

**MINUTES OF FEBRUARY 9, 2021**

**ARIZONA STATE UNIVERSITY RETIREES ASSOCIATION BOARD MEETING**

**Board Members Present:** Carl Cross, Jan Thompson, Connie McNeill, Larry Carlson, Evelyn Cesarotti, Jo Madonna, Jeff Chapman, Kathy Gunn, Mark Henderson, Frank Koonce and Jane Carey.

**Committee Chairs and/or Liaisons Present:** Jeri Meeks, Barry McNeill, Joy Shearman, Bev Buddee, Ruth Jones, Simin Levinson, Pat Schneider

**Excused absence:** Dick Jacob, Jean Duncan, Larry Edmonds

**Absent:** Trudy Perez, Jill Masara

- I. CALL TO ORDER at 10:08 am
- II. INTRODUCTIONS AND WELCOME TO GUESTS – None
- III. ADOPTION OF TODAY'S AGENDA – Jan moved and Jeff seconded a motion to approve today's agenda as written. The motion was approved unanimously.
- IV. REVIEW AND APPROVAL OF THE MINUTES OF THE NOVEMBER 10, 2020 BOARD MEETING – Barry suggested that under the Tri-University report that Connie had recommended that eligible retirees from NAU and UA could join ASURA and subsequently register for our seminars and other events. Connie moved and Jeri seconded a motion to approve the minutes as amended. The motion was approved unanimously.
- V. FINANCIAL REPORT/TREASURER'S REPORT AND ANNOUNCEMENT OF NEW TREASURER – Connie McNeill has been appointed and approved by the Board as Treasurer to take the place of Jill Masara who resigned as Treasurer but will stay on the board. Connie gave the Financial Report which is normally due in October but was not completed until last month. The report is included with these minutes. Connie emphasized two issues. Firstly, we receive \$7000 from Human Resources per year and it is important to spend all or most of this money to demonstrate need. Connie suggested that we commend Carolyn Minner for her excellent work in accomplishing this. Jan volunteered to write up a resolution of commendation for Carolyn. Secondly, this year's budget had an understatement of revenue which caused some issues with spending. This year, revenue is even more positive with a higher number of paid members. Connie also discussed the scholarship fund which is earning interest on the principal. She suggested that we have enough money in operating funds to pay for the scholarship from there and allow the Scholarship fund to earn as much interest as possible. We have a \$30,000 reserve which is not earning interest, but Foundation rules for investing in a quasi-Endowment account are too restrictive for us to take advantage of that type of account. A decision was

made to leave the \$30,000 intact. In summary, our financial situation is healthy and well-managed.

VI. EX-OFFICIO REPORTS (5 minutes or less, please)

- ASU Alumni Association – John Davis - absent
- Emeritus College Liaison – Ruth Jones – The Emeritus College met, but has not made a decision about how to proceed. They are thinking about having an online symposium, but no plans have been finalized.
- Human Resources – Judy Cato - absent
- University Club Liaison – Carl Cross – the club is still closed due to Covid. It offers lunches for take-out.
- University Liaison – Kendra Burton - absent
- University Senate – Simin Levinson - Simin gave a detailed report on Senate activities. She asked if ASURA would send a representative to give a 5-minute report to the senate in March. Carl will ask David Schwalm if he is interested in representing us.
  - ASU is operating the largest vaccine sites in Maricopa County at State Farm Stadium and Phoenix Municipal Stadium. As the availability of vaccine doses increases, ASU has requested to serve as a vaccination site. Currently, ASU is receiving approximately 1,000 doses per week which are provided to members of the ASU community by invitation.
  - ASU also operates over 100 Covid testing sites across the state. ASU Biodesign Institute has process over 625,000 Covid tests.
  - Innovation Quarter during the winter break was successful with over 10,000 participants and a broad range of non-credit program offerings.
  - ASU has launched Dreamscape Learn which provides immersive virtual reality opportunities for students to experience curricula in new and innovative ways. Dreamscape is provided through the Learning Futures Collaboratory, new biology curricula is being piloted using artificial intelligence.
  - Naming of the new Sidney Poitier New American Film School at ASU with program offerings in Tempe, Mesa, and Los Angeles
  - Watts College Dean Jonathan Koppell has been named vice provost of public service and social impact. This is a new vice provost position announced by Provost Marke Searle.
  - ASU is advancing on all fronts with a new model that includes three enterprises: Academic, Knowledge, and Learning Enterprises. President Crow presented ABOR with this model in the Strategic Enterprise Plan
- University Staff Council – Jared Vibbert - absent

VII. STANDING COMMITTEE REPORTS (5 minutes or less please)

- Community Outreach Committee – Subcommittee Reports
  - Adopt-A-Family – Ginny Sylvester – Ginny sent a report outlining gifts and gift cards given to our family at the holidays.
  - Scholarship Committee – Joy Shearman – Joy announced that the deadline for Scholarship applications is March 1. Her committee will meet to vote on the recipient.
  - Video History Project – Barry McNeill – Barry finished editing the Suzanne Steadman interview. Suzanne spent almost thirty years running International Students Programs.

- Events Committee & Subcommittee Reports
  - Events Committee Coordination – Trudy Perez – absent
  - Luncheons & Special Events – Trudy Perez – absent
  - Seminars – Bev Buddee –Pat Schneider will take over as chair for next year. There are two planned seminars. One in February (Nutrition by Carol Johnson) and March (Physical Therapy). Connie mentioned that only Emeritus faculty had license privileges for Zoom. She moved to spend \$200 to get a Zoom license for ASURA. Jane seconded the motion and it passed unanimously. Pat suggested that future seminars might be hybrid (some in-person attendees and some on Zoom).
  - Pre-Retirement Seminars – Trudy Perez, Liz Badalamenti – absent
  - Travel – John Brock – absent – The travel committee is considering Iceland and Costa Rica for potential trips.
  
- Finance Committee – Connie McNeill, Carolyn Minner
  - Book Collection – Mary Stevens – absent - Larry Carlson is collecting books. Feel free to call if you have any to donate.
  - The Financial Report was included in item V.
  
- Government Liaison Council
  - Legislature – Jeri Meeks, Tara Fuchs-Roesler, Pat Schneider. Jeri sent a list of bills that she is watching (see attached). In particular is HB 2138 that deals with the Optional Retirement *and* ASRS Programs offered by ABOR. This bill would allow ABOR and the Universities to opt out of ASRS. The Arizona Retirement Coalition and ASRS are opposed to this legislation because it risks weakening the ASRS and increasing the unfunded liability which would increase contributions from other state agencies and employees. It is unknown if this change would affect the ability of ASU retirees to choose health insurance offered through ASRS which many ASU retirees choose. At this point the committee this bill was assigned to has shelved it, but it could be resurrected at any time during the legislative session. There are over 100 bills regarding election changes.
    - ASRS Liaison – Dick Jacob – absent
    - ADOA Liaison – Larry Carlson
  
- Health Insurance Liaison Council
  - ASRS – Dick Jacob – absent
  - ADOA – Larry Carlson –see above
  
- Membership and Communications Committee – Subcommittee Reports
  - E-News – Barry McNeill – Barry will send out ENews this week.
  - Membership update – Dave Schwalm – absent – The Membership report is attached.
  - Obituaries – Becky Reiss - absent
  - Prime Times – Jeannette Robson – absent
  - Web Site and Database – Connie McNeill – Connie and Barry are going page by page through the website to make sure our pages conform to the new ASU web standards.
  - Third Decade of Success – Connie and Barry McNeill –Not much is happening due to website updates.

VIII. UNFINISHED BUSINESS

- Nominating Committee Report – Jan Thompson. Jan is waiting for the ballots to be returned by March 1, 2021. Carl and Jan will count the ballots on March 2 and report the outcome at the March meeting.
- Letter to President Crow – Carl wrote a letter to President Crow requesting information about ASURA members and eligibility for Covid testing and vaccination. The upshot is that we can go to the public access site for testing at the stadium but not the other locations. Covid vaccination appointments are only available through the Arizona Public Health site.

IX. NEW BUSINESS

- Annual Meeting – it was decided to hold the annual meeting on April 13, 2021 via Zoom. The agenda will be discussed in March.
- Annual Reports – Jane will send out a request for annual reports to the Committee Chairs. They will be sent to Barry, who will format the report for Carl's approval. The reports are due by April 1, 2021.

X. ANNOUNCEMENTS

Next Meeting – March 9, 2021  
9:15 am Executive Committee  
10:00 am Board Meeting

XI. ACTION ITEMS – None

XII. MEETING ADJOURNMENT – 11:28 am

To: ASURA Board  
From: Connie McNeill, Finance Committee Chair  
Date: 2 February 2021  
Re: Finance Committee Report for the February, 2021 Board Meeting

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## **Annual Review of Financial Records**

As required by the ASURA Bylaws (Article VI.A.4), the Finance Committee reviewed the Association's fiscal year 2020 financial records. The purpose of the review is to assess reasonableness and consistency with the budget. The committee was assisted in its review by Jerry Snyder, who was a senior financial officer at ASU for 37 years before he retired. The committee members who participated were Barry Bruns, Barry McNeill, Connie McNeill (chair), Carolyn Minner, and Mary Stevens.

Documents reviewed were:

- ASURA Annual Event Report for FY 2020
- ASURA Financial Report 7/1/2019 through 6/30/2020. The report covers ASURA's Operations, General University Allocation, Special Projects, Adopt-A-Family, Video History, History Book, and Scholarship Endowment Fund accounts.
- Applicable Banking Summaries prepared by the ASURA Business Manager.
- Related ASU Foundation Balance Sheets/Income Statements for each of these accounts.

After discussion, the committee unanimously agreed that revenues and expenditures of the Association in 2019-20 were reasonable and consistent with the budget and agree with the applicable ASU Foundation records. The Committee also verified that the ASURA ending cash balances agreed with the underlying Foundation and ASU records.

The committee has these observations and comments:

### **General University Allocation**

As has been mentioned in previous years, the Association should continue to closely monitor the spending of its General University allocation each year so that the year-end balance is as low as reasonably possible, and under all conditions should keep the unspent balance under 10% of the current year allocation. The Association, and particularly Carolyn Minner, is to be congratulated for having a 6/30/2020 unspent balance of only \$51. For the prior year 6/30/19, the unspent balance was only \$1 (actually, 75 cents). For several years prior to FY 2018/2019 there were noticeably larger unspent

balances for this General University Allocation Account. The effort to maintain a very minimal unspent balance should be continued in the current and future years.

### **FY 2019/2020 Operations Account Actual**

For FY 2019/2020 there was a \$1,700 decrease in account balance. We do not consider this decrease to be a concern because it was caused primarily by a delay in the year end (May and June) receipt of membership dues. The delay was the result of (1) delayed membership renewal notices due to the ASU Foundation going onto a new accounting system in late FY 2019/2020 and (2) slower than normal processing of checks received because of the COVID-19 pandemic. The pandemic caused the ASURA office to be closed and mail sent there was forwarded to the business manager much less frequently than normal.

### **FY 2020/2021 Operations Account Budget.**

The FY 2020/2021 Operations Account Budget shows a budgeted decrease in account balance of around \$3,000. If account expenses overall are held to no more than the budgeted amount, this decrease will be less than the budgeted \$3,000 for two reasons. First, a portion of the membership dues that would normally had been recorded in FY 2019/2020 was instead recorded in FY 2020/2021. Secondly, the ASURA's paid membership level is beneficially up. Normally, most of the memberships renewals for the new year are received in May and June of the prior year. Even so, as of 12/31/2020, 64% of the FY 2020/2021 Membership Dues budget had already been received. If the membership billing and processing timetable returns to its normal historical pattern for the coming May and June, the Membership Dues recorded in FY 2020/2021 will noticeably exceed the present FY 2020/2021 budget of \$14,000. In fact, even after the delayed processing of the Membership Dues in May/June 2020, actual FY 2019/2020 revenue was \$14,550. We therefore anticipate that the FY 2020/2021 financial results for the Operations Account will be noticeably better than the budgeted Operations Account decrease of \$3,000.

## **Endowed Scholarship Account**

During our review, we noticed that the Scholarship Endowment account had been divided into two parts, called "Temporarily Restricted" (FD401) and "Permanently Restricted" (FD400). The explanation received from the Foundation about this indicated that the change was caused by a switch to the Workday financial management system. The difference between the two parts is explained, as, "Generally speaking, on a standard endowment, the Gift Value (all gifts deposited to the endowment) is the only 'permanently restricted' portion. The investment returns, payout and fees are almost always 'temporarily restricted'. Reinvested payout can go either way, temporary or permanent, depending on the donor's instructions."

Our discussion of this raised questions that we posed to accountants at the Foundation. Those questions, and responses we received from Zach Fenner of the Foundation, follow.

- Can any portion of the "Temporarily Restricted" account FD401 be distributed to the Spending Account upon request? The name and the fact that it is separated from "permanently restricted" is what makes us wonder. *No -- Our endowments (FD4XX) follow a set payout schedule so distributions to the spending account happen only once a year except under special*

*circumstances. We do have a separate class of accounts which we call "quasi" endowments (FD200/240) which are essentially regular spending accounts that are invested the same way as an endowment. This allows the account to get earnings until the funds are spent while also allowing flexible payout options. However, quasi-endowments are not meant to be held in perpetuity like endowment accounts.*

- Are the funds in both sub-accounts treated the same in terms of investment – i.e., are investment gains and losses calculated on the totality, and not just on FD400/440? *Yes -- Investment gains/losses are calculated based on the market value of each account which is FD400 and FD401 combined (or FD440/441 for ASU accounts). All earnings are booked to FD401. We do this in order to keep the gift value separate from any investment returns/fees on our books. There are only a few circumstances when we would book returns and fees to FD400, usually relating to stock gifts and any associated gains/losses before the stock is sold or broker fees that directly impact the gift value.*
- If the Association wanted to, could it make a gift from its Operations Account to the Endowment? If so, would that be handled as a transfer, or would we need to write a check on the Operations Account and deposit that in the Endowment? *Yes -- As long as the operations account is set up as an ASUF account we can process it as a transfer. When ASU accounts send money to an ASUF account it has to be cut as a check.*
- If we wanted to, could we “reinvest” funds in the Spending Account into the Endowment? If so, what is the mechanism for doing it? Can we specify that it goes into the “Temporarily Restricted”, and then if we need it later can we get it back? *Yes and No -- This is very common and we call it reinvested payout. It's managed through our transfer module and is one of the transfer types that can be selected. Normally reinvested payout would be considered temporarily restricted if requested by a unit, unless required by the donor in which case it would be considered permanently restricted. Either way, the reinvested amount could not be withdrawn due to the same limitation as I mentioned in bullet 1, but it would increase payout every year going forward.*

Because we have an uncommitted reserve of about \$30,000 in our Operations account, we briefly looked into the “quasi-endowments” mentioned in Zach’s answer to our first question. We wanted to determine whether it would make sense to invest the reserve. We quickly concluded that a quasi-endowment fund to hold the reserve is not practical for us: The Finance Committee had also looked into this question in 2014 and had arrived at the same conclusion. Per “Gift Administration Terms and Conditions” available on the Foundation website at [https://live-asu-foundation.pantheonsite.io/sites/default/files/asuf\\_gift\\_administration\\_t\\_and\\_c\\_attach\\_a\\_2019\\_0.pdf](https://live-asu-foundation.pantheonsite.io/sites/default/files/asuf_gift_administration_t_and_c_attach_a_2019_0.pdf), Quasi-Endowment fund agreements include the following terms:

- The beneficiary or donor intends the quasi-endowment to be held for more than five years.
- A minimum balance of \$25,000 is required to remain in the fund.

Account Categories	FY21 Approved Budget	Actual YTD As Of 1/31/2021	COMMENTS
<b>ASURA Operations</b>			
<b>ASURA Operations - Income</b>			
<b>Balance Forward</b>	<b>35,157</b>	<b>35,157</b>	
<b>Current Year Revenue</b>			
Event Registration Fees & Donations Collected	100	10	Late collection for ASU Basketball Event
Membership Dues	14,000	8,910	
General Operations Donations	1,300	1,605	
Holiday Bake Sale 2020	0	0	
Transfer In	0	0	
5% Gift Assessment	-815	-530	
<b>Total Operations Current Year Revenue</b>	<b>14,585</b>	<b>9,995</b>	
<b>ASURA Operations - Expenses</b>			
<i>Printing and Mailing Costs</i>			
Membership Drive	700	776	
Prime Times	1,400	457	
<i>Event Costs</i>			
Paid Events	100	300	Tovrea Castle Tour
Annual Meeting	1,000	0	
Meet & Greet Luncheon	0	0	
Holiday Potluck & Fundraiser	0	0	No Holiday Potluck for 2020
<i>Other Operations Costs</i>			
Scholarship Award	7,700	7,872	\$10,000 - \$2128 paid from Endowment
AROHE	120	120	
Business Luncheons & Service Appreciation	100	0	
Technology Services	3,500	3,297	Wild Apricot (2 yrs) Zenfolio (1 yr)
Professional Services	0	1,106	Replaced office door card reader & cards
Office Equipment & Supplies	1,500	205	Includes postage
Marketing Supplies	200	0	
Seminars	100	0	
Foundation Transaction Fees	100	0	
Transfer Out	0	90	Scholarship donation posted incorrectly
Transfer to Adopt-A-Family	1,000	1,000	
<b>Total Operations Expenses</b>	<b>17,520</b>	<b>15,222</b>	
<b>Increase (Decrease) in Current Year Balance</b>	<b>-2,935</b>	<b>-5,226</b>	
<b>Uncommitted ASURA Operations Funds</b>	<b>32,222</b>	<b>29,931</b>	
<b>General University Allocation (HR)</b>			
<b>Balance Forward</b>	<b>51</b>	<b>51</b>	
<b>Current Year Allocation</b>	<b>7,000</b>	<b>7,000</b>	
<b>Total University Current Year Revenue</b>	<b>7,051</b>	<b>7,051</b>	
<b>Expenses Charged to Allocation</b>			
Annual Report	200	0	
Bylaws & Ballots	200	28	
Office Equipment & Supplies	1,100	0	
Prime Times Fall/Spring/Summer	3,000	575	
Copier/FAX Equipment Annual Lease	922	922	
Membership Drive	600	0	
Technology Services	300	0	Pantheon Web Hosting
Marketing Supplies	100	0	
8.5% Administrative Service Charges	579	127	
<b>Total Subsidized Expenses</b>	<b>7,001</b>	<b>1,653</b>	
<b>Uncommitted University Funds For Operations</b>	<b>50</b>	<b>5,398</b>	



Account Categories	FY21 Approved Budget	Actual YTD As Of 1/31/2021	COMMENTS
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<b>Special Projects</b>			
<b>Special Projects - Income</b>			
<b>Balance Forward</b>	<b>100</b>	<b>100</b>	
<b>Current Year Revenue</b>			
Gift-In-Kind Receipts		7,868	Includes \$168 GIK receipts not yet adjusted
Friends/Phx Library Book Sale Net Income	1,000	0	
<b>Total Special Projects Current Year Revenue</b>	<b>1,000</b>	<b>7,968</b>	
<b>Special Projects - Expenses</b>			
Gift-In-Kind Adjustment		7,700	
Transfer out 1/2 of Book Sale Income to Scholarship	480	0	
Transfer out 1/2 of Book Sale Income to Video History	480	0	
Mail Service - General	0	25	Delivered book donation from Poly Campus
Foundation Transaction Fees	40	0	
<b>Total Special Projects Expenses</b>	<b>1,000</b>	<b>7,725</b>	
<b>Increase (Decrease) in Current Year Balance</b>	<b>0</b>	<b>243</b>	Includes \$168 GIK receipts not yet adjusted
<b>Uncommitted Special Projects Funds</b>	<b>100</b>	<b>343</b>	Includes \$168 GIK receipts not yet adjusted

<b>Adopt-A-Family</b>			
<b>Adopt-a-Family - Income</b>			
<b>Balance Forward</b>	<b>550</b>	<b>550</b>	
<b>Current Year Revenue</b>			
Adopt-A-Family Donations	500	740	
5% Gift Assessment	-25	-37	
Transfer from Operations	1,000	1,030	Includes 1 duplicate renewal transferred
<b>Total Adopt-A-Family Current Year Revenue</b>	<b>1,475</b>	<b>1,733</b>	
<b>Adopt-A-Family - Expenses</b>			
Holiday gifts	2,000	1,257	
<b>Total Adopt-A-Family Expenses</b>	<b>2,000</b>	<b>1,257</b>	
<b>Increase (Decrease) in Current Year Balance</b>	<b>-525</b>	<b>476</b>	
<b>Uncommitted Adopt-A-Family Funds</b>	<b>25</b>	<b>1,026</b>	

<b>Video History</b>			
<b>Video History - Income</b>			
<b>Balance Forward</b>	<b>7,533</b>	<b>7,533</b>	
<b>Current Year Revenue</b>			
Video History Donations	350	530	
Transfer in 1/2 of Book Drive Proceeds from Spec Proj	480	0	
5% Gift Assessment	-18	-26	
<b>Total Video History Current Year Revenue</b>	<b>812</b>	<b>504</b>	
<b>Video History - Expenses</b>			
Equipment & Supplies	100	0	
Software Licenses	194	194	Premiere Pro CC License
Interview Expenses	1,000	0	Requested by VHP chair
Foundation Fees	15	0	
Transfer Out	309	0	
<b>Total Video History Expenses</b>	<b>1,618</b>	<b>194</b>	
<b>Increase (Decrease) in Current Year Balance</b>	<b>-806</b>	<b>310</b>	
<b>Uncommitted Video History</b>	<b>6,727</b>	<b>7,843</b>	

Account Categories	FY21 Approved Budget	Actual YTD As Of 1/31/2021	COMMENTS
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**History Book**

**History Book - Income**

<b>Balance Forward</b>	<b>1,919</b>	<b>1,919</b>	
<b>Current Year Revenue</b>			
History Book Donations	0	0	
5% Gift Assessment	0	0	
<b>Total History Book Current Year Revenue</b>	<b>0</b>	<b>0</b>	

**History Book - Expenses**

History Book	1,500	0	1500 as per Board approval
Foundation Management Fees (5%)	75	0	
<b>Total History Book Expenses</b>	<b>1,575</b>	<b>0</b>	
<b>Increase (Decrease) in Current Year Balance</b>	<b>-1,575</b>	<b>0</b>	
<b>Uncommitted History Book</b>	<b>344</b>	<b>1,919</b>	

**Scholarship Endowment Fund**

**Scholarship Endowment Principal (40003616)**

<b>Balance July 1</b>	<b>68,274</b>	<b>68,274</b>	
Invested Funds Gain (-Loss)	100	9,583	
Payout to Endowment Spending - FY20	-2,200	0	
Current-Year Contributions	1,000	980	
Foundation Management Fees	-900	-934	
<b>Total Scholarship Endowment Principal</b>	<b>66,274</b>	<b>77,903</b>	

**Scholarship Endowment Spending (70003616)**

<b>Balance July 1</b>	<b>2,498</b>	<b>2,498</b>	
Payout from Endowment Principal - FY20	2,200	0	
Transfer from Special Projects (Book Sale Proceeds)	960	0	
ASU Scholarship	-2,300	-2,128	
<b>Total Scholarship Endowment Spending</b>	<b>3,358</b>	<b>370</b>	

## ASURA MEMBERSHIP TOTALS

2021 Membership Year

Counts	As Of 2/4/2021	As Of 2/6/2020	This Yr -Last Yr	More Counts	As Of 2/4/2021	As Of 2/6/2020	This Yr -Last Yr
<b>Current-year Members</b>	<b>817</b>	<b>759</b>	<b>58</b>	<b>By Former Employment Category</b>			
Renewals from prior years (any prior year)	539	485	54	Faculty and Faculty w/ Admin Appt	343	323	20
Introductory members	278	274	4	Academic Professional	48	42	6
Paid for the current year, now deceased	4	1	3	Staff	162	170	-8
				University Staff (Service Professional)	229	188	41
<b>Last Year's Members - Not Renewed</b>	<b>218</b>	<b>210</b>	<b>8</b>	Administrative	35	36	-1
Members last year, now deceased	1	4	-3	<b>Having an Arizona Address</b>	<b>761</b>	<b>702</b>	<b>59</b>
<b>By Retired-from Organization</b>				<b>Level of Activity</b>			
Retired from ASU	798	737	N/A	Checked at least one volunteer area	146	138	8
Retired from another university	1	3	N/A	Attended at least one event this year	179	179	0
Former ASU employee, retired elsewhere	3	3	N/A	Attended an event ever	386	351	35
Still employed at ASU	15	16	N/A	Logged in to Members-only Site (ever)	243	211	32
				Made an additional donation this yr	171	140	31
<b>By (Approx.) Time Since First Joining</b>				<b>Non-members in Database</b>			
In Introductory Period	278	274	4	Was a member at some time	388	382	6
Members for 0-2 Years (excl Introductory)	69	34	35	Never a member	25	226	-201
Members for 3-5 Years	124	113	11				
Members for 6-10 Years	92	89	3				
Members for more than 10 Years	254	249	5				
<b>By Communications They Want to Receive<sup>1</sup></b>							
Upcoming Event Announcements (e-mail)	664	636	28				
Obituary Notices (e-mail)	315	312	3				
Prime Times (US Post)	733	692	41				
Other ASURA Communications (e-mail)	602	574	28				
None of The Above	16	12	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.

## List of Bills in Arizona Legislature

HB2008- ASRS; employer; member;contributions  
HB2028-treasurer; investments of trust funds  
HB2059-retirement systems; benefits computation; return to work  
**HB2138-ABOR; optional retirement programs**  
HB2139-ASRS;self-insurance program  
HB2433 – Patients’ Bill of Rights  
HB2434 – Telehealth; health care providers  
HB2612 – Retirement system; investment fees; disclosures  
SB1051 - ASRS;employer payments; ineligible contributions  
SB1052 - ASRS;required beginning date;distributions  
SB1053 - ASRS;non participatory employer liability  
SB1054 – ASRS; self-insurance program (parallels HB2139)  
SB1075 – Health care insurance; amendments (parallels HB2119)

### Sneaky Strike All Bills:

HB2029  
HB2030  
HB2039  
HB2053  
HB2179  
HB2360  
SB1042  
SB1117

### Election Bills

HB2039 - elections; hand counts; five percent  
HB2720 - ballots; elections contests; certificates  
SB1002 - early voting envelopes; party affiliation  
SB1003 - darling voting; signature required; notice  
SB1010 - recount requests; amount; bond; procedure  
SB1020 - voting locations; electioneering  
SB1023 - elections; county supervisors; ballots; markers  
SB1025 - elections; polls;override notification  
SB1036 - voting systems technology study committee  
SB1068 - elections manual; legislative council; GRRC  
SB1069 - permanent early voting list; eligibility  
SB1071 - voting irregularities; report; legislative review  
SB1072 - election contests; filing deadline  
SB1083 - elections; recount margin  
SB1103 - lieutenant governor; duties; ballot  
SB1104 - campaign finance construction; disclosures; itemization  
SB1106 - voting residency; intent to remain  
SB1107 - redistributing petition signatures; 2022 candidates

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