



Annual Report from the Board 2014-2015



ASURA Members at the ASU Day at the Capitol – February 17, 2015

This report is for distribution at the Annual Meeting
April 18, 2015, 1:00 p.m.
ASU Tempe Campus, Memorial Union Alumni Lounge

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ASURA BOARD AND OFFICERS

2014-2015 (outgoing)

Officers

Jo Madonna, President
Barry McNeill, Past President
Jim Fordemwalt, Vice President
Glenn Irvin, Secretary
Connie McNeill, Treasurer

Board Members (term expires)

Larry Carlson (4/2017)
Joyce Hartman Diaz (4/2017)
Jim Fordemwalt (4/2017)
Elmer Gooding (4/2015)
Karen Hammann (4/2016)
Glenn Irvin (4/2016)
Ruth Kingsley (4/2017)
Gary Kleemann (4/2015)
Jo Madonna (4/2016)
Barry McNeill (4/2015)
Connie McNeill (4/2015)
Trudy Perez (4/2017)
Jeannette Robson (4/2017)
Bill Stasi (4/2015)
Jan Thompson (4/2016)
Hal White (4/2016)

Ex-officio Members

Sheree Barron, Human Resources
Jim Fordemwalt, University Club
Elmer Gooding, Emeritus College
Rhonda McClintock, Alumni Assoc.
Helen Ossipov, University Senate
Abby Polito, Public Affairs
Barbara Shaw-Snyder, Public Affairs
Sharon Young, University Staff Council

2015-2016 (incoming)

Officers

Jim Fordemwalt, President
Jo Madonna, Past President
TBD, Vice President
Bev Buddee, Secretary
Barry Bruns, Treasurer

Board Members (term expires)

Barry Bruns (4/2018)
Bev Buddee (4/2018)
Larry Carlson (4/2017)
Joyce Hartman Diaz (4/2017)
Jim Fordemwalt (4/2017)
Bob Francis (4/2018)
Karen Hammann (4/2016)
Glenn Irvin (4/2016)
Ruth Kingsley (4/2017)
Jo Madonna (4/2016)
Larry Mankin (4/2018)
Trudy Perez (4/2017)
Jan Thompson (4/2016)
Jeannette Robson (4/2017)
Barbara White (4/2018)
Hal White (4/2016)

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TBD, University Senate
Abby Polito, Public Affairs
Barbara Shaw-Snyder, Public Affairs
Sharon Young, University Staff Council

IMPORTANT CONTACT INFORMATION

ASURA OFFICE (480) 965-7668
P.O. Box 873308 FAX: 480-965-7807
Tempe, AZ 85287-3308
<http://asura.asu.edu>

ARIZONA STATE RETIREMENT SYSTEM (602) 240-2000 or 1-800-621-3778
3300 North Central Ave.
Phoenix, AZ 85012
<https://www.azasrs.gov/>

ARIZONA DEPARTMENT OF ADMINISTRATION (602) 542-5008 or
100 North 15th Ave, Suite 103 1-800-304-3687
Phoenix, AZ 85007
<http://www.benefitoptions.az.gov/>

PRESIDENT'S MESSAGE



As you will read in this Annual Report, ASURA has had another productive and successful year. I think that you will agree that it is amazing that an association that depends solely on the volunteer efforts of its members is able to accomplish so much to advocate for retirees, support and contribute to the community, and offer a broad range of programs and activities that are of interest to the members.

During the 2013-14, under the leadership of then President Barry McNeill, a small group of our members developed and conducted a member survey to help the association better understand who our members are, their interests and needs, and their priorities and expectations for ASURA. Later in this Annual Report there is an article that will provide you with additional information about the survey outcomes.

For several months during the year Barry McNeill led the ASURA Board and Committee Chairs in discussions about the results of the survey and how to use the data to inform our work and programming. As you read through the various committee reports I hope that you will be able to recognize both subtle and substantive changes in the type of events, activities and programming. One example of this is that the Board decided to no longer hold an annual Retirees Day. Attendance at this day-long event, which included a series of workshops on various topics, had been steadily declining over the past several years. However, attendance at individual seminars had been increasing over the same period of time. With the information from the survey and a close look at these patterns of attendance, the Board recommended that the number of individual seminars be increased. This change is but one example of a number of changes that were made. All were very intentional and in response to the information learned from the survey and the follow-up discussions.

Recruiting members to volunteer for the various committees and leadership roles continues to be a challenge for the association. During this past year volunteers did take on the responsibilities as the ASRS Legislative Liaison and the ASRS Health Liaison. This was a definite improvement over the previous year when both of these important positions remained vacant. The Legislative Liaison Committee was also revitalized by several ASURA member volunteers. Several committees are in need of new volunteers for this coming year. As you read the reports on the following pages, please consider joining in the effort to keep ASURA on a path of relevancy and success.

ASURA was founded in 1991. The Office of Public Affairs was instrumental in ASURA's initial formation and in 2003 its ASU sponsorship of ASURA was formalized. Public Affairs continued to offer some financial and administrative support for those processes requiring access and/or approvals in university systems. This past year the Office of Public Affairs was reorganized and these changes also brought about discussions on which university department would be best suited to continue to support ASURA's needs in these administrative areas. This spring ASURA representatives met with Morgan Olson, ASU Executive Vice President Treasurer and Chief Financial Officer, and Kevin Salcido, ASU Vice President Human Resources and Chief Human Resources Officer, and Ray Jensen, ASU Associate Vice President Integrated Business Relationships, to discuss which university department can best offer continued administrative support to the association. The result is that ASURA will receive the needed support from the Department of Human Resources. This arrangement should work out very well for us and may offer further opportunities for the association to reach out to employees as they are planning for retirement.

Throughout this past year as your President, I have had the good fortune to meet many of you and I have enjoyed the work that I have been able to do on behalf of ASURA.

OFFICE VOLUNTEERS

Submitted by Linda Van Scoy



The ASURA front office volunteers are the face and voice for the organization, greeting members and visitors on the phone and in person. Volunteers work a 3-hour shift each week (9-12 or 1-4 pm). They handle event registrations, field questions, and assist in a variety of ASURA activities. Board members and committee chairs rely on them for scheduling meeting space, making copies, recording and tracking attendance for events using the software Wild Apricot, tallying surveys, collecting ballots, etc. Below you will find a pictorial listing of our volunteers and substitutes who have served ASURA during the past year.

Carol Moore has been the Office Coordinator since 2008. However, she started as a volunteer office worker in 2003. She has served under 12 ASURA presidents! Carol will be stepping down as Coordinator April 1, 2015 but will continue to keep her Tuesday morning shift as an office volunteer. Thanks to her excellent skills, the office has run smoothly during her tenure. Nancy Lesko and Linda Van Scoy will team up as the office Co-Coordiators when Carol steps down.



Another volunteer who is invaluable to our organization is our Business Manager, Carolyn Minner. She handles all purchasing, mailing and business transactions for ASURA. She also maintains the membership database and e-mail distribution lists.

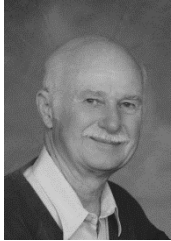


During the past year we relied heavily on, our substitute volunteers for office coverage when health issues for members or their families left us short staffed. We are in need of regular volunteers and/or substitutes so please contact the ASURA office a 480 965-7668 if you can assist in either capacity.

Carol Berg Monday morning	Bev Buddee Second Wed. Afternoon	Maxine LaRoux substitute	Joan Leard substitute	Nancy Lesko Wed. morning	Dorothy Meunier substitute
Jeannette Robson Monday afternoon	Bonnie Scheall Thursday morning	Helen Seaton substitute	Anna Marie Shivers Friday morning to October 2014	Linda Van Scoy Tuesday afternoon	Mary Williams LOA 2014-15

MEMBERSHIP SURVEY

Submitted by Barry McNeill



In September 2013 the ASURA Board approved a survey for its members and potential members to collect data related to three strategic goals:

- Increased Membership,
- Better Service, and
- Review the Community Outreach Portfolio

Over thirteen hundred SurveyMonkey® surveys were sent in early 2014. Forty-nine Never Joined surveys, sixty-one Lapsed Member surveys, and one hundred ninety-two Member surveys were returned which was good enough that an acceptable margin of error was

obtained. Data for cohorts consisting of females, males, those who retired before 2003, and those who retired after 2002 subsets were also generated. A single data file, “Compendium of ASURA Survey Data”, was created and is available on the ASURA website, see “2014 Survey” in the “Publications” menu. In addition to reviewing response percentages and weighted averages an effectiveness measure was calculated to quantify the difference between the importance and performance of survey items. Activities where performance lagged significantly behind importance were tagged to suggest that further discussion might be appropriate.

The demographics for the Member survey and its cohorts are shown in the following table. The members in the Pre 2003 cohort are older and retired sooner than those in the Post 2002 cohort. The percentage of women taking the survey is a bit higher than that of the membership. A check of the zip codes showed that over fifty percent of the returns were from members living in the East Valley.

Demographic Information for Member Survey and Its Cohorts

Demographic	Retirement Cohorts		Gender Cohorts		Member Survey
	Pre 2003	Post 2002	Female	Male	
Number In Cohort	74	83	95	69	192
Average Age	79	69	72	75	73
Average Retirement Year	1995	2008	2002	2001	2002
% Female	54%	63%	100%	0%	58%
% Receiving ASURA E-mail	65%	89%	79%	77%	78%
% Attended an ASURA Event in Past Five Years	65%	65%	71%	61%	65%

Survey Conclusions

After reviewing all the data and conclusions for these individual topics it is possible to draw the following conclusions about ASURA from the survey.

- Members give ASURA a thumbs up
Taken as a whole, the members have rated most of what ASURA does highly. They seem pleased with the activities and projects and with the type of information being provided. Many of the response averages for importance and performance are at or above 4.0 where 4 corresponds to a rating of “important” or (done) “well”. There is nothing in the survey responses to suggest the members might feel some activity should be removed. Even the golf tournament which received lower assessments than all other activities still managed to have a response average for importance just under 3 at 2.87, i.e., a response a bit less than neutral.
- ASURA members are busy
That members are busy was apparent directly or indirectly throughout the survey. Being busy is cited for not joining or for dropping membership. Interest in getting information about how to volunteer for ASURA was far down in the list of things members thought were important to know. Members expressed almost no interest in any new social /educational activities.
- Members in the newer retirees’ cohort differ from those in the older cohort
For the most part there are only minor differences in the responses of the two retirement date cohorts. But there are a few exceptions. The newer retirees appear less concerned about the ASURA advocacy

efforts when they joined. Only 50% of the newer retirees listed the advocacy work as a reason to join ASURA as compared to 75% for the older cohort. There are significantly more new retirees who know people who left ASU unhappy or people who are just too busy to join. The newer retirees assessed the importance of getting health insurance information higher, a response rating of almost 4.5 compared to 4.0 for the older cohort. Not surprisingly the newer retirees are more “tuned in” to electronic communication methods, giving high marks to the importance of emails and the website. Almost 90% of those in the newer cohort reported receiving ASURA e-mails versus 65% for the older cohort.

- There is very little difference in gender responses
There is little difference between the female and male responses. It does appear that women are a bit more comfortable with e-mail and rate its importance higher than their male colleagues.
- Members are getting old
About half the ASURA membership retired before 2003. The average age of the survey takers who retired before 2003 is 79. The data from the Lapsed Membership survey clearly shows that members are dropping out because they can no longer take advantage of what ASURA has to offer.
- Advocacy efforts are important but need review
It is very clear that members view ASURA’s advocacy efforts both in terms of retirement plans and health insurance monitoring as the most important activity that ASURA does. No one thought these activities were unimportant. The members also assessed the performance in carrying out these tasks as being done a bit above “well”. However the difference between the assessments for importance and performance was one of the largest of all the activities reviewed suggesting that these activities be reviewed. The newer retirees rated advocacy performance noticeably lower than members of the older retirement date cohort.
- Cost, Transportation, and Location are **not** barriers to attending events
When asked what factors dissuade you from attending social events, “Transportation is difficult” and “The cost is too high” were at the bottom of the list receiving ratings below the minimum threshold to be considered worthwhile to consider. The only response above neutral was “I cannot participate”. Location also did not seem to resonate with members. There were very neutral level responses to suggestions of spreading the events around the ASU campus or focusing on the Tempe campus.
- Members rate seminars as important
While none of the events reviewed, seminars, luncheons, and travel, were viewed as one of the more important ASURA activities, seminars were rated as more important than the other two activities and did just make it into the top five of important activities. The current seminar effort appears to be a good balance between importance and performance. Seminars had the best, i.e., smallest, EDM value of all the events.
- Community Outreach Projects are doing just fine
While the awareness of the outreach programs is toward the bottom of the activity / project awareness table, all three projects are ranked in the top half the activity / project performance table. The members rated the importance of the scholarship and video history project as the third and fourth most important ASURA activity.

ASURA Board Discussion of Survey

During the fall and winter Board meetings the following two survey related issues were discussed:

- increasing membership and
- increasing / improving ASURA’s advocacy role/efforts.

These two issues turned out to be interconnected. The strongest reason given in the survey for joining ASURA was its advocacy efforts on behalf of retirees. This led to a decision to look more closely at what ASURA could do to advocate with ASU for improved benefits and how to inform our members and potential members of the results of these efforts. The important Board decisions that came from the discussion were:

- Increase interaction with pre-retired employees including but not limited to pre-retirement seminars to help retirees ease into retirement as well to show these retirees what ASURA is about.
- Increase advocacy efforts with ASU to improve the computer related services available to retirees.

COMMUNITY OUTREACH COMMITTEE

The Community Outreach Committee identifies and promotes opportunities for members to donate or volunteer resources to better our community. It also oversees outreach programs designated by the Board. The committee currently oversees three projects and coordinates with and supports activities of two other ASU organizations. The projects are: Adopt-a-Family, Video History Project, and Scholarship. The organizations with whom we coordinate are the Emeritus College and the University Club. Reports from the chairs of these outreach efforts follow.

Adopt-a-Family Program

Submitted by Joan Leard



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

The Tempe family consists of a mother with a daughter 2 and a son 8. The social worker wrote, "I spoke with the mom and she said everything you gave them has been so helpful. She especially appreciated the bus passes."

The ASU family consists of a mother with daughters 9, 7 and 6 and a son 4.

The mother works part time and attends ASU full time working on a degree.

The mother says, "the gift cards are helpful because I can buy food that we are allowed to eat (gluten free, dairy free)."

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

Joan R Leard
Chair, ASURA Adopt-A-Family
e-mail: joan.leard@jazzinaz.org

Video History Project

Submitted by David Scheatzle



Interview Progress: To date, the Video History Project has completed 107 interviews, 48 of which have been done in house. Interviews done since the last Annual Report (96 names were listed) are: Ted Humphrey, David Schwalm, Walter Harris, Doug Anderson, Paul Bender, Suzanne Steadman, Sam Kirkpatrick, Bob Francis, Alan Carroll, Louis Olivas and Vladimir Borovansky. Those who have been interviewed are listed on the ASURA Website under Projects/Video History.

Video History Website: We have over 50 video clips to the ASURA web site and those can be easily viewed from your computers. Just go to the Video History page on our web site and click on "video clip" behind the person's name. You will see a YouTube type video clip, of several minutes, taken from the full interview.

Interview Studio: Our interview studio space in CSB 203 has continued to improve. The 4'x 8' aerial photograph (October 2013) now used as the background is working well. We obtained mini blinds which allow us to adjust the lighting, to some extent. The natural lighting is adequate for some seasons and on sunny days. On cloudy days and during the winter we need to add light. The incandescent lamps that we have produce considerable heat, so we are looking at obtaining LED lamps. They will produce 1/5th the heat and not will overwhelm the A/C system.

Donations: Since the last Annual Meeting (2014), we are very happy to have received \$1,230 in donations for the Video History Project.

Library Repository. We now have signed an agreement with the Library Archives that will allow us to store our interview archives on their server. At some point in the future, this will allow our interviews to be seen from the web. A Google search will “uncover” the interviews, or clips from the interviews on multiple topics. We are now transferring our video files to the ASU Library Repository. This will take some time to transfer all 107 (so far) interviews. To edit topical clips from the interviews will take much longer. Our intent is to pay students to do some of this.

Editing: The backlog of editing work is our biggest problem. We anticipate that the resources of Library Archives Repository will relieve us of many of the tasks that we have had in the past. We will no longer have to produce DVDs with labels, cases and labels for DVDs and mail DVDs to a multitude of persons. In addition to iMovie software on MACs, we hope to add Adobe Premiere software for editing on Windows computers. This will have a learning curve. We welcome additional volunteers at any time, so if you would like to help let us hear from you.

Selection Committee: A meeting was held in December to select new names as candidates for interview. Attending were: Elmer Gooding, David Schwalm, Gary Kleemann, Becky Reiss, John McIntosh and Dave Scheatzle. At the committee meeting, 42 new names were proposed to be added to our list of 63 names already proposed. So we now have over 100 names to consider.

Criteria for selecting candidates

Here are the criteria that we have been using to select possible candidates for interview:

- **Age:** interview candidates who are older, while their memories are still intact and before they pass on. Look for persons prominent in the 50's and 60's
- **Scope and level of service:** interview candidates who were part of the decision-making process and can offer unique facts and perspectives.
- **Comprehensiveness:** interview candidates from areas as yet not covered by the project.
- **Unique perspectives:** interview candidates who started something new that endures, to record for posterity what the foundational years were like.
- **Variety in roles:** interview candidates who can represent the faculty and staff as well as those who were in administrative roles.
- Persons who have made a positive impact on students, and/or their unit, or the University.
- Those who have brought prominence to ASU.
- Try to balance gender, ethnicity and employee categories.

The Video Crew: The video crew and the committee work very hard volunteering their time to schedule, conduct and edit the interviews and the success of the Video History Project rests on their shoulders. So thanks go to Linda Van Scoy, Roger Carter, Elmer Gooding, John McIntosh, Ann Patterson, Becky Reiss and Dave Scheatzle.

Dave Scheatzle

Chair, ASURA Video History Project

e-mail: scheatzle@asu.edu

Scholarship Committee

Submitted by Sue Blumer



Sue Blumer and Joy Shearman are Co-chairs of the Scholarship Committee. The Committee, meeting in April, 2014, selected Tara Pryts as the recipient of the 2014-15 scholarship. Ms. Pryts was selected from approximately forty applications, providing a very competitive choice with many outstanding candidates. She transferred from Scottsdale Community College after being awarded Associate degrees in Arts and Applied Sciences in Interior Design with Highest Distinction, a perfect record. She entered ASU as a junior in the School of Sustainability. Her academic goal is a Bachelor of Arts in Sustainability with a minor in Urban Planning so that she “can help

create our built environments with safe, healthy materials that fit naturally into surrounding ecosystems without causing undue harm.”

Serving on the committee allows 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. These students face long years to complete their undergraduate degrees and graduate studies. Since they are reentry students, further delays make it difficult for them to fulfill their potential. Thus, our scholarship, which provides \$10,000 for the academic year, is a powerful means to help one student at a time. The scholarship is funded by contributions from our members for that purpose, from fundraising events such as the golf tournament and book sales, from earnings on the scholarship endowment fund, and from the operations budget. As tuition continues to increase each year, the need for good scholarships like ours also grows.

Scholarship Committee members spend long hours reviewing the applications each year and take their jobs seriously. Their comments noted how well qualified many of the applications are and how difficult the choice is. These excellent students who apply for the scholarship make the selection process challenging 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. During the past few years, these students have pursued majors in performance art and art history in the College of Fine Arts, economics, supply chain management, and computer information systems in the College of Business, social work and gerontology in the College of Public Programs, psychology in the College of Liberal Arts and Sciences, and others, and have attended all four campuses. The ASURA scholarship program truly demonstrates outreach across ASU’s campuses and colleges.

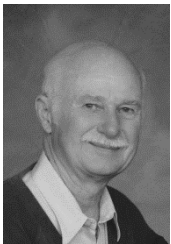
Sue Blumer

Co-Chair, ASURA Scholarship Committee

e-mail: sueblu@asu.edu

EVENTS COMMITTEE

Submitted by Barry McNeill



The Events Committee was chaired by the ASURA past President Barry McNeill. The committee is an “umbrella” committee made up of the chairs of the various event subcommittees and its purpose is to provide for the coordination of dates and activities between these subcommittees. These committees and the chairs are: Travel – Gary Anderson; Seminars – Jan Thompson; Luncheons and Special Events – Barbara Bradford Eschbach; Pre-retirement Seminar – Trudy Perez.

Retirees Day and Seminars

The 2014 offering of Retirees Day was cancelled when there were not enough registrations to support the event. The Events Committee meet on March 19th to discuss the future of Retirees Day. The committee unanimously agreed to send the following recommendation to the ASURA Board:

- Retiree Retirees Day
- Have the Seminar Committee develop and deliver 2 to 3 hour long Super Seminars which are retiree-focused single topic programs which address multiple aspects of the topic.

- Ask the chair of the Events Committee to seek out ways to offer the educational opportunities of Retirees Day from sources outside of ASURA.

There were several reasons for the recommendation; two of the important ones were:

- The ASURA survey showed that the newer members ranked seminars above Retirees Day in importance.
- The major support for Retirees Day came from those members who retired before 2001 and this group's attendance at all events has been dropping off as they age.

The proposal was approved in the September Board Meeting.

Creation of Pre-retirement Seminar sub-committee

One of the outcomes from the discussions of the ASURA survey was the creation of a new events sub-committee charged with the task of developing and delivering a seminar for pre-retired ASU employees. The seminar would address "What I wish I'd known before retiring". A primary emphasis will be on health insurance but other topics will also be presented. Trudy Perez graciously accepted this task.

Coordination of Calendar of Events

During the late spring of 2014, the various committee chairs were asked to determine a tentative schedule for the events that the committees planned to offer during 2014-2015. The committees were asked to spread the events throughout the year and to keep in mind the already established dates for some events, such as the Meet & Greet and Annual Meeting. The Events Committee chair reviewed the dates and plans in order to identify and resolve possible scheduling conflicts. This information was shared with the various committee chairs and the activity calendar of activities was established. The committee met again in November to review the spring events and to get a start on the fall 2015 offerings.

Promotion of Events

Seventy-three percent of our members requested and received email notifications for all ASURA organized events. All events were published on the ASURA events webpage and any member with an internet connection could register online by visiting this webpage. Further past events stories are available on the ASURA website. This year a new Affiliated Events page was added to advertise activities not organized by ASURA but which might be of interest to our members, e.g., Emeritus College Colloquium.

For the twenty-seven percent of our members who do not want email event notification an upcoming calendar of activities was published in each issue of Prime Times. In addition to the calendar Prime Times carried past event stories and promotional material for upcoming events.

Barry McNeill
Chair ASURA Events Committee
Barry_mcneill@cox.net

Luncheons and Special Events

Submitted by Barbara Bradford Eschbach



The 2014/2015 Luncheons and Special Events Committee consisted of the following: Joyce Hartman Diaz, Trudy Perez, Rick Wall and Barbara Bradford Eschbach (Chair).

The first luncheon of the year was the Fall Meet & Greet Pizza Party, held on Wednesday, 9/8/14, at CSB. This event was well-attended by 56 people, all of whom seemed to love eating Free Pizza. This year's pizza party was the fourth time to hold this kick-off party, the cost of which is subsidized by ASURA. While the pizza luncheon is the reason to come together, it is a valuable social event where members (new and previous) can come together to catch-up on "What I did on my summer vacation!" It was also an opportunity to introduce all

members of the Board and committee chairs. Board members and committee chairs had the opportunity to announce events already planned for the year, as well as to recruit attendees/members to get involved with the various committees and/or events.

The second luncheon of the year was the Fall Luncheon, held on Friday, 11/14/14, in the Skirm Auditorium of Friendship Village Tempe (FVT). This was the third luncheon held at Friendship Village in an effort to engage/include the numerous ASU retirees who reside at FVT but may be unable to travel elsewhere for ASURA events. This luncheon brought together only 24 members and their guests for lunch, conversation, social interaction and music. Of the total attendees, only six were residents of Friendship Village. Compared to the two previous luncheons at Friendship Village, the attendance at this luncheon was disappointing. The musical program was provided by Vicki McDermitt, vocalist, and Russell Schmidt, pianist, who provided a great set list of Cole Porter and George Gershwin tunes. FVT graciously provided shuttle service to/from a nearby parking lot for the non-residents. Due to the disappointing registration for this luncheon, especially by the residents of Friendship Village, the Fall luncheon for 2015/16 will be held at another location, such as the ASU University Club.

The third luncheon of the year was another standing/annual event: The Holiday Potluck & Bake Sale. As has been done for years, this luncheon was held at CSB, and musical entertainment (piano) was provided. All attendees came with wonderful contributions toward the luncheon (appetizers, entrees, desserts). The Bake Sale successfully raised \$122, slightly less than the bake sales of 2012/13 and 2013/14. Total attendance was 34, approximately 20 percent less than previous years. The lower attendance accounted for the reduced income from the bake sale. Nonetheless, the attendees went home well-fed, happy with their purchases and in a holiday mood!

The final luncheon for 2014/15 was a luncheon and wine tasting with a professional sommelier provided by our host venue: Dvine Bistro & Wine Bar in Chandler. This event was held on Thursday, March 5, 2015, and was attended by 18 members and their guests. Because this second wine tasting event was held in March vs. May (previous year) and the attendance improved by 50 percent! The wine tasting portion of this luncheon was very well received and definitely educational!

Barbara Bradford Eschbach
Chair, ASURA Luncheons and Special Events Committee
e-mail: Barbara.bradford@hotmail.com

Seminars

Submitted by Jan Thompson



Five seminars were presented by the Seminar Committee, chaired by Jan Thompson. Other committee members were Beverly Buddee, Gary Kleemann, and Karen Hammann.

Things I Wish I Had Known When I Retired

September 10, 2014 - 15 attendees

This panel discussion for recently retired members on lessons learned during the retirement process was led by Barbara White and Jeffrey Chapman. The session was held in conjunction with the Meet & Greet Pizza Party.

Health Care Seminar: Medicare -ADOA-ASRS Open Enrollment

October 22, 2014 - 95 attendees

Due to overwhelming demand during enrollment for this seminar, two identical sessions were offered on the same day for this year's health care seminar. A capacity audience of 65 attended the morning session, while 30 attended the afternoon session.

- Brian Bilyeu, an independent insurance broker with Bailey Bilyeu and Associates, presented overviews of Medicare, Medicare Advantage and supplement plans, and prescription drug plans.

- Elizabeth Shaefer, ADOA open enrollment manager, presented information on ADOA open enrollment and changes for 2015.
- Pat Klein, ASRS Assistant Director of External Affairs, presented information on ASRS open enrollment and changes for 2015.

Volunteerism Fair

January 22, 2015 - approximately 20 attendees

Attendees learned about the vital role that volunteers play in the wide-ranging activities of 9 prominent community organizations: St. Mary's Food Bank, Tempe Experience Corp, the Arizona Humane Society, Valley of the Sun United Way, the Phoenix Art Museum, Call 12 for Action, the Tempe Library and History Museum, Sky Harbor Airport, and the ASURA. Several of the organizations were represented by multiple people. Their presentations were educational, inviting and much appreciated by attendees.

The Brain: The Healthy Brain and the Alzheimer's Brain

February 12, 2015 - 65 attendees

ASU Professor Emeritus of Psychology Dr. Jay Braun and Mayo Clinic physician/researcher Dr. Bryan Woodruff presented this outstanding seminar contrasting aspects of the healthy brain and the Alzheimer's brain. A capacity crowd was enrolled for this seminar.

Taxing Matters: Strategies for Effective Estate Tax Planning

March 19, 2015 – 45 attendees

The seminar will be given by Christine G. Kolm, a Director of Wealth Planning Strategies with TIAA-CREF. Topics will include the updates on current tax laws and their effect on wealth management, charitable giving, wills, trusts, and legal directives.

Jan Thompson

Chair, Seminars Committee

e-mail: jmt6000@gmail.com

Travel

Submitted by Gary Anderson



“Travel is fatal to prejudice, bigotry, and narrow-mindedness,.....” Mark Twain
The ASURA Travel Committee had seven very energetic, talented experienced members this year. The members were: Judy Hellala, Helen Seaton, John Brock, Norm Perrill, Jim Fordemwalt, Gary Kleemann, and Gary Anderson, Chair. The Committee met most months at the Tempe Public Library. The goals are to provide a range of travel opportunities for the ASURA membership. The Committee has twice in the past conducted surveys among the Association membership to gain information about such travel factors as: destination, modes of travel, length of travel, types of travel, cost of travel, etc. This information from the members has been used as a guide in planning the various travel events. We try to plan one-day local outings, multiple-day state/regional outings and international trips.

In May of 2014, 16 ‘Belugas’ set off for an incredible river trip in Russia. We arrived in St. Petersburg, toured palaces, castles and museums of Czars & Czarinas and then set off on a 1000-mile river trip to Moscow. Stops along the way helped us learn about farms, villages and life in rural areas. Tours of Moscow included the Kremlin, Red Square, many museums and cathedrals and shrines; an incredible learning experience.

In October we made a day trip to Tovrea Castle, the Castle on the Hill between Tempe and Phoenix off of Washington and Van Buren Streets. The Castle was built originally as a tourist destination luxury hotel for wealthy guests but was sold before opening and became the private residence of the new owners. The Castle is now owned and operated by the city of Phoenix. Registration for this trip filled up in less than an hour! Another visit will be planned for Fall 2015.

In November we got musical and went to MIM, the Musical Instrument Museum in north Phoenix. We had a group guided tour followed by a self-guided tour for several hours of entertainment and learning. This is probably the third MIM trip ASURA has taken. Very popular.

We kept the music going by attending the Spirit of Phoenix Christmas concert in Mesa on December 6th. This renowned men's choral group provided a great introduction to the Christmas season. This was followed by dinner at a local brew house; an enjoyable afternoon and evening.

On April 22nd the Committee is offering a three-day trip to the Four Corners area of Arizona. The trip will include visits to Monument Valley, the spectacular Antelope Canyon, Canyon de Chelly and other stops along the way. The tour will be fully narrated by experts on the culture, history, geology and peoples of the region.

On May 18th, 22 ASURA members and their friends are going to depart for a 21-day trip around China. This fantastic adventure will include a three day cruise on the Yangtze through the Three Gorges, a visit to the panda research center, the Warriors in Xian, the ancient Naxi people near Burma, a seminar with students at Confucius' College in Qu Fu, a walk on the Wall, the Forbidden City, the Summer Palace, the Ming Tombs and Tiananmen Square. This is the second ASURA group to go to China and will be known as Chopsticks, too.

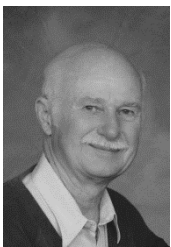
And finally, in September 2015, an ASURA group will be going to Italy to explore the Heartland area of Bologna and Parma and Tuscany and Umbria. The trip will include an exploration of Florence, the birthplace of the Renaissance as well as tours of churches, cathedrals, vineyards, olive groves and ancient towns and cities. The group will be enjoying the food and wine of the region and the rich cultural history.

The Travel Committee is most anxious to provide the kind of travel experience that will make Mark Twain's quote above come true. Let us know what you want.

Gary Anderson
Chair, ASURA Travel Committee
e-mail: gwander16@gmail.com

Participation in Non-ASURA Events

Submitted by Barry McNeill



This past year ASURA members represented our organization in quite a few events sponsored by other ASU affiliated organizations. Participation in these events was done in support of these organizations and to raise awareness about ASURA as a viable part of the university community.

- Faculty/Staff Fair - On September 11, 2014 ASURA past President Barry McNeill staffed a table and answered questions about ASURA at this event which is sponsored by the University Staff Council. This event is designed to help make faculty and staff aware of various organizations, events and benefits available to them at ASU.
- ASU Legislative Agenda Breakfast – on January 13, 2015 ASURA was well represented at this event at which ASU President Crow spoke. In attendance were Hal White, John Brock, Bill Stasi, Bob Mings, and Jeri Meeks.

- **ASU Day at the Capitol – On February 17, 2015**
ASURA had a table at this annual ASU Alumni organized event. The event was held on the Senate Lawn at State Capitol and is sponsored by the ASU Alumni Association to make legislative staff and elected officials more aware of the university and its programs. ASURA members attending were John Brock, Jeri Meeks, Hal White, and Brenda Shears.
- **ASU Staff BBQs – various dates in February, March, and April**
There are four events one on each of the ASU campuses. This year ASURA President Jo Madonna attended all four events and provided information about our organization to the attendees. This event is designed to recognize the ASU employee contributions to the university. Jo was joined by member Bill Stasi at the Tempe campus, member Joan Jankowski at the West campus and past President Barry McNeill for the Poly campus event.

Barry McNeill
Chair ASURA Events Committee
Barry_mcneill@cox.net

FINANCE COMMITTEE

Submitted by Connie McNeill



The members of the 2014-2015 Finance Committee were Connie McNeill, chair, Barry Bruns, Carolyn Minner, Bill Moor, and Jerry Snyder.

At the September Board meeting, the Finance Committee presented the first annual analysis of the organization's financial health, using definitions established in the March 2014 Board meeting. A revised copy of the analysis was included with the November Board meeting minutes and is shown below. The analysis shows that for 5 of the past 7 years the Association has spent more than it has taken in, and projections were that we would do so again for FY 2014-15. This has not been, and still is not, a major problem because we have had and still have a large cash reserve to draw upon. If the trend continues, we will have to consider where to cut expenses. The only realistic place would be to reduce or eliminate the annual scholarship until such time as the endowed scholarship fund is producing enough income to fund it.

ASURA Cash Reserve Analysis

12 Oct 2014

	2014-15 Projected	2013-14 Actual	2012-13 Actual	2011-12 Actual	2010-11 Actual	2009-10 Actual	2008-09 Actual
Financial Health							
Income	19,678	26,216	36,648	24,922	24,293	23,297	895
Expense	24,532	32,485	35,604	11,641	38,640	30,261	2,071
Gain/Loss for Year	-4,854	-6,269	1,044	13,281	-14,347	-6,964	-1,176
Balance Forward - start of year	36,061	40,916	47,184	46,139	32,858	47,206	54,171
Cash Reserve Analysis							
Scholarship	10,000						
1/2 prior year expenses	16,243						
Total To Reserve	26,243						
Excess Funds Analysis							
Balance Forward FY 2015	36,061						
Less Cash Reserve FY 2015	26,243						
Net Excess Funds	9,819						
Endowed Scholarship Fund -start of year	51,354	43,286	36,715	37,193	21,550	19,738	20,568

At the October Board meeting, the Finance Committee recommended a change to the policy on financial health and this was approved. The change was to lift the requirement to spend excess cash reserves unless last year was financially healthy and the current year is projected to be healthy.

At the November Board meeting the committee presented its analysis and recommendation on two matters raised by the Board. Its report and recommendations were accepted by the Board.

- *Should we invest some or all of our cash reserve in a quasi-endowment fund with the Foundation?* The committee recommended against doing so because restrictions on such funds by the Foundation would mean that we would likely need the invested funds before we would be able to access them.
- *Should we offer a Lifetime or Multiple-year Membership?* The committee recommended against offering a Lifetime Membership because doing so would likely have a negative effect on our overall financial health, and the accounting and tracking would be very time-consuming and difficult.

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

Connie McNeill
 Chair, ASURA Finance Committee
 e-mail: Connie.McNeill@asu.edu

Book Sale

Submitted by Mary Stevens



In 2011, the ASU Foundation/ASURA entered into an agreement with a local non-profit organization, Friends of the Phoenix Public Library (“Friends”). Per the agreement, Friends sell books donated by our members, other ASU retirees and anyone else who wishes to donate. Friends sells the donated books on-line, retains a 15% commission and splits the sales proceeds with ASURA every quarter. Friends started selling ASURA-donated books during the third quarter of 2011 (July through September) and ASURA received its first check from Friends on October 18, 2011 in the amount of \$72.01.

ASURA has maintained the book sales program with Friends since 2011. Generally, donors deliver their books to the ASURA office and sign a gift donation form, which is forwarded to the ASU Foundation. The Foundation sends each donor a gift receipt/ thank-you letter.

Elmer Gooding ASURA Membership Chair, made an arrangement with the ASU Human Resources Department to have a representative of ASURA attend meetings of ASU employees who are retiring within a few months. During the meetings, attendees receive information about the donated book sales program and a form to complete if they have books to donate. Mary Stevens and Bill Moor are the ASURA contacts for donors to arrange for receipt of their books. Last year, Linda Van Scoy arranged for the use of the Community Services Building room 257 as a storage room for donations. Board member and office volunteer, Jeannette Robson, arranged with Alpha Graphics to provide free, empty boxes to ASURA for our books. Jeannette picks up and delivers the empty boxes to the storeroom regularly.

In 2013, the Board approved Connie McNeill’s suggestion to enclose a book donation form with new and renewal to notify more people about the program.

With Business Manager, Carolyn’s Minner’s able assistance, the proceeds realized for each fiscal year since the Program began are: (rounded)

2011	\$ 72
2012	\$1092
2013	\$ 468

2014	\$ 718
2015	\$ 961 (only through first quarter, March 23, 2015)
TOTAL	<u>\$3311</u>

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

Many thanks to Connie McNeill, Carolyn Minner, Bill Moor, Linda Van Scoy and Jeannette Robson for their continuing assistance with the program.

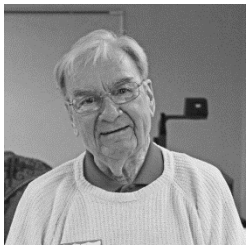
Mary Stevens
Chair, ASURA Book Donations
e-mail: marystevens0@gmail.com

GOVERNMENT LIAISONS

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.

Legislative Liaison Committee

Submitted by Hal White



The Legislative Liaison Committee is charged with providing liaison and advocacy in relation to the Arizona State Legislature. The membership includes John Brock, Alan Johnson, Jeri Meeks, Bob Mings, Norm Perrill, Brenda Shears, and Hal White. Various members attended the Annual Legislative Breakfast at the Channel 8 offices in Phoenix at which President Michael Crow provided his view on legislative issues. Committee members and also the Annual ASU Day at the Legislature which provided the opportunity to visit with state legislators, ASU and Alumni employees involved with the legislature and members of various ASU academic and administrative units

represented. Both events were sponsored by the ASU Alumni Association.

The Committee supports long term coordination of similar units of the retirees associations of the University of Arizona, Northern Arizona University and the Arizona Education Association for legislative issues of mutual interest. ASURA supports those legislative issues of the ASU Administration that are considered compatible with interests of retirees. Current issues being monitored involve structure of retirement programs and the funding and cuts in funding.

For those interested in following legislative issues information may be found by logging on to the Legislature's website at <http://www.azleg.gov> or link to it from the ASURA website at <https://asura.asu.edu>. The committee welcomes comments from the membership concerning Arizona state legislation.

Hal White
Legislative Liaison Committee Chair and Registered Arizona Lobbyist
e-mail: haroldwhite@q.com

Health Insurance Liaisons

In addition to the various health, dental and vision insurance plans available for retirees in the private sector, two state agencies offer plans available to ASURA retirees and their families. The ASURA Bylaws specify two Health Insurance Liaisons, one for Arizona Department of Administration (ADOA) and one for the Arizona State Retirement System (ASRS).

ADOA Health Insurance Program

Art Ashton was the ADOA Health Insurance liaison for the past several years and for the first few months of this past year he continued to act as the primary ADOA Health Insurance Liaison while we searched for someone willing to serve in this role on a more long term basis. Larry Carlson agreed to do this and, after a short transition period, at the beginning of 2015 became the ASURA liaison to ADOA.

The Benefits Services Division of the Arizona Department of Administration offers the Benefits Options program for State employees, retirees, their spouses and dependents. The Benefit Options program offers health, dental and vision plans for ASURA members and their families. Information about these plans is available at 602-542-5008 or <http://benefitoptions.az.gov>.

ASRS Health Insurance Program

In 2013-14 ASURA was unable to find a member to volunteer to serve as the ASRS Health Insurance Liaison. In the fall of 2014, member Joyce Hartman Diaz agreed to serve in this capacity and was recently able to identify and speak with a contact at ASRS with whom she will work on our behalf in the future.

The Arizona State Retirement System offers health and dental insurance plans to retirees and their qualified dependents. Information about these plans is available at 602-240-200 from within the metropolitan Phoenix area, 800-621-3778 from outside the Tucson and Phoenix areas or at <https://www.azasrs.gov>.

Larry Carlson
ADOA Insurance Liaison
e-mail: Lawrence.carlson@asu.edu

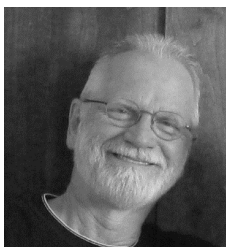
Joyce Hartman Diaz
ASRS Insurance Liaison
e-mail: joyceh_diaz@hotmail.com

MEMBERSHIP AND COMMUNICATIONS COMMITTEE

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

Membership

Submitted by Dave Schwalm



After an increase last year, membership declined by 42 members (about 7%) this year, reflecting a decline of 18 in renewals and 24 in introductory members. However, those who are members have participated in greater numbers in ASURA activities. Increased emphasis on timely seminars seems to have encouraged participation. We have continued the effective practice of making a 10 minute recruiting pitch at the retirement sessions run by HR. Participants also receive our revised and updated trifold promotional flyer summarizing the purpose and activities of the organization and an application form offering free membership for the first year. Copies of Prime Times and other ASURA materials are available at these meetings. This is the second year offering the first year free. We have also had some time to review the member survey in search of ideas for sustaining or increasing both membership and participation. Also, because of administrative reorganization in the university, ASURA will become affiliated with HR rather than Public Affairs, and this may enhance our recruiting opportunities.

Table 2 in the appendix shows some basic data about membership as of March 4, 2015 with comparative data from the previous year.

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

Prime Times Newsletter

Submitted by Jeannette Robson and Wilma Mathews, Co-Editors



The ASURA newsletter, *Prime Times*, is published three times a year and contains news and photographs about ASURA activities and people as well as information articles of general interest to its members. The ASURA Board recently approved increasing the size of the *Prime Times*, as needed, from a 12-page to 16-page publication.



ASURA members may not be aware of all of the organization's activities:

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

Current information on the ASURA board members, committee chairs, and our great office staff is also included in each issue. Articles of past and upcoming activities and events sponsored by the ASURA are special features of the newsletter along with information on upcoming travel for our member's consideration. We also encourage our members to suggest items they would like to have covered in the *Prime Times*.

Past *Prime Times* issues from fall 2010 through spring 2015 are available on line at <https://asura.asu.edu/PrimeTimes>. In response to information gleaned from the 2014 ASURA member survey and, beginning with the summer 2015 issue of *Prime Times*, those members who have signed up to receive association e-mail notifications will be sent an e-mail that includes an easy link to the on-line version of the newsletter. Paper copies will also continue to be mailed.

Jeanette Robson and Wilma Mathews
Co-Editors, ASURA *Prime Times*
e-mail: jrobson@asu.edu; wkm23@asu.edu

Obituaries

Submitted by Becky Reiss



ASURA sends ASU employee edited obituaries by e-mail to those members who have indicated that they wish to receive them. The notices are also posted on the ASURA website and in the next issue of the ASURA newsletter *Prime Times*. Letters of condolence are sent to the deceased member's surviving partner. The ASURA membership rolls over to the surviving partner. Before the condolence letter is sent out the President and Membership Chair are asked if they know the deceased and would like to add something to the letter.

Becky Reiss
Coordinator, Obituary Notifications
e-mail: rreiss@gmail.com

Database, Website and Technology Equipment Report

Submitted by Connie McNeill



During this past year, we made the following changes in the area of technology.

Website Upgrade

On April 30, 2014, we “went live” with a new website – same address, <http://asura.asu.edu>. The new website uses a service (Pantheon) that has a contract with ASU and a theme (look and features, called “Webspark”) created by ASU’s UTO office. We pay a small annual fee of \$240 for the service. Barry McNeill, Carolyn Minner and I copied information from the old to revamped pages on the new site during the month of April.

The new site is easier to maintain as far as the underlying software goes. It also has features that make laying out pages easier and much more flexible than what we had before. In addition, we now have utilization data (hits, etc.) available through a service provided by Google called Google Analytics. Interestingly, typically the largest number of hits are to our Technology Tips pages – but most of those hits are by students and other non-members. We also see a fairly high number of hits on our obituaries pages.

Linda Van Scoy maintains the Video History pages, Carolyn Minner the obituaries, Barry McNeill the past events, and Barry and I the rest of the pages.

Photo Gallery Upgrade

Also on April 30, 2014, we “went live” with a new photo gallery. The new gallery, at <http://asura.zenfolio.com/>, is hosted on a service called Zenfolio, for which we pay an annual fee of \$140. It is flexible, easy to use, and we think it looks good. I was able to move photos and captions from the old gallery via some programming, so it was not as labor-intensive as it might have been to make the change.

Barry McNeill and I are maintaining the photo gallery – adding photos taken by Elmer Gooding, Dave Scheatzle, and others at our events, etc.

Membership & Events Database

Our membership and events database performed quite well this year on the hosting service Wild Apricot. We (Barry McNeill and I) made some changes to facilitate handling of Introductory Memberships, added some internal help documentation, and began using Google Analytics to collect utilization data. For the most part, however, activity was the normal maintenance of our records by Carolyn Minner and some of the office staff and posting of events by Barry McNeill and sometimes Gary Kleemann.

Very few of our events have allowed payment by credit card because of the lead time required by the Foundation to set up the event for credit card payment. Our event organizers are usually not ready the necessary 4-6 weeks before posting the event.

As of February 24, 2015, 102 ASURA members have logged in to the members-only portion of the website. Login permits members to update their own information, to register for events without re-entering their address, etc., and to see a membership directory.

TREASURER’S REPORT

Submitted by Connie McNeill



Table 1 in the Report Appendix shows the current budget and operating expenditures for ASURA through March 2015. Carolyn Minner, our Business Manager, does an excellent job of keeping track of our expenditures and of preparing this report each month.

As can be seen, ASURA began the 2014-2015 fiscal year with a balance of \$35,760 in the Operations account and \$7,073 in the account provided by ASU. The latter account has been receiving an annual injection of \$7,000 from ASU. The project accounts each had a small balance forward. The budget approved in the September Board meeting would reduce the balance forward in the two operating accounts by over \$9,000, but as of the end of March it seems

likely that the reduction will be closer to \$7,000, because a project expected to cost \$2,000 was canceled. Of the \$7,000 reduction in balance forward, \$5,000 is caused by a transfer to the Video History account to cover projected expenses there.

The scholarship endowment fund began the year with \$51,354, which shows nice growth from July 1, 2008, when the balance was \$20,568. These funds are invested on our behalf by the ASU Foundation, and long-term growth is what we look for. We are still a long ways away from the day that the account will pay out enough to cover the annual scholarship we award, but progress is there.

Overall, ASURA is still in good financial condition. The support from ASU in the form of financial resources, assistance from personnel, computer resources, and office, meeting, storage, and video studio space makes a great deal of difference in our ability to operate on what is basically a small budget. Needless to say, the fact that all of our personnel are volunteers is essential to our financial well-being also.

Account Categories	Budget	Actual YTD Amount
ASURA Operations		
ASURA Operations - Income		
Balance Forward	35,760	35,760
Current Year Revenue		
Event Registration Fees & Donations Collected		2,010
Membership Dues	16,000	6,660
General Operations Donations	1,400	820
Holiday Bake Sale 2013	167	167
Holiday Bake Sale 2014	150	122
University History Book	0	15
5% Gift Assessment	-870	-374
Total ASURA Operations Current Year Revenue	16,847	9,420
ASURA Operations - Expenses		
<i>Printing and Mailing Costs</i>		
Annual Report	120	
Bylaws & Ballots	350	172
Member Survey Report	581	581
Membership Drive	1,500	879
Prime Times Summer	1,200	538
<i>Event Costs</i>		
Paid Events		1,702
Meet & Greet	360	360
Seminars	175	25
Retirees Day	360	360
Annual Meeting	600	
Holiday Potluck & Fundraiser	100	
<i>Other Operations Costs</i>		
Scholarship Award	10,000	10,000
Business Luncheons & Service Appreciation	500	474
Technology Services	1,460	1,331
Office Equipment & Supplies	3,000	1,237
AROHE Membership Dues	180	
Lobbyist Registration Fee	0	25
Foundation Transaction Fees	800	104
Transfer to Video History Project	5,000	5,000
Total ASURA Operations Expenses	26,286	22,788
Increase (Decrease) in Fund Balance for Current Year	-9,439	-13,368
Uncommitted ASURA Operations Funds	26,321	22,392

Account Categories	Budget	Actual YTD Amount
Public Affairs Income		
Balance Forward	73	73
Current Year Allocation	7000	7000
Total Public Affairs Current Year Revenue	7073	7073
Expenses Charged to Allocation		
Office Supplies	400	525
Prime Times Fall & Spring	2,400	2,027
Room Fees	450	175
Conference Room Projection Screen	2,000	
Copier/FAX Equipment Annual Lease	1,250	1,203
8.5% Administrative Service Charges	553	247
Total Subsidized Expenses	7,053	4,177
Uncommitted PA Funds For Operations	20	2,896

Special Projects		
Special Projects - Income		
Balance Forward	2,367	2,367
Current Year Revenue		
Friends/Phx Library Book Sale Net Income	275	1,188
Transfer In	0	62
5% Gift Assessment	-15	0
Total Special Projects Current Year Revenue	260	1,250
Special Projects - Expenses		
Transfer 2013 Bake Sale Income to Operations	167	167
Transfer 1/2 of Book Sale Income to Scholarship	128	334
Transfer 1/2 of Book Sale Income to Video History	128	334
Transfer to Adopt-a-Family	1,500	1,500
Video History DVD Cases	0	62
Foundation Transaction Fees	30	32
Total Special Projects Expenses	1,952	2,429
Increase (Decrease) in Fund Balance for Current Year	-1,692	-1,179
Uncommitted Special Projects Funds	675	1,188

Account Categories	Budget	Actual YTD Amount
Adopt-A-Family		
Adopt-a-Family - Income		
Balance Forward	515	515
Current Year Revenue		
Adopt-A-Family Donations	950	565
5% Gift Assessment	-48	-28
Transfer from Special Projects	1,500	1,500
Total Adopt-A-Family Current Year Revenue	2,403	2,037
Adopt-A-Family - Expenses		
Adopt-A-Family	2,000	1,418
Foundation Transaction Fees	15	0
Total Adopt-A-Family Expenses	2,015	1,418
Increase (Decrease) in Fund Balance for Current Year	388	
Uncommitted Adopt-A-Family Funds	902	1,133

Video History		
Video History - Income		
Balance Forward	1,755	1,755
Current Year Revenue		
Video History Donations	600	550
1/2 of Book Drive Income	150	318
Transfer 1/2 of Book Drive Proceeds from Spec Proj	128	128
Transfer from Operations	5,000	5,000
5% Gift Assessment	-30	-23
Total Video History Current Year Revenue	5,848	5,973
Video History - Expenses		
Production	3,000	191
Equipment	300	265
Foundation Transaction Fees	100	11
Total Video History Expenses	3,400	467
Increase (Decrease) in Fund Balance for Current Year	2,448	5,507
Uncommitted Video History	4,202	7,261

Account Categories	Budget	Actual YTD Amount
History Book		
History Book - Income		
Balance Forward	444	444
Current Year Revenue		
History Book Donations	0	0
5% Gift Assessment	0	0
Total History Book Current Year Revenue	0	0
History Book - Expenses		
History Book	0	0
Foundation Management Fees	0	0
Total History Book Expenses	0	0
Increase (Decrease) in Fund Balance for Current Year	0	0
Uncommitted History Book	444	444

Scholarship Endowment Fund		
Scholarship Endowment - Principal		
Endowment Balance July 1	51,354	51,354
Invested Funds Gain (-Loss)	6,700	581
Transfer to Scholarship Endowment - Spending	-1,500	-1,473
Foundation Management Fees	-700	-594
Transfer from Spending Account	1,388	1,388
Current-Year Contributions	2,000	1,020
5% Gift Assessment	-100	-51
Total Scholarship Endowment Principal	59,142	52,225
Scholarship Endowment - Spending		
Balance July 1	1,260	1,260
1/2 of Book Drive Income	150	318
1/2 Book Drive Proceeds - Transfer from Spec Proj	128	128
Payout from Endowment	1,500	1,473
Reinvest in Endowment	-1,388	-1,388
Management Fees	0	-6
Total Scholarship Endowment Spending	1,650	1,785
Total Scholarship Endowment	60,792	54,010

ASURA Membership Totals – 2015 Membership Year

Counts	As of 3/4/2015	As of 3/4/2014	This Yr -Last Yr
Current-year Members	570	612	-42
Renewals from prior years (any prior year)	522	540	-18
Introductory members	48	72	-24
Paid for the current year, now deceased	6	7	-1
Last Year's Members - Not Renewed	107	65	42
Members last year, now deceased	8	6	2
By Retired-from Organization			
Retired from ASU	550	599	N/A
Retired from another university	0	0	N/A
Former ASU employee, retired elsewhere	3	0	N/A
Still employed at ASU	17	13	N/A
By (Approx.) Time Since First Joining			
Members for 0-2 Years	72	97	-25
Members for 3-5 Years	90	125	-35
Members for 6-10 Years	192	170	22
Members for more than 10 Years	216	220	-4
By Communications They Want to Receive¹			
Upcoming Event Announcements (e-mail)	418	431	-13
Obituary Notices (e-mail)	334	347	-13
Prime Times (US Post)	529	590	-61
Other ASURA Communications (e-mail)	387	415	-28
None of The Above	12	6	6

More Counts	As of 3/4/2015	As of 3/4/2014	This Yr -Last Yr
By Former Employment Category			
Faculty and Faculty w/ Admin Appt	266	279	-13
Academic Professional	37	40	-3
Staff	162	190	-28
University Staff (Service Professional)	76	72	4
Administrative	29	30	-1
Having an Arizona Address	521	552	-31
Level of Activity			
Checked at least one volunteer area	97	80	17
Attended at least one event this year	161	145	16
Attended an event ever	289	274	15
Logged in to Members-only Site (ever)	102	77	25
Made an additional donation this year	164	189	-25
Non-members in Database			
Was a member at some time	293	329	-36
Never a member	725	864	-139

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

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

