

## Annual Report from the Board 2021-2022



December Holiday Potluck in the Park

This report is for publication at the Annual Meeting  
April 19, 2022

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## Contents

ASURA BOARD AND OFFICERS .....	2
ASURA OFFICE CONTACT INFORMATION .....	2
EXECUTIVE COMMITTEE MESSAGE.....	3
OFFICE VOLUNTEERS .....	4
COMMUNITY OUTREACH COMMITTEE.....	5
Adopt-A-Family Program .....	5
Video History Project.....	5
Scholarship Committee .....	6
EVENTS COMMITTEE .....	7
Luncheons and Special Events .....	7
Seminars .....	8
Pre-Retirement Seminars.....	8
Travel.....	9
FINANCE COMMITTEE .....	9
Book Donations .....	10
GOVERNMENT LIAISONS .....	11
Legislative Liaisons.....	11
ASRS Activities .....	12
SISTER RETIREMENT INSTITUTIONS.....	13
Tri-University Retirees Association .....	13
AROHE (Association of Retirement Organizations in Higher Education) .....	14
MEMBERSHIP AND COMMUNICATIONS COMMITTEE .....	14
Membership.....	14
E-News .....	15
<i>Prime Times</i> Newsletter .....	15
Obituaries .....	16
Website.....	16
TREASURER’S REPORT .....	18
Table 1 – Financial Report for Fiscal Year 2021-2022, as of 3/31/2022.....	19
Table 2 – ASURA Membership Totals as of March 16, 2022.....	23

**ASURA BOARD AND OFFICERS**

2021-2022 (outgoing)

Officers

President – Vacant (Larry Edmonds resigned January 2022)

Vice President – Vacant

Past President – Carl Cross

Secretary – Jane Carey

Treasurer – Barry McNeill

Board Members (year term expires)

Rojann Alpers (2024)
Jane Carey (2022)
Larry Carlson (2022)
Evelyn Cesarotti (2022)
Carl Cross (2022)
Kathy Gunn (2023)
Mark Henderson (2023)
Sue Henderson (2024)
Frank Koonce (2022)
Barry McNeill (2024)
Helene Ossipov (2024)
Mary Stevens (replacing Dave Schwalm --who resigned September 2021) (2023)
Tara Roesler (replacing Carol Tassone--- --Taylor who resigned Sept. 2021) (2024)
Pat Schneider (replacing Larry Edmonds --who resigned January 2022 (2023)

Ex-officio Members

Alumni Assoc. - John Davis & Maria ----  
---Symington

Emeritus College - Ruth Jones

Human Resources – Lynna Soller

University Affairs - Kendra Burton

University Club - Carl Cross

University Senate - Eduardo Pagán

University Staff Council – Carolyn Starr

2022-2023 (incoming)

Officers

President – Bill Stasi

Vice President – TBD

Past President – Tara Roesler

Secretary – Pat Schneider

Treasurer – Barry McNeill

Board Members (year term expires)

Jo Ellen Alberhasky (2025)
Rojann Alpers (2024)
Bev Buddee (2025)
Partha Dasgupta (2025)
Terrie Ekin (2025)
Kathy Gunn (2023)
Mark Henderson (2023)
Sue Henderson (2024)
Barry McNeill (2024)
Helen Ossipov (2024)
Trudy Perez (2023)
Pat Schneider (2023)
Bill Stasi (2025)
Mary Stevens (2023)
Tara Roesler (2024)

Ex-officio Members

Alumni Assoc. – Amy Rosen

Emeritus College - Ruth Jones

Human Resources - Lynna Soller

University Affairs - Kendra Burton

University Club - Carl Cross

University Senate - TBD

University Staff Council - Carolyn Starr

**ASURA OFFICE CONTACT INFORMATION**

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## EXECUTIVE COMMITTEE MESSAGE

Carl Cross, Jane Carey, Barry McNeill

Submitted by ASURA Executive Committee



This has been an up and down year for the Retirees Association. On the downside, COVID-19 made in person events and activities for the most part impossible and the Association lost its Vice President in September and President in January. As was the case last year, the Board did not feel an in person Annual Meeting was reasonable and so again this year's meeting is virtual

On the other hand, as you read this document you will see there is much to be said about the upside of the year. You will:

- read about the efforts of the Government Liaisons to keep the Board informed and to voice the Board's opposition to the Legislature's Guns on Campus legislation
- see that the Office returned to fairly normal operation
- read about the two events in Papago Park put on by the Luncheons and Special Events Committee
- read about the efforts by the Health Liaisons to improve the comparative information between health insurance programs
- see that the Travel Committee is on the verge of bringing forth a number of trips both local and international
- read how the Website Committee developed two new websites, one for members and one for the ASURA volunteers.
- read about the Finance Committee's decision to recommend increasing the scholarship endowment
- read about how the Adopt-A-Family Committee was able to get gifts and wrap them for ASURA's two families
- see how the Pre-retirement Seminar Committee went big time with seminars every month
- read about the work required to select next year's scholarship recipient (read the report to find out who this is)
- read about ASURA's stable membership

And if that were not enough, Bill Stasi will be ASURA's President next year. If you are a new member, you may not know much about Bill. He has been a long-time active member, chairing the Travel Committee, Co-chairing the beginning of the Seminar Committee, and serving on the Board. The Executive Committee is pleased to be able to hand Bill the gavel during the Annual Meeting.

Joining Bill on the Board this year are:

- Jo Ellen Alberhasky, who has been working with Larry Carlson the past year on ADOA health insurance issues
- Bev Buddee, who has been Board Secretary and longtime Office volunteer
- Partha Dasgupta, who is a newish member and has been working on the Luncheon and Special Events and Website Committees
- Terrie Ekin, who has been a long time member and this will be her first time on the Board

Carl Cross, Jane Carey, and Barry McNeill  
ASURA Executive Committee

**OFFICE VOLUNTEERS**

Submitted by Linda Van Scoy and Nancy Lesko



Happy New Year and Welcome Back!  
Your ASURA Office volunteers are back on our regular schedule of four days a week: Monday, Tuesday and Wednesday, 9-3 and Thursday, Noon- 3. Closed Fridays. We are looking for a Thursday morning volunteer; interested? – contact one of the Office Co-managers.

We are also receiving mail in person at our office daily. We even had a mail slot installed in the office door so Mail Services can leave mail for us in case the office isn't staffed.

As we transition back to in-person meetings we have options for meeting rooms in the building.

- The room on the second floor, 201B, is easy to schedule: Just let an office volunteer know the date and time and we put it on the large office calendar. The key is kept at the front desk and you can pick it up ahead of your meeting or stop by the day of, assuming it is within the office schedule:
- The second room is on the third floor and is reserved through University Central Room Scheduling. Contact the ASURA office to check on availability. Because it is also used as a classroom there is a possibility we could be “bumped” if it is needed for a class.
- One more possibility is our copy room which seats 6 comfortably. So, if you have a small gathering that’s available most any time.

We are still collecting books and we do have some bankers’ boxes if you need them.

We are back in business and happy about that! Call us anytime you have questions or need assistance: 480 965 7668. Below are photos of our Office volunteers and a list of our Managers.

Office Co-Managers – Linda Van Scoy ([lvs@asu.edu](mailto:lvs@asu.edu)) and Nancy Lesko ([nclesko@asu.edu](mailto:nclesko@asu.edu))  
 Business Operations Manager – Carolyn Minner ([carolynminner@outlook.com](mailto:carolynminner@outlook.com))  
 Technology Manager – Connie McNeill ([conniemcneill@outlook.com](mailto:conniemcneill@outlook.com))  
 Business Operations Manager -[CarolynMinner](mailto:carolynminner@outlook.com) (carolynminner@outlook.com)

 Nanci Beardsley	 Bev Budde	 Nancy Lesko	 Connie McNeill	 Dorothy Meunier
 Carolyn Minner	 Jeannette Robson	 Tara Roesler	 Linda Van Scoy	 Sharon Wielert

## 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



The Adopt-A-Family Committee was chaired by Ginny Sylvester with committee members Karen Burstein, Henry Stevens, Cecelia Hook., and Julia Martin.

The Adopt-A-Family crew had 2 families to buy gifts for. The ASU family consisted of a single mother with 3 children who was starting on a new path career and enrolled in a master's program. The other family, from Tempe Elementary Schools, had recently arrived from Honduras and also had 3 children.



We spent \$1900 in total. Buying \$125 gift cards for each family for their Thanksgiving celebration and then buying most of what the families wanted for Christmas and finally purchasing \$125 gift cards for each family for the Spring/Easter holiday celebration. We were able to find almost everything on their wish lists, and even gave each family a gift card to Olive Garden so they could enjoy a holiday meal without cooking!



I especially want to thank my fellow shoppers, Karen Burstein and Henry Stevens, for hanging in with me as we wandered around looking to find just the right thing during this 'supply chain' crisis. We also had a really nice time spending an afternoon wrapping presents, joined by Cecile Hook, a magical "wrapper". I'm grateful that we managed to get this accomplished before Omicron hit. We had a 4<sup>th</sup> volunteer, Julia Martin, whose schedule never seemed to match ours but I am appreciative of her willingness to help.

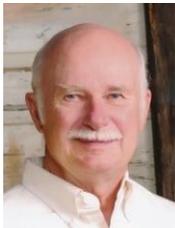
Ginny Sylvester

ASURA Adopt-A-Family Chair

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### Video History Project

Submitted by Barry McNeill



**Leadership History:** The Video History Project is in its 20<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 online capabilities at the ASU Library Repository. In 2019 Barry McNeill took over the chair and has placed emphasis on developing metadata standards and eliminating the backlog in unedited

interviews

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

- Interview Selection/Scheduling: **Elmer Gooding, Bonnie Eckard**  
Les Hendrickson, Helene Ossipov, 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**, Barry McNeill, and Pat Schneider

### Committee Work

Another year in the books with no new interviews and no new edits of existing interviews. But there was some activity.

1. The project received the AROHE (Association of Retirement Organizations in Higher Education) Hero Innovation Award (see details in Sister Retirement Intrusions later in the report)
2. During the summer, our collection of interviews in the library was moved to a new repository - KEEP. We were able to have a meeting with the KEEP folks and learned a bit about how the new repository worked. Carl Cross was given permission to add and edit the interviews.
3. In the fall we purchased space on iCloud so we could move the unedited interviews off the Macs in Office making them more available to the editors. The process of moving the interviews turned out to be harder than expected and no progress was made on getting the interviews moved.
4. During the fall / winter months work continued on getting the VHP process updated and posted on the ASURA volunteer website.

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

### Scholarship Committee

Submitted by Joy Shearman



The Scholarship Committee, with Chair, Joy Shearman, Co-Chair Barbara Fargotstein and five volunteers, moved electronically through the selection process in March of 2021. Receiving, reviewing, and arriving at a consensus, all electronically, during the Covid-19 Virus pandemic, required diligence, persistence, and commitment. Therefore, Jan Shore, Ginny Sylvester, Diane Guzy, and Jay Braun deserve a special thank you. Five applications were critiqued by all, and Brittney Gearhart was chosen to receive ASURA's 2021-2022, \$10,000 Scholarship Award.

Brittney is a single mom, and sole supporter for herself and her two children. She is in her junior year in ASU's online program at Edson College of Nursing and Health Innovation. Even with full time school and jobs, she maintains a high GPA and is in the Honors Program. Her goal after BSN is to get an MSN and continue to get a high-grade point, throughout her schooling. Brittney will arrange her schedule to speak to ASURA members via zoom on Annual Meeting Day, April 19<sup>th</sup>, 2022,

This scholarship is funded by contributions from members for that purpose, from book sales, earnings on the scholarship endowment fund, and from the operations budget. Each year the amount available is reviewed and thanks to the donations, \$10,000 has been approved for the next academic year of 2022-2023. One of our former recipients, said as soon as she was able to, she would donate to this scholarship that allowed her to follow her dreams. She went on to get her Law degree and has "paid it forward" by donating the past two years. Volunteering for this committee brings many rewards to the volunteers, as they immerse themselves in the lives of each applicant, while assuring the requirements of academic achievements, community involvement, professional goals and needs, are met. Being 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 Chair  
email: joyrn@cox.net

Jan Shore  
ASURA Scholarship Co-Chair  
Email: janshore@aol.com

## EVENTS COMMITTEE

Submitted by Trudy Perez



The Events Committee was chaired by Trudy Perez. 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; Pre-retirement Seminars – Trudy Perez, Liz Badalamenti, & Sue Henderson, Seminars – Pat Schneider; Luncheons and Special Events – Trudy Perez.

### Coordination of Calendar of Events

Due to the pandemic most of the events were seminars which were easy to coordinate. However the Luncheons and Special Events committee did manage to hold two outdoor events which slotted easily into the seminar schedule.

### Promotion of Events

Eighty-two percent of our members requested and received email notifications for all ASURA organized events, up one percentage point from last year. Of this group, 26% percent registered for at least one ASURA event during the past year, a decrease of seven percentage points over the previous year’s percentage. All events were published on the ASURA 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>).

For the eighteen 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.

Trudy Perez

ASURA Events Committee Chair

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### Luncheons and Special Events

Submitted Trudy Perez



The members of this committee included Mary Stevens, Partha Dasgupta, and Trudy Perez, Chair. As mentioned above, the COVID-19 pandemic shut down all but two in-person events. The committee hopes that by next September it will be possible to have the Meet and Greet Pizza party next September to kick off the new year.

Since indoor events were not considered feasible the committee decided to have an outdoor winter event in lieu of our traditional Holiday Potluck. Mary Stevens volunteered to oversee the December event. She kept the traditional potluck feature but moved the location outdoors to a park. The December event was held by the beautiful lake at Papago Park, Tempe and even had a few ducks splashing welcome. The day was beautiful and thirty plus attendees were excited to be together in person and outside of the ZOOM box. Pizza was not missed as we shared food from many cultures and what a gift to have several new retirees join us. It was a day that marked the beginning of togetherness, and you know how we retirees enjoy telling stories and catching up on life. Everyone really enjoyed the event and said we should do it again in the spring.

Mary and Special Events team took on the spring event “A Spring Fling in the Park, another potluck. There were thirty-one attendees, eleven who had not attended the December event. The event was another success in getting members back together with some wonderful food.

Trudy Perez

ASURA Events Committee Chair

[Trudy.perez@asu.edu](mailto:Trudy.perez@asu.edu)

**Seminars**

Submitted by Pat Schneider



The **Seminar Committee** members include Beverly Buddee, Sue Henderson, Carol Kubato, Jay Butler and Jeffrey Chapman. Five (5) seminars were held during the 2021-22 term. The seminars were all held via Zoom due to the continued concern for in-person gatherings under COVID-19.

- The annual open enrollment seminar was held on Thursday, October 7, 2021 via Zoom. Over 100 people attended the seminar, which for the first time was opened to people from both NAU and UArizona. Rob Foster a community volunteer with AARP presented the ABCD’s of Medicare. Randi Gray from ASRS and Tracie Carruthers from ADOA spoke to the health plans offered by both organizations. There were no changes in coverage to plans offered by ASRS and ADOA, so this year was a passive enrollment for plan participants if you were making no changes to your plans.
- “Downsizing/What do I do with my stuff?” was the first seminar of 2022, held on Thursday, January 13, 2022. ASURA members Ruth Jones and Don and Alleen Nilsen presented their stories of downsizing and moving into a planned retirement community. Sue Henderson (ASURA member), along with Marianne Garriti from *Moving Forward* presented on what it takes to get rid of that “stuff” addressing not only the physical disposition of it, but also the emotional attachment.
- A second seminar, “Volunteer Opportunities with CASA”, was held in January on Monday, January 24, 2022 where Roger Lurie and Lawrence Falvey presented to the participants opportunities as a volunteer CASA (court appointment special advocate) and how we can become involved in helping kids who don’t always have a voice once they are placed in foster care.
- Thursday, February 10, 2022 brought Duane Roen to present on “An Event that Changed my Family’s History”. This seminar gave participants the opportunity to share events in their family’s past that changed their history. Duane also provided questions and ideas to get us thinking about our history and how important it is for us to record it for our future generations.
- The last seminar for the 2021-22 term was held on Thursday, March 10, 2022. This seminar titled “Senior Living Options” was presented by Rita McBride from *A Better Solution for Senior Living*. Rita addressed the various senior living options with comparisons, cost ranges and tips on how to choose what’s right for you.

Patricia (Pat) Schneider  
Chair, Seminar Committee

**Pre-Retirement Seminars**

Submitted by Trudy Perez, Liz Badalamenti, & Sue Henderson



The Pre-Retirement seminars will add information to what HR provides for nearing retirement. We strive to share what retirees wish they had known before they retired. The seminars are available via Zoom around the noon hour. Twelve seminars were held this year ranging in topics from Social Security, Medicare, ASRS, financial information, TIAA/CREF & Fidelity and more. We are grateful to partner with OHR (Office of Human Resources) who presents twice a year. Attendance and interest remain high.

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ASURA Co-Chair Pre-Retirement Seminars  
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## Travel

Submitted by John Brock



The members of the Travel Committee are John Brock, chair, Joyce Hartman Diaz, Tara Roesler, Jeffery Bush, and Gary Kleemann.

The travel committee is trying to be active. We report that 9 persons have signed on for the Iceland tour that departs Sept. 30 and returns to AZ October 12. If other people want to sign in for this trip, they can get the information from the ASU RA website, or contact the travel committee.

We are talking about a Costa Rica trip for maybe the spring of 2023. The Cottonwood art and winery trip maybe set for the Fall of 2022, but no firm info at this date. We are exploring some in-state travel (or at least close to AZ borders) with the Detours company. We were contacted by a cruise and tour company Mayflower that works out of the west valley. They may have some things to interest our committee and ASURA in general. Our committee meets the first Tuesday of the month at 1 PM at the Tempe Public Library at the coffee shop, you are always welcome to attend. Submitted Feb. 2, 2022 John H. Brock, Travel committee chair

John Brock

ASURA Travel Committee Chair

e-mail: [john.brock@asu.edu](mailto:john.brock@asu.edu)

## FINANCE COMMITTEE

Submitted by Barry McNeill



The members of the 2021-2022 Finance Committee were Barry Bruns, Barry Mc Neill, chair, Carolyn Minner, and Gary Kleemann. Jerry Snyder was a consultant.

At the September meeting the committee submitted the annual Financial Health Report (see September Board minutes on the ASURA website for report). The report showed ASURA to be financially healthy with an adequate cash reserve, much less than the actual funds in the Operations account, primarily because spending during the year was off due to the pandemic. The report went on to suggest that the excess funds, those funds in the Operations account in excess of the adequate cash reserve, were higher than need be, and consideration should be given to reducing them back to historic levels.

The Board approved ASURA scholarship of \$10,000 for the next year at the September Board meeting.

At the October Board meeting the committee presented the results of its annual review of expenditures. The committee found that revenues and expenditures were reasonable and consistent with the budget and in agreement with applicable ASU Foundation records. The report again noted the large excess funds and suggested the Finance Committee should consider options for the Board to consider on what to do with this "surplus". While either long-term or short-term options are possible, until getting COVID better under control and effectively behind us, short-term or one-time options seem a more reasonable approach to consider. The full report is included with the October minutes.

In February the committee met again to discuss options for the excess funds in the Operations account. Four options were considered: 1) purchase some desired but expensive item, 2) move the money to the scholarship endowment, 3) increase the size of the scholarship, and 4) increase the scholarship but split into two scholarships. The committee decided, primarily heading the advice in the October report, to move \$10,000 to the endowment. A report was written and presented to the March Board meeting (see minutes for a copy of the report). The committee's recommendation was approved in the March Board meeting.

Barry McNeill

ASURA Finance Committee Chair

e-mail: [barry\\_mcneill@outlook.com](mailto:barry_mcneill@outlook.com)

**Book Donations**

Submitted by Mary Stevens



In 2011, the ASU Foundation/ASURA entered into an agreement with a local non-profit organization, Friends of the Phoenix Public Library (“Friends”). Per the agreement, Friends sell books donated by our members, other ASU retirees and anyone else who wishes to donate. Friends sells the donated books on-line, retains a 15% commission and splits the sales proceeds with ASURA every quarter. Friends started selling ASURA-donated books in July 2011. Donors deliver their books to the ASURA office and sign a gift donation form, which is forwarded to the ASU Foundation. The Foundation sends each donor a gift receipt/ thank-you letter.

On a quarterly basis, Friends provides ASURA with sales reports and checks for the proceeds from the sales of our books. In my annual reports, I have shown a list of annual proceeds ASURA received from Friends for the calendar year, January 1-December 31. Last year, 2020, there was confusion on whether Friends uses a calendar or fiscal year, July 1-June 30.

In last year’s annual report for 2020, Carolyn Minner, ASURA Business Manager, and I reviewed and calculated annual proceeds from 2012 – 2020, using fiscal, not calendar years. As result, the amounts of proceeds per year changed. This year, we learned that Friends does in fact use the calendar year. I went back to reporting annual proceeds for 2021 and total proceeds for calendar years 2011-2021. The proceeds for calendar year, January 1 – December 31, 2021, is \$5522.

Due to Covid 19, the Friends’ warehouse was closed a good part of the year and some staff resigned, including a driver. As a result, we did not receive as many book pick-ups from Friends as we had in the past and the book donations storeroom was completely full a good portion of the time. Friends seems to be back on track with pickups now.

Larry Carlson has assisted greatly with picking up book of donors who are unable to deliver their books to our office. He drops them off at the office and has also delivered many boxes directly to the Friends warehouse, when feasible. Many thanks to Carolyn, Linda Van Scoy, Nancy Lesko and Larry for their significant assistance in keeping our program on track during the last two difficult years.

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

**Annual Proceeds Amounts Rounded  
Revised to Reflect Calendar Years (except 2020)**

<b>Year</b>	<b>Amount (\$)</b>	<b>Year</b>	<b>Amount (\$)</b>
CY 7/2011	\$72	CY 2017	\$877
CY 2012	\$1,092	CY 2018	\$1,257
CY 2013	\$ 468	CY 2019	\$1,425
CY 2014	\$ 718	FY 2020	\$1,928
CY 2015	\$1,486	CY 2021	\$5,522
CY 2016	\$1297		
<b>TOTAL 2011-2021</b>		<b>\$16,142</b>	

Mary Stevens  
ASURA Book Donations Chair  
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## GOVERNMENT LIAISONS

The Government Liaison Committee acts as an agent of the Board to provide advocacy in relation to the Arizona State Legislature, the Arizona State Retirement System (ASRS) and such other agencies as the Board may designate. Per the ASURA Bylaws, the Committee is charged to exert influence on targeted agencies as approved by the ASURA Board and in consultation with the Arizona State University Retirees Association (ASURA) Officers.

### Legislative Liaisons

Submitted by Jeri Meeks



The 55<sup>th</sup> Legislature Second Regular Session opened in January 10, 2022 and, at this writing, we are more than half way through this legislative session. The initial 1,560 bills introduced in this session have been slimmed down considerably, with some new and possibly provocative bills yet to be presented late in the session using the “strike everything” option. But that’s not to say that we are waiting on dubious bills. A group of dedicated lawmakers continue to pursue voting system changes and a new 2020 general election audit. Bills allowing guns on campus are, again, an issue. Legislation affecting ASRS funding, university governance and assisted living accommodations and staffing are being considered.

There have been dozens of bills introduced this year affecting the State of Arizona voting system. Few have made the crossover from House to Senate, or vice versa, but radical changes are still moving through the legislature. The bills still moving forward require additional proof of residence, date and place of birth and citizenship (HB2492), increase the minimum number of precincts for post-election recounts (SB1259) and address changes for early ballots. The House Bill introduced by Rep. John Fillmore, R-Apache Junction, requiring all voting to take place on election day only (HB2596) was effectively shut down by House Speaker Rusty Bowers when he assigned the bill to all twelve of the House committees on February 1<sup>st</sup>. But the Senate has given this bill a second chance, using a strike everything amendment. Senator Kelly Townsend, R-Mesa, added Fillmore’s bill as an amendment to a bill that had already passed the House (HB2289), so it sidesteps the 12 committee assignments it got from Speaker Bowers. HB2289 not only restricts voting to same day, it requires paper ballots only, which are tabulated by hand (no electronic voting and tabulating devices). It repeals the Active Early Voting List and repeals authorizations and requirements related to voting centers, emergency voting centers and on-site early voting. This bill, now amended by the Senate, goes back to House floor for a vote.

There are several active bills affecting the universities that have moved from the Senate to the House. SB1082 allows an ASRS employer to prepay pension contributions by borrowing or by entering into a lease-purchase agreement for school buildings. SB1626 requires that ABOR and each community college establish a prevention of sexual misconduct on campus task force. House Bill HB2231 reinstates a requirement that the state university offer pro bono assistance to small land owner claimants, with no legal counsel, in the general stream [water rights] adjudications. Guns on the university campus has been another hot button this year, with a seemingly staunch group of supporters – and a larger group of opposers. Neither of the Senate or House bills, prohibiting governing boards from taking action regarding the possession of concealed or open carry weapon on campus by a permit holder, has moved forward. But we are watching for a strike everything revival. Interestingly, an active House bill (HB2448) requires school districts and charter schools to provide students in grades 6-12 age-appropriate firearms safety training based on a firearms accident prevention program.

Bills pertaining to retirees and seniors address regulation and licensure of senior community residences and related nurses and staff. Both the Senate and House have active bills working their way through the legislative bodies addressing fingerprint requirements for care facilities and regulation of nursing care and assisted living staff. Interestingly, there is a Senate bill (SB1257) that addresses caregiver occupancy in RV parks. This bill allows a disabled resident to have one or more live-in health care providers or support persons in their dwelling, without the park charging an extra fee.

Dr. Crow continues to support ASU's *Public Enterprise* model and links ASU's continuing successes with the emergence of national service universities, whose focus is high value jobs, workforce training and the attraction and retention of leading corporations. This Model also agrees with ABOR's *New Economy Initiative*, which is designed to improve the state's workforce and support a healthy economy. ASU facilitates the *New Economy Initiative* with significant investments in ASU's Ira A. Fulton School of Engineering, providing applied learning opportunities for students, a ready to go workforce for AZ Technology startups and partnerships with established AZ Technology companies. These new ASU Science and Technology Centers will bring students, faculty, researchers and private sector partners together to both learn and meet business objectives in the areas of communications technologies, extreme environments, human performance, energy materials and advanced manufacturing. I encourage you to visit [neweconomy.asu.edu](http://neweconomy.asu.edu) for more information.

At this writing, the appropriation request is still under discussion.

ASURA Lobbyists Jeri Meeks and Pat Schneider are virtually attending the Governor's Advisory Council on Aging meetings again this year. Sponsored by the Governor's Office of Youth, Faith and Family, 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.

We are pleased to have stable 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, Larry Carlson, Dick Jacob, and all of our members who bring issues affecting retirees to our attention.

Would you like to be a Legislative Watchdog? Please contact me at [jeri.meeks@asu.edu](mailto:jeri.meeks@asu.edu).

Jeri Meeks  
ASURA Government Liaison Chair  
[jeri.meeks@asu.edu](mailto:jeri.meeks@asu.edu)

### **ASRS Activities**

Submitted by Dick Jacob



The Board of Trustees of the Arizona State Retirement System has met only electronically during the period of the pandemic. Although the public, myself included, can call in, the meeting proceedings themselves attended in that manner are quite uninformative. However, during a lunch meeting with ASRS Director Paul Matson, and based on documentation provided with the meeting agenda, I obtained the following information of interest to ASURA members from the ASRS Board Meeting of November 12, 2021:

#### **1. Permanent Benefit Increase (PBI):**

The ASRS Board approved a PBI for eligible retired members and survivor beneficiaries beginning with the July 2022 benefits check. To qualify for the PBI a retiree must have been retired by July 31, 2021. Retirees with an ASRS membership date of Sept. 13, 2013 or later are not eligible under state law for a PBI, nor are retirees who choose a lump-sum benefit instead of a monthly annuity. The annual increase will be \$11.49 for each year of service. Thus, for example, the calculation for a retiree with 20 years of service is as follows: \$11.49 X 20 years of service = \$229.80 annual PBI, divided by 12 months = \$19.15 increase to monthly benefit payment.

#### **2. Contribution Rates**

Contribution rates paid by active members and their employers will decrease by 0.24% of pay, falling from 12.41% to 12.17% on July 1, 2022.

#### **3. Financial Health of the ASRS Fund:**

The (actuarial) funded status of the total plan as of June 30, 2021 is 71.5%. If you include the unrecognized gains still in the investment portfolio, the funded status would be 80.0%. The (actuarial) funded status of the health benefit supplement plan as of June 30, 2021 is 133.1%. If you include the unrecognized gains still in the investment portfolio, the funded status would be 148.9%. The (actuarial) funded status of the long term disability plan as of June 30, 2021 is 87.6%. If you include the unrecognized gains still in the investment portfolio, the funded status would be 94.0%.

#### 4. **Investment Returns:**

The ASRS investment returns as of June 30, 2021 are:

1 year: 25.1%  
3 year average: 10.3%  
5 year average: 10.9%  
10 year average: 8.9%

The ASRS investment returns as of September 30, 2021 are:

1 year: 21.1%  
3 year average: 9.9%  
5 year average: 10.5%  
10 year average: 10.3%

#### 5. **Prefunding Initiative**

Due to both the current very low interest rate environment, and also the cash balances that some employers have generated, the ASRS has conducted significant research and analysis to enable it to accept additional contributions from employers, and is working with the State legislature on a program where the ASRS can accept additional employer contributions. There are multiple benefits for such a program including increasing expected returns on the funds, decreasing unfunded liabilities, increasing funded status, and lowering expected future contribution rates.

#### 6. **Legislature**

There were no successful legislative attempts to separate the Board of Regents system from the ASRS.

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

#### **SISTER RETIREMENT INSTITUTIONS**

ASURA reached out this year and actively interacted with a several different retirement associations.

##### **Tri-University Retirees Association**

Submitted by Carl J Cross



This group consists of representatives from the Arizona State University Retirees Association (ASURA), the Northern Arizona University Retirees Association (NAURA), and the University of Arizona Retirees Association (UARA). Historically each association took its turn hosting an annual meeting in October. With the Covid lockdown, NAU decided to conduct the 2020 meeting via Zoom. Participation was so good that the meeting was continued in November to accommodate everyone's input.

Because everyone enjoyed the lively and productive exchange of ideas, it was agreed to begin meeting quarterly. Dates were set for 2021 and Shannan Rice of NAU agreed to set up the Zoom meetings and send out reminders, asking for agenda items. The three universities have continued to meet each quarter as we

offer suggestions to help each of our organizations to not only grow in numbers, but to offer more opportunities for participation.

A common concern for all is state legislative actions that directly affect pre-retirees, retirees, and the Arizona State Retirement System. Jeri Meeks, ASURA's Government Liaison, has been very good at keeping the group informed.

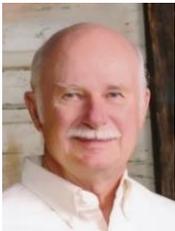
ASURA is privileged to have a robust seminar program. Not only do we present our monthly pre-retirement seminars, but there are also special interest seminars throughout the year. The three retiree associations suggested that we open up our registrations for these events allowing members throughout the state to participate. ASURA has welcomed more than 20 persons from NAURA to join us for these events.

Our bylaws allow "retirees from other universities" to be eligible for membership. NAU said that several of their retirees now live in the valley and might enjoy participating in ASURA events. The Tri-University Retirees Association continues to meet quarterly, always looking for additional ways to serve our respective members.

Carl Cross  
Past President  
e-mail: [carl.cross@asu.edu](mailto:carl.cross@asu.edu)

### **AROHE (Association of Retirement Organizations in Higher Education)**

Submitted by Barry McNeill



In October, at the virtual, annual convention of AROHE (Association of Retirement Organizations in Higher Education), the Video History Project received the Hero Innovation Award. Our nomination was originally submitted last year by Jan Thompson and was prepared by Dave Scheatzle with help from Connie McNeill, Linda Van Scoy, and John McIntosh. Larry Edmonds taped a special thanks to AROHE for the honor.

In February, Carl Cross and Barry McNeill were a panelist on an AROHE webinar dealing with creating an Annual Report. Thirty or so other schools attended. The webinar dealt with why it is important to have an Annual Report as well as discussion on how the reports are prepared. ASURA was selected because of the completeness of its report. The need to have a definitive goal / purpose was an important take-away.

Barry McNeill  
Executive Committee  
e-mail: [barry\\_mcneill@outlook.com](mailto:barry_mcneill@outlook.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.

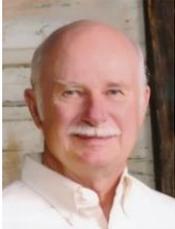
#### **Membership**

This year was a bit closer to a normal year. However, COVID again kept us from having our recruiting opportunities at the various Staff Council events. Counter acting that is the monthly Pre-retirement seminars which get ASURA in front of those considering retirement in the near future.

Table 2 in the Appendix shows that on March 16, 2022 the membership total was 822 up 5 over last year. What is encouraging is the growth in "new", paying members (Members for 0-2 years excluding Introductory Members). This group grew by 83, over three times the number for last year. This suggests that ASURA is delivering the sort of activities and programs this younger group of retirees find of interest. The association continues to have a nice 50-50 balance between faculty and staff,

## E-News

Submitted by Barry McNeill



The E-News editor is part of the Membership and Communications Committee. Seventy-four percent of the membership receive the monthly email, which is generally 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. The tone is light, often with a link to some page in the ASURA website to encourage members to use the site.

This past year 12 issues were published. You can read back issues on the ASURA website at <https://asura.asu.edu/e-news-archives>. Several special editions were published in the summer and when a time dependent item came up right after an issue had been published.

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. Since the Covid pandemic hit us all hard in 2020 and 2021, we have had very few in-person events taking place to be able to get those very photogenic member photos to include in our newsletter. However, with the Fall 2021 “Picnic-in-the-Park” event that took place at Papago Park and “A Spring Fling in the Park” scheduled at the same location for March 2022, we are very hopeful to start publishing our normally photo-filled *Prime Times* again.

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:

- Special projects: Adopt-a-family, Video History, ASURA Scholarship, and Book Donation.
- Travel opportunities: regional excursions and one-two week international travel (**Note:** currently in the planning stages for 2022 is “Iceland in the Fall”).
- Luncheons/social events, workshops, seminars, pre-retirement seminars and a community outreach activity titled “ASU Book Group” which meets monthly during each semester, either via zoom or in-person at the Pipers Writers House on ASU Tempe Campus.
- Monitoring of activities related to Arizona legislation and the ASRS and ADOA retirement benefits.

Through highly 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 is going on in Arizona and how it pertains to our 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 *Prime Times* premiered its first “Advertisement” section offering discounted services designated for our members. This past year, whether it was because of the pandemic or other reasons, our “free advertising” space saw little activity. We would still like to continue with this special feature in our future newsletters so, if you have any friends or business associates interested in taking advantage of our free advertising, please refer them to me at (480) 965-7668 or [jrobson@asu.edu](mailto:jrobson@asu.edu) further information.

June Payne was the first editor of the *Prime Times* which featured its inaugural publication in the early 1990s. *Prime Times* newsletters, beginning with the fall 2004 through spring 2022 issues, are all available on-line at <https://asura.asu.edu/prime-times>. The mail out versions have all been in black and white while the on-line versions have been in color since Spring 2012. However, a special **color** version of the Spring 2021 *Prime Times* was approved, printed and mailed out to all our members. I sincerely hope you all enjoyed reading it as much as I enjoyed having it printed in color for you.

Beginning with the summer 2015 issue, those members who had signed up to receive association e-mail notifications are also being sent the monthly “ASURA E-News” email which includes an easy link to the on-line **color** version of the *Prime Times*. Black & white paper copies continue to be mailed to our membership through the Tempe Campus ASU Mail Services.

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

### Obituaries

Submitted by Tara Roesler



From July 2021 through mid-November 2021, obituaries were handled by Becky Reiss. Becky retired as the Obituaries Notifications Volunteer at the end of November after completing 20 years. ASURA is extremely grateful for her dedicated service. I assumed the role in mid-November.



The Obituary Notifications Volunteer receives notifications of the passing 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 from various sources including the ASU Foundation and ObitMessenger as well as notifications from members and families.

Once notified of a passing, an obituary notice is prepared to include a picture of the deceased (if available), age, date of death, ASU Affiliation/years, survivors and information on memorial services and/or memorial donations. These notices are e-mailed to all members who have requested inclusion on the obituary e-mail list. 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.

Tara Roesler  
Obituary Notifications Volunteer  
e-mail: [troes7718@msn.com](mailto:troes7718@msn.com)

### Website

Submitted by Connie McNeill



This year the ASURA websites were completely overhauled. The old sites looked a little stale and some of the content hadn’t been reviewed in several years. An additional major driver for change came in the form of new mandates from ASU:FF

- Meet new and vastly more detailed branding standards for websites that use the asu.edu domain;
- Stop using old technology (Drupal 7 and Webspark 1) by September 30, 2021. Instead, use new tools (Drupal 9 and Webspark 2) that would be available July 1, 2021. The new tools would help units comply with the new branding standards and also provide many new options for designing a modern website. However, it would not be possible to simply upgrade old sites to use the new tools.

ASU had the replacement technology and new ASU branding standards ready for beta testers in April 2021. Connie and Barry McNeill participated in the UTO's beta test group and found that experience very beneficial. Not only did it allow some time to get familiar with the new tools, but it also allowed them to get to know the very competent people at ASU that created Webspark2 and the branding standards. These people were and are very supportive of the ASURA team. The new tools were made officially available on July 1, 2021, and the race to create the new site was on.

Connie assembled a team that included Carl Cross, Paul Harper, Mark Henderson, Barry McNeill, Carolyn Minner, Jeannette Robson, and Pat Schneider.

- Connie established the technological framework for the site, learning lots of new ways of doing things in the process.
- Barry, Connie, Mark and Paul designed a new menu structure and recreated the old content on the new framework – the part of the content that has unique pages for each topic.
- Carl, Carolyn, Jeannette and Pat used new data-entry forms that Connie created to move ASU obituaries, Board minutes, ASURA past event reports, volunteer bios, E-News archives, and video history interview summaries/links to the new site. Together, they created hundreds of new pages.

The new website went “live” on September 28, 2021, and all the content from the old site had been moved by the end of November. The new site has a nice new look, complies with ASU standards, and is being regularly added to using the new data entry forms.

After the new asura.asu website was up, Connie and Barry turned their attention to the documentation for and by ASURA volunteers that had been created using web pages and documents on the Wild Apricot service. This documentation was mostly 5-15 years old and much in need of review and update. In addition, it was not particularly accessible, and the website did not meet ASU branding standards (which it was not required to do, but... ). Connie and Barry decided that the best way to improve both accessibility and quality was to create another website based on Webspark 2 and to “move” (really, mostly re-write) the documentation to that new site. Pat Schneider worked with them to do just that, and the new site, “Help for Volunteers”, <https://vol.asura.asu>, went live on March 1, 2022.

That leaves one website in need of an overhaul: the Zenfolio site that is used for ASURA's photo galleries. Connie is currently looking at alternative hosts for the photo galleries and expects to have a replacement site up sometime in 2022.

### **Membership & events processing**

There were small changes to the Membership database and Events processing tools and procedures this year:

- Members now access their profile and the membership directory and register for events via the main asura.edu website – they no longer are directed to Wild Apricot to do that.
- Beginning in 2022 the Membership Report is presented to the Board quarterly rather than monthly.
- Paul Harper has developed some improved automation tools for importing new retirees each quarter and possibly also for preparing the membership report.

### **Other technology tools**

In order to facilitate “hybrid” Board meetings – i.e., with most members attending in person but some attending remotely via Zoom, ASURA purchased a product called “Meeting Owl Pro”. It automatically switches microphone and camera to whomever is speaking among the in-person group and broadcasts that person to the Zoom group. Instructions for using Meeting Owl were added to the Help for Volunteers website – see <https://vol.asura.asu.edu/meeting-equipment>.

## Team addition

Partha Dasgupta has volunteered to help with ASURA technology. In the coming year he will be taking over some responsibilities from those who want to “cut back”.

Connie McNeill  
Web & Database Committee Chair  
e-mail: [conniemcneill@outlook.com](mailto:conniemcneill@outlook.com)

## TREASURER'S REPORT

Submitted by Barry McNeill

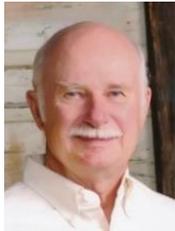


Table 1 in the Annual Report Appendix shows the current fiscal year budget and operating expenditures for ASURA through March 31, 2022. As has been true for previous years Carolyn Minner, the ASURA Business Manager, has done an excellent job of keeping track of our expenditures and income and has prepared a financial report each month for the Board.

A review of the Uncommitted Operations Funds (bottom line on the first page of Table 1) shows:

- an expected budgeted growth to almost \$42, 000
- an actual end of year balance of almost \$27,000
- Note:
  - the budget did not include the \$10,000 transfer to the scholarship endowment
  - the year to date column does not include expenses / revenue that will occur in May and June and amount to about \$1,5000 for publishing the summer edition of Prime Times and \$8,000+ in dues
- The next effect of the previous note is the end of year Operations balance will be close to the value the Finance Committee was striving for when it recommend the \$10,000 transfer to the scholarship endowment.

Table 1 shows the Scholarship Endowment Fund has exceeded \$90,000 (fourth page of Table 1). The increase is due to the rise of the stock market and the transfer from Operations. The endowment funds are invested on behalf of ASURA by the ASU Foundation, with our primary goal being long-term growth. Once a year the Foundation moves some amount from the Endowment to the Endowment Spending account, which ASURA can use to either reinvest in the endowment or use it to partially pay for the scholarship. While growth is our desired goal, due to current financial conditions, the Board continues to use the endowment earnings to partially fund the current scholarship. The endowment earnings for this year are \$2,480 down from \$3,602 last year. We have no control on how much money the Foundation moves annually to the Spending Account,

Money from the book sales is deposited in the Special Projects Account (second page of Table 1). At the moment there have been no deposits. It is anticipated that before the close of the fiscal year there will be about \$4,000 deposited in this account. The money can be used to support either the scholarship, the Video History Project, or both.

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 maintain its many ongoing projects.

ASURA remains in good financial condition. With the varied support from ASU and our totally volunteer work force, ASURA will be able to continue to offer its many excellent program and services when the pandemic is behind us..

Barry McNeill  
ASURA Treasurer  
e-mail: [barry\\_mcneill@outlook.com](mailto:barry_mcneill@outlook.com)

Account Categories	FY22 Approved Budget	Actual YTD as of 3/31/2022	COMMENTS
<b>ASURA Operations</b>			
<b>ASURA Operations - Income</b>			
<b>Balance Forward</b>	<b>34,722</b>	<b>34,722</b>	
<b>Current Year Revenue</b>			
Event Registration Fees & Donations Collected	600	0	
Membership Dues	16,000	8,970	
General Operations Donations	3,200	1,490	
Holiday Bake Sale 2020	0	0	
Postage - History Book	0	12	
5% Gift Assessment	-990	-522	
<b>Total Operations Current Year Revenue</b>	<b>18,810</b>	<b>9,951</b>	
<b>ASURA Operations - Expenses</b>			
<i>Printing and Mailing Costs</i>			
Membership Drive	0	87	
Prime Times summer printing	800	0	
Prime Times summer mailing	800	539	
<i>Event Costs</i>			
Paid Events	600	0	
Annual Meeting	1,000	0	
Meet & Greet Luncheon	0	0	
Holiday Potluck & Fundraiser	0	0	
Holiday Picnic & Spring Luncheon	400	84	Winter Event & Spring Fling
<i>Other Operations Costs</i>			
Scholarship Award	6,400	6,400	\$10,000 - \$3600 paid from Endowment
AROHE	120	0	2022 Membership renewal
Business Luncheons & Service Appreciation	0	28	Engraving President's plaque
Technology Services	404	0	Zenfolio & Zoom
Professional Services	0	0	
Office Equipment	500	445	
Office Supplies & Postage	200	74	
Marketing Supplies	0	0	
Seminars	0	0	
Foundation Transaction Fees	100	0	
Transfer Out	0	80	Duplicate membership renewal
Transfer to Scholarship Endowment	0	10,000	One time transfer
Transfer to Adopt-A-Family	260	0	
<b>Total Operations Expenses</b>	<b>11,584</b>	<b>17,738</b>	
<b>Increase (Decrease) in Current Year Balance</b>	<b>7,226</b>	<b>-7,787</b>	
<b>Uncommitted ASURA Operations Funds</b>	<b>41,948</b>	<b>26,935</b>	

Account Categories	FY22 Approved Budget	Actual YTD as of 3/31/2022	COMMENTS
<b>General University Allocation (HR)</b>			
Balance Forward	0	0	
Current Year Allocation	7,000	7,000	
<b>Total University Current Year Revenue</b>	<b>7,000</b>	<b>7,000</b>	
<b>Expenses Charged to Allocation</b>			
Annual Report	190	0	
Bylaws & Ballots	230	45	
Office Equipment & Supplies	500	0	Laptop for online meetings
Prime Times Fall/Spring Printing	1,600	547	
Prime Times Fall Spring Mailing	1,100	1,231	
Copier/FAX Equipment Annual Lease	922	922	
Membership Drive	1,500	520	
Technology Services	260	0	Pantheon Web Hosting
Marketing Supplies	100	0	
Meet & Greet Luncheon	0	100	2 Room rentals -1 cancelled \$50 refund pending
Miscellaneous Expense	0	266	Mail slot installed in office door
8.5% Administrative Service Charges	595	309	
<b>Total Subsidized Expenses</b>	<b>6,997</b>	<b>3,939</b>	
<b>Uncommitted University Funds For Operations</b>	<b>3</b>	<b>3,061</b>	

<b>Special Projects</b>			
<b>Special Projects - Income</b>			
Balance Forward	75	75	
<b>Current Year Revenue</b>			
Gift-In-Kind Receipts	14,000	14,685	
Friends/Phx Library Book Sale Net Income	2,000	0	
<b>Total Special Projects Current Year Revenue</b>	<b>16,000</b>	<b>14,685</b>	
<b>Special Projects - Expenses</b>			
Gift-In-Kind Adjustment	14,000	14,655	
Transfer 1/2 of Book Sale Income to Scholarship	1,000	0	
Transfer 1/2 of Book Sale Income to Video History	1,000	0	
Mail Service - General	0	0	
<b>Total Special Projects Expenses</b>	<b>16,000</b>	<b>14,655</b>	
<b>Increase (Decrease) in Current Year Balance</b>	<b>0</b>	<b>30</b>	
<b>Uncommitted Special Projects Funds</b>	<b>75</b>	<b>105</b>	

Account Categories	FY22 Approved Budget	Actual YTD as of 3/31/2022	COMMENTS
<b>Adopt-A-Family</b>			
<b>Adopt-a-Family - Income</b>			
<b>Balance Forward</b>	<b>1,270</b>	<b>1,270</b>	
<b>Current Year Revenue</b>			
Adopt-A-Family Donations	500	837	
5% Gift Assessment	-25	-42	
Transfer from Operations	260	0	
<b>Total Adopt-A-Family Current Year Revenue</b>	<b>735</b>	<b>795</b>	
<b>Adopt-A-Family - Expenses</b>			
Holiday gifts	2,000	1,901	
<b>Total Adopt-A-Family Expenses</b>	<b>2,000</b>	<b>1,901</b>	
<b>Increase (Decrease) in Current Year Balance</b>	<b>-1,265</b>	<b>-1,106</b>	
<b>Uncommitted Adopt-A-Family Funds</b>	<b>5</b>	<b>163</b>	

<b>Video History</b>			
<b>Video History - Income</b>			
<b>Balance Forward</b>	<b>9,253</b>	<b>9,253</b>	
<b>Current Year Revenue</b>			
Video History Donations	1,000	990	
Transfer in 1/2 of Book Drive Proceeds from Spec Proj	1,000	0	
5% Gift Assessment	-100	-50	
<b>Total Video History Current Year Revenue</b>	<b>1,900</b>	<b>941</b>	
<b>Video History - Expenses</b>			
Equipment & Supplies	500	0	
Software Licenses	294	194	
Interview Expenses	0	75	iDrive Subscription
Transfer Out	0	0	
<b>Total Video History Expenses</b>	<b>794</b>	<b>269</b>	
<b>Increase (Decrease) in Current Year Balance</b>	<b>1,106</b>	<b>671</b>	
<b>Uncommitted Video History</b>	<b>10,359</b>	<b>9,925</b>	

Appendix to Annual Report 2021-2022  
Table 1  
Financial Report for Fiscal Year 2022 7/1/2021 - 3/31/2022

Account Categories	FY22 Approved Budget	Actual YTD as of 3/31/2022	COMMENTS
<b>Scholarship Endowment Fund</b>			
<b>Scholarship Endowment Principal (40003616)</b>			
<b>Balance July 1</b>	<b>84,403</b>	<b>84,403</b>	
Invested Funds Gain (-Loss)	5,000	1,913	
Payout to Endowment Spending - FY22	-3,000	-2,480	
Current-Year Contributions	2,300	907	
Transfer from Operations	0	10,080	
Endowment Management Fee	-1,000	-991	
<b>Total Scholarship Endowment Principal</b>	<b>87,703</b>	<b>93,832</b>	
<b>Scholarship Endowment Spending (70003616)</b>			
<b>Balance July 1</b>	<b>3,602</b>	<b>3,602</b>	
Payout from Endowment Principal - FY22	3,000	2,480	
Transfer from Operations	0	0	
Transfer from Special Projects (Book Sale Proceeds)	1,000	0	
ASU Scholarship	-3,600	-3,600	
<b>Total Scholarship Endowment Spending</b>	<b>4,002</b>	<b>2,482</b>	

	Current 3/16/2022	Last Year 3/4/2021	Change
<b>Current-year members</b>	<b>822</b>	<b>817</b>	<b>5</b>
Renewals from prior years (any prior year)	522	540	-18
Introductory members	300	277	23
Paid for the current year, now deceased	3	4	-1
<b>Last year's members - not renewed</b>	<b>266</b>	<b>214</b>	<b>52</b>
Members last year, now deceased	12	1	11
<b>By retired-from organization</b>			
Retired from ASU	799	798	1
Retired from another university	2	1	1
Former ASU employee, retired elsewhere	5	3	2
Still employed at ASU	16	15	1
<b>By time since first joining</b>			
In introductory period	300	277	23
Members for 0-2 years (excl Introductory)	117	34	83
Members for 3-5 years	106	114	-8
Members for 6-10 years	83	87	-4
Members for more than 10 years	216	251	-35
<b>By former employment category</b>			
Faculty and faculty w/ admin appt	333	342	-9
Academic professional	50	49	1
Staff	411	391	20
Administrative	28	35	-7
<b>Having an Arizona Address</b>	<b>757</b>	<b>761</b>	<b>-4</b>
<b>Logged in to member-only site (ever)</b>	<b>272</b>	<b>245</b>	<b>27</b>

**Available on request (examples)**

- How many want to receive obituary notices
- How many have shown interest in volunteering
- How many have made an optional donation
- How many have logged in as members

