$65,778. 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](mailto:barry.bruns@asu.edu)



Financial Report for Fical Year 2019-2020 as of 2/29/2020

Account Categories	FY20 Approved Budget	Actual YTD Amount	COMMENTS
<b>ASURA Operations</b>			
<b>ASURA Operations - Income</b>			
<b>Balance Forward</b>	<b>36,854</b>	<b>36,854</b>	
<b>Current Year Revenue</b>			
Event Registration Fees & Donations Collected	2,000	2,375	
Membership Dues	14,000	7,260	
General Operations Donations	2,000	1,250	
Holiday Bake Sale 2019	200	131	
Transfer In	0	30	Credit card donation posted incorrectly
5% Gift Assessment	-780	-417	
<b>Total ASURA Operations Current Year Revenue</b>	<b>17,420</b>	<b>10,629</b>	
<b>ASURA Operations - Expenses</b>			
<i>Printing and Mailing Costs</i>			
Membership Drive	700		
Prime Times	2,300	1,670	
<i>Event Costs</i>			
Paid Events	2,500	2,347	
Annual Meeting	1,600	200	
Meet & Greet Luncheon	400	858	
Holiday Potluck & Fundraiser	300	322	
<i>Other Operations Costs</i>			
Scholarship Award	7,700	7,700	\$10,000 award - \$2300 paid from Endowment
Business Luncheons & Service Appreciation	150	72	
Technology Services	3,500		Wild Apricot (2 yrs) Zenfolio (1 yr)
Office Equipment & Supplies	700	547	Includes postage
Marketing Supplies	600	42	
Seminars	1,200	300	
Foundation Transaction Fees	200	93	
Transfer to Adopt-A-Family	1,000	1,000	Cover possible shortage of funds
<b>Total ASURA Operations Expenses</b>	<b>22,850</b>	<b>15,151</b>	
<b>Increase (Decrease) in Fund Balance for Current Year</b>	<b>-5,430</b>	<b>-4,522</b>	
<b>Uncommitted ASURA Operations Funds</b>	<b>31,424</b>	<b>32,332</b>	

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General University Allocation (HR)			
Balance Forward	1	1	
Current Year Allocation	7,000	7,000	
<b>Total General University Current Year Revenue</b>	<b>7,001</b>	<b>7,001</b>	
<b>Expenses Charged to Allocation</b>			
Annual Report	200		
Bylaws & Ballots	200	196	
Office Equipment & Supplies	3,500	3,464	Replace office computer equipment
Prime Times Fall/Spring/Summer	700	823	
Copier/FAX Equipment Annual Lease	922	922	
Membership Drive	510	583	
Technology Services	300	258	Pantheon Web Hosting
Marketing Supplies	0	159	
8.5% Administrative Service Charges	669	544	
<b>Total Subsidized Expenses</b>	<b>7,001</b>	<b>6,950</b>	
<b>Uncommitted General University Funds For Operations</b>	<b>0</b>	<b>51</b>	

Special Projects		
<b>Special Projects - Income</b>		
Balance Forward	132	132
<b>Current Year Revenue</b>		
Friends/Phx Library Book Sale Net Income	1,100	654
Gift In Kind Receipts		4,389
<b>Total Special Projects Current Year Revenue</b>	<b>1,232</b>	<b>5,043</b>
<b>Special Projects - Expenses</b>		
Transfer out 1/2 of Book Sale Income to Scholarship	550	327
Transfer out 1/2 of Book Sale Income to Video History	550	327
Foundation Transaction Fees	55	33
Gift In Kind Adjustment		4,389
<b>Total Special Projects Expenses</b>	<b>1,155</b>	<b>5,076</b>
<b>Increase (Decrease) in Fund Balance for Current Year</b>	<b>77</b>	<b>-33</b>
<b>Uncommitted Special Projects Funds</b>	<b>209</b>	<b>100</b>

Adopt-A-Family			
<b>Adopt-a-Family - Income</b>			
Balance Forward	564	564	
<b>Current Year Revenue</b>			
Adopt-A-Family Donations	1,000	440	
5% Gift Assessment	-50	-21	
Transfer from Operations	1,000	1,000	Cover possible shortage of funds
<b>Total Adopt-A-Family Current Year Revenue</b>	<b>1,950</b>	<b>1,419</b>	
<b>Adopt-A-Family - Expenses</b>			
Holiday gifts	2,000	1,553	
<b>Total Adopt-A-Family Expenses</b>	<b>2,000</b>	<b>1,553</b>	
<b>Increase (Decrease) in Fund Balance for Current Year</b>	<b>-50</b>	<b>430</b>	
<b>Uncommitted Adopt-A-Family Funds</b>	<b>514</b>	<b>430</b>	

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Video History			
<b>Video History - Income</b>			
<b>Balance Forward</b>	<b>6,662</b>	<b>6,662</b>	
<b>Current Year Revenue</b>			
Video History Donations	600	360	
Transfer in 1/2 of Book Drive Proceeds from Spec Proj	550	327	
5% Gift Assessment	-30	-14	
<b>Total Video History Current Year Revenue</b>	<b>1,120</b>	<b>673</b>	
<b>Video History - Expenses</b>			
Equipment & Supplies	300	29	
Software Licenses	500	194	Premiere Pro CC License
Interview Expenses (15 @ \$150)	1,000		
Foundation Fees		1	
Transfer Out	0	30	Credit card donation posted incorrectly
<b>Total Video History Expenses</b>	<b>1,800</b>	<b>255</b>	
<b>Increase (Decrease) in Fund Balance for Current Year</b>	<b>-680</b>	<b>418</b>	
<b>Uncommitted Video History</b>	<b>5,982</b>	<b>7,080</b>	

Scholarship Endowment Fund			
<b>Scholarship Endowment Principal (40003616)</b>			
<b>Balance July 1</b>	<b>65,778</b>	<b>65,778</b>	
Invested Funds Gain (-Loss)	6,000	3,725	
Payout to Endowment Spending - FY20	-2,000	-2,129	
Current-Year Contributions	1,900	1,361	
Foundation Management Fees	-800	-866	
<b>Total Scholarship Endowment Principal</b>	<b>70,878</b>	<b>67,870</b>	
<b>Scholarship Endowment Spending (70003616)</b>			
<b>Balance July 1</b>	<b>2,343</b>	<b>2,343</b>	
Payout from Endowment Principal - FY20	2,000	2,129	
Transfer from Special Projects (Book Sale Proceeds)	550	327	
ASU Scholarship	-2,300	-2,300	
<b>Total Scholarship Endowment Spending</b>	<b>2,593</b>	<b>2,498</b>	
<b>Total Scholarship Endowment</b>	<b>73,471</b>	<b>70,369</b>	

Counts	As Of 3/4/2020	As Of This Yr 3/5/2019	-Last	More Counts	As Of 3/4/2020	As Of This Yr 3/5/2019	-Last
<b>Current-year Members</b>	<b>763</b>	<b>714</b>	<b>49</b>	<b>By Former Employment Category</b>			
Renewals from prior years (any prior year)	486	482	4	Faculty and Faculty w/ Admin Appt	323	298	25
Introductory members	277	232	45	Academic Professional	42	41	1
Paid for the current year, now deceased	2	2	0	Staff	172	185	-13
				University Staff (Service Professional)	190	155	35
<b>Last Year's Members - Not Renewed</b>	<b>209</b>	<b>213</b>	<b>-4</b>	Administrative	36	35	1
Members last year, now deceased	4	5	-1				
				<b>Having an Arizona Address</b>	<b>706</b>	<b>663</b>	<b>43</b>
<b>By Retired-from Organization</b>				<b>Level of Activity</b>			
Retired from ASU	740	696	N/A	Checked at least one volunteer area	140	133	7
Retired from another university	3	3	N/A	Attended at least one event this year	190	177	13
Former ASU employee, retired elsewhere	3	4	N/A	Attended an event ever	357	341	16
Still employed at ASU	17	11	N/A	Logged in to Members-only Site (ever)	215	<b>185</b>	30
				Made an additional donation this yr	140	161	-21
<b>By (Approx.) Time Since First Joining</b>				<b>Non-members in Database</b>			
In Introductory Period	277	232	45	Was a member at some time	380	277	103
Members for 0-2 Years (excl Introductory)	34	53	-19	Never a member	226	340	-114
Members for 3-5 Years	114	71	43				
Members for 6-10 Years	87	123	-36				
Members for more than 10 Years	251	235	16				
<b>By Communications They Want to Receive<sup>1</sup></b>							
Upcoming Event Announcements (e-mail)	639	605	34				
Obituary Notices (e-mail)	312	296	16				
Prime Times (US Post)	696	654	42				
Other ASURA Communications (e-mail)	576	544	32				
None of The Above	12	8	4				

<sup>1</sup>All 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.