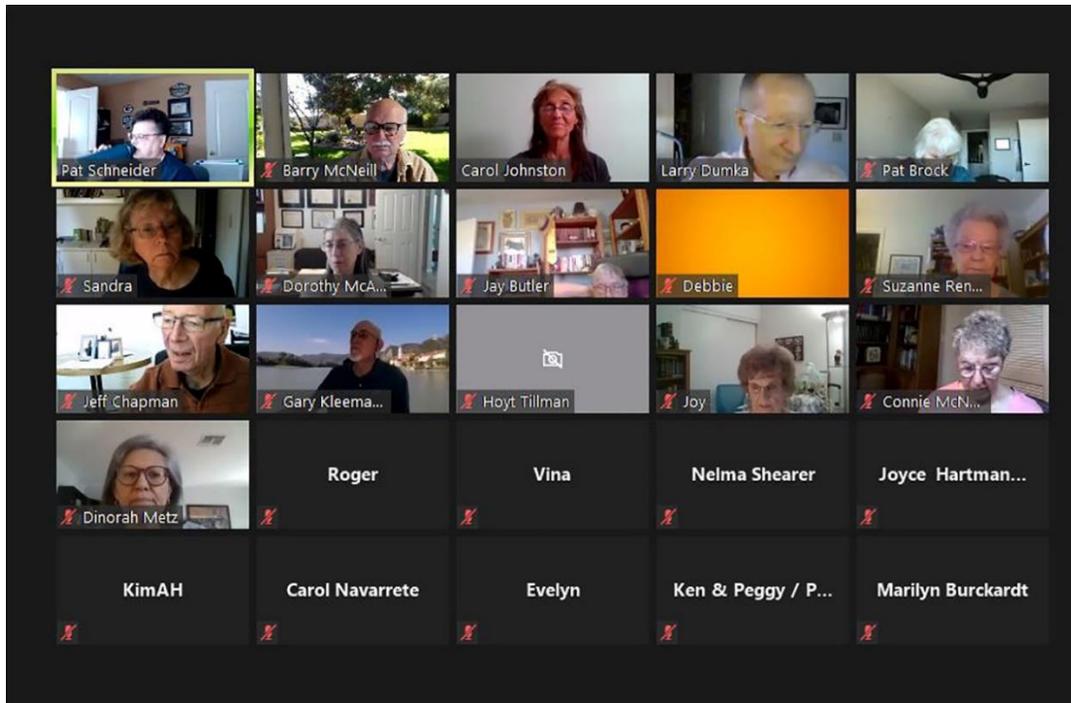




Annual Report from the Board 2020-2021



February Zoom Seminar

This report is for publication at the Annual Meeting
April 13, 2021

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ASURA BOARD AND OFFICERS

2020-2021 (outgoing)

Officers

President – Carl Cross

Vice President – Larry Edmonds

Past President – Jan Thompson

Secretary – Jane Carey

Treasurer – Connie McNeill (Jill Massara resigned 1/2021)

Board Members (year term expires)

Jane Carey (2022)
 Larry Carlson (2022)
 Evelyn Cesarotti (2022)
 Jeffrey Chapman (2021)
 Carl Cross (2022)
 Jean Duncan (2021)
 Larry Edmonds (2023)
 Kathy Gunn (2023)
 Mark Henderson (2023)
 Frank Koonce (2022)
 Jo Madonna (2021)
 Connie McNeill (replacing Jo Faldtz who -----resigned 3/15/2019) (2021)
 Trudy Perez (2023)
 Dave Schwalm (replacing Jill Massara -----who resigned 1/2021) (2023)
 Jan Meyer Thompson (2021)

Ex-officio Members

Alumni Assoc. - John Davis

Emeritus College - Ruth Jones

Human Resources - Judith Cato

University Affairs - Kendra Burton

University Club - Carl Cross

University Senate - Simin Levinson

University Staff Council - Jared Vibbert

2021-2022 (incoming)

Officers

President – Larry Edmonds

Vice President – Kath Gunn

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)
 Larry Edmonds (2023)
 Kathy Gunn (2023)
 Mark Henderson (2023)
 Sue Henderson (2024)
 Frank Koonce (2022)
 Barry McNeill (24)
 Helen Ossipov (2024)
 Trudy Perez (2023)
 Dave Schwalm (replacing Jill Massara -----who resigned 1/2021) (2023)
 Carol Taylor-Tassone (2024)

Ex-officio Members

Alumni Assoc. - John Davis

Emeritus College - Ruth Jones

Human Resources - TBD

University Affairs - Kendra Burton

University Club - Carl Cross

University Senate - Eduardo Pagán

University Staff Council - Jared Vibbert

ASURA OFFICE CONTACT INFORMATION

Phone (480) 965-7668

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PRESIDENT'S MESSAGE

Submitted by Carl J Cross



As this year's ASURA President, I am pleased to present the 2020-2021 Annual Report. We have all learned to cope with the Covid-19 pandemic and ASURA was forced to begin this fiscal year by having to cancel the Annual Meeting. It was replaced by a "virtual meeting" via *E-News* which included the Annual Report and messages from both Past President Jan Thompson and Carl J Cross as she turned the gavel over to him.

In keeping with University policies, we again are having a "virtual meeting", but this time we are taking advantage of Zoom. Members can watch and listen as the new officers are introduced, the reports are given, and our guest speaker, Dr. Joshua LaBaer, addresses the group. Dr. LaBaer is executive director of The Biodesign Institute as well as professor in the School of Molecular Sciences at ASU. He leads ASU's COVID-19 research efforts.

As you review this document, I believe you will share my appreciation for what our members have accomplished through their individual and collaborative efforts and within their chosen committees.

To say this year was *unusual* would be an understatement. Our organization has traditionally enjoyed getting together for both social and educational activities. Having to cancel all our social gatherings could have affected our membership but it actually increased by 58 members. I am always impressed by the investment of volunteer time and talent within this organization. This results in outstanding programs, seminars, and events. We were able to continue offering these via Zoom and realized an increased attendance to our online seminars. All of our seminars are recorded and made available on our website.

This year's Board worked through many challenges and opportunities, accepting new responsibilities as the year unfolded. We were pleased to complete our current year Board with the mid-year appointment of Connie McNeill as Treasurer to step in for Jill Massara when personal obligations required her to resign that position. Ex-Officio Board Liaison positions were filled by University Affairs Kendra Burton, University Senate President Simin Levinson, and Emeritus College representative Ruth Jones.

As we welcome next year's new Board members Rojann Alpers, Sue Henderson, Barry McNeill, Helene Ossipov, and Carol Taylor-Tassone, I would like to thank outgoing Board members Jeff Chapman, Jean Duncan, Jo Madonna, Connie McNeill, and Jan Thompson. Their contributions were many and I appreciate them greatly.

As I hand over the ASURA Presidency to the very capable Larry Edmonds, I would like to thank the Executive Committee, Board members, Committee and Sub Committee Chairs and Ex-Officio members for their service this year. I am thankful for the privilege of working with this committed group of volunteers. If you'd like to join us, there are many opportunities and we would love to have you. Please contact our new President at doctoredmonds@gmail.com.

Carl J Cross
ASURA President

OFFICE VOLUNTEERS

Submitted by Linda Van Scoy and Nancy Lesko

The “New Normal” ... I am sure we would rather have the Old Normal, but your ASURA Office volunteers are forging ahead...adapting, pivoting and reinventing! Hopefully this past year hasn’t been too inconvenient for our members. As you know the ASURA office closed on December 10, 2020, and we reopened on February 16, 2021 with an abbreviated schedule: Tuesdays through Thursdays 11:00-2:00 PM. Closed Mondays and Fridays. That schedule is working for now but we hope to return to four days a week when possible.

With suspended mail delivery, we continue to pick up mail at Mail Services once a week and check voice mail messages on the days we are closed. We are also still able to receive book donations.

Most of the “tenants” in the building have moved out, save a few which resulted in a couple of positive results: The Conference Room on the 2nd floor is no longer managed through Room Scheduling, but is available for our use most any time. Also, with little foot traffic we are somewhat more “protected” than other offices.

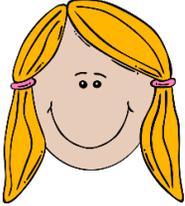
Below is the list of our Office staff volunteers so you will remember us! Call anytime you have questions or need help. (480) 965 -7668.

Business Operations Manager - Carolyn Minner (carolynminner@outlook.com)

Technology Manager - Connie McNeill (conniemcneill@outlook.com)

Co-Office Manager – Linda Van Scoy (lvs@asu.edu)

Co-Office Manager – Nancy Lesko (nclesko@asu.edu)

				
Nanci Beardsley	Bev Buddee	Nancy Lesko	Dorothy Meunier	Carolyn Minner
				
Jeannette Robson	Tara Roesler	Bonnie Scheall	Helen Seaton	Linda Van Scoy
				
Sharon Wielert	This could be you			

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 ASU Retirees Adopt-A-Family program continued this year although COVID-19 made our work very different. I chose not to run around, even though I had 2 willing volunteers, but went the gift card route instead and shopped alone. ASU Retirees supported 2 families, one from Tempe Schools and one from ASU. We provided a gift card at Thanksgiving for \$150 each from Walmart and then provided a \$450 Walmart card for each family at Christmas. In addition, at Christmas, I was able to get some small stocking stuffers as well as a large Christmas stocking making those gifts a bit more festive. There is enough money left in the budget for a gift card for the families for Spring/Easter celebration. Next year, when we are vaccinated and life is normal, I am counting on my 2 volunteers – Henry Stevens and Cecilia Hook – to join me in this fun experience.

As is often the case we received thank you cards from both families.

- The Tempe School District family wrote: *“We would like to thank you for all they you have done. It is amazing how a little prayer goes a long way. A prayer for a good meal came a feast, with laughter, ornaments and presents underneath. We just want to thank you for allowing God to use you. You stepped out on faith while the world is in chaos and blessed us abundantly. Once again you have blessed us for Easter. We thank you and pray that you all get it back 100fold. From our family to yours...peace and blessings”*
- The social worker from Tempe Schools also included a card that thanks ASURA for our generosity and that the family was truly grateful. She wishes we could have seen it for ourselves.

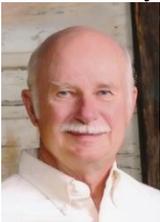
Ginny Sylvester

ASURA Adopt-A-Family Chair

e-mail: Ginny.Sylvester@asu.edu

Video History Project

Submitted by Barry McNeill



Leadership History: The Video History Project is in its 19th year. Starting in 2002, it was chaired for 5 years by June Payne, then for 2 years by Bob Francis. During these first seven years, June and Bob managed a contract with Agave Productions to record 49 interviews. Starting in 2009, Linda Van Scoy chaired the project for 6 years while the project developed its in-house recording and editing capabilities which was made possible by the four fund raising golf tournaments which netted over \$70,000. In 2014, Dave Scheatzle became Chair and worked to develop our on-line capabilities at the ASU Library Repository. In 2019 Barry McNeill took over the chair 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, 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

The Interview Selection/Scheduling subcommittee met early in the year and developed some possible interview candidates. The pandemic shut down our interviews for the year.

The Interview Production Subcommittee had nothing to do during the year. There was some discussion of trying a Zoom interview but that idea was not pursued.

The Editing Subcommittee got the following two unedited interviews edited and into the digital repository.

- Dave Schwalm, Vice Provost for Academic Affairs at the ASU Polytechnic Campus. It was a very interesting interview and has extensive coverage of the early years of the Polytechnic Campus. The video is available for online viewing at <https://repository.asu.edu/items/57499>.
- Suzanne Steadman managed the International Student Programs for about thirty years. There are many stories about the trials and tribulations international students face because of world crises and how Suzanne and her department helped these students cope. The interview is available for online viewing at <https://repository.asu.edu/items/63114>.

The Database Subcommittee also kept busy. Pat Schneider continued to add Abstracts and Table of Contents to those interviews in the Repository that are missing this important information. The interviews of Edwards (John), Ellis, Elmore, Fearon, Glick, Nelson, Kingsinger, and Penley have all been updated. If you would like to help the project and at the same time learn some interesting things about ASU contact Barry McNeill.

In March the Selection and Production Committees were asked to develop guidelines to define when it would be safe to restart interviewing.

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 2020. Receiving, reviewing, and arriving at a consensus, all electronically, during the Corona-19 Virus pandemic, required diligence, persistence, and commitment. Therefore, Jan Shore, Jane Humble, Ginny Sylvester, Lester Hendrickson and Jay Braun deserve a special thank you. Eight applications were critiqued by all and Monique Rodrigues was chosen to receive ASURA's 2020-2021, \$10,000 Scholarship Award.

Ms. Rodriguez is a single mom, raising her six children alone since her husband died a few years ago. She lives in Laveen, AZ., and is in her Junior year, attending Phoenix Downtown Campus and majoring in Social Work. Her goal is to get her MSW and maintain her 4.0 grade point that she has carried throughout her schooling. Though Monique has a class on Annual Meeting day on April 13th, 2021, she has agreed to work with her professor for time to speak via zoom at the meeting.

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 2021-2022.

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

Barbara Fargotstein,
ASURA Scholarship Co-Chair
Email: barbara.fargotstein@asu.edu

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; Seminars – Bev Buddee; Luncheons and Special Events – Trudy Perez.

Coordination of Calendar of Events

Due to the pandemic, there were only seminar events this past year which required no coordination.

Promotion of Events

Eighty-one percent of our members requested and received email notifications for all ASURA organized events slightly reduced from last year. Of this group, thirty-three percent registered for at least one ASURA event during the past year, an increase of six percentage points over the previous year’s percentage. All events were published on the ASURA events website and any member with an internet connection could register online by visiting this website. Further, past event stories continued to be added to the ASURA website (<https://asura.asu.edu>).

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*. 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

Luncheons and Special Events

Submitted Trudy Perez



The members of this committee included Carol Taylor-Tassone, Jo Madonna, Chet Duncan, and Jean Duncan. Unfortunately, the COVID-19 pandemic shut down all in person events. The committee hopes that by next September it will be possible to have the Meet and Greet Pizza party to kick off the new year.

Trudy Perez
ASURA Luncheons Committee Chair
e-mail: Trudy.perez@asu.edu

Seminars

Submitted by Beverly Buddee



Members of the Seminar Committee included Beverly Buddee, Jay Q. Butler, Jeffrey Chapman, and Patricia Schneider. Four seminars were presented during the 2020-2021 FY. Due to the continuing COVID-19 pandemic, all seminars were virtual meetings using the ZOOM platform.

- The panel discussion, What I Wish I Had Known Before I Retired, typically held in September in conjunction with the New Member Meet and Greet Luncheon was cancelled this year due to the COVID-19 pandemic.
- Thursday, October 8, 2020 – Open Enrollment Health Care Seminar. Speakers Randi Gray from ASRS and Tracie Carruthers from ADOA spoke to the updates on plan changes for their respective agencies. Rob Foster, a volunteer community speaker from AARP, talked about the ABCD's of Medicare.
- Thursday, January 14, 2021 – Email, Tech Tools, and You. Speaker Connie McNeill, ASURA's Technology Manager, explained how email works, and how to use it wisely and safely. Also covered were options when it comes to using an email service provider other than ASU, including how to migrate to a different service and how to retain your @asu.edu email address after migration. This was followed by tips on tools you can use to make your digital life a little better
- Thursday, February 11, 2021 – Dr. Carol Johnston, Professor and Association Dean at the College of Health Solutions, presented how our diet can affect our brain function and health. She divided the presentation in three parts: 1. Diet recommendations for healthy minds; 2. Nutrients that are critical to promote a healthy brain; and 3. Food for thought, the other things that impact our brain health.
- Thursday, March 11, 2021 – Noah Arenson, one of the owners of Contact Physical Therapy, continued the theme of healthy living. To compliment Dr. Johnston's February presentation on the effects of a healthy diet on a healthy brain, Noah discussed how therapeutic activity can improve both our lifespan and "healthspan".

The Seminar Committee hopes to offer both in-person attendance and virtual meeting options going forward. Additionally, meetings were recorded for the first time this year and published on the ASURA Past Events webpage.

Respectfully submitted,
Beverly Buddee
Chair, Seminar Committee

Pre-Retirement Seminars

Submitted by Trudy Perez & Liz Badalamenti



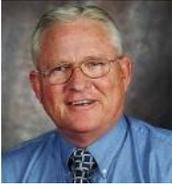
The Pre-Retirement seminars are intended to fill a gap between what HR provides for those about to retire and what retirees wish they had known before they retired. The seminars are available on all campuses via Zoom and are held at noon to accommodate work schedules. Eight seminars were held this year ranging in topics from Social Security, Medicare, Frauds, to How to Financially Prepare for the Economic Reopening. New this year, the seminars were advertised to the ASURA membership.

Trudy Perez
ASURA Co-Chair Pre-Retirement Seminars
trudy.perez@asu.edu

Liz Badalamenti
ASURA Co-Chair Pre-Retirement Seminars
elizabeth.badalamenti@asu.edu

Travel

Submitted by John Brock



The travel committee shut down in the spring because of the COVID-19 pandemic. Before shutting down we were planning several actions which will carry over into 2021 - 2022. We planned to have a visit to Tovera Castle, and in the late spring of 2020 a 2 or 3 day road trip with the "Detours" company to southeastern AZ. We were also planning toward international trips either/or or both, Iceland and Costa Rica. We will continue in this action and the Iceland trip would be in about a year in the spring of 2022. The southeastern AZ trip will be planned for the fall of 2021, dependent on the status of COVID-19 containment. The local trips, like, Tovera Castle and the Rhythm Cats show are coming back to the planning agenda.

John Brock

ASURA Travel Committee Chair

e-mail: john.brock@asu.edu

FINANCE COMMITTEE

Submitted by Connie McNeill



The members of the 2020-2021 Finance Committee were Barry Bruns, Connie Mc Neill, chair, Carolyn Minner, and Mary Stevens. Jerry Snyder was a consultant.

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

In October 2017, the Board approved raising the ASURA scholarship to \$10,000. The financial condition of the Board has stabilized over the last few years and consequently this same amount was approved for fiscal 2021/2022.

The Friends of Phoenix Library book sale program brought in a record amount (see next article).

Identifying and recommending methods of implementing new approaches for improving financial activities of the Board is ongoing

Connie McNeill

ASURA Finance Committee Chair

e-mail: conniemcneill@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.

Friends provides ASURA a quarterly report and issues 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. In past years, I mistakenly

thought that Friends used a calendar year for its reports. This year, I learned that Friends uses a fiscal year, July 1-June 30.

Carolyn Minner, ASURA Business Manager, and I reviewed and calculated annual proceeds based on a fiscal, not calendar year. As result, the list of proceeds per year changed. Also, in 2019, Carolyn advised that funds directed to the College of Education were misdirected to our account with the ASU Foundation in the amount of \$346. The total annual amount from 2011-2020 reflects this deduction.

Due to Covid-19, Friends' operations have been closed since March 2020. Our coordinator at Friends had a skeleton crew. He did not have access to his data bases to print out quarterly reports or write checks to ASURA for sales of our books. Last week, he was able to get access and provide a check for \$1928, our proceeds for FY2020. Carolyn has confirmed that she received the check.

We were able to continue receiving books from donors despite the closure of the Community Services Building. Initially, I met donors at CSB. Linda Van Scoy arranged for Facilities Management to meet me and the donor at CSB at a designated time to open the building and get books to our storeroom. At Linda's request, Facilities provided Linda and me with a key to the building so we could open it for donors and assist them in getting their books to our storeroom. Now that CSB is re-opened, Linda or Nancy Lesko or I can meet donors to move their books to our office or storeroom, until our office is re-opened.

Larry Carlson has assisted greatly with picking up book of donors who are unable to transfer their books. 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, Nancy and Larry for their significant assistance in keeping our program on track during this difficult year.

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

Annual Proceeds (Revised to Reflect Fiscal Years)

Year	Amount (\$)
FY2012	\$893
FY2013	\$496
FY2014	\$ 255
FY2015	\$1554
FY2016	\$1325
FY2017	\$1236
FY2018	\$1082
FY2019	\$1035 less \$347 to Dept. of Ed = \$688
FY2020	\$1928
TOTAL 2011-2020	\$9,457

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

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 Legislative Liaison Committee consists of: Tara Roesler, Lobbyist, Jeri Meeks, Lobbyist, Pat Schneider, Larry Carlson, and Martha Cocchiarella

The 55th Legislature First Regular Session opened on January 11, 2021 and, at this writing, we are more than halfway through this legislative session. With some bills carrying over from the abbreviated 2020 legislative session, the initial 1,824 bills introduced in this session have been slimmed down considerably (over 925 died in committee), with some new and possibly provocative bills yet to be presented late in the session using the “strike all” option. But that’s not to say that we are waiting on controversial bills, especially after the recent contentious presidential election.

This legislative session has seen 124 bills introduced to adjust our current voting system by restricting early voting, revising voting centers numbers, locations and hours, requiring ballot notarization or additional proof of identity, requiring mail in ballots to be received the Thursday before voting day and automatically removing persons from the permanent early voting list after missing four elections (or two general elections), which would affect seniors, military and missionaries. There have also been many bills affecting election procedures; bills adjusting election hand-count/recount parameters, requiring legislative oversight of the election’s procedures manual, establishing emergency polling places and shortening the timeline for correcting unsigned or overvote ballots. The most sensational bill, garnering national attention, would have allowed the popular vote to be overridden by the Arizona Legislature. This bill is dead, at least for this year. Of the over one hundred election related bills presented, approximately fifteen bills are currently moving forward.

Bills pertaining directly to retirees and seniors address regulation and licensure of senior community residences and related nurses and staff. There are appropriation bills asking for general fund monies for adult education grant programs and adult protective services. The bill garnering attention from Arizona Education Association Retired (AEA), American Civil Liberties Union (ACLU), Arizona Retirement Security Coalition (ARSC) and others allowed ABOR to create an optional retirement program. This bill did not move forward. As we do every year, the ASU Retirees Association fully supports ABOR’s appropriation request.

Dr. Crow addressed the Arizona Board of Regents in February 2021, presenting ASU’s Public Enterprise model, which he mapped into academic, learning and knowledge enterprises. Dr. Crow linked ASU’s highly successful enterprise model to 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 – presented last year – which is designed to improve the state’s workforce and support a healthy economy. Each university has a Workforce Readiness Initiative, Arizona State University is expanding engineering education and research and adding five science and technology centers; Northern Arizona University’s focus is in healthcare, including mental and behavioral, which is the largest growing private industry in Arizona; University of Arizona is focused on workforce development initiatives in its medical schools and space exploration, planetary defense, national security and asteroid exploration centers. 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 a growing team of ASU Retiree Association Legislative Watchdogs monitoring the bills as they move through the legislative process, attending retiree related meetings and conferences and working with state and local representatives. My thanks to Tara Roesler, Pat Schneider, Martha Cocchiarella, 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.

Jeri Meeks
ASURA Government Liaison Chair
jeri.meeks@asu.edu

Governor's Advisory Council on Aging

Submitted by Jeri Meeks



Team: Jeri Meeks, Pat Schneider, Tara Roesler, Martha Cocchiarella

ASURA Lobbyists Jeri Meeks and Pat Schneider virtually attended the Governor's Advisory Council on Aging (GACA) meetings this year. GACA was created to advise the Governor, Legislature and all State Department on necessary matters and issues related to aging, including the administration of the State Plan on Aging. These meetings bring together a caucus of Arizona Senators, Representatives and community partners to discuss challenges facing Arizona's seniors.

The Governor's Advisory Council on Aging – sometimes referred to as the Community and Legislative Partners in Aging (CLPA) - reorganized within the Governor's Office of Youth, Faith and Family (GYFF) recently. The meetings have taken on a different frequency, format and variety of topics from past years. Under the GYFF, this year's GACA meetings have been focused on our state's Long Term Care Taskforce response to the pandemic. The Task Force was established to develop recommendations and benchmarks for the gradual re-opening of visitation and to ensure proper protocols are put into place. Members of the task force include operators of a variety of facility types, family members, advocates, and government officials.

Topics for this year's Governor's Advisory Council on Aging meetings were:

- COVID-19 Update,
- Long Term Care Taskforce,
- Alzheimer's Update during COVID-19.
- COVID-19 Vaccinations in long term care facilities, and
- The Staggering Toll on Arizona's Elderly Residents.

ASURA has posted a write-up of each meeting on our website at

<https://asura.asu.edu/GovernorsCouncilOnAging>. Following is a quick recap of this year's meetings:

June 2020 COVID-19 Update. This meeting was an open forum discussion between the participants which included Senators Heather Carter, Lela Alston and Andre Dalessandro; Representatives Jennifer Jermaine, Jay Lawrence, Jennifer Pawlik and Rosanna Gabaldon. The discussion focused around the rise in COVID-19 cases overall and how hospitals will continue to handle the increase. It appears that skilled nursing facilities have a better handle on caring for the patients in their care. Additional testing of staff will continue. Concern over obtaining the necessary PPE was also discussed. Care in rural areas still remains a concern and many areas are converting hotels into respite facilities. There is increasing concern for staffing of long-term facilities as people are somewhat hesitant to seek employment there. Lack of plans for moving infected people from long-term care facilities and group homes to isolated places, like St. Luke's concerned several of the discussion participants. It was suggested that more discussion needs to take place on a strategic, long-term plan for dealing with the virus in 2021-22.

August 2020 Long Term Care Taskforce. Presenters included Dave Voepel, CEO of AZ Health Care Association, Dana Kennedy AZ Director of AARP, Representative Jennifer Longdon LD24 and Becky Hill, a concerned citizen whose mother had been living in a Long-Term Care (LTC) for 10 years. This discussion was focused on resuming

visitation to LTC's after the COVID-19 shut down in March 2020, which, at this meeting, had prevented families from seeing their loved ones for six months. This group was in the process of drafting a "companionate care visitation" plan, which includes several suggestions, such as 1) a negative COVID-19 test result less than 48 hours old and a signed attestation from the visitor 2) organized resident cohorts to restrict spread and designated visitation rooms, 3) medical guidance with contamination metrics and mitigation measures. There was a recognition that one policy would not fit all LTC situations.

LTC family members were firm that they should be part of this discussion and that these facilities need to start reopening now. They stated that family members are no more of an infection risk than an LTC staffer that leaves the facility at the end of the day. Family members play an essential role in physical, mental and emotional care. Family enhances communication, especially if the resident is hard of hearing or deaf. Family also humanizes the resident to the LTC staff and provide an extra set of eyes and ears, ensuring the best treatment for their loved one. There were stories of resident neglect, complaints to the Attorney General or the police, response procedures that left the resident out of the loop and the lack of funds to fully investigate the complaint. We again heard concerns from LTC's about staffing and PPE shortages. Lastly, there was a concern about LTC residents' access to voting.

November 2020 Alzheimer's Update during the Coronavirus pandemic. Presenters included James Fitzpatrick, Director of Public Policy for the Alzheimer's Association Desert SW Chapter, Dr. Eric Reiman, Director of the AZ Alzheimer's Consortium, Senator Heather Carter, Senator Lela Alston, Representative Regina Cobb and Representative Jennifer Jermaine. James Fitzpatrick started the discussion with an update from the Arizona Alzheimer's Association. Arizona has had the fastest growth rate of the coronavirus in the United States and COVID-19 is the 4th leading cause of death in our state. This virus has uniquely and negatively affected the Alzheimer's community and those with dementia. Communication and cognitive skills decline swiftly with family visitation restricted and caregivers overtaxed. Many caregivers suffer from stress and related diseases and have to quit working. Support group participation has declined. Access to community services is essential, but severely impacted by the virus.

Dr. Reiman discussed Alzheimer's therapies and prevention. There is a consensus within the AZ Alzheimer's Consortium, a statewide collaboration in Alzheimer's Disease research, that there will be a prevention therapy within the next five years. Consortium partners Arizona State University, Banner Alzheimer's Institute and Sun Health Research Institute, Barrow Neurological Institute, Mayo Clinic, TGEN and University of Arizona, are working together to develop best practices for research and care, with the goal of a prevention therapy. The state and federal government are funding 50-60 new studies a year. Next year's prevention trial, using subjects with no symptoms but brain indicators such as amyloid plaques, will employ an amyloid antibody. If successful there could be a gene therapy in 2025.

As of right now 60% of patients with Alzheimer's are never tested or diagnosed with the disease.

January 2021 COVID-19 Vaccinations in Long Term Care facilities. Presenters were Dana Kennedy, State Director the AZ AARP, Dove Voepel, CEO of AZ Healthcare Association and Maddy Bynes, Pima Council on Aging and Mark Clark.

Although we were unable to attend this meeting personally, GACA February 2021 minutes contained these notes: Meagan Surgenor, Special Programs Manager with the Arizona Department of Health Services, provided an update on COVID-19 Immunizations. Meagan provided "an overview of the Vaccine and Antiviral Prioritization Advisory Committee (VAPAC). VAPAC is composed of state, local and tribal experts that convene to provide recommendations to ensure fair and equitable vaccine allocation across the State of Arizona. Meagan emphasized that long-term care facilities are a vaccination priority and over 2,100 facilities in Arizona have and are receiving services under the CDC Pharmacy Partnership for Long-term Care with Walgreen's and CVS. The goal is to cover about 450,000 residents and staff over the next several months."

Mary Beals-Luedtka, from the Arizona Area Agencies on Aging (AAA), spoke about the AAA's concerns "with food insecurity, access to the vaccine, and social isolation during the COVID-19 Pandemic. In regard to food insecurity, some areas have received donations to support the continuation of extra meals being delivered,

originally supported by CARES Act funding, but this has not been universal throughout all agencies. In regard to access to the vaccine, there is great concern with getting the vaccine to homebound older adults. Mary noted how some of the agencies have been utilizing regional resources to assist in vaccinating and transportation. She noted that not all care facilities in Tucson have been vaccinated. In regard to social isolation, multiple agencies have developed partnerships to help engage more with older adults. These partnerships have led to the development of iPad projects with “circles of friends,” robotic pets, and mobile applications. She also noted that the 211 number only operates in Maricopa and for state POD vaccinations.”

March 2021 COVID-19: The Staggering Toll on Arizona’s Elderly Residents. The state’s elderly population are bearing the brunt of COVID-19, which is devastating residents of nursing homes and similar facilities. What should the state do to protect the elderly? What short-term changes should state policymakers adopt? What should then not adopt? Which long-term reforms should they explore to fight COVID-19 and similar deadly viruses in the future?

Presenter Dana Kennedy, AARP Director, talked about the continuing struggles of long-term care facilities (LTC’s) and home and community-based services, focusing on the need for family access to loved ones to deter social isolation, abuse, neglect and related eating disorders. The death toll is still high in LTC’s; although only 1% of our state’s population lives in LTC’s, the majority of Arizona’s deaths are related to these facilities. There is a definite need for ombudsman inspections. There is also a need to review emergency response requests to police and firefighters from residents. Kennedy spoke about residents having to call 911 for help, and the responders being turned away by staff. She suggested that there should be a quick response system for elder abuse, modeled after the child protective services system.

Employing, training and retaining caregivers is a continuing struggle. LTC employees are paid poorly and many employees leave for other less stressful minimum wage work. They have no system for reporting abuse outside of the LTC. Representative Longdon stated that caregivers are more than friends or family, they know us intimately and are in charge of our well-being. Their salary should reflect that.

Representatives Dunn and Longdon expanded on the need for inspectors and a priority system for Priority B – nonemergency, but serious – claims. They stated that the Arizona Department of Health Services (DHS) and Arizona Health Care Cost Containment System (AHCCCS) state agencies are heavily siloed and there is no easy handshake between them. Longdon suggested there should be an audit on processes, just like the one done on the Child Protective Services department a few years back. Representatives Dunn and Longdon know that the problem is money and are actively supporting bills that would fund approximately \$5,000,000 in funding for inspectors, watchdogs and an audit process.

In addition to GACA meetings, the Capital Times hosted a meeting in March 2021:

March 2021 Community Legislative Partners in Aging Update. Presenters included Dana Kennedy, AARP Director, Cecilia B Rosales, MD MS Associate Dean Community Engagement and Phoenix Programs and Kyle Sawyer, AHCCCS Liaison.

Dana Kennedy provided highlights from the recent Morning Scoop “COVID-19: The Staggering Toll on Older Arizonans” and discussed how AARP has been a champion for older Arizonans who live independently and in long-term facilities. Kennedy provided information on the latest development in LTC’s and what needs to be done to protect older Arizonans, their families and caregivers. Dr. Rosales discussed the program she had developed to help older, underserved Arizonans receive vaccinations, taking the vaccinations directly to the community members. Kyle Sawyer explained the new transportation benefit that AHCCCS is proving to its members in need of transportation to vaccination POD’s.

Lastly, The Department of Economic Security held a national conference in November 2020:

November 2020 World Elder Awareness Day Virtual Conference. Several sessions were presented ranging from elder abuse, Alzheimer and dementia support for both the patient and the caregiver, local agencies throughout the State of Arizona that provide services supporting the elderly and marginalized populations, as well as private

agencies that exist as service providers. The National Task Group on Intellectual Disabilities & Dementia practices provided a great list of resources, both locally and nationally, that focused on persons with intellectual disabilities and Alzheimer’s disease. Other agencies represented included – Maricopa Elder Abuse Prevention Alliance (MEAPA), National Resource Center on Nutrition and Aging, Phoenix Area Agency on Aging and the Arizona Adult Protection Services.

Jeri Meeks, ASURA Government Liaison
jeri.meeks@asu.edu

ASRS Activities

Submitted by Dick Jacob



The Board of Trustees of the Arizona State Retirement System met last in full session on January 31, and in an *ad hoc* meeting to consider dental plan recommendations on April 20. Committee meetings since then have been held in virtual mode. Membership of the Board now stands at 8 with 1 vacancy yet to be filled. I attended the very brief January 31 meeting as a member of the public on behalf of ASURA and have relied on published minutes and personal communications with ASRS Director Paul Matson and Trustee Michael Miller for information since then. The following are items I deem of importance to the members of ASURA:

- Delta Dental of Arizona and Cigna Health were selected as providers of dental care insurance after a solicitation for bids was held. The contracts were approved on April 20. As such, the ASRS will conclude its current five-year contract with Sun Life Financial on December 31, 2020.
- ASRS, through the procurement processes of the Arizona Department of Administration (ADoA), sought proposals for the next five years’ health plans for active and retired members. Categories for which proposals were sought are separately for both medical and pharmaceutical services: *Non-Medicare Fully Insured*, *Medicare Fully Insured*, *Non-Medicare Administrative Services Only (ASO)* (meaning SRS self-insured); and *Medicare ASO* for pharmaceutical services. The self-insurance option places benefit risk solely on ASRS, with the carrier providing, as said, administrative services only. (It is thought that this may lead to greater flexibility and lower premiums.) At the bidding deadline of 30 April 2020, seven companies had submitted proposals covering one or more of the above categories. One company responded to all seven categories. The proposals were reviewed by a committee of ASRS members (of which I am one of 3) assisted by the Segal Group (healthcare consultants,) and staff from ASRS and ADoA. The following contract awards for medical care were made:

Medicare Advantage HMO – UnitedHealthcare	
Base Premium (per insured person)	\$73
Less RRA* Funds	(\$73)
Net Retiree Premium	\$0
Medicare Advantage PPO – UnitedHealthcare	
Base Premium (per insured person)	\$108
Less RRA Funds	(\$41)
Net Retiree Premium	\$67
Non-Medicare – UnitedHealthcare Choice (per insured person)	
Choice Premier	\$1,062
Choice Value	\$886
Choice Economy	\$775
Choice Plus PPO (out-of-state)	\$1,361

Additional contracts were let to Aetna for non-Medicare coverage, Humana for Medicare and CVS Health for pharmaceutical management. Details of these contracts will be available in the open enrollment guide.

Open Enrollment dates are November 1 through November 30. Materials will be mailed to eligible members before then. On-line seminar and information session schedules will be included.

Self-insurance options were sought from the contenders, but legislation had not reached the point where self-insurance can be considered for 2021. However, the premiums obtained obviate at the moment the motivation for ASRS moving to self-insurance.

- The Arizona Retirement Security Coalition issued a heads-up about a bill to be introduced in the 2021 legislature (sponsored by Rep. Cavanagh and others) that would give new employees an option of choosing an optional 401(K) style defined contribution plan. Estimates are that this could create significant liabilities to ASRS. This action is mostly stimulated by the AZ Board of Regents' apparent desire to withdraw from the Defined Benefit programs of AZASRS.
- As of December 31, 2020, the six month fiscal-year-to-date investment return on the fund was approximately 13.5%.

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

2020 ADOA Health Insurance

Submitted Larry Carlson



The ADOA retiree health insurance program open enrollment for calendar year 2021 ran from October 19 – November 6, 2020. This was an active enrollment, with participants required to enroll or re-enroll for medical, dental and vision plans. Here's what changed:

- Medical; ADOA offered the new Triple Choice Plan (TCP), replacing the Exclusive Provider Organization (EPO) and Preferred Provider Organization (PPO) plans. Each of the three tiers offered a different level of deductible and coverage. The TCP will be offered by BlueCross BlueShield of Arizona and UnitedHealthcare. Medical coverage is no longer available from Aetna and Cigna. Premiums increased.
- Vision; Premiums are reduced 4-6%. The Avesis Discount Plan is not available this year. Also, dental or medical insurance is required to have vision coverage.
- Both providers are promoting comprehensive coverage, online virtual doctor visits, a 24-hour Nurse Line, mobile apps and Virtual ID card. No referrals needed.

In the era of COVID-19 Open Enrollment seminars evolved into webinars and enrollment was processed through ADOA's Retiree Y.E.S self-service portal.

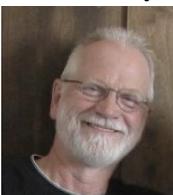
Larry Carlson
ADOA Health Insurance Liaison
e-mail: azorion@gmail.com

MEMBERSHIP AND COMMUNICATIONS COMMITTEE

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

Membership

Submitted by Dave Schwalm



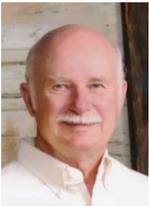
This was an "unusual" membership year. The annual membership drive was delayed about a month as the ASU Foundation struggled to get their new online payment system in place and working. And of course, the COVID-19 pandemic shut down our on campus "recruiting" activities, e.g., the HR pre-retirement workshops, ASU Staff BBQ's, etc. and all the in person social events. But despite all these problems our membership has actually grown.

Table 2 in the Appendix shows that on March 4, 2021 the membership total was 817 up 54 over last year. And even more encouraging was the growth in “new”, paying members which was up almost one hundred percent over the previous year. There was also a modest increase in the number of three-to-five-year members. Further proof of membership interest, 205 members reported attending at least one event, i.e., one of the Zoom seminars, during the year. And finally, members who made an additional donation were up almost twenty percent over the previous year. Table 2 is a picture of a highly successful membership year.

Dave Schwalm
Membership Committee Chair
e-mail: David.Schwalm@asu.edu

E-News

Submitted by Barry McNeill



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

This past year I published 17 issues; you can find old issues in the E-News archive on the ASURA website at <https://asura.asu.edu/EnewsArchives>. Several issues were published during the summer to let the members know ASURA was still functioning and had not shut down because of the pandemic.

Barry McNeill
E-News Editor
e-mail: barry_mcneill@outlook.com

Prime Times Newsletter

Submitted by Jeannette Robson



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

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

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

Through 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 <https://asura.asu.edu/PrimeTimesAdvertising> for further information.

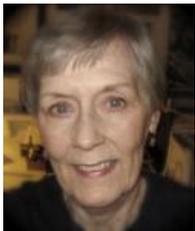
Previous *Prime Times* newsletters, beginning with the fall 2010 through spring 2021 issues, are all available on-line at <https://asura.asu.edu/PrimeTimes>. The mail out versions have all been in black and white while the on-line versions have been in color. However, a special **color** version of the Spring 2021 *Prime Times* was approved and 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 will continue to be mailed to our membership through ASU Mail Services again starting with the summer 2021 issue.

Jeannette Robson, Designer/Editor
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Obituaries

Submitted by Becky Reiss



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

Becky Reiss
Obituary Notifications Volunteer
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Website

Submitted by Connie McNeill



Website

Our website content was kept current and relevant through the efforts of several volunteers. New content included:

- Links to recorded videos of seminars and pre-retirement seminars.
 - Detailed help related to email services and use.
 - Reports from the Governor’s Council on Aging meetings.
 - A list of actions to take if your spouse dies.
- An archive of past E-News issues.
 - Information on how to schedule a COVID-19 vaccination.

In February and March 2021, we updated the site to stay consistent with the latest ASU branding guidelines.

Over 32,000 people visited our website last year, with over 68,000 unique page views. Over 640 pages on our website were accessed at least once. We have a total of over 900 pages, of which about 50 are for internal use, i.e., not viewable by the public. About 60% of our website hits are to our technology tips pages. Our obituaries pages are also very popular with the general public.

In addition to our own website, we have a total of over 100 video interviews from our Video History Project available online via the ASU Library Digital Repository.

Photo Gallery Maintenance

There was no change to the structure or appearance of the photo gallery during the year, and comparatively few photos were added because of the lack of in-person events during the pandemic.

Membership & Events Database

There were no major changes to the Membership and Events database this year. Paul Harper took over responsibility for importing the quarterly files of new ASU retirees to our membership database. Carolyn Minner had been handling that previously.

Other Technology Tools

Because we had some occasional problems in receiving email addressed to asura@asu.edu, we implemented a change to the way such mail is routed. It no longer goes to an ASU Exchange public folder, but instead is routed to an ASURA Gmail account. This simply means that we have better control over the handling of this mail because we do not have to request help from ASU to make changes.

Connie McNeill

Web & Database Committee Chair

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Third Decade of Success Book

Submitted by Barry & Connie McNeill



In the March 2020 Board meeting the possibility of writing a book covering the third decade of ASURA was discussed. The discussion was instigated by Bill Stasi, who offered a very generous donation to help with the printing costs if the book was written. The idea was to continue a tradition, given that there are “First Decade” and “Second Decade” books. At the May Board Meeting we (Barry and Connie McNeill) offered to write a book that would focus on celebrating ASURA’s successes during its third decade. The goal was to have a completed printed /

electronic version ready by the April 2021 Annual Meeting. With the Board’s approval, we took on the project.

We developed an eight-chapter table of contents and began soliciting input from various ASURA volunteers. We were specifically looking for how the volunteers felt about their work, e.g., why they accepted a chair role, what they were proud of, etc. We got good input from a number of volunteers and four of the chapters were written and reviewed during the fall. The final four chapters and an introduction and conclusion were completed in January/February. An assembled copy of the book was available in early March and several members very kindly read the draft and offered change suggestions. At the March Board meeting it was agreed to print 250 color copies of the book. It was taken to the printer in mid-March.

Barry McNeill & Connie McNeill

Third Decade of Success Authors

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TREASURER'S REPORT

Submitted by Connie McNeill



Table 1 in the Annual Report Appendix shows the current fiscal year budget and operating expenditures for ASURA through March 31, 2021. As has been true for previous years Carolyn Minner, the ASURA Business Manager, has done an excellent job of keeping track of our expenditures and income and has prepared this report each month.

Overall, it looks as though ASURA will have somewhat increased income and decreased expenditures vs fiscal year 2019/2020, and the operations account balance at the end of fiscal year 2020/2021 will be about the same as it was at the end of last fiscal year. The main operating account began the new year with a \$35,157 carry forward balance. Because there were changes in the Foundation financial system late in fiscal year 2019/2020 and also because the COVID-19 pandemic impacted mail delivery, our annual membership drive was late. Therefore, revenue was somewhat lower in fiscal year 2019/2020 than would otherwise have been the case, and revenue in fiscal year 2020/2021 will be somewhat higher. Also contributing to a somewhat higher income is an upward trend in membership renewals. Expenditures are likely to be somewhat lower because the pandemic prevented us from having any in-person events. The budget that was developed during the summer and adopted by the Board in October did not take these factors into consideration, and therefore was very conservative. That budget projects a yearend balance of \$32,34. In any case, ASURA will enter fiscal year 2021/2022 with the financial resources needed to cover normal expenses and with a cushion to cover some additional expenses.

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. The scholarship endowment began the year with \$68,274. These funds are invested on behalf of ASURA by the ASU Foundation, with our primary goal being long-term growth. While growth is our desired goal, due to current financial conditions, the Board has approved the use of the endowment earnings to fund current scholarship expenses.

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

Connie McNeill - ASURA Treasurer
e-mail: conniemcneill@outlook.com

Table 1

Financial Report for Fiscal Year 2020-2021 as of 2/28/2021

Account Categories	FY21 Approved Budget	Actual YTD As Of 2/28/2021	COMMENTS
ASURA Operations			
ASURA Operations - Income			
Balance Forward	35,157	35,157	
Current Year Revenue			
Event Registration Fees & Donations Collected	100	610	ASU Basketball & Refund Tovrea Cancellation
Membership Dues	14,000	8,970	
General Operations Donations	1,300	1,620	
Holiday Bake Sale 2020	0	0	
Transfer In	0	0	
5% Gift Assessment	-815	-533	
Total Operations Current Year Revenue	14,585	10,667	
ASURA Operations - Expenses			
<i>Printing and Mailing Costs</i>			
Membership Drive	700	776	
Prime Times	1,400	457	
<i>Event Costs</i>			
Paid Events	100	300	Tovrea Castle Tour
Annual Meeting	1,000	0	
Meet & Greet Luncheon	0	0	
Holiday Potluck & Fundraiser	0	0	No Holiday Potluck for 2020
<i>Other Operations Costs</i>			
Scholarship Award	7,700	7,872	\$10,000 - \$2128 paid from Endowment
AROHE	120	120	
Business Luncheons & Service Appreciation	100	0	
Technology Services	3,500	3,297	Wild Apricot (2 yrs) Zenfolio (1 yr)
Professional Services	0	1,106	Replaced office door card reader & cards
Office Equipment & Supplies	1,500	361	Includes postage
Marketing Supplies	200	0	
Seminars	100	0	
Foundation Transaction Fees	100	0	
Transfer Out	0	90	Scholarship donation posted incorrectly
Transfer to Adopt-A-Family	1,000	1,000	
Total Operations Expenses	17,520	15,378	
Increase (Decrease) in Current Year Balance	-2,935	-4,711	
Uncommitted ASURA Operations Funds	32,222	30,446	
General University Allocation (HR)			
Balance Forward	51	51	
Current Year Allocation	7,000	7,000	
Total University Current Year Revenue	7,051	7,051	
Expenses Charged to Allocation			
Annual Report	200	0	
Bylaws & Ballots	200	28	
Office Equipment & Supplies	1,100	0	
Prime Times Fall/Spring/Summer	3,000	2,856	
Copier/FAX Equipment Annual Lease	922	922	
Membership Drive	600	0	
Technology Services	300	0	Pantheon Web Hosting
Marketing Supplies	100	0	
8.5% Administrative Service Charges	579	324	
Total Subsidized Expenses	7,001	4,130	
Uncommitted University Funds For Operations	50	2,921	

Table 1

Financial Report for Fiscal Year 2020-2021 as of 2/28/2021

Account Categories	FY21 Approved Budget	Actual YTD As Of 2/28/2021	COMMENTS
Special Projects			
Special Projects - Income			
Balance Forward	100	100	
Current Year Revenue			
Gift-In-Kind Receipts		8,568	
Friends/Phx Library Book Sale Net Income	1,000	0	
Total Special Projects Current Year Revenue	1,000	8,568	
Special Projects - Expenses			
Gift-In-Kind Adjustment		8,568	
Transfer out 1/2 of Book Sale Income to Scholarship	480	0	
Transfer out 1/2 of Book Sale Income to Video History	480	0	
Mail Service - General	0	25	Delivered book donation from Poly Campus
Foundation Transaction Fees	40	0	
Total Special Projects Expenses	1,000	8,593	
Increase (Decrease) in Current Year Balance	0	-25	
Uncommitted Special Projects Funds	100	75	

Adopt-A-Family			
Adopt-a-Family - Income			
Balance Forward	550	550	
Current Year Revenue			
Adopt-A-Family Donations	500	750	
5% Gift Assessment	-25	-38	
Transfer from Operations	1,000	1,030	Includes 1 duplicate renewal transferred
Total Adopt-A-Family Current Year Revenue	1,475	1,743	
Adopt-A-Family - Expenses			
Holiday gifts	2,000	1,507	
Total Adopt-A-Family Expenses	2,000	1,507	
Increase (Decrease) in Current Year Balance	-525	235	
Uncommitted Adopt-A-Family Funds	25	785	

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

Table 1

Financial Report for Fiscal Year 2020-2021 as of 2/28/2021

Account Categories	FY21 Approved Budget	Actual YTD As Of 2/28/2021	COMMENTS
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History Book			
History Book - Income			
Balance Forward	1,919	1,919	
Current Year Revenue			
History Book Donations	0	0	
5% Gift Assessment	0	0	
Total History Book Current Year Revenue	0	0	
History Book - Expenses			
History Book	1,500	0	1500 as per Board approval
Foundation Management Fees (5%)	75	0	
Total History Book Expenses	1,575	0	
Increase (Decrease) in Current Year Balance	-1,575	0	
Uncommitted History Book	344	1,919	

Scholarship Endowment Fund			
Scholarship Endowment Principal (40003616)			
Balance July 1	68,274	68,274	
Invested Funds Gain (-Loss)	100	8,918	
Payout to Endowment Spending - FY21	-2,200	-2,237	
Current-Year Contributions	1,000	1,004	
Foundation Management Fees	-900	-934	
Total Scholarship Endowment Principal	66,274	75,025	

Scholarship Endowment Spending (70003616)			
Balance July 1	2,498	2,498	
Payout from Endowment Principal - FY21	2,200	2,237	
Transfer from Special Projects (Book Sale Proceeds)	960	0	
Transfer from Operations	0	30	1 donation posted incorrectly in Workday
ASU Scholarship	-2,300	-2,128	
Total Scholarship Endowment Spending	3,358	2,637	

Counts	As Of 3/4/2021	As Of 3/4/2020	This Yr -Last	More Counts	As Of 3/4/2021	As Of 3/4/2020	This Yr -Last
Current-year Members	817	763	54	By Former Employment Category			
Renewals from prior years (any prior year)	540	486	54	Faculty and Faculty w/ Admin Appt	342	323	19
Introductory members	277	277	0	Academic Professional	49	42	7
Paid for the current year, now deceased	4	2	2	Staff	163	172	-9
				University Staff (Service Professional)	228	190	38
Last Year's Members - Not Renewed	214	209	5	Administrative	35	36	-1
Members last year, now deceased	1	4	-3				
				Having an Arizona Address	761	706	55
By Retired-from Organization				Level of Activity			
Retired from ASU	798	740	N/A	Checked at least one volunteer area	146	140	6
Retired from another university	1	3	N/A	Attended at least one event this year	205	190	15
Former ASU employee, retired elsewhere	3	3	N/A	Attended an event ever	390	357	33
Still employed at ASU	15	17	N/A	Logged in to Members-only Site (ever)	245	215	30
				Made an additional donation this yr	171	140	31
By (Approx.) Time Since First Joining				Non-members in Database			
In Introductory Period	277	277	0	Was a member at some time	384	380	4
Members for 0-2 Years (excl Introductory)	67	34	33	Never a member	25	226	-201
Members for 3-5 Years	127	114	13				
Members for 6-10 Years	92	87	5				
Members for more than 10 Years	254	251	3				
By Communications They Want to Receive¹							
Upcoming Event Announcements (e-mail)	666	639	27				
Obituary Notices (e-mail)	317	312	5				
Prime Times (US Post)	733	696	37				
Other ASURA Communications (e-mail)	604	576	28				
None of The Above	15	12	3				

¹All members receive the annual Board of Directors ballot, and membership renewal notices. Those with e-mail addresses also receive confirmation notices (by e-mail) about renewal, event registrations, and donations.

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