



**ARIZONA STATE UNIVERSITY
RETIREES ASSOCIATION**

REPORT FROM THE BOARD, 2000-01

10th Anniversary Founders' Day Celebration and Annual Membership Meeting

**Luncheon, Saturday, April 21, 2001, 11:30 a.m.-2 p.m.,
the ballroom, Old Main**



(All group photos were taken at the board meeting of March 8, 2001.)

VOTING MEMBERS, ASURA BOARD OF DIRECTORS, 2000-2001

Terms expire 4/2003

Bill Baxter
15016 N. Stratford Circle
Fountain Hills 85268-2312
480-837-3275
azwmbaxter@aol.com

Quentin Bogart
2633 S. Bala Drive
Tempe 85282-3957
480-968-0977
qbala@imap3.asu.edu

Ellie Branstetter
10200 N. 86th Street
Scottsdale 85258-1403
480-991-7867
sulin10200@aol.com

Vivienne Gardner
2625 E. Southern, #C113
Tempe 85282
480-831-3778
levivienn@hotmail.com

Chuck Woolf
334 E. Fremont Drive
Tempe 85282-6934
480-839-2883
charles.woolf@asu.edu

Terms expire 4/2002

Mat Betz VP
6816 E. Eagle Feather Road
Scottsdale 85262-7362
480-488-7954
mandjbetz@aol.com

June Payne
4733 E. Cambridge Avenue
Phoenix 85008-1507
602-840-3427 FAX 602-952-8526
junepayne@qwest.net

Peggy Randolph Sec
3101 S. Golf Drive
Tempe 85282-4033
unlisted; leave message @ ofc.
peggy.randolph@asu.edu

Don Robinson
2114 W. Mesquite Street
Chandler 85224-1736
480-963-6252

Gayle Shuman (resigned)
successor to be appointed

Terms expire 4/2001

Don Dotts Pres
1206 E. Harbor View Dr.
Tempe 85283-2117
480-838-4658
dondotts@aol.com

Marvin Fisher
956 E. Leeward Lane
Tempe 85283-1940
480-839-9525

Sam Hunter
3143 E. Amber Ridge Way
Phoenix 85048
480-706-9490

Gordon Inskip
2625 E. Southern, C-275
Tempe 85282-7656
480-831-3466
inskeeps@asu.edu

Kelly Stadmler Treas
712 W. Manhattan Drive
Tempe 85282-4731
480-967-8182

FIVE NON-VOTING MEMBERS OF BOARD, 2000-2001

Doug Johnson
2000-01 Pres. Acad. Senate
(Ex-officio)
GHall 116, Mail 2202
480-965-2222
doug.johnson@asu.edu

Joan Leard, for
Classified Staff Council
(Ex-officio)
MU 182G, Mail 0901
jleard@asu.edu

Nancy Jordan, Asst. VP
Institutional Advancement
(Ex-officio)
ADM B285
480-727-7913
nancy.jordan@asu.edu

Christine Cervantes, for
Human Resources
(advisory)
AG 103, Mail 4203
christine.cervantes@asu.edu

Carole Johnson
for Sr. VP/Provost
(Ex-officio)
ADMA 210D, Mail 2803
480-965-1224
carole.johnson@asu.edu

AZ area codes:
602 — Phoenix & N. Phoenix (with a few exceptions)
480 — East valley
623 — West valley
520 — AZ outside valley area

as of January 2001

c:board101.pub

OTHER NUMBERS

ASURA Office 480-965-7668
480-965-7807 FAX

Corrine Irvan, Coord, office and office volunteers
mci212@imap1.asu.edu

Activities
Joe Schabacker 480-786-6184
Betty Ann Wood 480-367-0357

Adopt-A-Family
Jeri Goldflader, jeri855@juno.com 480-855-3855

Education
Diana Regner, dianareg@aol.com 480-838-8372
Joe Wilkinson, joseph.wilkinson@asu.edu 480-966-6986

Health Insurance
Dick Murra, rmurra@asu.edu 480-821-0124
Martha Waltemath 480-893-2266

History Project
Dean Smith, desmith@goodnet.com 480--831-3679

Legislative Liaison Council

Bob Beeman, Co-Ch., bobbeemansr@juno.com 480-967-7084
Bob Mings, Co-Ch., mings@asu.edu 480-968-1815
Mat Betz, mandjbetz@aol.com 480-488-7954
Don Fausel, dfausel@asu.edu 602-274-2020
Don Gieschen, giesch@imap1.asu.edu 480-966-7497
Bruce Mason, wiesmuhl@imap3.asu.edu 480-423-0123
Joe Milner 480-838-1797
Zeke Prust, zaprust2@juno.com 480-838-0511
Gale Richards, galeri@imap3.asu.edu 480-966-7635
Dean Smith, desmith@goodnet.com 480-831-3679

Membership

George Morrell 480-967-4417

Newsletter

Carolyn Brown, cbrown258@juno.com 480-632-6049

Retirement System

Gale Richards, galeri@imap3.asu.edu 480-966-7635
Quentin Bogart, qbala@imap3.asu.edu 480-968-0977

Scholarship

Mat Betz, mandjbetz@aol.com 480-488-7954

University Club

George Morrell 480-967-4417
Denis Kigin, kigin@imap3.asu.edu 480-967-0836

Volunteers

Madelyn Wright 480-777-0027



President's Report

by Don Dotts, President, 2000-01

As we began our new ASURA year last April, I outlined four areas of emphasis where I wanted to make significant progress in the ensuing 12 months. As this report is written, we still have a few months to go and some of our most active projects (legislative advocacy, insurance concerns, etc.) are just underway. However, we have good things to report in spite of our ongoing concerns. The four areas of emphasis are:

Increasing our membership to 1,000—As this was written, we had reached a total of 986 members, up considerably from this time last year, and we have hopes of reaching that 1,000-member goal. We were informed by the University last fall that we could no longer receive full information, including addresses, on new retirees. This meant that we have been able to get only the names of retirees and must take time for address research and verification before we can approach potential new members. In spite of this slower process, we're optimistic that we will increase our ranks as planned.

Serving our members—We have had successes in our travel and activities offerings this year which have served our membership well. We also have carefully monitored the issues involved in the Retirement System's health insurance changes this year—matters of great concern to our members. As the Department of Administration health insurance programs go through the planning phase for new contracts next fall, we are keeping a close watch on these potential changes. I feel that one of our most important functions is to help our members understand the inevitable changes which will be occurring in these critically important programs, and for us to exert influence through our representatives as decisions are made.

Increasing effectiveness in our advocacy for retirees and ASU issues—ASURA has a good record of standing up for our members and for ASU's concerns with the state legislature. As our senators and representatives consider important matters relating to retirees' benefits, health issues, and support for higher education, we are actively engaged in this process. Our Legislative Liaison Council members continue to actively represent our group as the legislative process continues, and we had a record turnout of ASURA representatives at the February legislative picnic.

Serving the University community—Just as we help in the legislative advocacy for ASU, we also serve the broader community in other ways. We have had two stories in the ASU employees' newsletter, *Insight*, about ASURA and our programs. We have canvassed the University's departments by mail to help increase the involvement of our volunteers throughout the campus.

It has been an active year for your association. We are proud of what we have done and are optimistic as we continue to serve and represent our members.

Treasurer's Report

by Kelly Stadmiller



Our revenue and expenditure situation is relatively stable.

This leaves us in a position to be able to finance capital equipment purchases as needed, operating supplies, assist the Adopt-A-Family program, and make various other necessary expenditures throughout the year.

A large portion of our annual revenue from renewals and new memberships is deposited between April 1 and June 30.

Balance forward 7/1/2000		23,063
Revenue 7/1/00-3/7/01	7,617	
Expenditures 7/1/00-3/7/01*	<17,219>	
In 1996-97 the board voted to endow a re-entry scholarship. This year the board has again added \$5,000 to the fund.	<5,000>	<14,602>
Balance as of 3/7/01		8,461

*Includes printing of the 10th anniversary history book.



Committee, Coordinator, and Liaison Reports in alphabetical order

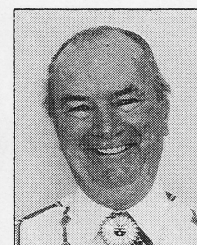
Activities Committee

by Betty Wood and Joe Schabacker

The activities committee planned several successful trips in 2000-2001. We completed a trip to Kartchner Caverns State Park early in 2000; it was very well attended.

The annual "big trip" went to Nova Scotia and other places in Canada in the fall. Participants had a wonderful time. In late December, members enjoyed the Fantasy Lights tour in Sedona.

In 2001 we conducted a member-interest survey, and are assessing the results. We hope you responded, and that the activities we've planned for next year will be exciting to you.



Adopt-A-Family

by Jeri Goldfader

The Adopt-A-Family program was established in 1992 and the following year an association with the Tempe Elementary School District #3 began. Each year, with input from the TD3 nurses and social workers who act as our liaisons, the program assists a deserving and needy family which is trying to better itself by supplying them with food, clothing, toys, and special needs. This year one of the families needed local bus tickets, for example. Deliveries are made approximately eight times during a full academic year (mainly at holiday times) with greatest emphasis on gifts for Christmas. This year we were able to adopt two families consisting of a grandmother, two mothers and four children.



Committee members help with shopping, wrapping and delivering gifts. Our dedicated 2000-2001 members are Don Fausel, Maxine LaRoux, Ruth Ludemann, Janis Newman and Madelyn Wright. My personal thanks to these wonderful volunteers who make my work so much easier.

Donations of new and gently used items, as well as monetary gifts, are always welcome. Letters requesting donations in the form of gift certificates are sent throughout the year to local businesses and it is gratifying when positive responses are received. ASURA members were extremely generous in response to our recent request for funds, and the families will be well taken care of through spring this year and the fall 2001-02 season.

Our thanks to everyone who participates in this wonderful community project. We are proud that our Adopt-A-Family program has the reputa-

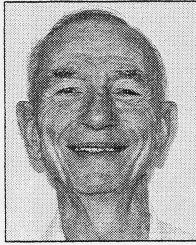
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tion of being unique in that it helps the families throughout the year, and not just on a one-time basis.

Education Committee

by Diana Regner and Joe Wilkinson



The eighth annual Retirees Day was a demonstration again of how the combined efforts of the active members of our organization can present a successful event. The education committee, volunteer office staff, and board members combined with the Memorial Union staff to give our members one of the best Retirees Days yet. The presenters gave their time to offer eight great programs and the catering office served an outstanding meal quietly and quickly.

A brief summary of the programs, which were all well-received, follows. The sign-ups were very balanced and the numbers () are included.

PRICING THE PAST was presented by Suzanne Houck, a certified appraiser, who provided an overview of the appraisal process, whether for insurance claims, estate valuations, or one's own knowledge. She presented an informative slide talk and samples of china and silver. (29)

EXERCISE AND AGING, PRINCIPLES AND PRACTICE was presented by Pam Swan, PhD, and her session could have been filled many times over. She emphasized the importance of regular exercise according to one's capabilities. She guided an individual through five spinal column exercises and provided handouts. (25)

AGING: THE LIFELONG CHALLENGE was presented by Pattie Moore, a visiting professor of Design at ASU and an internationally-known gerontologist and designer. She is a leading authority on the requirements and behaviors of seniors. She spoke of her dedication to building and making environments and products which meet the needs of all consumers—of all ages and abilities. She described the work of her company in designing tools and living spaces that meet those needs. Her research was done in disguise as an elderly woman traveling throughout the U.S. (39)

TRY CARTOONING FOR FUN was presented by our own Don Robinson, who shared the wealth of his artistic abilities with the attendees. His hands-on lesson delighted the participants, who left the session gleefully displaying the results. (26)

DOING WATERCOLORS was presented by Audrey Robinson, a watercolor artist in her own right. Each individual was given the tools and basic instruction to start their own creation. Participants were heard laughing and having fun. A time limit was all that prevented masterpieces from developing. (26)

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GROWTH AND THE QUALITY OF THE URBAN EXPERIENCE was presented by Dean John Meunier of the College of Architecture who gave an outspoken and forceful overview of urban sprawl and possible solutions. He gave a thought-provoking multiscreen slide show about the issues of architectural and environmental quality in the Phoenix area. (30+)

FINANCIAL PLANNING FOR RETIREES was presented by Professor Les Tenney, whose expertise in financial areas was shared with many members before retirement. This talk was geared to retirement years. He explained the new distribution rules for IRAs and other retirement plans which liberalize required distribution amounts and choices of beneficiaries. He listed worry-free investment strategies, classes of risk and tests to employ in selecting investment brokers. (33)

ARIZONA RECOLLECTIONS was canceled due to the illness of Polly Rosenbaum. Pattie Moore kindly offered to take over that hour and gave another interesting talk about quality of life by design and having consumers insist on a level playing field for products, places and people. (20+)

Our luncheon speaker, **BETSEY BAYLESS**, Arizona Secretary of State, gave an address telling of her early years in Phoenix. She is a third-generation Arizonan. She pointed out that the Arizona economy has been extractive (i.e. mining, citrus, cotton), but is now adjusting to other successful areas such as technology and service. She had declined lunch, since she was leaving for Lake Havasu, but upon seeing a sample plate, changed her mind and enjoyed her lunch. She was very appreciative of member Don Robinson's cartoon of her, which also incorporated some of her pets, and he received a nice note from her later.

The committee this year has been Diana Regner, Chair; Joe Wilkinson, Co-chair; Jim Ames, Sue Blumer, Don Gieschen, Bets Manera, Elaine McGovern, Zeke Prust, Gale Richards, Don Robinson, Dean Smith, Lou Weschler, and Ruth Wineberg.

Health Insurance

by Dick Murra

The year 2000 continued the escalation of costs for health insurance and decreased the availability of private physicians in the HMO structure. CIGNA terminated their contracts with most east valley physicians and forced senior care members into their in-house staff model centers. While the change caused concern at the time, in general the transition went well. Members found new physicians and accepted the staff centers. The loss of Blue Cross/Blue Shield as an indemnity carrier caused general complaints and the change to Intergroup for indemnity coverage has caused some problems. In general, the changes have been accepted with only some reluctance.



The escalation of costs for health insurance was the primary concern expressed by members. A legislative bill introduced in the 2000 legislature to increase the subsidy did not make it through committees. A bill passed by the legislature which allows HMO-enrolled members to sue their HMOs and added chiropractic

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care as a covered benefit promised to cause significant cost increases to premium charges. While the premiums for policy year 2000 (for members with Department of Administration policies, October 1, 2000 through September 30, 2001) appear to be holding, the impact for the 2001 policy year promises to be significant.

The announced selection of PacifiCare as the sole health insurance provider (for members with Arizona State Retirement System policies) caused considerable concern. The impact on retired members who were enrolled in the Blue Cross/Blue Shield indemnity plan was most significant since the PacifiCare Senior Care supplement plan, not being a true indemnity plan, was more restrictive. Further, there have been reports of physicians not accepting PacifiCare due to slow pay. A major problem exists in the PacifiCare formulary. Many of the prescription drugs which were approved by Blue Cross/Blue Shield are not included and therefore were not approved. Patients were advised to return to their physician to get a prescription for an alternate drug. This problem is currently under study by the Arizona State Retirement System and PacifiCare. A change in the formulary is likely but may result in increased cost.

The Department of Administration's health insurance section experienced large cost increases in premium charges for the policy year beginning October 1, 2001. As a result, they elected to re-compete the health insurance program. Bids were received on January 25, 2001 and are now being evaluated. New contracts are anticipated prior to the end of the current legislative session. The Governor's Office and the legislature have been advised of the probable budget impact. Increases in co-pay amounts as well as premium charges to be paid by the retiree are anticipated. The only saving grace would be an increase in the subsidy amount. Our retired members must be willing to make the effort to contact their legislative representatives asking for their support on this issue.

History Committee

by Dean Smith



The History Committee has completed its assigned task, and the book about the ASURA's first decade is now available.

We are charging \$6 per copy. I believe that the founders of the association should receive free copies—those who got it started and the ten presidents, at least. That decision is up to the board of directors, however.

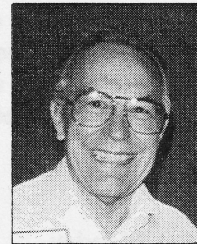
I am grateful to June Payne, who edited the manuscript and assembled photos, along with Carolyn Brown and others; to Al Camasto, who did the design; to Zeke Prust, who worked with the printer; and to the many others, on and off our committee, who helped bring the book to completion.

Legislative Liaison Committee

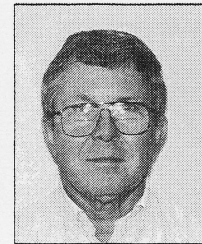
by Bob Beeman and Bob Mings

The Legislative Liaison Committee of the ASU Retirees Association has maintained a close contact and relationship with the Coalition of State Retiree groups, the ASU Devil's Advocates, the Arizona State Retirement System and the Arizona State Legislature.

Committee members have made personal, telephone, mail and e-mail contacts with Senate and House leaders, Legislative committee chairs and committee members, asking support for bills which would benefit Arizona's state retirees. While the committee's primary concern has been for an increase in the health insurance premium benefit, lobbying efforts have also been made on behalf of bills which would increase the basic retirement benefit.



Beeman

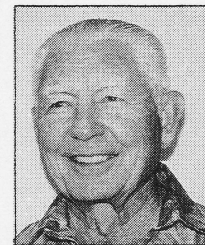


Mings

Membership Committee

by George Morrell

Membership in the ASURA is steadily increasing. We will end the 2000-2001 year with approximately 950 members. This number will fluctuate during the year with the enrollment of new members and some dropouts. It is the long-term goal of the committee that we increase our membership to 1,000. The recruitment process continues throughout the year.



Office Volunteers
by Corrine Irvan
Coordinator

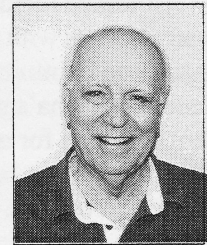


Thanks to ALL our dedicated office volunteers who help keep the place up and running. Many of them have been on board since the beginning in 1991. Our newest office recruit is Bob Frazier, formerly with Benefits in Human Resources. The following people take care of the office on the days noted. Morning volunteers work 9 to 12 and afternoon volunteers work from 1 to 4. Of course, many of these volunteers help with big mailouts and also are on various committees and some have been on the board. They're a multitalented group.

MORNING AFTERNOON

Monday

Morning—Pat Skinner
Afternoon—Gale Richards



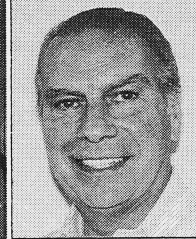
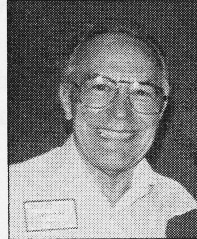
Tuesday

Morning—Esther Hardesty
Afternoon—Maxine LaRoux



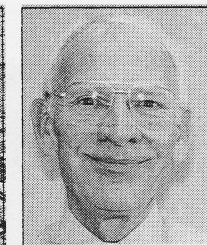
Wednesday

Morning—
Bob Beeman
Ed Scannell
Afternoon—
Marilyn Wahl



Thursday

Morning—Corrine Irvan
Afternoon—Bob Frazier



Friday

Morning—Martha Waltemath
Afternoon—Dorolis Wade

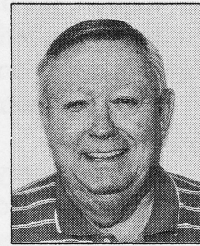


Call or stop by to say hello or sit in the rocking chair for awhile!!

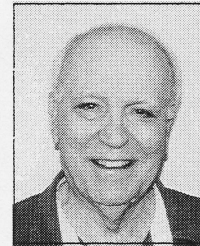
Retirement System Liaison Committee

by Quentin Bogart and Gale Richards

Your representatives continued their Arizona State Retirement System (ASRS) oversight responsibilities during the past year. ASRS is one of the most successful state employee retirement funds in the nation. This 23-plus billion dollar agency is the statutory responsibility of a nine-member board of directors appointed by the Governor from several categories representing both the interests of our members and the public. Chuck Essigs of Mesa is the current chair. The ASRS board meets once a month, usually at its headquarters, 3300 North Central Avenue in uptown Phoenix; however, it also meets three or four times a year in Tucson.



Bogart*



Richards

Seven standing committees provide leadership to the various areas of ASRS's operations. Those in which our ASURA members should have a natural interest are: Investment Review, Long-Term Disability and Health Insurance, and External Relations and Legislation. All seven committees are supported by key professional staffers. One or two meet once a week, another once a month, while the rest meet on an "as needed" basis.

The day-to-day operation of the System is under the direction of LeRoy Gilbertson, the director. He is assisted by an extremely large professional staff, some of whom deal directly with us as member services people who aid us as we plan our retirements and again when we have questions or problems as retirees. ASRS also has a division whose staff deals with retiree disability and health insurance issues. A good many of you are aware of this group. Evident, but not seen, are scores of other professional staffers who deal with System investments, payments to members, and other vital services.

The System has been so successful with its investments that sufficient funds are available to handle all the obligations of the System for the next three years without requiring additional income or using any of its invested assets. The board appears to be extremely cautious in changing investment strategies, giving those of us with oversight responsibilities the assurance that the funds are in good hands. Individual board members do their homework, ask good questions, and judiciously protect the fund assets. Investments are made by both ASRS professional staffers and by external investment firms using several types of funds. Each one of these investment funds representing ASRS's assets is carefully monitored. If a specific fund is not performing up to the expectations of the board and ASRS staff, the fund's managers are removed and the funds are placed with a new set of managers. This is not an uncommon occurrence.

Perhaps the most volatile issue facing the system today is that of health insurance. This year ASRS received only one bid in response to its RFP (request for proposals) for health insurance. The board is deeply concerned by the lack of interest on the part of potential health care providers. PacifiCare is the current ASRS provider. One issue which is generating a lot of criticism is that of prescription drugs. Many of the name brand medicines which our members require are not on PacifiCare's list of approved drugs. Because of member concerns, the board's committee on long-term disability and

*As the newer member of the oversight team and one who is just beginning to get a basic understanding of ASRS, it seemed to me that sharing something of the agency's organization, structure, and operation might be helpful to all who read this.

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health insurance prevailed on PacifiCare officials to revisit this crucial issue. As a result, the list of approved medications is being broadened, but not without a modest monthly increase (\$14) in the premiums of those who are enrolled in the program. Look for the entire health insurance arena to be a difficult one for all of us in the months ahead.

In summary, ASRS assets are in good shape even though the stock market has experienced considerable volatility as the economy has gone through its recent "hiccup." Yes, some of ASRS's assets have decreased in value, but probably not as much as retirement plans in other states. ASRS continues to be well managed and in good general health. A more complete picture of ASRS's current condition may be found in the Winter 2001 edition of *Financial Horizons*, the ASRS newsletter, which was mailed to you recently.

Scholarship Committee

by Mat Betz



Each year ASURA awards a scholarship for a re-entry student (defined as an undergraduate who has been out of high school for at least five years and will be a full-time ASU student for the first time in the fall semester). The stipend for this year was \$2,272, equal to in-state fees, which may be used for any educational purpose.

The committee recommends the review procedure and criteria, evaluates the applications, and selects the awardee. This year there were six qualified applicants, and the committee decided to award the scholarship to Susan Taffer for a second year, the maximum allowed. Ms. Taffer has been a 4.0 Sociology major and made an impressive presentation to the ASURA meeting last April.

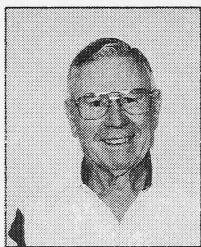
This year the ASURA board contributed an additional \$5,000 to the scholarship endowment; the amount in the endowment fund now totals over \$23,000, including accrued interest.

In the fall the committee reviewed the procedures and criteria and recommended some minor modifications and clarifications to the board. They were approved and forwarded to the ASU Scholarship Office, which identifies candidates and administers the award for us.

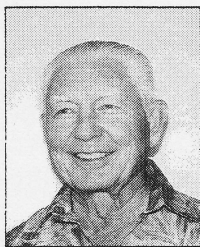
This year the committee consisted of Bob Beeman, Sue Blumer, Diana Regner, Guido Weigend, Hal White, and Mat Betz, chair.

University Club

by Denis Kigin and George Morrell



Kigin



Morrell

The professional staff is making a determined effort to make the Club user-friendly. A half-price membership fee was recently offered to eligible persons.

Personnel involved with the Club include Tom Trierweiler, General Manager; Mona Hernandez, Member Services Coordinator; Todd Everett, District Manager, Fine Host Corporation; and John de Toit, Executive Chef.

Their features include a frequent breakfast program; Friday night dinners; periodic Sunday brunches; and Thursday casual dining and happy hours.

The Arizona State University Club is a members-only club. Members have reciprocal privileges with other clubs which are members of the Association of Faculty Clubs International (AFCI).

Volunteers

by Madelyn Wright



The Volunteer Committee consists of 13 ASURA committees and 21 functions for Arizona State University. About a third of our retirees appear on these lists, with some retirees volunteering for more than one area.

Parking permits are available without cost to retired staff members, thanks to the generosity of the Vice Provost for Administrative Services, or to retired faculty through the generosity of the Senior Vice President/Provost, for several campus lots.

There is something for everyone who is interested in being active. Need more contact with other people? Want to learn more about a different area of ASU? Want to help out regularly? Occasionally? Let us know.