



Annual Report from the Board 2022-2023



September Meet and Greet

This report is for publication at the Annual Meeting
April 19, 2023

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ASURA BOARD AND OFFICERS

2022-2023 (outgoing)

Officers

President – Will Stasi

Vice President – Kay Faris

Past President – Tara Roesler (appointed)

Secretary – Pat Schneider

Treasurer – Barry McNeill

2023-2024 (incoming)

Officers

President – Kay Faris

Vice President – TBD

Past President – Will Stasi

Secretary – Partha Dasgupta

Treasurer – Terrie Ekin

Board Members (year term expires)

Board Members (year term expires)

<p>Jo Ellen Alberhasky (2025) Rojann Alpers (2024) Bev Buddee (2025) Partha Dasgupta (2025) Terrie Ekin (2025) Kay Faris (replaced Sue Henderson who resigned June 2022) (2024) Kathy Gunn (2023) Mark Henderson (2023) Barry McNeill (2024) Helene Ossipov (2024) Trudy Perez (2023) Will Stasi (2025) Mary Stevens (replacing Dave Schwalm --who resigned September 2021) (2023) Tara Roesler (replacing Carol Tassone--- --Taylor who resigned Sept. 2021) (2024) Pat Schneider (replacing Larry Edmonds --who resigned January 2022 (2023)</p>	<p>Jo Ellen Alberhasky (2025) Rojann Alpers (2024) Bev Buddee (2025) Jeff Bush (2026) Carl Cross (2026) Partha Dasgupta (2025) Don Dotts (2026) Terrie Ekin (2025) Kay Faris (replaced Sue Henderson who resigned June 2022) (2024) Maria Hesse (2026) Barry McNeill (2024) Helen Ossipov (2024) Kathy Palmanteer (2026) Will Stasi (2025) Tara Roesler (2024)</p>
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Ex-officio Members

Alumni Assoc. TBD

Emeritus College - TBD

Human Resources – Lynna Soller

University Affairs - Kendra Burton

University Club – Tara Roesler

University Senate – Penny Dolan

University Staff Council – Shawn

Banzhaf

Ex-officio Members

Alumni Assoc. – TBD

Emeritus College - TBD

Human Resources - Lynna Soller

University Affairs - Kendra Burton

University Club – Tara Roesler

University Senate - TBD

University Staff Council - Shawn

Banzhaf

ASURA OFFICE CONTACT INFORMATION

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PRESIDENTS MESSAGE

Submitted by Will Stasi



As this year's ASURA President, I am pleased to present the 2022-2023 Annual Report. ASURA is holding the first in-person Annual Meeting since 2019. Additionally there were numerous other in-person events reinvigorating a back to normal operation for the organization. This has been a challenging year as we have transitioned some volunteer positions and divided others. Some new members stepped up to serve on or chair some of the Committees. Some long-time members have passed away during the last year and we are grateful for their support of many years. ASURA has found ways to innovate and persevere over some obstacles meeting the challenges. A few speed bumps are still down the road.

Volunteer positions in various areas still need replacements. ASURA committees and volunteers have, through it all, continued generating programs and events even with these difficulties. We also continue to contribute to the community with Adopt-A-Family making a positive difference for some families. The Annual Report is available on the ASURA website. It contains reports from all the ASURA Chairs.

Showcasing a few highlights:

MEMBERSHIP Growth continues with the greatest increase in Introductory members – there are 35 more than there were a year ago. The about 100 paid memberships for people who have been with us for 2 years or less is down slightly compared with last year. There is a balance between 0-5 years and over 10 years. The base remains stable at over 850.

COMMUNICATION Our website continues to evolve with a separate section detailing Volunteer Duties to encourage new volunteers. Organizational information and links to various sources have ongoing updates. *Prime Times* and E-News fill the gap of new information. Event postings provide current happenings.

EVENTS A return to normal operations has provided many in-person events well participated in by members as a result of great volunteers providing support to make it happen. Travel has been reenergized with members enjoying multiple opportunities to get out of the house again and enjoy sights and sounds to be explored.

SEMINARS This is one of ASURA's strengths and highest growth areas with members participating and finding great interest in the subject matter. I think one of the greatest successes that has resulted from Covid shutdown was when we transitioned to ZOOM presentations. This enabled a new following with participation by sister Universities NAU and UArizona. Pre-retirement seminars collaborating with ASU Human Resources, continued as a monthly event helping support transition of employees getting ready to retire. These seminars are also by ZOOM.

I thank the outgoing Executive Committee, Board Members, Committee Chairs, Committee volunteers, and Ex-Officio members for their dedication this past year. I enjoyed the privilege of supporting ASURA and its activities and hope I made a positive difference to the organization. I also want to recognize outgoing Board members for their service, Kathy Gunn, Mark Henderson, Trudy Perez, Patricia Schneider, and Mary Stevens.

I will transfer leadership to the new ASURA President, the dedicated Kay Faris.

We welcome next year's Board members Jeff Bush, Carl Cross, Don Dotts, Maria Hesse and Kathy Palmanteer. In the new year many volunteer opportunities exist, allowing you to become more involved in ASURA. Please contact our new president Kay.faris@asu.edu to be a volunteer.

William Stasi
President 2022-2023

OFFICE VOLUNTEERS

Submitted by Linda Van Scoy and Nancy Lesko



We are back in business! With Covid in the rear-view mirror we seem to be functioning normally again. What is normal you ask?

We have a set schedule of Tuesday, Wednesday and Thursday from 10:00-1:00 PM Staffed as follows: Tuesday, Linda Van Scoy, Wednesday Bev Buddee shared with Jan Thompson, and Thursday Jeannette Robson.

We are receiving book donations once again and Friends of Phoenix Library (FPL) is picking them up. They have offered a revised contract to reimburse us for books by the pound instead of by value.

In-person events are scheduled and registrations and checks are coming in. NOTE: Checks must be payable to: ASU Foundation/ASURA. The Foundation is our banker and they require that checks be made out to them.

Members are calling the office with questions and/or to register for Zoom seminars. So, please feel free to do so, 480 965 7668.

Video History Interviews have resumed so scheduling those are happening with regularity.

A couple of our Office volunteers are currently on leave of absence so we could really use 1-2 volunteers to help out for a few months.

So it is nice to be normal again! We look forward to interacting with our members and thank you for your support. Below are pictures of our office volunteers:

Office Co-Managers – Linda Van Scoy (lvs@asu.edu) and Nancy Lesko (nclesko@asu.edu)
 Business Operations Manager – Carolyn Minner (carolynminner@outlook.com)
 Technology Manager – Connie McNeill (conniemcneill@outlook.com)

 Nanci Beardsley	 Bev Budde	 Nancy Lesko	 Connie McNeill	 Dorothy Meunier
 Carolyn Minner	 Jeannette Robson	 Tara Roesler	 Jan Thompson	 Linda Van Scoy

COMMUNITY OUTREACH COMMITTEE

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

Adopt-A-Family Program

Submitted by Ginny Sylvester



The Adopt-A-Family group of merry elves finished their Christmas work 2 weeks before Christmas. All gifts were delivered to the 2 families the week of December 5th. We had 2 smaller families this year, both single moms, but their needs were great, especially for household items. We were able to fill most of their requests, including buying 2 microwaves. I've attached photos of the gifts after we wrapped them and before they were delivered.



In addition to Christmas, we gave each family a gift card for \$125.00 for their Thanksgiving meal and plan on being able to do the same for the Easter/Spring meal. This is always such a rewarding – and fun – time.

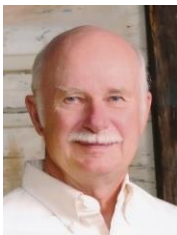
Ginny Sylvester

ASURA Adopt-A-Family Chair

e-mail: Ginny.Sylvester@asu.edu

Video History Project

Submitted by Barry McNeill



Leadership History: The Video History Project, suggested by ASURA President Mat Betz, is in its 21th year. Starting in 2002, it was chaired for 5 years by June Payne, then for 2 years by Bob Francis. During these first seven years, June and Bob managed a contract with Agave Productions to record 49 interviews. Starting in 2009, Linda Van Scoy chaired the project for 6 years while the project developed its in-house recording and editing capabilities. This was made possible by the four fund raising golf tournaments, organized by of Dave Scheatzle with his connections and hard work, which netted over \$70,000. In 2014, Dave Scheatzle became Chair and worked to develop our online capabilities at the ASU Library Repository. In 2019 Barry

McNeill took over the chair and has placed emphasis on developing metadata standards and eliminating the backlog in unedited interviews

Committee Work

The committee is composed of Roger Carter, Carl Cross, Don Doerres, Bonnie Eckard, Elmer Gooding, Les Hendrickson, Barry McNeill, Helene Ossipov, Tara Roesler, Dave Scheatzle, Pat Schneider, and Linda Van Scoy.

We finally got back in the business of recording new interviews.

1. Roger Carter, Don Doerres, and Linda Van Scoy spent time improving our interview room. Along with some cosmetic changes, the technology was upgraded to include a floor monitor so the videographer can better see what they are recording and a “magic” box that allows for real time switching between the two cameras and adding captions which should make editing easier.
2. Interviews were held with Barbara Stark, Anthropology, and David Altheide, Sociology on February 9th and March 7th respectively. Hopefully the postponed interview with Jeremy Rowe will take place in April.
3. We continue to have trouble working with the new digital repository (KEEP). We currently cannot add new interviews or add/modify metadata on the interviews in KEEP. We have contacted the ASU Librarian to see what can be done.
4. Using iCloud to store our raw, i.e., unedited, interviews turned out to be infeasible due to a limit on file size. Instead, we now have an ASU Enterprise Dropbox account which has no limit on file size. All of the

raw interviews currently posted in KEEP have been uploaded to the Dropbox. Work continues to get the raw interviews for those interviews still needing editing loaded to our Dropbox.

Barry McNeill,
Chair, ASURA Video History Project
barry_mcneill@outlook.com

Scholarship Committee

Submitted by Jan Shore



During this year the Scholarship Committee underwent a transition in leadership as Joy Shearman, longtime, dedicated chair transitioned to the position of co-chair and Jan Shore assumed the Chair. A heartfelt thanks to Joy for her continued years of dedicated and diligent service to the ASURA Scholarship Committee.

The Scholarship Committee, with Chair Jan Shore, Co-Chair Joy Shearman, and 4 additional volunteers, continued to function electronically through the selection process in March of 2023. Receiving, reviewing, and arriving at a consensus, all electronically, during a time of continued concerns about Covid-19 again required adjusted procedures and continued commitment to this electronic process. Therefore, a very special thank you to committee members Karen Burstein, Martha Christiansen, Ginny Sylvester, and Jan Thompson. Ten applications were critiqued by all, and Sylvia Ceja-Gonzalez was chosen to receive ASURA's 2022-2023, \$10,000 Scholarship Award. Sylvia has returned to school after raising her children. Her goal is to obtain her Bachelor's degree in Political Science and continue on in a Masters program in Public Administration or Non-Profit Management. She is in her senior year in ASU's online program. She maintains a high-grade point average while working at a non-profit agency. Sylvia has arranged her schedule to speak to ASURA members at the Annual Meeting, Wednesday, April 19th, 2023.

This scholarship is funded by contributions from members, income from book sales, earnings on the scholarship endowment fund, and from the operations budget. Each year the amount available is reviewed and thanks to the donations, \$10,000 has been approved consistently in past years. The committee reviews the materials submitted by each applicant. assuring the requirements of academic achievements, community involvement, professional goals and needs, are met. Being a member of this committee gives members the unique opportunity to make a difference in students' lives. That, from the beginning, has been the purpose of this ASURA Scholarship.

Jan Shore
ASURA Scholarship Chair
Email: jan.shore@asu.edu

Joy Shearman
ASURA Scholarship Co-Chair
email: joyrn@cox.net

EVENTS COMMITTEE

Submitted by Trudy Perez



The Events Committee was chaired by Trudy Perez. Event promotion, website publication and the posting of event follow-up reports were managed, coordinated and performed by Partha Dasgupta and Barry McNeill. The committee is an "umbrella" committee made up of the chairs of the various event subcommittees and its purpose is to provide for the coordination of dates and activities between these subcommittees. These committees and the chairs are: Travel – John Brock; Pre-retirement Seminars – Trudy Perez & Liz Badalamenti, Seminars – Pat Schneider; Luncheons and Special Events – Mary Stevens.

Coordination of Calendar of Events

The number of events offered this year was much closer to the pre-pandemic level. The events were nicely scattered throughout the year so coordination was not very difficult.

Promotion of Events

Eighty-one percent of our members (721) requested and received email notifications for all ASURA organized events, down one percentage point from last year. Of this group, 22% percent (194) registered for at least one

ASURA event during the past year, a decrease of two percentage points over the previous year's percentage. All events were published on the ASURA website and any member with an internet connection could register online by visiting this website. Further, past event stories continued to be added to the ASURA website (<https://asura.asu.edu>).

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

Trudy Perez
ASURA Events Committee Chair
Trudy.perez@asu.edu

Luncheons and Special Events

Submitted by Marry Stevens



Luncheons and Special Events

The committee members were Mary Stevens, Chair, Trudy Perez and Partha Dasgupta. Barry McNeill and Partha Dasgupta wrote and published the announcements for each event. Barbara Eschbach and Kimmy Sasson joined the committee for the Holiday Potluck/Bake Sale, and they chaired the Spring Luncheon.

Meet and Greet pizza party – September 14, 2022. The first event was the Meet and Greet pizza party at Ability360, a large and very suitable facility for our events. The event is hosted by ASURA and free to attendees. After attendees finished their pizza and beverages, President Will Stasi introduced the members of the ASURA Board of Directors and Committee Chairs. The chairs provided information on their activities. Several new members attended and volunteered for committees, which is one of the goals of this event.

Holiday Potluck and Bake Sale – December 15, 2022. This is always such a fun and delicious ASURA gathering. Our members bring such tasty and unique dishes and desserts for the potluck and the Bake Sale. Barbara Eschbach and her good friend, Kimmy Sasson conducted the bake sale and made \$200 for ASURA! They also joined the Luncheons/Events Committee.

Spring Luncheon – March 2, 2023. Barbara and Kimmy chaired this event with Friendship. Village in Tempe. Attendees paid only \$20 for a delicious luncheon and entertainment by a group selected by Barbara. WildP'lay, a terrific duo, which included a pianist and vocalist/saxophonist presented songs from famous musicals. 62 members and guests attended. It was a great year for events once again.

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

Seminars

Submitted by Pat Schneider



The **Seminar Committee** members include Pat Schneider, Beverly Buddee, Carol Kubato, and Jay Butler. Seven (7) seminars (up 2 from the previous year) were held during the 2022-23 term. The seminars were all held via Zoom in order to continue to include participants from NAU and UArizona.

- Our first seminar was on May 12, 2022. Dr. Billie Enz, an emeritus professor at Arizona State University, presented a very informative seminar on understanding the brain and how to maintain brain memory. During the presentation Dr. Enz touched on brain basics and understanding memory systems, the normal aging brain vs dementia and maintaining brain health.

- The annual open enrollment seminar was held on October 8, 2022. Over 100 people attended the seminar, which was opened to people from both NAU and UArizona. Rob Foster a community volunteer with AARP presented the ABCD's of Medicare. Randi Gray from ASRS spoke to the health plans offered by ASRS. There were no changes in coverage to plans offered by ASRS but there will be an increase in premium, so this year was a passive enrollment for plan participants if you were making no changes to your plans.
- A second benefits seminar was held on October 17, 2022, where Tracie Caruthers from ADOA presented the updates to the plans offered by ADOA. Like ASRS, this was a passive enrollment if you were not making any changes to your coverage.
- The January 12, 2023, seminar featured speakers from the **Area Agency on Aging**. Alfredo Gonzalez, Scott Hathornthwaite and Marco Mendoza provided valuable information on the services offered by the agency. The services and programs they presented are available within Maricopa County. However, they all mentioned that most of the programs are found in other counties throughout the State of Arizona, but under a different agency/council.
- The February 9, 2023, seminar focused on how to get started in researching and creating your family history. Duane Roen provided many, many tips and suggestions as well as demonstrated techniques for uncovering your family history.
- March 9, 2023, brought us a return visit from Dr. Billie Enz who provided information on our executive brain functions – inhibition/action, working memory and focus & attention. The seminar focused on how these functions are developed over time and how they can diminish as we age.
- A second seminar was held on March 23, 2023, in which Robert Herschberger provided insights into the diary he kept during the time he was the primary caregiver of his wife who suffered from Alzheimer's disease. He has since turned this diary into a book that offers reflections and advice to caregivers, family members, medical personnel, psychologist, church members, ministers, deacons and persons in families with a history of Alzheimer's disease.

Patricia (Pat) Schneider
Chair, Seminar Committee
pms0627@gmail.com

Travel

Submitted by John Brock



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

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

- In early October Seven ASURA folk did a very nice two-week trip to Iceland
- In early November about 12 travelers made a tour of northeast Arizona
- In March ASURA members and their guests attended the *Variety Music* show at the Silver Star Theater in Mesa. The theater offers a dinner buffet and musical shows.
- In April ASURA members and guests again attended the Silver Star Theater and were entertained by the *True Country* show.

Upcoming committee activities include:

- Arranging for difficult to obtain tickets for a tour(s) of Tovrea Castle in the fall of 2023.

- Looking forward the travel committee is working with Overseas Adventures Travel for a trip to Costa Rica. The dates of the tour are March 11 through March 24, 2024. See the ASURA website or call OAT at 800-955-1925 and ask for this ASURA affiliated trip. The trip code is G4-29579 plus ARAJ 101.
- We are discussing and starting to plan another instate trip in October 2023 to southeast Arizona plus some local things, like a tour of the New American Film School in Mesa and perhaps a tour of the ASU Tempe campus libraries.

John Brock
ASURA Travel Committee Chair
e-mail: john.brock@asu.edu

Pre-Retirement Seminars

Submitted by Trudy Perez, Liz Badalamenti



As the Pre-Retirement Seminars approach the 12th year of service to ASU faculty and staff, we thank you for your support and encouragement. Our attendance has increased, averaging 35-59 monthly creating a need for additional topics assisting future ASURA members to be better prepared. Listening to suggestions from current members we have added some new topics, ASU's Human Resource Benefit team, Optional Plan providers: Fidelity, Nationwide, and TIAA, Connie McNeill's "Email Life after ASU" and last but not least The Employee Network (TEN) sharing many discounts available to employees as well as retirees. We consider most important was creating an Outlook's Distribution List (DL) to allow privacy for your attendees. If you have

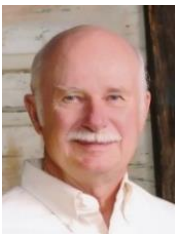
any topic idea please share with us, we appreciate your continued support!

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

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

FINANCE COMMITTEE

Submitted by Barry McNeill



The members of the 2022-2023 Finance Committee were Barry Bruns, Terrie Ekin, Barry Mc Neill, chair, Carolyn Minner, and Larry Carlson. Jerry Snyder was a consultant.

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

The committee met on December 13 to discuss the previous year's expenditures as required by the Bylaws. The results of the meeting were written up and presented to the January Board meeting (see January Board Minutes). Highlights of the report are:

1. The previous year's expenditures were reasonable and consistent with the budget and in agreement with the Foundation.
2. An explanation as to why the Financial Health Report was redone. The redo treated, as part of the scholarship expense, any transfers made directly to the scholarship endowment from Operations. The result was an increase of \$5,000 in the excess funds.
3. The recommendation to transfer \$5000 from Operations to the endowment (approved January Board Meeting)
4. The recommendation to revise the distribution restrictions on the money received from book sales (approved January Board Meeting).

In February the committee looked at member donations (exclusive of dues) which are a source of income. It turned out to be fairly substantial – over \$4,000 (see March Board Meeting Minutes).

Barry McNeill
ASURA Finance Committee Chair
e-mail: barry_mcneill@outlook.com

Book Donations

Submitted by Mary Stevens



In 2011, the ASU Foundation/ASURA entered into an agreement with a local non-profit organization, Friends of the Phoenix Public Library (“Friends”). Per the agreement, Friends sells books donated by our members, other ASU retirees and anyone else who wishes to donate. Friends sells the donated books on-line, retains a 15% commission and splits the sales proceeds with ASURA every quarter. Friends started selling ASURA-donated books in July 2011. Donors deliver their books to the ASURA office and sign a gift donation form, which is forwarded to the ASU Foundation. The Foundation sends each donor a gift receipt/ thank-you letter.

On a quarterly basis, Friends provides ASURA with sales reports and a check for the proceeds from the sales of our books. Proceeds are transferred to the ASURA Special Projects account and are used to support ASURA's annual scholarship and the Video History Project. The table below shows the annual proceeds from 2011 through December 2022. Calendar year 2021 was a banner year.

Larry Carlson continues to assist some of our donors. When a donor is unable to deliver their books to the ASURA Office, he picks the books up and drops them off at the Office. When feasible, he has also delivered many boxes of books directly to the Friends warehouse. Many thanks to Carolyn, Linda Van Scoy, Nancy Lesko and Larry for their significant assistance in keeping our program on track.

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

Year	Amount (\$)	Year	Amount (\$)
CY 7/2011	\$72	CY 2017	\$877
CY 2012	\$1,092	CY 2018	\$1,257
CY 2013	\$ 468	CY 2019	\$1,425
CY 2014	\$ 718	FY 2020	\$1,928
CY 2015	\$1,486	CY 2021	\$5,522
CY 2016	\$1297	CY 2022	\$2,164
TOTAL 2011-2022		\$18,696	

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

GOVERNMENT and Health Insurance LIAISONS

The Government Liaison Committee acts as an agent of the Board to provide advocacy in relation to the Arizona State Legislature, the Arizona State Retirement System (ASRS) and such other agencies as the Board may designate. Per the ASURA Bylaws, the Committee is charged to exert influence on targeted agencies as approved

by the ASURA Board and in consultation with the Arizona State University Retirees Association (ASURA) Officers.

Legislative Liaisons

Submitted by Pat Schneider



The **Government Liaison Committee** members include Tara Roesler, Larry Carlson and Pat Schneider. The beginning of the 2023 Legislative session brought forth a few bills that affect the ASRS. Fortunately, the bills do not have a negative impact on the ASRS and all have no impact on existing members and benefits. The only bill that may be of interest is the bill that will grant a new retiree 90 days to make his/her contribution payout selection instead of the current 30 days. In addition, there are a few bills that affect Arizona's senior population. There is a bill that would allow for seniors living in school districts with a high school tax to get assistance in meeting their assessment. Also, presented for consideration is a bill that funds a three-year program to address food insecurity among seniors. Several bills have been presented that affect voting procedures in Arizona, many, which as of this writing, have not even had their first reading in either the house or senate. The committee will continue to monitor the bills that have been identified as "of interest" to members of the ASURA and report accordingly.

In addition to monitoring bills, Pat Schneider also attended the Virtual Day at the Capitol. This event included presentations by the chair of the Arizona Retirement Security Coalition who briefed participants on the bills that have been presented that have an effect on the ASRS. In addition, one of the ASRS lobbyists also presented on the bills currently in the legislature. Finally, a panel of two representatives and two senators answered questions posed to them by the ARSC chair and the event participants. They all stressed the importance of getting to know who your representatives and senators are and to be in communication with them.

Pat Schneider
Interim ASURA Government Liaison Chair
pms0627@gmail.com

ADOA Health Insurance Liaisons

Submitted by Larry Carlson



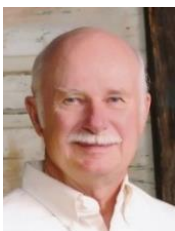
For 2022 not much activity was possible dealing with the ADOA. The directive for staff was that they act at the direction of the Governor and that no public input for changes was needed. For retirees, insurance options did not change and ADOA absorbed premium changes (if any).

Governor Hobbs is still waiting for the Arizona Senate to approve a new director. It is our hope that the new administration will be open to public input.

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

SISTER RETIREMENT INSTITUTIONS

Submitted by Barry McNeill



ASURA actively interacted with a several different retirement associations. See the Seminar section for interactions with NAU and UArizona. In addition to NAU and UArizona, ASURA received two inquiries about our program this past year. The first was from Virginia Commonwealth University. VCU said they wanted to improve retiree engagement and giving and felt we had a strong program. I responded suggesting they read the "Third Decade of Success" to see how we operate. I received no return emails.

The second inquiry came from the University of Maryland's Emeritus/Emerita Association. They were a new association and were thinking about starting an oral history project, which they learned about via Sue Barnes at AROHE (Association of Retirement Organizations in Higher Education). The email included the

sentence “ASURA has played a major role in the retiree organization movement, and we would like to benefit from the lessons you have learned.” I responded suggesting some readings and links from our website. I also mentioned that ASU had a separate Emeritus College. I got a very quick response saying they were beginning to think about retirees other than faculty. I suggested they read “The First Decade of Success” to understand why there are two retirees’ organizations at ASU.

Barry McNeill

e-mail: barry_mcneill@outlook.com

MEMBERSHIP AND COMMUNICATIONS COMMITTEE

The Membership and Communications Committee is an “umbrella” committee made up of the chairs of five committees. The committees and their chairs are: Membership, Carl Cross, E-News, Barry McNeill; Prime Times, Jeannette Robson; Obituaries, Tara Roesler; Database, Paul Harper; and Websites, Connie & Barry McNeill.

Membership

Submitted by Carl Cross



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

Human Resources discontinued their preretirement sessions after 2019. ASURA had always presented a live ten-minute recruiting pitch and distributed our tri-fold promotional flyer summarizing the purpose and activities of the organization and an application form offering free membership for the first year. ASURA is now offering monthly preretirement seminars which introduce our organization to those considering retirement in the near future. ASURA was well represented at two ASU employee BBQ luncheons and the Human Resources Wellness Expo. These events provided exposure and awareness of the ASU Retirees Association and should help to increase membership.

Table 2 in the Appendix shows that on March 1, 2023, the membership total was 858, up 36 over last year. What concerns me is the decline in “new” paying members (Members for 0-2 years excluding Introductory Members) that dropped by 14. Our events committees and subcommittees are constantly working to offer a rich, diverse and interesting menu of activities to increase member participation. This growth suggests that ASURA is delivering the sort of activities and programs this younger group of retirees find of interest. The association continues to have a nice balance between faculty and staff.

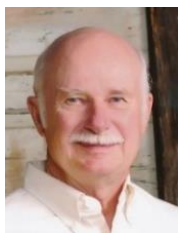
Carl J Cross

Chair, Membership Committee

email: carl.cross@asu.edu

E-News

Submitted by Barry McNeill



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

This past year 10 issues were published. You can read back issues on the ASURA website at <https://asura.asu.edu/e-news-archives>. Several special editions were published in the summer and when a time dependent item came up right after an issue had been published.

Barry McNeill
E-News Editor
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Prime Times Newsletter

Submitted by Jeannette Robson



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

With the onset of Covid-19 back in 2020-2021, the health and safety of our ASURA members was our primary focus. With that in mind, ASURA curtailed all local and international travel offerings and presented only Zoom seminars which, by the way, proved to be a very valuable tool to disseminate important information and topics of interest to our members. Hopefully, 2022 got us back on track with the following in-person event offerings:

- “Fall Meet & Greet” in September.
- Tovrea Castle Tour in October.
- 13-day trip to Iceland in September.
- A three-day local travel adventure to North Eastern Arizona in early November.
- “Holiday Potluck & Bake Sale” in December.
- Spring Luncheon in March

More local and international travel, besides informative seminars and fun social events are currently in the planning process. The *PrimeTimes*, our ASURA website, and monthly E-News emails will help our members stay up to date on all the exciting events being planned for them throughout the year. Also, we are all very excited about having our first in-person ASURA Annual Meeting since 2019. Be sure and smile when you see a camera pointing in your direction as I have plans on publishing as many photos as possible in the next *Prime Times*, Summer 2023.

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

- Special projects: Adopt-a-family, Video History, ASURA Scholarship, and Book Donations.
- Travel opportunities: regional excursions and one-two week international travel.
- Luncheons/social events, workshops, seminars, pre-retirement seminars and a community outreach activity titled “ASU Book Group” which meets monthly during each semester, either via Zoom or in-person at the Pipers Writers House on ASU Tempe Campus.
- Monitoring activities related to Arizona legislation and the ASRS and ADOA retirement benefits.

Through highly informative articles and updates on the various legislative and health insurance/Medicare issues, ASURA Government and Health Insurance Liaison volunteers have done an exceptional job relating what is going on in Arizona and how it pertains to our retirees. We always encourage our members to suggest other items of interest they would like to have covered in the *Prime Times*.

Current information on the ASURA Board members, Committee Chairs, and its volunteer Office volunteers is also

included in each issue. Articles of past and upcoming activities and events sponsored by the ASURA are special features of the newsletter along with information on upcoming travel and other events for our member's consideration.

The Spring 2017 *Prime Times* premiered its first "Advertisement" section offering discounted services designated for our members. This past year, whether it was because of the pandemic or other reasons, our "free advertising" space saw little activity. We would still like to continue with this special feature in our future newsletters so, if you have any friends or business associates interested in taking advantage of our free advertising, please refer them to me at (480) 965-7668 or jrobson@asu.edu further information.

June Payne was the first editor of the *Prime Times* which featured its inaugural publication in the early 1990s. *Prime Times* newsletters, beginning with the fall 2010 through spring 2022 issues, are all available online at <https://asura.asu.edu/prime-times>. The mail out versions have all been in black and white while the on-line versions have been in color since Spring 2012. However, a special color version of the Spring 2021 *Prime Times* was approved, printed, and mailed out to all our members. I sincerely hope you all enjoyed reading it as much as we enjoyed having it printed in color for you.

Beginning with the summer 2015 issue, those members who had signed up to receive association e-mail notifications are also being sent the monthly "ASURA E-News" email which includes an easy link to the on-line color version of the *Prime Times*. Black & white paper copies continue to be mailed to our membership through the Tempe Campus ASU Mail Services.

Jeannette Robson
Prime Times Designer/Editor
e-mail: jrobson@asu.edu

Obituaries

Submitted by Tara Roesler



The Obituary Notifications Volunteer receives notifications of the passing of people who were at some time ASU employees, spouses or partners of employees, or people who had a significant (non-student) connection to ASU from various sources including the ASU Foundation and ObitMessenger as well as notifications from members and families.

Once notified of a passing, an obituary notice is prepared to include a picture of the deceased (if available), age, date of death, ASU Affiliation/years, survivors, and information on memorial services and/or memorial donations.

These notices are e-mailed to all members who have requested inclusion on the obituary e-mail list. The notices are also posted on the ASURA website and a list of those who have passed away, date of death and affiliation with ASU is published in the next issue of the ASURA newsletter *Prime Times*.

If the deceased was a member of ASURA, a letter of condolence is sent to the deceased member's surviving spouse or partner stating that the deceased member's ASURA membership rolls over to the surviving spouse or partner. The ASURA President and Membership Chair are also given the opportunity to add any comments of their own.

Tara Roesler
Obituary Notifications Volunteer
e-mail: troes7718@msn.com

Database

Submitted by Paul Harper

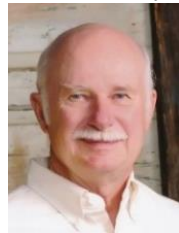


The Database Committee was created last year to focus on specialized responsibilities that were previously included in the Website Committee, including creating introductory ASURA memberships and welcome letters for new retirees, producing quarterly membership reports for board members and performing data integrity checks and updates to the association's database. This year we added job title to the data collected for new retirees and populated it retroactively for everyone who retired from 2018 forward. Knowing the job title that the person held while working at ASU may help in recruiting volunteers for specific tasks.

Paul Harper
Database Committee Chair
paul@harper.ms

Websites

Submitted by Connie & Barry McNeill



The committee members are: Connie & Barry McNeill, co-Chairs, Partha Dasgupta, Carolyn Minner, Pat Schneider, and Perla Vargas.

Website Maintenance (Connie McNeill)

There are periodic updates to the underlying web software which Connie monitors and applies. She is also our main contact with the ASU Webspark development team.

Content Responsibilities (Barry McNeill)

The websites are not static. New material is generated that needs to be added. Some pages get old and need to be removed or updated. The content responsibilities are:

- Connie McNeill – Help for Volunteers new pages
- Barry McNeill – Annual Report, Board Minutes, E-News, Prime Times, Past event stories, Pre-retirement seminars, Volunteer Bios, Board of Director's Page, Leadership Year page, Help for Volunteers updates
- Partha Dasgupta is now doing the Wild Apricot Event posting and Notices
- Carolyn Minner – Obituaries
- Pat Schneider – Seminar Past event stories, Help for Volunteers updates
- Perla Vargas – Homepage.

The load is not shared equally and we will work in the upcoming year to try and even out the responsibilities.

Help for Volunteers Website

Toward the end of last year Connie and Barry created a website, "Help for Volunteers" (see last year's Annual Report). This year there was a major effort to document the operation of the Business Manager, now broken down into three separate operations: Financial, Mailing, and Membership. In addition to this effort there is continual updating of the existing site as previously unknown tasks are uncovered and/or new ways to perform the tasks are developed. Keeping this website current is a never-ending task.

Zenfolio

There remains one website in need of an overhaul: the Zenfolio site that is used for ASURA's photo galleries. Connie continues to look for alternative hosts for the photo galleries.

Connie McNeill
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Barry McNeill
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TREASURER'S REPORT

Submitted by Barry McNeill

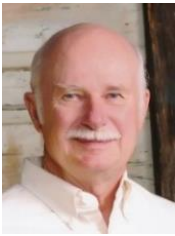


Table 1 in the Appendix shows the current fiscal year budget and operating expenditures for ASURA through March 31, 2023. As has been true for previous years Carolyn Minner, the ASURA Business Manager, has done an excellent job of keeping track of our expenditures and income and has prepared a financial report each month for the Board.

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

- For the most part the budgeted income and expenses track closely to the YTD values.
- The budget for Event Registration Fees Collected (line 7) and Event Costs – Paid events (line 18) did not account for the NE Arizona tour taken in November or travel trips to the Silver Star Theater and hence the YTD is much larger than the budget. In the end these two items cancel themselves out and have little impact on the Operations funds available for spending. The current value shown for Fees Collected (line7) is too large and once the Foundation takes their five percent fee for handling the event money it will be reduced and more closely match the money paid out for the events (line18).
- Since the Fiscal Year ends June 30, the YTD column does not show the April, May, and June income and expenses. The loss shown on line 36 of almost \$7,000 will be erased once the membership drive begins in May.
- The budget did not include the \$5,000 (line 32) transfer to the scholarship endowment from Operations (approved during January Board meeting).

Page 3 of Table 1 shows the Scholarship Endowment Fund has almost reached \$100,000 (line105). The YTD endowment earnings (line 101) are \$429, down from \$2,480 last year. The Endowment was briefly over \$100,000 until the annual distribution to the Spending Account (line 102) was made. Once a year the Foundation moves a formula-based amount from the Endowment to the Endowment Spending account, which ASURA can use to either reinvest in the endowment or use to partially pay for the scholarship. While scholarship growth is our desired goal, the Board continues to use the endowment earnings to partially fund the scholarship.

Money from the sale of books is deposited in the Special Projects Account (line 63 on second page of Table 1). At the moment there have been no deposits. It is anticipated that before the close of the fiscal year there will be about \$3,000 deposited in this account. The money is split 50-50 with the scholarship and Video History Projects. Starting next year the requirement that the split between the scholarship and the Video History Project be 50-50 will be removed.

ASURA continues to receive excellent support from ASU in the form of financial resources (\$7,000) and office and meeting space. This critical support allows ASURA to maintain its many ongoing projects.

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

Barry McNeill
ASURA Treasurer
e-mail: barry_mcneill@outlook.com

Table 1 – Financial Report for Fiscal Year 2022-2023, as of 3/31/2023

Account Categories	FY23 Budget	Actual YTD as of 3/31/2023	COMMENTS
ASURA Operations			
ASURA Operations - Income			
Balance Forward	31,801	31,801	
Current Year Revenue			
Event Registration Fees Collected	300	13,709	(see attached report)
Donations, including membership donations	19,000	9,665	
Holiday Bake Sale 2020	100	200	
Total Operations Current Year Revenue	19,400	23,574	
ASURA Operations - Expenses			
<i>Printing and Mailing Costs</i>			
Membership Drive	850	768	
Prime Times summer printing	900	-	
Prime Times summer mailing	900	-	
Prime Times Supplies	900	709	7,000 shells
<i>Event Costs</i>			
Paid Events	150	12,432	(see attached report)
Annual Meeting	500	-	
Meet & Greet Luncheon	500	435	
Holiday Potluck & Fundraiser	450	60	
Holiday Picnic & Spring Luncheon	100	-	Winter Event & Spring Fling
<i>Other Operations Costs</i>			
Scholarship Award	5,000	5,000	\$10,000 - \$5,000 paid from Endowment
Newspaper subscriptions for Gov. Liaisons	750	598	Yellow Sheet
AROHE	120	(120)	Duplicate payment refunded
Business Luncheons & Service Appreciation	28	-	Plaque updating
Technology Licenses	4,282	4,078	Zenfolio, Wild Apricot (2 yrs), Zoom
Office Equipment & Supplies	1,000	289	
Marketing Supplies	0	-	
Transfer Out			
ASURA donation to Scholarship Endowment	0	5,000	approved by Board 10 Jan 2023
Transfer to Scholarship Endowment - donation change	0	30	
Transfer to Adopt-A-Family	1,197	1,197	
Total Operations Expenses	17,627	30,475	
Increase (Decrease) in Current Year Balance	1,773	(6,902)	
Unexpended ASURA Operations Funds	33,574	24,899	

Account Categories	FY23 Budget	Actual YTD as of 3/31/2023	COMMENTS
General University Allocation (HR)			
Balance Forward	45	45	
Current Year Allocation	7,000	7,000	
Total University Current Year Revenue	7,045	7,045	
Expenses Charged to Allocation			
Annual Report	100	-	
Bylaws & Ballots	300	87	
Encumbrance	1,300	-	Encumbered F22 for laptop purchase
Office Equipment & Supplies	0	-	
Prime Times Fall/Spring Printing	1,350	713	
Prime Times Fall/Spring Mailing	1,400	1,155	
Copier/FAX Equipment Annual Lease	922	922	10% increase over FY22
Membership Drive	650	632	
Technology Services	401	-	Pantheon Web Hosting
Meet & Greet Luncheon	-50	100	
Miscellaneous Expense	0	-	
8.5% Administrative Service Charges	595	307	Charge levied monthly on transactions
Total Expenses Paid From Allocation	6,968	3,915	
Unexpended General University Allocation	77	3,130	
Special Projects			
Special Projects - Income			
Balance Forward	2,835	2,835	
Current Year Revenue			
Friends/Phx Library Book Sale Net Income	3,000	-	
Total Special Projects Current Year Revenue	3,000	-	
Special Projects - Expenses			
Transfer 1/2 of Book Sale Income to Scholarship	1,538	-	
Transfer 1/2 of Book Sale Income to Video History	4,298	2,760	Carry forward from FY22
Total Special Projects Expenses	5,835	2,760	
Unexpended Special Projects Funds	0	75	
Adopt-A-Family			
Adopt-a-Family - Income			
Balance Forward	578	578	
Current Year Revenue			
Adopt-A-Family Donations	500	694	
Transfer from Operations	1,197	1,197	
Total Adopt-A-Family Current Year Revenue	1,697	1,891	
Adopt-A-Family - Expenses			
Holiday gifts	2,250	2,006	
Total Adopt-A-Family Expenses	2,250	2,006	
Unexpended Adopt-A-Family Funds	25	463	

Account Categories	FY23 Budget	Actual YTD as of 3/31/2023	COMMENTS
Video History			
Video History - Income			
Balance Forward	10,716	10,716	
Current Year Revenue			
Video History Donations	1,000	841	
Transfer in 1/2 of Book Drive Proceeds from Spec Proj	4,298	2,760	Carry forward from FY22
Total Video History Current Year Revenue	5,298	3,601	
Video History - Expenses			
Equipment & Supplies	500	1,051	
Software Licenses	294	371	Adobe Premiere Pro
Interview Expenses	0	-	
Transfer Out	0	-	
Total Video History Expenses	794	1,422	
Unexpended Video History Funds	15,220	12,895	
Scholarship Endowment Fund			
Scholarship Endowment Principal			
Balance July 1	95,246	95,246	
Net Investment Return	-1,000	429	
Payout to Endowment Spending - FY22	-1,500	(3,179)	
Current-Year Contributions	2,300	1,211	
Transfer from Operations	0	5,030	
Total Scholarship Endowment Principal	95,046	98,737	
Scholarship Endowment Spending			
Balance July 1	5,242	5,242	
Payout from Endowment Principal - FY23	1,500	3,179	
Transfer from Operations	0	-	
Transfer from Special Projects (Book Sale Proceeds)	1,538	-	
ASU Scholarship	-5,000	(5,000)	
Total Scholarship Endowment Spending	3,280	3,421	

Table 2 – ASURA Membership Totals as of March 1, 2023

	Current 3/1/2023	Last Year 3/16/2022	Change
Current-year members	858	822	36
Renewals from prior years (any prior year)	523	522	1
Introductory members	335	300	35
Paid for the current year, now deceased	1	3	-2
Last year's members - not renewed	253	266	-13
Members last year, now deceased	3	12	-9
By retired-from organization			
Retired from ASU	839	799	40
Retired from another university	2	2	0
Former ASU employee, retired elsewhere	3	5	-2
Still employed at ASU	14	16	-2
By time since first joining			
In introductory period	335	300	35
Members for 0-2 years (excl Introductory)	103	117	-14
Members for 3-5 years	121	106	15
Members for 6-10 years	77	83	-6
Members for more than 10 years	223	216	7
By former employment category			
Faculty and faculty w/ admin appt	342	333	9
Academic professional	45	50	-5
Staff	438	411	27
Administrative	33	28	5
Having an Arizona Address	795	757	38
Logged in to member-only site (ever)	293	272	21