

**ASU<sup>®</sup> Retirees  
Association**  
**Arizona State University**

Annual Report from the Board  
2023-2024



Spring Luncheon at Friendship Village

This report is for publication at the Annual Meeting  
April 17, 2024

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## Contents

ASURA BOARD AND OFFICERS .....	2
ASURA OFFICE CONTACT INFORMATION .....	2
PRESIDENT'S MESSAGE .....	3
OFFICE VOLUNTEERS .....	4
COMMUNITY OUTREACH COMMITTEE .....	5
Adopt-A-Family Program .....	5
Scholarship Committee.....	6
Video History Project .....	7
EVENTS COMMITTEE .....	7
Luncheons and Special Events.....	8
Seminars .....	8
Travel .....	10
Pre-Retirement Seminars.....	10
2023 Annual Meeting.....	11
FINANCE COMMITTEE.....	11
Book Donations .....	11
GOVERNMENT and HEALTH INSURANCE LIAISONS .....	12
Legislative Liaisons.....	13
ASRS Report .....	14
SISTER RETIREMENT INSTITUTIONS .....	15
MEMBERSHIP AND COMMUNICATIONS COMMITTEE .....	15
Membership.....	15
E-News.....	16
<i>Prime Times</i> Newsletter.....	16
Obituaries .....	17
Database .....	18
Websites Committee.....	18
TREASURER'S REPORT.....	20
Table 1 and 2 – Financial Report for Fiscal Year 2023-2024, as of 2/29/2024 .....	21
Table 3 – ASURA Membership Totals as of March 18, 2024 .....	23

## ASURA BOARD AND OFFICERS

2023-2024(outgoing)	2024-2025 (incoming)
<b>Officers</b> President – Kay Faris Vice President – Maria Hesse Past President – Will Stasi Secretary – Partha Dasgupta Treasurer – Barry McNeill	<b>Officers</b> President – Maria Hesse Vice President – TBD Past President – Kay Faris Secretary – Partha Dasgupta Treasurer – Jeff Bush
Board Members (year term expires)	Board Members (year term expires)
Jo Ellen Alberhasky (2025) Rojann Alpers (2024) Bev Buddee (2025) Jeff Bush (2026) Carl Cross (2026) Partha Dasgupta (2025) Don Dotts (2026) Terrie Ekin (2025) Kay Faris (replaced Sue Henderson who resigned June 2022) (2025) Maria Hesse (2026) Barry McNeill (2024) Helene Ossipov (2024) Kathy Palmanteer (2026) Will Stasi (2025) Tara Roesler (2024)	Jo Ellen Alberhasky (2025) Bev Buddee (2025) Jeff Bush (2026) Carl Cross (2026) Don Doerres (2027) Partha Dasgupta (2025) Don Dotts (2026) Terrie Ekin (2025) Kay Faris (2025) Caroline Harrison (2027) Maria Hesse (2026) Richard Knopf (2027) Kathy Palmanteer (2026) Rodney Rogers (2027) Jan Meyer Thompson (2027) Will Stasi (2025)
<b>Ex-officio Members</b> Alumni Assoc. Tim Desch Emeritus College – Mark Lussier Human Resources – Lynna Soller University Affairs - Kendra Burton University Club – Tara Roesler University Senate – Greg Stone University Staff Council – Shawn Banzhaf	<b>Ex-officio Members</b> Alumni Assoc. – Tim Desch Emeritus College - Mark Lussier Human Resources - Lynna Soller University Affairs - Kendra Burton University Club – Tara Roesler University Senate - TBD University Staff Council - Shawn Banzhaf

## ASURA OFFICE CONTACT INFORMATION

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## **PRESIDENT'S MESSAGE**

Submitted by Kay Faris



It has been an honor to lead the Arizona State University Retirees Association this year. I am very impressed with the number of people who are willing to volunteer their time and talents to support other retirees. The programs available to our ASU retirees are impressive from advocacy for retirement benefits, healthcare, and the legislature to social activities, educational seminars, community support, travel, etc. ASURA also keeps our membership informed through excellent communication such as the website, *Prime Times* and E-News. In this report, you will see all the wonderful contributions of our many volunteers.

This past year, the Board looked at our membership benefits—how we can provide the best support for retirees? We experimented with our seminar delivery as you will see in the seminars report. We also conducted a survey of members who chose not to renew their memberships to determine how we could have better met their needs. We will report on those results when we have the survey responses.

This year, we have had a closer collaboration with the Alumni Association with Tim Desch as our liaison and with the Emeritus College with Mark Lussier as our liaison. We have learned a great deal from each and find our closer collaboration will help all of our organizations.

As a huge ASU fan, I love that we stay connected to ASU—not just our friends, but the school itself. Staying informed on the ASU initiatives and where we can support is critical to me. The work of ASURA such as awarding a \$10,000 scholarship to an ASU returning student contributes to ASU and its vitality as does our outreach to the community through Adopt-A-Family.

This year, it is a pleasure to recognize several members who have contributed so much to ASURA to make it the success that it is. At the Annual Meeting, we recognized five individuals who “retired” from ASURA—we call this retired, retired! These members served in leadership roles for more than 10 years! We wouldn’t be the organization we are without them!

- Becky Reiss--21 years of service! Becky served as Obituaries Committee Chair (2002 – 2022).
- Carolyn Minner--18 years of service! Carolyn served as the Business Operations Manager (2007 – 2024) and was a Board Member (2012 – 2014).
- Dave Scheatzle--17 years of service! Dave was a Board member (2 terms), President (2004-2005), *Prime Times* editor (2004-2009), Golf Tournament Director (2005-2011), and Video History Project member (2014-2019).
- Elmer Gooding--16 years of service! Elmer was a Board member (4 terms), President (2005-2006), Membership Committee Chair (2006-2013, 2021-2022); and Emeritus College Liaison (2012-2016).
- Dave Schwalm--12 years of service, Board member (2 terms), President (2011-2012), Membership Committee Chair (2013-2021), and Golf Tournament Chair (2012-2014).

I would like to thank our outgoing board members: Rojann Alpers, Barry McNeill, Helene Ossipov, and Tara Roesler. Thank you for all you have done! We now welcome our incoming board members: Rodney Rogers, Richard Knopf, Caroline Harrison, Don Doerres, and Jan Thompson. ASURA truly appreciates Michael Latsko, Vice President and Chief Human Resources Officer for all of his support to the organization.

And now, I am pleased to welcome Maria Hesse as our incoming President. We look forward to her leadership. If you have any questions or suggestions, Maria can be reached at [Maria.Hesse@asu.edu](mailto:Maria.Hesse@asu.edu).

Kay Faris  
President 2023-2024  
[kay.faris@outlook.com](mailto:kay.faris@outlook.com)

## OFFICE VOLUNTEERS

Submitted by Linda Van Scoy



2023-2024 was a good year for ASURA. How could it not be, since we work with happy retirees who are always pleasant and appreciative.

The office continues to operate on a 3-day per week schedule: Tuesday through Thursday from 10:00 to 1:00. Of course, if you need to drop off books, renewals or other documents outside of this time frame, we can easily arrange for someone to meet you. Just call the office at 480-965 7668, with your request and we will get back to you within 24 hours.

And speaking of books and documents, here are some helpful hints that will help our office volunteers: For books, if you can empty the books from your boxes into the large red bins that would be so appreciated. And then you can take your boxes home if you like. Or you can leave them for us to recycle,

For payments for events or membership renewals, please ALWAYS list "ASU Foundation" first in the pay line, followed by "/ASURA". Since the Foundation is our banker, they need to be the primary listing. We often have to return checks to be re-issued for a seemingly minor word order.

One more important request, we really need office volunteers both to staff the office one day a week for a 3-hour shift and/or to be on our on-call substitute list. Send a note or call the office if you can help out. Finally, we thank our members/volunteers for their continued support!

Office Manager, Linda Van Scoy ([lvs@asu.edu](mailto:lvs@asu.edu))

Membership Operations Manager, Carolyn Minner ([carolynminner@outlook.com](mailto:carolynminner@outlook.com))

Technology Manager, Connie McNeill ([connniemcneill@outlook.com](mailto:connniemcneill@outlook.com))

Mailings Operations Manager, Caroline Harrison ([cjharri1@asu.edu](mailto:cjharri1@asu.edu))

Financial Operations Manager, Terrie Ekin ([ekin.household@gmail.com](mailto:ekin.household@gmail.com))

				
Bev Buddee	Terrie Ekin	Caroline Harrison	Connie McNeill	Dorothy Meunier
				
Carolyn Minner	Jeannette Robson	Tara Roesler	Jan Thompson	Linda Van Scoy

Linda Van Scoy  
Office Coordinator  
Email: [lvs@asu.edu](mailto:lvs@asu.edu)



## 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, 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 is happy to report another successful year meeting the needs of 2 student families, one from Tempe Elementary #3 and the other from ASU. We were also thrilled and happy to find that our budget was increased this year, up to \$3,000. Although we didn't spend all of it, knowing we had an increase brought peace of mind to us as we shopped.

Our Tempe Schools family was small this year, a dad, a step-mom, an 8-year-old boy and 9-year-old girl. The father and step-mother had simple wishes: shoes for the mom and clothes for the Dad. Even the kids did not ask for much – Stitch stuffed animal, hair bows, clothes for the girl. The boy wanted board games, 'army and dinosaur' toys as well as new clothes.

The ASU family was also small, with a single mom, 2 girls (9 and 16) and a 19-year-old boy. Their wishes were also basic needs, as well as a few 'popular' brands. It was especially nice, knowing we had a larger budget and we were able to purchase at least one of the popular name brands for each person: Nike clothes, sweatshirts, UGG slippers etc.

We also were able to get each family a \$125.00 gift card for food at Thanksgiving, Christmas and Easter (Spring). Each family also received a \$125 gift card for use at Olive Garden with our hope that everyone can enjoy a nice meal at a nice restaurant.

Our total expenditure: \$2,395.20

Thanks to ASURA for supporting this wonderful committee. It is always a great experience.

Ginny Sylvester, Chair

Henry Stevens, Master Shopper

Karen Burstein, Master Boxing-Up-Wrapper

Cecile Hook, Master Beautiful Wrapper (she was ill this year, but there in spirit)

Linda Cravens, Master Helper of Everything

And...Trudy Perez, Ex-Officio - ensured that the ASU student was selected in time and then made sure the gifts got to the student and her family!

Ginny Sylvester

ASURA Adopt-A-Family Chair

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

## **Scholarship Committee**

Submitted by Jan Shore



During this past year, the Scholarship Committee continued under the chairpersonship of Jan Shore and was co-chaired by Joy Shearman, former chair.

The Scholarship Committee had seven additional members: Karen Burstein, Evelyn Cesarotti, Mary Fachman, Diane Guzy, Ginny Sylvester, Jan Thompson, and Leslie Towill. The committee reviewed the materials submitted by each applicant, ensuring the requirements of academic achievements, community involvement, professional goals, and financial need were met. From its inception, this has been the purpose of the ASURA Scholarship. Being a member of this committee gives members the unique opportunity to make a difference in students' lives.

The committee continued to function electronically throughout the selection process in March of 2023. Receiving, reviewing, and arriving at a consensus, all electronically, in a time-sensitive manner, required adjusted procedures and continued commitment to this electronic process. Therefore, a very special thank you to all committee members who worked diligently to respond within a specific timeframe with a quick turnaround.

The committee considered nine applications, and Bea Ahbeck was chosen to receive ASURA's 2023-24 \$10,000 Scholarship Award. Bea returned to school when it became a challenge to continue her career in photojournalism due to a decline in the printed news. Her goal is to obtain a degree in Sustainability from the ASU College of Global Futures, and she aspires to make a difference in underserved communities. Ms. Ahbeck lives in Lodi, CA, and is pursuing her education online at ASU. She maintains a high grade point average. Bea has arranged her schedule to travel to Arizona from California to speak to ASURA members at the Annual Meeting on Wednesday, April 17th, 2024.

During the ASURA Annual Meeting last April, our 2022-23 Scholarship recipient, Sylvia Ceja-Gonzales, came in from California. She discussed her background, the Scholarship's meaning to her personally, and her future academic and career plans.

For the second year, our representative from the ASU Scholarship office is Julia Layno-Rojas. Throughout the year, the chair remains in contact with Ms. Rojas to ensure the accurate and timely posting of the scholarship, to receive updates from the Scholarship Office, and to receive eligible applications for review.

This scholarship is funded by contributions from members, income from book sales, earnings on the scholarship endowment fund, and the operations budget. Each year, the amount available is reviewed, and thanks to these resources, \$10,000 has been consistently approved by the ASURA Board in past years.

Respectfully submitted by:

Jan Shore  
ASURA Scholarship Chair  
Email: [jan.shore@asu.edu](mailto:jan.shore@asu.edu)

Joy Shearman  
ASURA Scholarship Co-Chair  
email: [joyrn@cox.net](mailto:joyrn@cox.net)



## Video History Project

Submitted by Don Doerres



### Committee Work

The committee has the same members as last year. Sadly, our videographer, Roger Carter, has a long term illness and is sorely missed. The committee is composed of Roger Carter, Carl Cross, Don Doerres, Bonnie Eckard, Elmer Gooding, Les Hendrickson, Barry McNeill, Helene Ossipov, Tara Roesler, Dave Scheatzle, Pat Schneider, and Linda Van Scoy.

1. Two interviews were conducted in the last year, Jeremey Rowe in April, and Peter Lawford in May. The Barbara Stark interview, done in January 2023, was edited and was sent to be to be uploaded to the Library's repository, KEEP.
2. The interview room is in good shape and we are working out the details of starting up interviews again.
3. We are still working through the details of video storage and interface to the ASU Library's KEEP repository.
4. We are looking for volunteer video editors familiar with Adobe Premier, and camera operators.

Don Doerres,  
Chair, ASURA Video History Project  
[don@azlaborlaw.com](mailto:don@azlaborlaw.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 Partha Dasgupta and 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, Seminars – Pat Schneider; Luncheons and Special Events – Mary Stevens.

### Coordination of Calendar of Events

The number of events offered this year were nicely scattered throughout the year so coordination was not very difficult.

### Promotion of Events

Eighty-one percent of our members (817) requested and received email notifications for all ASURA organized events, the same percentage as last year. Of this group, twenty-five percent (164) registered for at least one ASURA event during the year, an increase of three percentage points over the previous year. 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 and video recordings continued to be added to the ASURA website (<https://asura.asu.edu>).

For the nineteen 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* which is mailed to all members. In addition to the calendar, *Prime Times* carried past event stories and promotional material for upcoming events.

Trudy Perez  
ASURA Events Committee Chair  
[Trudy.perez@asu.edu](mailto:Trudy.perez@asu.edu)

## Luncheons and Special Events

Submitted by Mary Stevens



The committee members were Mary Stevens, Chair, Trudy Perez and Partha Dasgupta. Partha Dasgupta wrote and published three announcements for each event with editing by Barry McNeill.

Meet and Greet Pizza Party was held on September 18, 2023, at Ability 360, a large and very suitable venue for our events. The event is hosted by ASURA and free to attendees. Forty-two attendees participated. After attendees finished their pizzas delivered and set up by Red Devil Pizza and beverages supplied by ASURA, Kay Faris, President, introduced the members of the ASURA Board of Directions and chairs of committees. The chairs provided information on their activities. Several new members attended and volunteered for committees, which is one of the goals of this event.

The Holiday Potluck was held on December 12, 2023. This is always such a fun and delicious ASURA gathering for members and guests. Attendees bring such tasty and unique salads and dishes and delicious desserts to the potluck for everyone to enjoy! President Kay Faris invited a guest, Jared Swerzenski, who spoke to us about the Osher Lifelong Learning Institute (OLLI) and its many offerings of lectures, activities, events, and multiple benefits for our active, productive retirees who want to continue learning!!

Mary Stevens  
ASURA Luncheons and special Events Chair  
e-mail: marystevens0@gmail.com

## Seminars

Submitted by Patricia (Pat) Schneider



The **Seminar Committee** members include Pat Schneider (Chair), Beverly Buddee, Carol Kubato, Karen Moses and Jay Butler. Six (6) seminars were held during the 2023-24 term. The seminars were all held via Zoom in order to continue to include participants from NAU and our members who cannot attend in person.

- The first seminar was on May 11, 2023 with Noah Arenson, a physical therapist and one of the owners of Contact Physical Therapy. In his presentation, Noah stressed the importance of exercise on brain health. He presented the four pillars of exercise – stability, aerobic efficiency, resistance training and anaerobic training. Noah provided a sample weekly schedule of exercises that we should all do as best as we can. He stressed over and over that with any exercise program, we should be sure to discuss our goals and intentions with our primary care doctor.
- The annual open enrollment seminars were held in October 2023. This year the Medicare portion of the seminar was split off into a session of its own. The Medicare seminar was held on October 5, 2023, with father and son team, Joe Craney, Jr and Joe Craney III from the insurance brokerage firm of Senior Preferred as the presenters. They covered topics that addressed the ins and outs of Medicare – enrollment periods, the parts of Medicare and how they work together; coverage options and benefit options, and what Medicare doesn't cover.
- The second seminar related to open enrollment was held on October 19, 2023. This year, both ADOA and the ASRS medical enrollment was a passive enrollment, meaning if you weren't making any changes to your coverage, you didn't need to participate in the enrollment process. Both ADOA and the ASRS presented an overview of the current plans that are available to retirees. In addition, the ASRS

had a representative from United Healthcare present on the Medicare Advantage plan that the ASRS offers.

- We started 2024 with a seminar on January 11 that covered achieving our dreams and goals as we transition from our role as “worker” to our role as “retiree”. Tara Brown presented us with the “results formula” which is made up of the components that lead to results – thoughts cause feelings which cause actions which lead to results. She then spoke of the importance of doing a life assessment utilizing the four quadrants that typically influence our life – health and wellbeing, love and relationships, vocation or creativity and time and money freedom. After presenting us with a quote from C.S. Lewis – “You are never too old to set another goal or to dream a new dream”, she led us into discussion on three key elements for reaching our dream and/or goals – designing your dream, deciding the dream to pursue, and finally to befriend your fear. She reminded us that fear and failure are pre-requisites for achieving great dreams!
- The Area Agency on Aging and the programs offered by the agency were the topics for the February 8, 2024 seminar. Marco Mendoza and Alfredo Gonzalez from the agency covered the wide variety of programs available to seniors and elderly within Maricopa County. They highlighted the State Health Insurance Assistance Program (SHIP) which is part of a national network of 54 SHIP grantees. Its main purpose is to assist in navigating Medicare – understanding your Medicare choices, how to enroll, plan comparison, coverage and costs, submitting appeals and referral to other resources. Some of the other programs offered by the Area Agency on Aging they covered included the 24-hour Senior Help Line which is the central intake for the agency, Senior Adult Independent Living (SAIL) which provides case management and services to seniors and adults with disabilities and need assistance with daily living activities, Caring Circles which is a group of volunteers who provide companionship to seniors to reduce social isolation, legal assistance, and many other services.
- Caregivers was the topic for the March 14, 2024 seminar. The Area Agency on Aging was back again, along with two of their partners – Duet, Partners in Health & Aging and Trualta. Patricia Dominguez from Duet presented the programs for grandparents who are in the role of raising their grandchildren. Educational programs for the grandparents as well as a social group – Grandparents Café, are just two of the programs offered for the grandparents. Kids Day Out is a program specifically designed for the grandchildren to participate in activities with other kids. In addition to these programs, they hold monthly GrandFamily outings. Darci Henry from Trualta provided information on Trualta which is an online education learning platform supporting caregivers. Using Trualta, a person can take a variety of online courses that prepare them for their role of a caregiver, whether it be on a specific condition topic or how to provide assistance for someone in managing their daily functions, like bathing, getting dressed, etc. The course library is extensive! The courses are all developed by expert professionals in the field. In addition to courses, community groups and chats are available through the platform. Here, people can find others who are dealing with similar issues and ask questions and/or have discussions. Webinars are also available. Access to Trualta is free and you don’t have to be a caregiver to access it! Trualta also contains courses and resources for those planning to retire, and estate planning to name a few. Finally, Michael Harper from the Area Agency on Aging gave a recap of the services the agency offers.

As mentioned earlier, all of the seminars were offered via Zoom. However, there was a request from the ASURA membership to provide the opportunity for people to attend the seminars in person. The Seminar Committee agreed to provide a hybrid version of presenting the seminars which was tested out for the January, February and March seminars. Members were given the option of signing up to view the Zoom session in person with other members at the Community Services Building. The speakers still presented remotely, but this gave those who may have difficulty using Zoom or just wanted to meet up with other people the opportunity to join others. We had one person take advantage of this option. Going forward the seminars will be offered as Zoom only unless a greater demand for the hybrid option arises.

Pat Schneider will be stepping down as chair of the Seminar Committee in May but will remain on the committee and provide support for seminar announcements, website updates, etc. as needed by the new chair. The new chair of the Seminar Committee will be Karen Moses. Karen is very well qualified to assume the role!

Submitted by  
Patricia (Pat) Schneider  
Chair, Seminar Committee

## Travel

Submitted by John Brock



The ASURA travel committee meets the first Tuesday of each month, at 1 PM, at the Tempe Public Library. Current committee members include Joyce Hartmann-Diaz, Jeffery Bush, Tara Fuchs Roesler and Gary Anderson. Members can join the committee by coming to one of our meetings.

The travel committee tries to keep busy. During this past year:

- In early October a group toured SE Arizona
- Two tours of the ASU Sidney Poitier New American Film School
- Two dinner theater events
- In March a group went to Costa Rica

Upcoming committee activities include:

- Arranging for difficult-to-obtain tickets for a tour(s) of Tovrea Castle in the fall of 2024.
- Looking forward the travel committee is working with Overseas Adventures Travel for a trip to Africa this summer and Sicily in April 2025.
- We are discussing and starting to plan another instate trip in October 2023 to southeast Arizona plus some local things, like a tour of the New American Film School in Mesa and perhaps a tour of the ASU Tempe campus libraries.

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

## Pre-Retirement Seminars

Submitted by Trudy Perez, Liz Badalamenti



As the Pre-Retirement Seminars approach the 13<sup>th</sup> year of service to ASU faculty and staff, we thank you for your support and encouragement. Our attendance has increased by ten percent and continues to grow. The Committee is always looking for additional topics to assist future ASURA members to be better prepared for retirement. Listening to suggestions from current members, we have added, ASU's Human Resource Benefit team, Optional Plan providers: Fidelity, Nationwide, and TIAA, Connie McNeill's "Email Life after ASU" and last but not least The Employee Network (TEN) sharing many discounts available to employees as well as retirees. If you have any topic ideas please share with us, we appreciate your continued

support!

Trudy Perez  
ASURA Co-Chair Pre-Retirement Seminars  
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Liz Badalamenti  
ASURA Co-Chair Pre-Retirement Seminars  
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## **2023 Annual Meeting**

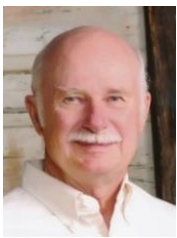
Submitted by Barry McNeill

The first in-person Annual Meeting in three years was held on April 19, 2023, in the Ability360 conference room. Sixty plus registered; forty plus attended. A bit of a disappointment, but the forty who did attend enjoyed an excellent program organized and presented by Mary Stevens, Will Stasi, Kay Faris, and Trudy Perez. The guest speaker was Professor Dennis Hoffman who gave a very informative talk about the state of the economy and the chance of a recession. You can read more about the event on the ASURA website (<https://asura.asu.edu/april-2023-annual-meeting>).

Barry McNeill  
2023 Annual Meeting Story Writer.

## **FINANCE COMMITTEE**

Submitted by Barry McNeill



The members of the 2023-2024 Finance Committee were Barry Bruns, Terrie Ekin, Barry McNeill, chair, Connie McNeill, and Larry Carlson. Jerry Snyder was a consultant.

At the September Board meeting the committee submitted the annual Financial Health Report (see September 2023 Board Meeting Minutes on the ASURA website <https://asura.asu.edu>). The report showed ASURA to be financially healthy with an adequate cash reserve. The required reserve is smaller than the actual funds available in the Operations account.

The committee met in December to discuss the previous year's expenditures as required by the Bylaws. The results of the meeting were written up and presented to the January Board meeting (see January 2024 Board Minutes). Highlights of the report are:

1. The previous year's expenditures were reasonable and consistent with the budget and in agreement with the Foundation records.
2. The recommendation to transfer \$5,000 from Operations to the endowment (approved at the January 2024 Board Meeting).

Barry McNeill  
ASURA Finance Committee Chair  
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[barry\\_mcneill@outlook.com](mailto:barry_mcneill@outlook.com)

## **Book Donations**

Submitted by Mary Stevens



### Original agreement between Friends of the Phoenix Public Library and ASURA

In September 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 sold books donated by our members, other ASU retirees and anyone else who wishes to donate. Until this year, Friends sold the donated books on-line, retained a 15% commission and split the sales proceeds with ASURA every quarter.

Each quarter, Friends provided ASURA with sales reports and checks for the proceeds from the sales of our books. In my annual reports, I have showed a list of annual proceeds ASURA received from Friends for the calendar year, January 1-December 31 from 2011 and the current year.

Larry Carlson continues to assist some of our donors with picking up books 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 VanScoy, Connie McNeill and Larry for



their significant assistance in keeping our program on track.

Proceeds from book sales are split between ASURA's annual student tuition scholarship and the History Video Project.

#### Termination of original agreement and replacement agreement

In 2023 Friends totally changed their book sales program due to difficulties caused by the pandemic. Their warehouse closed because staff could not enter the warehouse to catalog our books and sell them on-line. Further the drivers who picked up our books from our storeroom and delivered them to their warehouse resigned due to Covid 19. The result - the functioning donation sales program ceased.

After the pandemic subsided, Friends could not get the former program back on track due to increases in costs for selling, shipping, transportation, labor, and inflation. Friends terminated our original agreement of September 2011 and offered a much-reduced proceeds alternative. Friends would pay ASURA \$.02 ¢ (2 cents) per pound for our donated books, CD's, and DVD's, pick up our books in a timely manner and disburse payments monthly. I presented this change to the Board and recommended we enter into the alternative agreement, as some proceeds would be better than no proceeds. The ASURA Board of Directors voted to enter into the Per Pound Agreement and the new Agreement was signed by then President, William Stasi on February 14, 2023.

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

Year	Amount (\$)	Year	Amount (\$)
CY 7/2011	\$72	CY 2018	\$1,257
CY 2012	\$1,092	CY 2019	\$1,425
CY 2013	\$ 468	FY 2020	\$1,928
CY 2014	\$ 718	CY 2021	\$5,522
CY 2015	\$1,486	CY 2022	\$2,164
CY 2016	\$1297	CY 2023	\$205
CY 2017	\$877		
TOTAL 2011-2022		\$18,901	

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

#### **GOVERNMENT and HEALTH INSURANCE 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 Patricia (Pat) Schneider



The **Government Liaison Committee** members include Don Dotts, Tara Roesler, Richard Knopf, and Pat Schneider. Larry Carlson and Jeri Meeks, ex-officio members, also provided input to the functions of the committee this past year. The beginning of the 2024 Legislative session brought forth three (3) bills that affect the Arizona State Retirement System (ASRS). The first bill, HB2206, clarified the guidelines for a contingent annuitant which allows the ASRS member to rename the beneficiary the member initially designated. HB2207 provides for disclosure of information related to the member's ASRS account to a current or former spouse on receipt of proof of service or a petition for annulment or dissolution of a marriage or legal partnership. The last bill, HB2208, provides for the continuation of the ASRS for another 8 years. These bills, as of the writing of this report, have passed in the House, have been transmitted to the Senate and are awaiting final vote.

Again this year, there were several bills that affect voting, such as the return of early ballots and voting locations. As of the writing of this report, there has been little movement on the bills that were selected to be monitored by the committee.

In addition to monitoring bills, Pat Schneider attended two virtual webinars sponsored by the Arizona Retirement Security Coalition. The first webinar was held in December 2023 and covered information to prepare for the upcoming legislative session. The second webinar held in February 2024, was the Virtual Day at the Capitol. This event included presentations by the chair of the Arizona Retirement Security Coalition who briefed participants on the bills that have been presented that have an effect on the ASRS. In addition, one of the ASRS lobbyists also presented on the bills currently in the legislature. Finally, a panel of two representatives and two senators answered questions posed to them by the ARSC chair and the event participants. They all stressed the importance of getting to know who your representatives and senators are and to be in communication with them.

The committee met on February 16, 2024, along with Kendra Burke, lobbyist/liaison for ASU. Going forward, we need to designate a primary lobbyist for the ASURA. Jeri Meeks agreed to stay on as the alternate lobbyist. The committee also requested that we be put on the weekly distribution list for the bills that Kendra is watching so we can provide support as needed.

As of this writing, a new chair for the committee is needed. Work will be done to get a new person on board.

Submitted by  
Patricia (Pat) Schneider  
Government Liaison Committee

## ASRS Report

Submitted by Richard Jacob



As many on the Board know, I recently served for four years on the Arizona State Retirement System Board of Trustees. This followed two years of service as ASURA's representative to ASRS, which involved my attending public board and committee meetings of the Trustees and reporting back. This responsibility followed me through my term as a Trustee and afterwards. However, the COVID pandemic and other internal organizational factors led to the Trustees meeting only remotely and covering less of what would be considered to be of "importance" to the ASURA membership, resulting in a more infrequent submission by myself of reports to ASURA. (ASRS healthcare issues are reported on separately by others to ASURA.) There has also been a reduction of structural and political issues involving ASRS, leading to a further diminution of the need for frequent reports.

Nevertheless, for several reasons, including my obligation to ASURA, I have maintained a strong interest in the agency, which I still consider to be the best-run state agency in Arizona, and follow it up with frequent luncheon meetings with Paul Matson, the ASRS Director. The information I report here is gleaned from such meetings over the past several months.

### 1. Board of Trustees

The ASRS Board consists of nine members, five from various ASRS membership categories and four who are not ASRS members. As of this date, the Board has a complete complement of Trustees, including three women. The current Governor has not yet made any appointments.

### 2. Fund Performance

While final numbers have not yet been crunched, the end-of-fiscal-year fund performance is currently estimated to be approximately 8.6%, which is above expectations. The Fund value is approximately \$51B. Current allocations are approximately 40% public equities, 23% credit, 19% real estate, 13% private equity and 5% Treasury bonds. The investment allocation is monitored by the Trustee's Investment Committee, and investments are made through a host of investment managers and in-house investment experts. The pension fund stands at more than 70% of full funding, a very good position. The deficit is continuing to be amortized according to a 20-year plan.

### 3. Agency Personnel

The agency is at essentially full strength, able to fulfill its obligations to its membership and the State. On average, approximately 80% of the staff now work remotely at no overall reduction of productivity or morale. In part due to this, as well as technological improvements, the agency had succeeded in reducing its occupancy in the 3300 N Central building (which it owns) from five to three floors.

### 4. Permanent Benefit Increase

Despite the outstanding relative performance in the past, the returns do not meet the statutory requirement to distribute another PBI next year.

### 5. Legislature

ASRS submitted through members of the State Legislature three initiatives during the 2023 session:

- a. New employer legislation to clarify that a political subdivision may join the ASRS for purposes of allowing their employees to participate in any ASRS supplemental deferred compensation plan without participating in the ASRS defined benefit plan.

- b. Retirement cancellation legislation to extend the timeframe in which a member may make changes to their retirement application.
- c. Contribution prepayment program legislation removing the requirement that an employer must begin to amortize prepaid contributions if the employer's net pension liability becomes negative; and to allow a short term return investment to be utilized by an employer, particularly during the last year of amortization.

These bills were passed and signed by the Governor.

No external legislation made it through committees that would alter in any significant way the nature of the agency's pension, health insurance, or long-term disability programs, or its relationship to Arizona State University.

Richard Jacob  
ASRS Liaison  
e-mail: rjjacob@asu.edu

## **SISTER RETIREMENT INSTITUTIONS**

Submitted by Barry McNeill

ASURA had two interactions with AROHE (Association of Retirement Organizations in Higher Education). ASURA submitted an article about the Meet & Greet Pizza Party for the September 2023 AROHE newsletter. The article gave a brief overview of the event and listed several measures of success. In October I represented ASURA in an AROHE webinar addressing getting and keeping new members. I mentioned two changes to our recruitment efforts: 1) making the first year free, and 2) automatically enrolling retirees when they retire.

ASURA continued offering access to our seminars to members of the NAU Retirees Association.

Barry McNeill,  
e-mail: barry\_mcneill@outlook.com

## **MEMBERSHIP AND COMMUNICATIONS COMMITTEE**

The Membership and Communications Committee, chaired by Carl J Cross until this January, is an "umbrella" committee made up of the chairs of six subcommittees. The subcommittees and their chairs are: Membership, Carl J Cross; E-News, Barry McNeill; *Prime Times*, Jeannette Robson; Obituaries, Tara Roesler; Websites, Connie McNeill and Barry McNeill; and Database, Paul Harper.

### **Membership**

Submitted by Carl Cross



ASURA continues to strive to stop the bleeding and increase membership. Eleven years ago, we introduced a policy of automatically giving all new retirees a free Introductory Membership for the first year of retirement. We then keep them informed of all ASURA activities and events for the trial year by mail or email and send them copies of our publication *Prime Times* and an occasional E-News encouraging them to sample ASURA activities and services.

Human Resources discontinued their preretirement sessions after 2019. ASURA had always presented a live ten-minute recruiting pitch and distributed our tri-fold promotional flyer summarizing the purpose and activities of the organization and an application form offering free membership for the first year. ASURA is now offering monthly preretirement seminars which introduces our organization to those considering retirement in the near future.

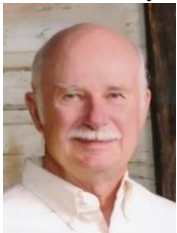
Table 3 in the Appendix shows that on March 18, 2024, the membership total was 789, down 69 from last year. A task force is currently developing a new survey to discover why Introductory Members are not renewing as well as learn what ASURA might do to encourage more membership.

Our events committees and subcommittees are constantly working to offer a rich, diverse and interesting menu of activities to increase member participation. The association continues to have a nice balance between faculty and staff.

Carl J Cross  
Chair, Membership Committee  
email: [carl.cross@asu.edu](mailto:carl.cross@asu.edu)

### **E-News**

Submitted by Barry McNeill



The E-News editor is part of the Membership and Communications Committee. Eighty 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 the latest Board meeting, calendar of upcoming events, the need for volunteers for a research project, etc. The tone is light, sometimes with a link to a page in the ASURA website to provide more information.

This past year 10 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 February, November, and September when time dependent items came up.

Barry McNeill  
E-News Editor  
e-mail: [barry\\_mcneill@outlook.com](mailto:barry_mcneill@outlook.com)

### **Prime Times Newsletter**

Submitted by Jeannette Robson



The first issue of ASURA *Prime Times* newsletter was published in early 1992. Over the years there have been six editors, counting myself, who have volunteered to oversee the composition, printing, and distribution of the newsletter. The first editor, June Payne (1992-1995), created & published the inaugural publication. Following June were Carolyn Brown (1995-2002), Rocky Mackey (2002-2004), Dave Scheatzle (2004-2009) and Wilma Mathews (2009-2016).

Beginning with the Summer 2015 *Prime Times* newsletter, those members who had signed up to receive association e-mail notifications are also being sent the monthly "ASURA E-News" e-mail which includes an easy link to the on-line color version of the newsletter.

The Fall 2004 to Spring 2024 *Prime Times* are currently available on the ASURA website at <https://asura.asu.edu/prime-times>. Newsletters between Fall 2004 to Spring 2012 are posted in black & white while the Spring 2012 through Spring 2024 issues are in color. Black & white paper copies are mailed to our membership through the Tempe Campus ASU Mail Services. The Spring 2021 *Prime Times* edition was a special "color paper" copy mailed out to the membership and was thoroughly enjoyed by all.

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

- Special projects: Adopt-a-family, Video History, ASURA Scholarship, and Book Donations.
- Travel opportunities: regional excursions and one-two week international travel.
- Luncheons and 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.

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.

More local and international travel, pre-seminars, seminars, and other events are currently being planned for 2024 and 2025 so regularly check our ASURA website, E-News e-mails, and the *Prime Times* newsletters for up-to-date information.

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*.

Jeannette Robson  
ASURA *Prime Times* Designer/Editor (2010 – current)  
e-mail: [jrobson@asu.edu](mailto:jrobson@asu.edu)

## **Obituaries**

Submitted by Tara Roesler



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: [tara456encanterra@outlook.com](mailto:tara456encanterra@outlook.com)



## Database

Submitted by Paul Harper

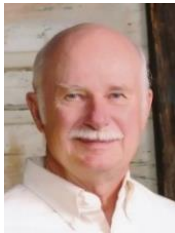


The Database Committee continued its routine activities, including creating introductory ASURA memberships and welcome letters for new retirees, producing quarterly membership reports for board members, performing data integrity checks and updates to the association's database and generating ad hoc reports to help with board efforts to increase membership renewal efforts.

Paul Harper  
Database Committee Chair  
paul@harper.ms

## Websites Committee

Submitted by Connie & Barry McNeill



### Introduction

ASURA has four websites that the Websites committee maintains:

- The main site, [asura.asu.edu](http://asura.asu.edu), provides information about the organization, its members, and its activities.
- The Help for Volunteers site, [vol-asura.asu.edu](http://vol-asura.asu.edu), describes volunteer assignments in use by ASURA and provides information on how to carry out those assignments.
- The Zenfolio site, [asura.zenfolio.com](http://asura.zenfolio.com), contains an organized collection of photos taken at ASURA events, volunteers, and facilities.
- The WildApricot site, [asura.wildapricot.org](http://asura.wildapricot.org), hosts the membership database and event management. There are a couple of "outward-facing" pages associated with member login on this site.

Committee members and their areas of responsibility are listed below.

### Content Responsibilities (Barry McNeill)

The website content needs to be kept fresh and current. The committee members are the ones that see that it is, as follows:

- Connie McNeill – Membership, Retiree Help, and Technology sections of the main site. Together with Barry McNeill, the Help for Volunteers site. The Wild Apricot site (as pertains to the pages that members see and the way they are interfaced to the main site).
- Barry McNeill – (except as listed below) - Events, Service, Publications, Support ASURA, and About sections of the main site. Together with Connie McNeill, the Help for Volunteers site. The Zenfolio site.
- Partha Dasgupta – Upcoming Events (except for seminars) and Board minutes.
- Carolyn Minner – Obituaries.
- Pat Schneider – Seminar event postings and stories and Video History interviews.
- Mary White – Pre-retirement Seminar event stories.

### Website maintenance (Connie McNeill)

There are periodic updates to the underlying web software (Webspark and Drupal for the main two sites) that Connie applies. She is also our main contact with the ASU Webspark development team.



This year there were two major updates to the Webspark software, and both times Connie was among the first to deploy them. The second time she was asked to be an early adopter by the ASU Webspark team because they thought she would be able to provide useful and educated feedback on the procedures they outlined.

In addition to these responsibilities, this year Connie volunteered to help with the 2024 ASU Community Audit of website pages. This meant spending time reviewing three high-use ASU web pages against a checklist of ASU design/brand standards.

The websites are fairly lightly used for most of their pages. The pages that get the most use are those that might be of interest to ASU students. Below is a chart showing the 10 most-used pages for the past year.

Page title and screen class ▾		↓ Views	Users
		62,088	32,463
		100% of total	100% of total
1	Your ASU email address   ASU Retirees Association	19,825	14,160
2	Welcome   ASU Retirees Association	6,295	2,829
3	Tech support from ASU   ASU Retirees Association	2,886	2,231
4	Upcoming Events   ASU Retirees Association	2,726	1,556
5	ASU Obituaries   ASU Retirees Association	1,477	406
6	Page not found   ASU Retirees Association	1,437	912
7	ASU email on smart devices   ASU Retirees Association	1,423	1,014
8	Log in   ASU Retirees Association	1,198	463
9	Member Directory   ASU Retirees Association	1,089	259
10	Renew Membership   ASU Retirees Association	951	738

#### Goals for the coming year:

- Finding more volunteers to help keep content current. This is an obvious need given the current dependence on Barry and Connie McNeill.
- Finding a means of maintaining the ASURA photos on a Webspark site instead of on Zenfolio. This would help with maintenance and access and save a little money.

Connie McNeill  
Websites Co-Chair  
Email:  
conniemcneill@outlook.com

Barry McNeill  
Websites Co-Chair  
Email: barry\_mcneill@outlook.com

## TREASURER'S REPORT

Submitted by Barry McNeill

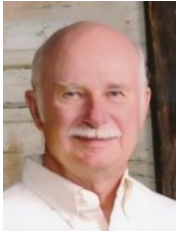


Table 1 in the Appendix shows the fiscal year budget and operating expenditures for ASURA through February 29, 2024. Connie McNeill and now Terrie Ekin, the ASURA Business Operations Managers, have done an excellent job of keeping track of our expenditures and income and have prepared financial reports for the Board.

A review of the Operations Account (first page of Table 1 in the Appendix) shows:

- For the most part the budgeted income and expenses track closely to the YTD values.
- New this year, rather than reporting the money collected for event tickets and money spent paying the vendor for the event as two separate entries, this year only the net of these two numbers is shown ("Paid Events – net" under "Event Costs"). ASURA policy is to have this net as close to zero as possible. The \$531 expense is due primarily to a SE Arizona tour when one of the members withdrew (See Table 2 in the Appendix).
- Based on a recommendation from the Finance Committee, the Board approved a \$5,000 transfer from Operations to the scholarship endowment. This required approval of a modified budget.
- Since the Fiscal Year ends June 30, the YTD column does not show the April, May, and June income and expenses. These months are the membership renewal months and hence the primary income months. The net deficit shown in the Operations account of \$715 will be easily covered once membership donations start arriving.
- Page 2 of Table 1 shows the Scholarship Endowment Fund has reached just over \$111,000. The YTD for the "Net Investment Return" is \$6,294, up considerably compared to last year's report of \$429.
- Once a year the Foundation moves a formula-based amount from the Endowment to the Scholarship Endowment Spending fund, which ASURA can use to either reinvest in the endowment or use to partially pay for the scholarship. Currently the Board wants to use the money to partially fund the scholarship.
- Money from the sale of books is split between the Video History account and the Scholarship Endowment Spending fund. As discussed earlier in this report, money from book sales had dropped way down but it is still not zero. The money for the scholarship is used to help pay the current year's scholarship.

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 programs and services.

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

**Table 1 and 2 – Financial Report for Fiscal Year 2023-2024, as of 2/29/2024**

Account	FY24 Budget	Actual 2/29/2024	COMMENTS
<b>ASURA Operations</b>			
<b>ASURA Operations - Income</b>			
Balance Forward	22,341	22,341	
<b>Current Year Revenue</b>			
Donations, including membership donations	18,000	8,030	net after 5% to ASU
Holiday Bake Sale	225	-	no bake sale held FY 2024
Total Operations Current Year Revenue	18,225	8,030	
<b>ASURA Operations - Expenses</b>			
<i>Printing and Mailing Costs</i>			
Annual Report	120		
Membership Drive	67	67	
Prime Times summer printing	150	-	split payment with ASU allocation
Prime Times summer mailing	655	-	
Prime Times Supplies	0	-	
<i>Event Costs</i>			
Paid Events - net	0	531	(see attached report)
Annual Meeting	1,200	-	
Meet & Greet Luncheon	500	482	
Holiday Potluck & Fundraiser	100	428	
Holiday Picnic & Spring Luncheon	0	-	Funded by attendees
<i>Other Operations Costs</i>			
Scholarship Award for AY 2024-25	6,571	-	balance of \$10K award is paid from Scholarship Spending Acct
AROHE	120	-	due June 1 each year
Business Luncheons & Service Appreciation	20	-	Presidents plaque updating
Technology Licenses	416	180	Zenfolio Zoom, Wild Apricot (2-year subscription due 8 Oct 2024)
Office Equipment & Supplies	500	404	
Marketing Supplies	0	-	
<b>Transfer Out</b>			
ASURA donation to Scholarship Endowment	5,000	5,000	Budgeted adjusted in January Board Meeting
Transfer to Adopt-A-Family	981	1,653	
Total Operations Expenses	16,400	8,745	
Increase (Decrease) in Current Year Balance	1,825	(715)	
Unexpended ASURA Operations Funds	24,166	21,626	
<b>General University Allocation (HR)</b>			
Balance Forward	656	656	
Current Year Allocation	7,000	7,000	
Total University Current Year Revenue	7,656	7,656	
<b>Expenses Charged to Allocation</b>			
Annual Report	120	-	
Bylaws & Ballots - printing and mailing	150	135	
Prime Times Summer 2023 Mailing	0	722	charges were too late to be in FY 2023 as had been budgeted
Prime Times Fall/Spring Printing	1,500	991	
Prime Times Fall/Spring Mailing	1,310	1,229	
Prime Times Summer 2024 Printing	500	-	split payment with Operations as needed
Copier/FAX Equipment Annual Lease	922	922	
Membership Drive	1,850	414	
Technology Services	601	-	Pantheon Web Hosting - 2 sites
Meet & Greet Luncheon	100	-	room rental
8.5% Administrative Service Charges	600	375	charge levied monthly on transactions
Total Expenses Paid From Allocation	7,653	4,788	
Unexpended General University Allocation	3	2,868	

**Table 1 (continued)– Financial Report for Fiscal Year 2023-2024, as of 2/29/2024**

Account	FY24 Budget	Actual 2/29/2024	COMMENTS
<b>Adopt-A-Family</b>			
<b>Adopt-a-Family - Income</b>			
Balance Forward	1,019	1,019	
<b>Current Year Revenue</b>			
Adopt-A-Family Donations	1,000	358	net after 5% to ASU
Transfer from Operations	1,000	1,623	
Total Adopt-A-Family Current Year Revenue	2,000	1,981	
<b>Adopt-A-Family - Expenses</b>			
Holiday gifts	3,000	2,395	
Total Adopt-A-Family Expenses	3,000	2,395	
Unexpended Adopt-A-Family Funds	19	605	
<b>Video History</b>			
<b>Video History - Income</b>			
Balance Forward	15,102	15,102	
<b>Current Year Revenue</b>			
Video History Donations	1,000	413	net after 5% to ASU
Total Video History Current Year Revenue	1,000	413	
<b>Video History - Expenses</b>			
Equipment & Supplies	2,500	-	
Software Licenses	742	411	Adobe Premiere Pro annual renewal for team account, 2 users
Interview Expenses	0	-	
Total Video History Expenses	3,242	411	
Unexpended Video History Funds	12,861	15,105	
<b>Scholarship Endowment Fund</b>			
<b>Scholarship Endowment Principal</b>			
Balance July 1	102,725	102,725	
Net Investment Return	2,000	6,294	(Sum of net investment return and endowment payout)
Payout to Endowment Spending	(3,548)	(3,548)	
Current-Year Contributions	2,500	741	
Transfer from Operations	0	5,000	
Total Scholarship Endowment Principal	103,677	111,212	
<b>Scholarship Endowment Spending</b>			
Balance July 1	3,179	3,179	
Payout from Endowment Principal	3,500	3,548	will be available to spend 1 Jul 2024
Book sales net income	250	105	after 5% unrestricted gift admin fee
ASU Scholarship - AY 2024-25	-3,429	-	
Total Scholarship Endowment Spending Account	3,500	6,832	

**Table 2 FY 2024 Events with Fees Handled by ASURA**

Event	Fees Collected*	ASUF Mgt Fee	Event Costs	Net Gain/ Loss
2023 SE Arizona Tour	8,830	(399)	(8,873)	(442) **
2024 Silver Star – Elvis	638	(38)	(655)	(55)
2024 Silver Star – Yachts	522	(20)	(536)	(34)
<b>Totals</b>	<b>9,990</b>	<b>(457)</b>	<b>(10,064)</b>	<b>(531)</b>
*Fees paid include a 5% admin fee on checks deposited.				
** Costs and Mgt fee will appear in March				

**Table 3 – ASURA Membership Totals as of March 18, 2024**

	<b>Current 3/18/2024</b>	<b>Last Year 3/1/2023</b>	<b>Change</b>
<b>Current-year members</b>	<b>789</b>	<b>858</b>	<b>-69</b>
Renewals from prior years (any prior year)	501	523	-22
Introductory members	288	335	-47
Paid for the current year, now deceased	2	1	1
<b>Last year's members - not renewed</b>	<b>334</b>	<b>253</b>	<b>81</b>
Members last year, now deceased	1	3	-2
<b>By retired-from organization</b>			
Retired from ASU	772	839	-67
Retired from another university	1	2	-1
Former ASU employee, retired elsewhere	3	3	0
Still employed at ASU	13	14	-1
<b>By time since first joining</b>			
In introductory period	288	335	-47
Members for 0-2 years (excl Introductory)	105	103	2
Members for 3-5 years	116	121	-5
Members for 6-10 years	81	77	4
Members for more than 10 years	200	223	-23
<b>By former employment category</b>			
Faculty and faculty w/ admin appt	321	342	-21
Academic professional	52	45	7
Staff	388	438	-50
Administrative	28	33	-5
<b>Having an Arizona Address</b>	<b>725</b>	<b>795</b>	<b>-70</b>
<b>Logged in to member-only site (ever)</b>	<b>282</b>	<b>293</b>	<b>-11</b>



## 2023-2024 ASURA Annual Report