



# ANNUAL REPORT FROM THE BOARD 2010-2011



*Attendees at the Holiday Luncheon, December 16, 2010*

This report is for distribution at the Annual Meeting  
April 30, 2011, 1:00 p.m.  
ASU Tempe Campus, Memorial Union Alumni Lounge

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## ASURA BOARD AND OFFICERS

### 2009-2010 (outgoing)

#### Officers

Connie McNeill, President  
Mary Stevens, Past President  
Dave Schwalm, Vice President  
Jo Madonna, Secretary  
Joyce Hartman Diaz, Treasurer

#### Board Members

Gary Anderson  
Joyce Hartman Diaz  
Jim Fordemwalt  
Elmer Gooding  
Dick Jacob  
Doug Johnson  
Jo Madonna  
Wilma Mathews  
Connie McNeill  
Rose Minetti  
Carolyn Minner  
Bill Moor  
Dave Scheatzle  
Dave Schwalm  
Joy Shearman  
Bill Stasi  
Mary Stevens

#### Advisory Board Members

Sheree Barron, Human Resources  
Gary Grossman, University Senate  
Robert Muscari, Univ. Staff Council  
Barbara Shaw-Snyder, Public Affairs

### 2010-2011 (incoming)

#### Officers

Dave Schwalm, President  
Connie McNeill, Past President  
Sheila Stokes, Vice President  
Barry Leshowitz, Secretary  
Bill Moor, Treasurer

#### Board Members

Gary Anderson  
Barry Bruns  
Barbara Bradford Eschbach  
Dick Jacob  
Doug Johnson  
Barry Leshowitz  
Wilma Mathews  
Connie McNeill  
Rose Minetti  
Carolyn Minner  
Bill Moor  
Jeannette Robson  
Dave Scheatzle  
Dave Schwalm  
Joy Shearman  
Sheila Stokes

#### Advisory Board Members

Sheree Barron, Human Resources  
Barbara Shaw-Snyder, Public Affairs  
TBA, University Staff Council  
TBA, University Senate

## IMPORTANT CONTACT INFORMATION

### ASURA OFFICE

P.O. Box 873308  
Tempe, AZ 85287-3308  
<http://asura.asu.edu>

(480) 965-7668  
FAX: 480-965-7807

### ARIZONA STATE RETIREMENT SYSTEM

3300 North Central Ave  
Phoenix, AZ 85012  
<https://www.azasrs.gov/>

(602) 240-2000 or  
1-800-621-3778

### ARIZONA DEPARTMENT OF ADMINISTRATION

100 North 15th Avenue, Suite 103  
Phoenix, AZ 85007  
<http://www.benefitoptions.az.gov/>

(602) 542-5008 or  
1-800-304-3687

**OFFICE VOLUNTEERS**



**Carolyn Minner**



**Carol Moore**

Carolyn Minner, our volunteer Business Manager, handles all purchasing, mailing and other business transactions for the Association. She also maintains the membership database and the e-mail distribution lists. Carol Moore recruits, trains and coordinates our Front Desk volunteers, in addition to serving a shift on the Front Desk herself.

Our dedicated Front Desk staff volunteers keep our office running smoothly, and they cheerfully help everyone who interacts with the ASURA. Office hours are Monday through Friday, 9 a.m. to noon and 1 to 4 p.m.



Carol Berg  
Monday morning



Carolyn Lanners  
Friday afternoon



Maxine LaRoux  
Thursday morning



Joan Leard  
substitute



Nancy Lesko  
Wednesday afternoon



Betty Norris  
Monday afternoon



Jeannette Robson  
Wednesday morning



Jack Sarrett  
substitute



Ed Scannell  
substitute



Helen Seaton  
substitute



Anna Marie Shivers  
Friday morning



Linda Van Scoy  
Tuesday afternoon

Connie McNeill is the technology support volunteer for the ASURA. She helps office staff and Board and committee members with technology use. She also installs and supports ASURA equipment. This year a new Video Editing studio was established in the office for use by the Video History Project volunteers. It includes a high-end computer, scanner, CD printer, and related hardware and software.

We always welcome any and all assistance from those interested in getting involved. If you are interested in joining our volunteer staff, please contact us at (480) 965-7668.

## PRESIDENT'S MESSAGE



**Connie McNeill**

It has been an honor and a pleasure to serve as your president in 2010-2011. Like those who have gone before me, I have been continually impressed and gratified by the ability and dedication that our members bring to bear in serving the ASU Retirees Association. Altogether, I have found the year enjoyable and rewarding.

One of my major goals for this year was to get the Board thinking about our long-term financial health a little more. Mary Stevens and the Finance Committee took on this challenge. The Board confirmed the importance to our organization of continuing with our scholarship, video history, and adopt-a-family programs, and determined that to assure that we have the financial resources necessary to continue or even expand these, we need to raise some funds. Dave Scheatzle, along with some volunteers that he recruited, very gallantly returned to the fund-raising fray by putting on another Veterans' Day Golf Tournament, which was pretty successful considering that we had not held it for a couple of years. The committee is currently in the process of determining whether we might be able to raise funds by collecting used books from our members and selling those in cooperation with the Friends of the Phoenix Public Library. In addition, the Board made the decision to re-invest the earnings from our Scholarship endowment fund back into the endowment, with the goal that eventually there will be a large enough endowment that the annual investment earnings will support the current full tuition scholarship – and perhaps someday, even additional scholarships or partial scholarships.

The Board believes that we ought to try to do more to help our members with the many life choices and daily living issues that retirees face. As a result, we have formed a new Seminars Committee that Dick Jacob is chairing. The committee plans to put on several seminars per year. In the next few months we will be offering sessions on financial planning, health insurance, social networking (e.g. Facebook), and optimizing your volunteer experience.

Our Legislative Liaison Council – Jerry Aronson, Dick Jacob, Doug Johnson, and Rose Minetti in the forefront – have spent lots of time downtown working with government entities to protect and promote the interests of our membership, and other retirees of the State of Arizona. They know a lot about what is going on, and I hope that they will share some of that knowledge, and discussion about it, with interested members via a seminar, coordinated by the Seminars Committee.

We have had a particularly active year in terms of events. There was a very successful trip to China last summer, planned and coordinated by Gary Anderson. Bill Stasi and members of the Travel Committee planned a number of local outings and a trip to Copper Canyon. Barbara Bradford Eschbach and her colleagues on the Luncheons and Special Events Committee organized a second Fashion Show and a second Jam Session, building on ideas begun last year. In addition, the committee added a very interesting and successful Crafts Show to the annual Holiday Luncheon. Barry McNeill and the Retirees Day Committee put on another very informative and interesting event. Innovations in the handling of pre-session coffee and in the luncheon entertainment were well received. Doug Johnson, Rose Minetti, and Dick Murra put on very well-attended and useful sessions for those who wanted help in understanding the new State health insurance programs.

Lastly, our Membership Committee, chaired by Elmer Gooding, has spent lots of time trying to get out the word about how our organization benefits ASU retirees. We hope that by sharing our own positive experiences with the organization we will encourage our fellow retirees to join with us in our retirement-years activities.

## 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



**Joan Leard**

Two families were adopted for this school year; one family of six from the Tempe Elementary School District #3 and one family of four from ASU.

The Tempe family consists of a mother, father, girls 13, 5, 3 and a boy 7. The father is attending school and their income is very limited. Three of the children attend Laird school. They are having a hard time making ends meet and were grateful for all we gave them. Their first priority was basic needs such as food and clothing. At Christmas the oldest girl asked for a WalMart gift card so she could shop for school supplies.

The ASU family consists of a mother, father, son 18 months and a daughter 4. The father is a senior at ASU in the WP Carey School of Business working toward his degree in Business Management. He works full time at a local credit union where he has worked for seven years. The mother is a stay at home mom. He wrote, "I feel extremely humbled and blessed to know that ASURA has chosen to adopt my family. This year has been extremely hard for us and your news made our day."

The funds used for these purchases come from ASURA member donations and the ASURA treasury. With your help we will continue to give two families struggling with education for a better life a helping hand. Please continue to donate so we may keep this outreach program alive and well for many more years.

### Video History Project



**Linda Van Scoy**

The Video History Project (VHP) made significant progress this year. To date, 64 interviews have been completed and we are pleased to report our committee has produced 16 of those in house, with 6 more interviews scheduled in the next two months.

Also important to report is the recent establishment of an editing studio in the ASURA office. In addition to producing the DVDs, we are now able to edit them as well. This will be useful for viewing or research if the user is interested in specific chapters (arranged by topic). It also enables us to develop presentations using a variety of highlights from individual interviews for meetings and events. Eventually we plan to have selected "clips" available on our Web site. With the editing process recently underway, we hope to have our in-house videos edited by the beginning of the fall semester. Following that, over time, we will edit the balance of the DVDs produced prior to the in-house process.

Another improvement to our project that was put in place this year is offering the membership the opportunity to receive the videos by mail. To order by mail, call, e-mail or write us to request the DVD you would like to view and we will send it to you by US Mail. Enclosed in each DVD will be a label with the ASURA return address on it. After you view the DVD, return it in the mailer in which you received it, affix the new label to the front (over your address) add postage and drop in the mail. You may also continue to drop by the office and check them out for viewing.

Below are the DVDs that are available with the exception of those with an asterisk, which are being edited and will be available in the summer or fall.

1. Charles Backus (Engineering and East/Polytechnic Campus)
2. Loretta Bardwyck (Nursing)
3. Mat Betz (Civil Engineering/Administration)
4. Ellamae Branstetter (Nursing)
5. Brent Brown (Public Affairs & Institutional Advancement)
6. \*Hugh Burgess (Architecture)
7. \*Rudy Campbell (Former Tempe Mayor, Board of Regents, Sun Angels, Research Park)
8. Lattie Coor (President)
9. Troy Crowder (Journalism and Telecommunications)
10. Don Dotts (Alumni Association)
11. Roy Doyle (Education)
12. John Edwards (Education)
13. Bob Ellis (KAET-TV)
14. James W. Elmore (Architecture)
15. Hal Fearon (Purchasing/Management)
16. Marvin Fisher (Langues and Literature)
17. \*Milton Glick (Provost) (pictured on our home page with Ruth Jones)
18. Margaret Gisolo (Dance)
19. Elmer Gooding (Economics/Administration)
20. Leonard Gordon (Sociology)
21. Betty Greathouse (Curriculum and Instruction)
22. Eugene Grigsby (Art)
23. \*Ann Hardt (Education)
24. \*Vernon Hastings (Construction)
25. William Huizingh (Accounting)
26. Bill Kajikawa (Athletics)
27. Denis Kigin (Technology, and Continuing Education & Summer Sessions)
28. \*Jack Kinsinger (Provost)
29. Frank Kush (Athletics, football)
30. Beth Lessard (Dance)
31. \*William Lewis (Engineering, Information Technology)
32. Eugene Lombardi (Music, University Symphony Orchestra)
33. Bruce Mason (Political Science)
34. Alan Matheson (Law)
35. Gerry McSheffrey (Architecture and West campus)
36. Arlene Metha (Counseling Psychology)
37. Victor J. Miller (Agriculture)
38. Carleton Moore (Chemistry and Geology, meteorites)
39. George Morrell (Purchasing)
40. \*Paige Mulhollan (Executive VP/Provost)
41. Dick Murra (Human Resources)
42. Russell Nelson (President, Business)

43. \*Robert Oliver (Architecture)
44. Lonnie Ostrom (Development & ASU Foundation)
45. Clyde Parker (Gammage)
46. \*Larry Penley (Business)
47. Bonnie Peplow (News Bureau)
48. Anne M. Pittman (Physical Education, tennis)
49. Ross Rice (Political Science)
50. Gale Richards (Human Communication)
51. Frank Sackton (Public Affairs and many other hats!)
52. Nick Salerno (English)
53. \*Joseph Schabacker (Management)
54. Wilma Schwada (former ASU first lady)
55. Leon Shell (Student Affairs)
56. Dean Smith (ASU Historian, Publications)
57. Rudy Turk (Art Museum)
58. George Umberson (Music)
59. Linda Van Scoy (Provost's Office)
60. \*Guido Weigend (Liberal Arts)
61. \*Louis Weschler (Public Affairs)
62. Bobby Winkles (baseball)
63. \*Madelyn Wright (Class Scheduling/Registrar)
64. Roundtable discussion with Brent Brown, Russell Nelson and Frank Sackton

\*Interview complete, DVD forthcoming.

As a means to supplement the Video History Project and Scholarship budgets, ASURA sponsored a fundraiser. Co-chairs Dave Scheatzle and Mernoy Harrison resurrected the Veterans' Day Golf Tournament and raised \$4,000. Half of the proceeds went to the Bobby and Ellie Winkles scholarship endowment and half to ASURA to split between the VHP and the Scholarship budgets.

Our VHP committee this year includes Roger Carter, Richard Loveless, John McIntosh, Dave Scheatzle and Linda Van Scoy. If you have an interest in this project, particularly in editing or transcribing, we invite you to join the committee. As always, we welcome nominations of retired ASU employees for inclusion in the Video History Project. Send your nominations to:

ASU Retirees Association  
Video History Project  
P. O. Box 873308  
Tempe, AZ 85287-3308

Or e-mail them to [lvs@asu.edu](mailto:lvs@asu.edu)



### **Scholarship Committee**



**Sue Blumer**

The Scholarship Committee met in April, 2010, to select the recipient of this year's scholarship, Anthony Desamito, an art major at ASU. He presented an outstanding academic record as well as a focused career goal and career experience and a life story of overcoming hardship. He has not only created art, but he has also put together art shows. He has expressed his gratitude for the scholarship. He plans to talk at our annual meeting.

This scholarship program provides an important means for members to participate in the lives of current students on all of our campuses and to see what unusual and diverse life stories these students bring to the university. Most of these students face long years to complete their undergraduate degrees and graduate work. Since they are reentry students, further delays make it difficult for them to fulfill their potential. Thus, our scholarship, which provides \$6500 for the academic year, is a powerful means to help one student at a time.

The committee meets each spring to select the scholarship recipient for the next academic year. As tuition rises and economic conditions remain difficult, the number of applications has increased precipitously, demonstrating the importance and need for the scholarship. Committee members spend long hours reviewing the applications before the meeting to make the selection.

The excellent students who apply for the scholarship make the selection difficult but rewarding. Their diverse interests and background, their outstanding academic and community achievements, and their academic and professional goals continue the tradition of the ASURA scholarship.

## EVENTS COMMITTEE

The Events Committee plans for and provides educational programs and activities consistent with interests of ASURA members. Currently, the Events Committee consists of four separate subcommittees – Luncheons and Special Events, Retirees Day, Seminars, and Travel. Reports from the subcommittee chairs follow.

### Luncheons and Special Events



**Barbara  
Bradford  
Eschbach**

The subcommittee responsible for planning and organizing ASURA luncheons and special events consisted of Mary Stevens, Pat Nay, Arlene Westgard and Barbara Bradford Eschbach.

The first meeting of the subcommittee was called by Mary Stevens in early October 2010. Barbara agreed to act as chair, and the subcommittee agreed to an overall plan for the year focusing on a few new activities in addition to the traditional luncheons.

The first event was held November 17th, and offered ASURA members an opportunity to learn about volunteer opportunities for Habitat for Humanity. The event was hosted by ASU retiree Darel Eschbach, a HFH volunteer for 10 years, and was held at the HFH ReStore in Mesa. We did not have enough lead time to advertise this event in a *Prime Times*, and the event drew only a few attendees.

The annual Holiday Potluck was scheduled for December 16th and was again held in the CSB. The subcommittee was interested in an enhancement to the traditional potluck event, and organized an Arts and Crafts Exhibition and Sale at the same time. The crafts provided festive decorations and the sales totaled \$425.00 of which \$85 (20 percent) in commissions was directed to ASURA. It is recommended that the crafts exhibition and sale be repeated in future years, with advertisement beginning with the summer edition of *Prime Times* to provide more advance notice and preparation time.

Based on the success of the previous year, a second Fashion Show and Brunch was held at Dillard's (Chandler Fashion Center) on January 20th. Retirees were recruited as models (seven ladies, three guys) and overall participation was good (35 total). While this event was successful and enjoyable, it may be wise to skip a year for an event of this type.

To engage musicians (vocalists, instrumentalists) and music lovers, a Musical Jam Session was held in the Skirm Auditorium of Friendship Village Tempe on March 23rd. The event was advertised in the Spring 2011 *Prime Times* as well as the normal flyers and e-mail announcements. Special emphasis was placed on advertising to the ASU retirees who are Friendship Village residents as well as members of the ASU Emeritus College. There were 20 attendees and a few retirees (e.g. Bob Ellis, Jack Mendleson) performed with the professional musicians.

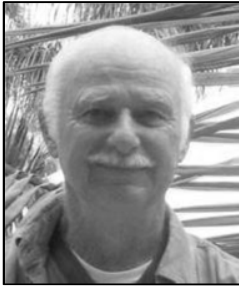
The final event organized by this subcommittee is scheduled for April 8th. This event will be a luncheon at Shalimar Golf Clubhouse with a presentation by Dr. Jay Braun. Registration thus far stands at 25, and it will no doubt be a well-attended, successful event.

The subcommittee recommends that for 2011-2012 we get events planned and advertised much sooner, particularly those that are scheduled for Fall 2011. Emphasis will be placed on submitting

articles for publication in the Summer 2011 and Fall 2011 *Prime Times*. There should probably be two luncheons (one Fall and one Spring) in addition to the traditional Holiday Potluck.

A suggestion submitted to the ASURA Board at its March 2011 meeting was to organize a welcome and orientation event for late September or early October 2011. Light refreshments will be served (e.g. a morning coffee or an afternoon tea) and new and existing ASURA members will hear presentations from Board and committee members regarding the year's activities (seminars, travel, luncheons, etc.). The Board agreed to budget \$200 from the 2011-2012 budget for this event.

### Retirees Day



**Barry McNeill**

The 18th annual Retirees Day, held on Saturday, February 26, 2011, was planned and carried out by the Retirees Day Committee. The committee had eight members including Carol Berg (ASURA Office liaison), Sue Blumer, Dennis Ederer, Barbara Eschbach, Joyce Hartman Diaz, Wilma Mathews, Barry McNeill (chair), and Evelyn Partridge. The committee was formed in the late summer and held its first meeting on September 2, 2010. The committee met twice more in September and then once a month through March 2011.

The event was held in the Memorial Union on the Tempe Campus and there were 106 registered attendees, down about 30 from last year. Registration was again set at \$25 which resulted in a revenue neutral event. The evaluations indicated that most attendees felt the event was well done. The committee tried using the Cochise Room for the morning food and drinks room rather than a presentation room and this seemed to be well received.

The final program consisted of the following eight morning presentations:

- Islam, Islamists and America by Dr. M. Zuhdi Jasser, President of the American Islamic Forum for Democracy (AFID).
- Ethical Challenges of Emerging Technologies by Dr. Joseph R. Herkert, Lincoln Associate Professor of Ethics and Technology, Arizona State University.
- The Impact of Alzheimer's Disease by Helle Brand, Physician's Assistant, Banner Alzheimer's Institute, Memory Disorders Clinic.
- Seeking Silence by Prof. Max Underwood, Architect and President's Professor of Architecture, Arizona State University.
- Illegal: Life and Death in Arizona's Immigration War Zone by Terry Greene Sterling, journalist, author, and Writer-in-Residence at the Walter Cronkite School of Journalism and Mass Communication at ASU.
- Bartlett's Sketchbook: Background of an episode of PBS' History Detectives by Dr. Eduardo Pagán, Bob Stump Endowed Professor of History, School of Humanities Arts and Culture, Arizona State University and Dr. Jeremy Rowe, School of Computing, Informatics and Decision Systems Engineering at Arizona State University.
- Freaks of the Storm by Dr. Randy Cerveny, President's Professor School of Geographical Sciences, Arizona State University.
- Economic Recovery by Dr. Dennis Hoffman, Director of L. William Seidman Research Institute, W. P. Carey School of Business, Arizona State University.

The luncheon program was a bit different this year with a program put on by vocalist Delphine Cortez and pianist Joel Goldenthal both from Jazz in AZ. Joel spent about 15 minutes giving some of his background, a bit about what jazz is, and some material about the organization Jazz in AZ. He then went to the keyboard and Delphine joined him on the small stage. They presented the audience with

30/40 minutes of jazz renditions of various songs, some which the audience probably knew and some of which few if any in the audience knew. The general reaction seemed to be quite positive.

### Seminars

The Seminars Committee met for the first time on Friday, February 18, and again on Friday, March 18, 2011. Committee members present were Doug Johnson, Bill Stasi, Barry Leshowitz, Barry McNeill (2/18 only) and myself. Joy Shearman was excused both times.



**Dick Jacob**

We used most of the time at the first meeting to orient ourselves regarding our charge and discussing the principles that would guide us.

We decided that:

- “Seminar” was a close approximation to what the Board had in mind.
- Topics should be relevant to the challenges and opportunities of “senior life.”
- Topics solely of intellectual or pastime interest are covered by several organizations in the area and would not be addressed by us.
- We will try to have the seminars as cost-free as possible.
- Rather than intermittently, the seminars should be offered on a “regular” basis, by which we mean monthly during the traditional school year.

A discussion of possible topics ensued and, at the end of the meeting, assignments were given to committee members to generate single-page seminar proposals, to be submitted to the chair within two weeks. Plans to develop and administer a questionnaire at Retirees’ Day were agreed upon, and Bill Stasi took the lead in developing the instrument.

Proposals were duly submitted and discussed at the second meeting, as was the responsibility to offer informational seminars during the next health care open enrollment period. Committee members who were present and participated in the discussion were asked to prioritize five proposals under consideration. Opinions were submitted by email, and the following slate of seminars has been selected:

- |    |           |  |
|----|-----------|--|
| 1. | April     | Financial Planning for Later Life (Johnson)        |
| 2. | May       | Reconciling Health Insurance Statements (Jacob)    |
| 3. | September | Investments and Fraud (Stasi)                      |
| 4. | October   | Open Enrollment Seminars (TBD)                     |
| 5. | November  | Social Networks - Facebook (McNeill)               |
| 6. | December  | Enriching Your Volunteering Experience (Leshowitz) |

Titles and exact dates are to be determined. Names are those of the assigned subcommittee chairs responsible for organizing the respective seminars. Subcommittee chairs have been urged to begin their work as soon as possible.

A scan of the survey indicated that the Community Services Building is the most acceptable venue for these seminars. The survey has not otherwise been analyzed as yet.

## **Travel**

The ASURA Travel Committee meets on a monthly basis during the academic year. The committee members this year were Gary Anderson Co-Chair, Willis Buckingham, Beth Fordemwalt, Jim Fordemwalt, Gary Kleemann, Patricia Moore, Norm Perrill, and Vladimir Borovansky. The Committee members strive to select, plan and conduct travel opportunities that the ASURA membership and their friends will participate in and enjoy. The Committee has conducted surveys of members' travel interests and destinations and always evaluates reactions to trips to gather ideas for future planning. The Committee welcomes your suggestions and ideas.

The Committee has several types of travel opportunities they try to include each year: day trips around the Valley; overnight trips (2-3 nights) within Arizona; overnight trips (3-4 nights) in the region; and international trips of two-three weeks. One comment travelers almost always make is the great fun and joy they have traveling with colleagues.

We continue to plan future trips with updates and information in the *Prime Times* and on the ASURA Web site. Photos and stories about past trips can be viewed under past events on the ASURA Web site. A new Web site feature allows space for comments.

The Travel Committee greatly appreciates the support of the ASURA office staff, Carolyn Minner with financial accounting and mailing of the printed flyers, Jeannette Robinson with the *Prime Times*, and Connie McNeill for the Web site. This team effort makes it all happen.

Individuals interested in providing input for future travel activities and joining this committee should contact [wstasi@asu.edu](mailto:wstasi@asu.edu) or [gwander@asu.edu](mailto:gwander@asu.edu). We want you to get more involved with ASURA and its various committees.

## **International Travel**



**Gary Anderson**

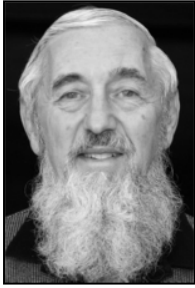
In May, 2010, twenty ASURA 'Chopsticks' boarded a plane at Sky Harbor for an incredible 22 days in China. We covered thousands of miles by train, plane, boat and bus, from Shanghai on the east coast to the city of Lijiang in the far southwest of the country, not far from Tibet.

The highlights included a three days cruise on the Yangtze River, the terracotta warriors in Xian, the karst geologic structures along the Li River, an ancient village of the Naxi people, a walk on the Great Wall, a visit to the Temple of Heaven, the Forbidden City, the Ming tombs, the Summer Palace and so, so many more. One suggestion: do not ask a Chopstick to see their pictures!

We found the Chinese people to be very, very friendly and cordial. They would frequently, and shyly, ask us if they could practice their English with us. Often we were asked if we would pose with them as their friend took a picture. On one occasion a Chinese mother asked one of our Chopsticks to hold her baby while she took a picture! We also ran into a group of ASU students while touring the Forbidden City. Small World!

Where next? In October, 2011, eighteen ASURA 'Boomerangs' and their friends are going to board a plane to go Down Under. We will spend 24 days visiting Australia and New Zealand, from the red rocks of the Outback, to the coral of the Great Barrier Reef, to the mountains and bays of Kiwiland. Keep alert: your trip is coming.

### **Local Travel**



**Bill Stasi**

The Travel Committee provided four local trips this year. The first trip was to Copper Canyon, Mexico. This week long trip included many stops providing both educational and cultural experiences coupled with great scenery from the sunset by the ocean in Guaymas to the mountains and canyons inland. Memories will last a lifetime for all who traveled with us.

The second trip in the fall provided music to soothe your soul at the new Musical Instrument Museum, a treasure in our own back yard of Phoenix, AZ. This journey was a sellout and we repeated it again in the spring so all could enjoy this delight.

The last trip of the year will be to Boyce Thompson Arboretum in April viewing the beauty in Arizona's oldest and largest botanical garden in Superior, AZ.

## FINANCE COMMITTEE

The members of the 2010-2011 Finance Committee were Mary Stevens, chair, Joyce Hartman Diaz, Doug Johnson, Bill Moor, and Jerry Snyder. The Committee met regularly and focused on four functions/projects. These are detailed below.



**Mary Stevens**

### 1. Differentiating the Roles of the Treasurer and the Finance Committee

On June 7, 2010, President Connie McNeill provided written guidance to the Finance Committee on the roles and responsibilities of the Treasurer and the Finance Committee.

The Treasurer is responsible for: preparing the annual budget in the fall and monitoring/revising it as the year progresses; making recommendations on handling financial transactions, including donations and costs for activities; and requesting the Finance Committee to conduct the annual review of the previous year's expenditures. The Finance Committee is responsible for: considering the long-term finances of the Association, including whether there is sufficient income to finance on-going special projects (Video History Project, annual scholarship and Adopt-A-Family program); making recommendations to the Board on ways to raise revenue if necessary; and conducting the annual review of the previous year's expenditures.

### 2. Conducting the Annual Review of ASURA Expenditures in 2009/10

Per ASURA Bylaws, Article V.D.5, the Committee conducted the annual review on November 11, 2010 after considering these documents: ASURA Annual Event Report FY 2010; ASURA Financial Report 7/1/2009 through 6/30/2010; Cash Flow-ASU Foundation Operations 7/1/2009 through 6/30/2010; ASU Foundation Summary Balance Sheet/Income Statement as of June 30, 2010 (operations); Cash Flow-Public Affairs Operations 7/1/2009 through 6/30/2010; ASU Foundation Summary Balance Sheet/Income Statement as of June 30, 2010 (special projects); and Cash Flow-Special Projects 7/1/2009 through 6/30/2010. The Business Manager, Carolyn Minner, participated in the review. The Finance Committee unanimously agreed that the expenditures of the Association in 2009/2010 were reasonable and consistent with the budget. The Committee also verified that ASURA ending cash balances were in agreement with the underlying Foundation records. The Committee submitted its review to the Board on December 8, 2010. The records used to conduct the review are included with the Minutes of the December 8, 2010 Board meeting.

### 3. Pursuing Fund Raising Activities on behalf of ASURA

The only past fundraising for ASURA occurred between 2004 and 2007. This year, ASURA conducted two fundraising events and another is in progress.

#### ASURA/Bobby Winkles Golf Tournament



**Dave Scheatzle**

From 2004 to 2007 current Board member and former ASURA President Dave Scheatzle organized and conducted annual golf tournaments with sponsors and raised considerable income for the ASURA Video History Project. In 2007, the Board asked Dave if some of the income could be used for the other two special projects, the scholarship and Adopt-A-Family programs. After considering the text of the materials used to promote the tournaments, Dave advised that some of the income could be used for the other special projects. Due to the recession, there were no tournaments in 2008 or 2009.

Dave offered to organize a golf tournament this year and he and Mernoy Harrison co-chaired the event, which took place at the ASU Karsten Golf Course on Veterans Day, November 11, 2010. Sundt Construction and Core Construction Services contributed \$1500 each as sponsors and each player paid \$75 for green fees and lunch. Famed former ASU baseball coach, Bobby Winkles played, which drew more participants. ASURA and Coach Winkles agreed to split the proceeds after expenses. The tournament netted proceeds of \$4067, \$2033 for the Bobby and Ellie Winkles Scholarship Endowment and \$2033 for ASURA,

At the January 11, 2011 Board meeting, the Board voted to contribute approximately \$1000 of ASURA's share of the proceeds to the Living History Video Project and \$1000 to the Scholarship Endowment.

#### Holiday Pot Luck/Art & Crafts Sale

ASURA hosts an annual Holiday Pot Luck for members. At the suggestion of Barbara Bradford Eschbach, this year members were invited to sell their art and crafts during the Potluck. ASURA received 20% of the sales price and netted \$85 from the sale. Because members enjoyed the sale, this fundraiser could become increasingly successful in future years.

#### On-line Sale of Donated Books through the Friends of the Phoenix Public Library

The Friends of the Phoenix Public Library ("Friends"), a local non-profit, has established a very successful program for on-line sales of donated books. Friends will enter into agreements with organizations, such as ASURA/ASU Foundation to sell books donated by members and others. Friends uses Amazon.com, eBay and sales sites to sell books. Proceeds are shared equally between Friends and the organization. At this time, ASURA has provided a survey to members on-line and through the mail to determine if members have sufficient books to donate in order to enter into an agreement with Friends. The deadline for survey responses is April 25, 2011. After that date, the Finance Committee will make a recommendation to the Board on entering an agreement with Friends and commencing the collection of books.

#### **4. Providing Recommendations to the ASURA Board on Use of Investment Income from the Scholarship Endowment Account**

[ASURA provides an annual tuition scholarship to a returning or community college student each year. The annual scholarship is funded with funds maintained in the ASURA special projects account, administered by the ASU Foundation. To date, no funds from the Scholarship Endowment have been used to fund the annual scholarship.]

In 1997, the ASURA Board established a Scholarship Endowment Account through the ASU Foundation. The investment earnings on the Endowment are dedicated to funding scholarships. The principal in the Endowment in December 2010 was \$24,051. The principal may not be expended or withdrawn. Investment earnings to date were \$9,927. Investment earnings are available to ASURA for spending on scholarships only.

On January 10, 2011, the Committee considered four options

1. Do not use any investment earnings until ASURA needs funding for the annual scholarship.



2. Transfer some investment earnings to the special projects account for the 2011/2012 annual scholarship.
3. Move all investment earnings to the special projects account to fund the scholarship for 2011/2010 and beyond.
4. Transfer all investment earnings back into the Endowment account to allow the Endowment to grow and eventually fund annual scholarships.

The Committee recommended #2 to the Board, specifically, to transfer \$3,400 from investment earnings to the Endowment account and retain sufficient earnings to be able to fund the annual scholarship for one year. On January 11, 2011, a majority of the Board rejected the Committee's recommendation and voted to move all investment earnings back into the Endowment to support its future growth.

As a result of transfers and donations, the balance in the Scholarship Endowment account as of February 28, 2011 was \$35,371.

In Fall 2011, the Finance Committee will review again the financial health of ASURA and determine whether income from all sources, less expenses, is sufficient to continue our special projects, the Video History Project, the annual scholarship and Adopt-A-Family programs.

## GOVERNMENT LIAISON COUNCIL

The Government Liaison Council acts as an agent of the Board to provide liaison and 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 Council is charged to exert influence on targeted agencies as approved by the ASURA Board and in consultation with the ASURA officers. Reports on activities related to the State Legislature and to the Arizona State Retirement System follow.

### State Legislative Liaison



**Jerry Aronson**

The Committee began its activities in October of 2010 without Alan Johnson, a longtime member of the group and valued mentor. Alan elected to turn his attention to other retirement activities. The Committee is composed now of four persons -- Rose Minetti, Bob Mings, Dick Jacob (Johnson's replacement) and Jerry Aronson. All are registered lobbyists serving without compensation.

We got off to a rocky start when UARA objected to the manner in which the Tri-University retirees meeting was organized. However, the presidents of ASURA, NAURA and UARA conferred and agreed to workable guidelines for organizing the meeting which was held in the University Club on November 8, 2010. ASRS Director, Paul Matson, was our principal speaker. He mentioned that he had been informed by the *Arizona Republic* that they would be publishing an extensive series on Arizona's public retirement plans and that he would be given an opportunity to express his views in a subsequent article. The *Republic* articles were critical of the Corrections Officer Retirement Plan (CORP), the Elected Officials Retirement Plan (EORP), the Public Safety Personnel Retirement System (PSPRS) and the ASRS. Cited, for example, were pensions exceeding the amount earned when the member was working and retirees drawing a pension while returning to work ("double dipping") without contributions to the system/plan. As Matson noted, ASRS has for the past several years supported legislation to correct abuses and has been successful with one notable exception. The Legislature has repeatedly refused to enact an ASRS Plan design change that would require employers of retirees returning to work to pay an alternate contribution rate (ACR) into the trust fund (as noted below, this probably will change). We also discussed the possibility of the introduction of a bill in the new Legislature that would close the ASRS Defined Benefit Plan (DB) to new hires who would be offered a new defined contribution plan (DC). It was pointed out that such a legislative initiative, which died in the previous session of the Legislature, would have negative impacts on current Plan members and might lead to litigation of its constitutionality. On October 27, 2011, John Campbell of AEA-Retired convened a meeting of a coalition of Arizona retiree groups (composed primarily of K-12 teachers) with an ASURA delegation present. The content of the meeting essentially mirrored that of the TRI-U held earlier, with Paul Matson giving a similar presentation. The teachers were already organizing their opposition to any legislation proposing the replacement of the ASRS DB plan with a DC plan. Since the new Legislature would not be in session for two months we (ASURA) decided to remain neutral until we knew what the legislative intent was.

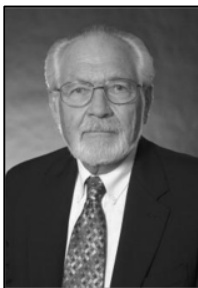
Since these two meetings held last Fall, the new Legislature has introduced more than 20 proposals that would, in one form or another, impact one or more of the public retirement systems in the State. Nineteen of these bills appear to be dead having been nullified by more comprehensive (omnibus) bills or rejected without consideration. The expected proposal to establish a DC plan to replace the current ASRS DB plan (SB1340) was introduced but died without a committee hearing (as was the case last year). But, as noted below, we probably have not seen the end of this. HB2024 requiring

employers of returning retirees to pay an ACR is still alive, providing also a time limit for long-term disability claims. We have supported 2024 but it appears that it will fall by the wayside as omnibus proposals advance. Two omnibus bills have emerged, HB2726 and SB1609. Both bills redesign all four of the State retirement programs but, with some political compromises, an amended version of SB1609 is most likely the bill that will pass. If this assumption is correct, current and new members of CORP, EORP and PSPRS will be treated much less generously than in the past. There will be limitations on maximum pension amounts, employee contribution rates will rise appreciably, benefit increases will be subject to more stringent criteria and ACR requirements will be implemented. ASRS Plan members will not be greatly disadvantaged by SB1609. Most of the reforms proposed for the other retirement systems have, in recent years, been incorporated into the Plan's design with the exception of the ACR provision which is regarded as a beneficial change. It appears that the most significant change in the Plan would be the elimination of the 80/85 points for "normal" retirement. Under the pending legislation a normal retirement will be possible if the member is 62 years of age with 10 years of service or 65 years old with any length of service. Members who commence employment at a relatively young age will be the most impacted group under this particular change.

There is (as mentioned above) an additional provision in SB1609 for a study of the feasibility and cost of transferring current members of DB plans to a new DC plan which would be implemented for new hires as well. A House amendment to the bill details the committee roster, consisting of the five members of the State Board of Investment (the chair of the investment board would serve as chair of the study committee), three members each of the House and Senate and one member each from PSPRS and ASRS. The study committee would have broad investigative authority and would be required to submit an interim report by December 31, 2011 and a final report with recommendations by December 31, 2012. The report will be submitted to the House Speaker, the Senate President and the Governor with copies to the Secretary of State. Assuming passage of SB1609, we will be carefully watching the progress (if any) of the study committee.

The Board has authorized LLC to oppose legislation that would permit concealed weapons on the campus of universities and other educational institutions. This was not difficult with respect to House bills 2001 and 2014 neither of which was assigned for hearing in committee and are dead. In the case of SB1201, however, the result has been different. Although LLC registered our opposition to liberalization of weapons statutes, SB1201 passed in committee and on the Senate floor and has been sent to the House. It passed the House Judiciary Committee on a narrow 5-4 vote. It is now in House Rules but as yet has not appeared on the committee agenda. We (LLC) will be discussing courses of action we may take in opposition to this bill.

### **Arizona State Retirement System Liaison**



**Dick Jacob**

During the report year, I represented ASURA at the ASRS Board meetings of 5/21/2010, 7/16/2010, 9/3/2010, 11/19/2010, 1/12/2011, 2/18/2011 and 3/18/2011. Absence from the state resulted in my missing the ASRS Board meetings of 4/16/2010 and 10/15/2010. I also attended the ASRS External Affairs Committee meeting of 12/3/2011, at which nothing of consequence was discussed, the meeting lasting less than 15 minutes. My reports to the ASURA Board and my written report to the membership in the Spring, 2011 *Prime Times* should be taken as appendices to this report.

This year's legislative action, while containing much of concern to active members of Arizona's public employee retirement systems, involved surprisingly little of relevance to those already retired. The only significant issue for current retirees involved the Permanent Benefit Increase, which, at this writing, is in the process of being redefined. The issue is

moot for all practical purposes, since under either the new or old definition, no PBI is anticipated for the next decade or so due to poor market performances in 2008 and 2009. I therefore appeared before no legislative committees on behalf of ASRS's positions.

I paid considerable attention to observing the functions and processes of ASRS, its Board of Trustees and its staff. I found them all to be reassuringly professional and skillful in their respective responsibilities, and give much credit to ASRS Director Paul Matson and Board Chair David Byers. The ASRS has achieved noteworthiness among national public employee pension systems for its outstanding performance. My report to the members of ASURA is that our pensions are in good hands. Each of the various sectors of the "Fund" is given thorough oversight by the ASRS investment officers and the Board, with detailed reports from the sector management consultants that stimulate knowledgeable and searching discussion among Board members.

ASRS staff have managed, even during the complexity of health insurance reenrollment, to maintain a high level of responsiveness to clients, a record other state agencies would do well to emulate.

The Fund value has followed the national indices and has recovered by now most of the losses incident with the recent recession.

Data supporting my conclusions may be found in the copies of the ASRS Board of Trustees agendas I have deposited at the ASURA offices.

## HEALTH INSURANCE LIAISONS

### ADOA Health Insurance Program



**Doug Johnson**

ADOA continues to offer health insurance, pharmacy, and dental insurance plans to active state employees, members of Arizona retirement plans, and their qualified dependents. Open enrollment was held November 1 through November 18, 2010 for the new plan year beginning January 1, 2011. The two help sessions which were offered by ASURA to assist members in making their plan choices were well attended.

Retirees continue to pay 100% of the cost for their enrolled programs. As in recent years premiums for the 2011 plan year increased approximately 10%. During the 2009 plan year, average costs incurred for retirees was \$7,666 compared to \$4,667 for active employees, continuing the trend of senior members requiring increased amounts of medical and pharmaceutical resources to maintain their quality of life.

Health insurance premiums continue to stretch retiree budgets. ASURA members are encouraged to continue evaluating the costs and value of alternative health plans. Medicare Advantage and traditional Medicare (with "Medigap" supplements) may offer lower total costs, however many problematic assumptions must be made to make realistic comparisons. ASURA will seek to provide more extensive guidance for those seeking alternative coverage in the coming year.

The 2009-2010 Annual report for Benefit Options is available on the ADOA website: <http://www.benefitoptions.az.gov/>.

### ASRS Health Insurance Program



**Rose Minetti**

#### New Contracts

In 2010 after over 4 months of negotiating ASRS contracted with United Healthcare for member health insurance. There were premium increases and some changes in plans:

- Medicare Retirees: The Secure Horizons Medicare Complete (HMO) urban and rural Senior Supplement payment for doctors increased by 5%. (Medicare lowered revenue to insurance companies and in turn ASRS increased the premiums.)
- Non-Medicare Retirees: Choice (HMO) Choice Plus PPO urban and rural options and Choice Plus PPO Plan (out of state) have an extended network of providers. The plan is similar to an HMO since the member has co-pays but it resembles a PPO in that there is no primary care physician. It is essentially an EPO. Also, enrollment increased and so did the claims cost. So premiums increased in order to maintain benefits.

Mayo Clinic ( all locations) and the physicians associated with Mayo Clinic are added to the provider network for non-Medicare and Choice Plus members. ASRS Senior Supplement members may also use Mayo Clinic but the clinic does not accept Medicare Assignment. Therefore the member would

be responsible for 15% over the Medicare amount. ASRS Secure Horizon Medicare Complete Retiree Plan uses Mayo only for emergency or urgent care.

ASRS members who use PrescriptionSolutions mail order can access orders through mobile phone. Go to [www.prescriptionsolutions.com](http://www.prescriptionsolutions.com).

As of January 2011, the non-Medicare Choice plan (in-state, in-network only) will use the United Healthcare Drug List instead of Pacific Care. For more info, go to <http://www.myuhc.com>, register and access information on My Formulary.

There is a new Prescription Discount Card contract with WellCardRX, which replaced Script Save. See [www.wellcardrx.com](http://www.wellcardrx.com).

In late spring of 2010 ASRS contracted with Assurant Dental. As a member of the ASRS Insurance Advisory Committee I attended two sessions reviewing the bids from United Healthcare, Assurant and a pre-paid Arizona plan. After much consideration Assurant was selected. Then a review by the operations board finalized the decision. Although Assurant dental contracts did require that dentists provide discounts on non-covered services, Arizona passed legislation restricting insurers from requiring dentists to extend discounts for services not covered by insurance. If you have Assurant dentals plans "Freedom Basic" or "Freedom Advanced" and you receive dental care from Dental Health Alliance, you will want to talk to your DHA dentist to understand your costs. Your best bet is to contact ASRS for clarification. See <http://www.assurantemployeebenefits.com/wps/portal>.

The changes in ASRS and ADOA health insurance plans did cause some concern and confusion for ASURA members. During open enrollment ASURA held two meetings to help clarify the information. ADOA liaison Doug Johnson and ASRS liaison Rose Minetti met with about 100 members over two sessions to review the plans and hopefully clarify the member's options.

#### Planning for Change Caused By the Patient Protection and Affordable Care Act

ASRS is working with United Healthcare to craft retiree health care insurance plans so there is minimal impact from the implementation of the Patient Protection and Affordable Care Act in 2011. ASRS already incorporated some of the early reform requirements:

- Elimination of lifetime limits: only 2 ASRS plans had life time limits. As of January 2011 none of the ASRS sponsored medical plans have lifetime limits.
- Dependent Child coverage until 26 years old: ASRS's previous age was 25years old. It is now raised to 26 years old. Also, ASRS expanded the definition of dependent to include married children not living at home, working children without employer coverage and children not in school.
- Pre-existing conditions of children under the age of 19: ASRS already excluded pre-existing conditions for all members.
- Select preventive services at no cost: ASRS Medicare Complete and Senior Supplement already offered preventive services without co-payment. These co-payments are eliminated from non-Medicare Choice and Choice Plus plans also.
- Out of pocket limits for all plans.

Although ASRS already delivered these benefits, costs will be impacted due to increasing medical expenses, increased utilization and a lack of reduced revenue streams.

Other changes required by the Affordable Care Act, pertaining to the Senior Supplement Plan, Medicare D and the "donut hole":

- If you reach the \$2,830 Total Drug benefit you will receive a 50% discount on total cost of eligible brand name drugs;
- From 2012-2020 Medicare will phase in additional savings on eligible drugs and finally by 2020 your responsibility will be 25% of the cost in the coverage gap.

ASRS is also participating in the US Department of Health and Human Services Early Retirement Reinsurance Program, which will offset the cost of providing health care to retirees 55 and older who are not eligible for Medicare. ASRS applied for and was approved to receive funds. United Healthcare is preparing necessary documents (for more info contact ASRS).

## MEMBERSHIP AND COMMUNICATIONS COMMITTEE



We are now in our second year of utilizing a computerized database for managing our membership list. This has helped us to better serve and more efficiently contact our members. We appreciate the dedicated work of Connie McNeill and Carolyn Minner who continue to manage and update our database.

Approximately half of our members prefer to receive information via email and the other half prefer to receive information through the U.S. Postal service. In a year of “tight” budgets, utilizing email has helped us contain our mailing costs.

**Elmer Gooding** As we continue to serve our members and to provide them with important information, we especially thank two of our volunteer members: Wilma Mathews for her excellent work in producing *Prime Times* and Becky Reiss for communicating information about our colleagues who have passed away. Becky reviews the newspaper obituaries daily and provides notices of recent deaths to those on our email list who wish to receive them.

We continue to receive excellent information from Human Resources regarding new retirees and we send a special invitation for all new retirees to join ASURA upon their retirement —although those currently working are also invited to join as associate members. As a service to those who will be attending pre-retirement meetings, we make regular presentations about the functions and the services of the ASU Retirees Association to those anticipating retirement.

We welcome all ASU retirees — staff, faculty, academic professionals, administrative and service professionals — into our membership.

### **Prime Times Newsletter**



**Wilma  
Mathews**

With a goal of continued improvement in *Prime Times*, both in content and in on-time delivery, the *Prime Times* team worked with Board and committee members to get material submitted earlier and to have the final version to the printer earlier. With adherence to this type of schedule, many ASURA events and programs received additional coverage and/or earlier notification to members.

Noting that many ASURA members aren't aware of the smaller efforts of the association, Board and committee members provided much-needed information on the works of committees for Adopt-A-Family, ASURA Scholarship, Video History Project, Travel, new events, legislative and ASRS issues, and seminars.



**Jeannette  
Robson**

The ASURA board also approved a proposal to post all obituaries on the ASURA Web site as the information becomes available. This provides more timely information to members about deceased colleagues while creating more room in the *Prime Times* for updates on all of the efforts of the association.



### **Web Site, Database, and E-mail Distribution Lists**



**Connie McNeill**

Our Web site, Membership Database, and distribution lists work together to support ASURA operations and to provide information to our members and to the ASURA Board. These tools have become essential for our organization, since without them we would have to depend on much more costly and much less reliable and effective paper-based means of keeping records and of communicating.

ASURA's Web site, <http://asura.asu.edu> now has about 250 pages. The pages are full of information on events, people, and topics of interest to ASU's retirees. Our "past events" pages feature lots of interesting photos, most taken by event photographers Val Peterson and Dave Scheatzle. We now invite people to add their comments about our events to these "past events" pages.

I am very grateful to Dave Schwalm for taking on responsibility for adding the obituary information that Becky Reiss collects to our site. Dave and I take pride in keeping our site current, and we are always looking for others who can help us do that. Please contact me at [Connie.McNeill@asu.edu](mailto:Connie.McNeill@asu.edu) if you might have an interest. If you are fairly handy with technology tools like Word, you will be surprised at how easy it is to add and modify content on our site!

There have been only minor modifications to our Membership Database this past year. In general, it is serving its purpose without major time spent on the programming side of it. Carolyn Minner does spend considerable time maintaining the content, which we all appreciate greatly.

Similarly, there has been no change this year to our e-mail distribution list process. The lists are "loaded" periodically from our Membership Database.

## TREASURER'S REPORT



**Joyce Hartman  
Diaz**

As the fiscal year 2010-2011 ends, once again I wish to acknowledge the hard work and dedication of Carolyn Minner, ASURA Business Manager, and to thank her for it. She has prepared the monthly financial reports, spent our resources as directed by the Board, and generally managed the budget in a most professional manner.

Due to the ongoing tight economic situation this year, the board has continued to find ways to curtail unnecessary expenses. We have implemented more on-line information, and utilized e-mail messages wherever possible. We thank the membership for supporting this effort. If you haven't looked at our Web site recently, please do: <http://asura.asu.edu>. It has a wealth of information.

Last fiscal year we finalized our ASURA Scholarship Endowment and have made members aware of contributing directly to the endowment. As of the spring, our endowment had approximately \$35,000. We are hopeful with continued contributions and some successful fund raising efforts over the next few years, our endowment will be able to support much of our annual Scholarship funding.

Each of our events committees has pledged to try to break even on the cost of their events. This is a great help in keeping our budget sound.

The financial report below gives the specific breakdown of expenses and income. As my term on the board ends this year, I leave with confidence that our operational expenses are reasonable, our future fund raising potential sound, and our income will sustain the organization.

	<b>FY 2011 Budget (Approved)</b>	<b>Actual Year To Date Amount</b>	<b>Budget Minus YTD</b>
<b>ASURA Operations - Income</b>			
Balance Forward	28,216	28,216	0
Events Registration Fees & Donations Collected	4,000	5,322	-1,322
Membership Donations ("Dues")	14,000	3,920	10,080
General Operations Donations	3,000	1,890	1,110
<b>Total ASURA Operations Income</b>	<b>49,216</b>	<b>39,348</b>	<b>9,868</b>
<b>ASURA Operations - Expenses</b>			
<i>Printing &amp; Mailing Costs</i>			
Annual Report	300	0	300
Events - Advertising	2,400	1,542	858
Board Ballots	550	337	213
Membership Drive	950	941	9
<i>Other Operations Costs</i>			
Business Luncheons/Staff Appreciation	1,200	659	541
Events - All Costs Except Advertising	3,500	2,700	800
Office Equipment & Supplies	3,500	2,285	1,215
Foundation Management Fees	800	417	384
Transfer to Special Projects for 2011-12 Scholarship	6,500	6,500	0
<b>Total ASURA Operations Expenses</b>	<b>19,700</b>	<b>15,380</b>	<b>4,320</b>
<b>Uncommitted ASURA Operations Funds</b>	<b>29,516</b>	<b>23,968</b>	<b>5,548</b>
<b>Public Affairs</b>			
<i>Printing &amp; Mailing Costs</i>			
Membership Drive	550	0	550
Prime Times	4,600	3,066	1,534
Retirees Day	275	240	35
Open Enrollment Orientation	0	0	0
<i>Other Public Affairs Operations Costs</i>			
Phone/FAX Service	0	0	0
Annual Meeting	850	0	850
Copier Maintenance	700	0	700
<b>Total Operations Expenses Covered by PA</b>	<b>6,975</b>	<b>3,307</b>	<b>3,668</b>

<b>Special Projects - Income</b>			
Balance Forward	18,989	18,989	0
Adopt-A-Family Donations	600	480	120
Video History Donations	500	2,239	-1,739
Golf Tournament Net Income	4,068	4,068	0
Transfer from Operations for 2011-12 Scholarship	6,500	6,500	0
<b>Total Special Projects Income</b>	<b>30,657</b>	<b>32,276</b>	<b>-1,619</b>
<b>Special Projects - Expenses</b>			
Scholarship	6,500	6,500	0
Adopt-A-Family	2,100	1,398	702
Video History	11,000	7,067	3,933
Golf Tournament Proceeds Transfers Out	4,068	4,068	0
Foundation Management Fees	150	400	-250
<b>Total Special Projects Expenses</b>	<b>23,818</b>	<b>19,433</b>	<b>4,385</b>
<i>Uncommitted Special Projects Funds</i>	<i>6,839</i>	<i>12,843</i>	<i>-6,004</i>
<b>Scholarship Endowment Fund</b>			
Endowment Balance July 1	21,550	21,550	0
Invested Funds Gain (-Loss)	1,509	4,294	-2,785
Transfer To Scholarship Endowment - Spending	0	-819	819
Current-Year Contributions	1,200	11,353	-10,153
Management Fees	-493	-342	-151
<b>Total Scholarship Endowment Fund</b>	<b>23,766</b>	<b>36,037</b>	<b>-12,271</b>
<b>Scholarship Endowment - Spending</b>			
Balance July 1	9,927	9,927	
Payout from Endowment	0	0	
Reinvest in Endowment	0	-9,927	
<b>Total Scholarship Endowment Fund</b>	<b>9,927</b>	<b>0</b>	

Financial Report for Fiscal Year 2010-2011, as of 3/31/2011