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CELEBRATING A THIRD DECADE OF SUCCESS

A History of the

ARIZONA STATE UNIVERSITY RETIREES ASSOCIATION



CELEBRATING A
THIRD DECADE
OF SUCCESS
A History of the
ARIZONA STATE
UNIVERSITY
RETIREES ASSOCIATION
2011-2021

by
Barry and Connie McNeill

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Printed in the United States of America.

ACKNOWLEDGEMENTS

We would like to thank Bill Stasi for making a generous donation towards the cost of printing this book. It was his donation, made early in 2020, that started the discussion about whether to write a “third decade” book.

We would also like to acknowledge those who took the time to contribute remembrances of their ASURA experiences and accomplishments during the past decade. Those first-hand thoughts immensely enrich the stories being told.

Special thanks to Jo Madonna and Jan Thompson, who read drafts of every chapter and then of the assembled book. Their input and encouragement were invaluable. We are also grateful to the reviewers listed below. Their suggestions made it a much better book, and we are most appreciative.

Barry Bruns

Jeri Meeks

Carolyn Minner

Nancy Lesko

Val Peterson

Becky Reiss

Joy Shearman

Linda Van Scoy

Lastly, we are thankful for the many friendships we have made through working with the association. We truly hope that those who lead and volunteer with ASURA in the coming decade will be as fortunate, and that the association will continue to thrive and be a valuable force for its members, for ASU, and for our community.

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INTRODUCTION

Almost ten years have passed since the publication of the ASU Retirees Association's *A Second Decade of Success* and ASURA is about to enter its fourth decade. In remarking upon this in a meeting of the ASURA Board of Directors in March of 2020, members wondered whether it was worth the effort to write about our third decade. If we did, would it just be a boring recounting of routine activities and events?

We were not sure ourselves until we took time to think about what has changed in ASURA since April of 2011. In the bustle of daily activities, we did not really notice that ASURA has been doing something special. Having now spent a few months focusing on our recent history, we strongly believe that there is much that we can all rightfully feel proud of, and that writing about it is well worth the effort.

So, our goal in writing this "third decade" book was to share our appreciation and to engender a well-deserved sense of pride in our members, especially those who volunteer with the organization. We also hope it is fun to read!

We like to think of this book as a small museum with a series of rooms (chapters). Each room is populated with interesting people who know a lot about what goes on in that room, and who feel pride and joy in telling you about it. There are pictures on the walls to make things more interesting. We hope that as you engage with the people and exhibits you will begin to share in the pride and be glad that you are a part of it all.

So before beginning your tour of the eight rooms in our little museum take a moment to read an overview of what to expect in each room.

INTRODUCTION

The Room of Vibrant Membership

As you would expect, this room is full of members. There is a group talking about all the efforts we have made to include new members and to keep existing members coming. All the decade's Presidents are here talking about what motivated them to be president and what they feel proud of.

The Inviting Events Exhibit

It takes a big room to have space enough for all our event activities. You can visit the "Meet & Greet" or seminar displays to hear about the birth and rise of these events. You will want to check out the pre-retirement section to see how we are helping our colleagues still at ASU prepare to join us in retirement. The walls are hung with fun trip pictures taken by our intrepid international travelers.

The Hall of Active Retiree Advocacy

Here you have a chance to mingle with our government and health insurance liaisons and listen to them discuss how they advocate for retirees. Be sure to applaud their success stories.

The Invested Community Service Room

In this room you can rub elbows with members of the Video History Project, with our Scholarship Committee chairs and our scholarship recipients, and the chair of the Adopt-a-Family program. Their stories and pictures are not to be missed!

The Engaging Communications Studio

At the door of The Engaging Communications Studio, you will meet our friendly office staff. Also in the studio are the people who edit and produce our publications – seven different publications! They are eager to tell you about their efforts to keep members informed, entertained, and interested in our association.

The Beneficial ASU Relationship Corridor

Moving through this corridor you will notice that there are people walking in both directions. Some are enumerating and expressing appreciation

INTRODUCTION

for the many ways that ASU helps ASURA, and some are explaining how ASURA benefits ASU.

The Healthy Finances Exhibit

This room is filled with members of the Finance Committee who have a knack for explaining how we can afford to do all we do. The graphs on the walls are helpful too. There is a special section of the room devoted to the way we fund our scholarship and why the endowed scholarship fund is important.

The Sustainable Operations Archives

Our archives are populated with volunteers who love accurate records, documentation, and systems that facilitate record keeping and operations. They are looking forward to telling you about the major improvements our association has made in these areas during the past decade.

Now that you have finished this overview of what our collections hold, please begin your tour. We hope you will enjoy it. In what follows “we” refers to the ASURA – all of us! And of course, ASURA refers to the ASU Retirees Association."

Barry and Connie McNeill
March 2021



Barry and Connie McNeill

CHAPTER 1 – VIBRANT MEMBERSHIP

Having vigorous membership is arguably the most remarkable accomplishment of the ASU Retirees Association during the past decade. At a time when church groups, PTAs, sports groups, professional societies, book clubs, labor unions, veterans' groups and service clubs are experiencing steady decline, our organization has experienced growth. In addition, our volunteers are active and committed, participation in events is strong, donations to our programs keep coming in, and we even get a decent voter turnout for our annual Board elections.



*Bonnie Scheall, Gary Kleemann and
Chuck Backus*

Unsurprisingly, almost every chapter of this book has something to say about our members, but this chapter is especially dedicated to that topic.

MEMBERSHIP GROWTH AND STABILITY

Our ability to maintain and grow our membership is fundamental to the health of our association.

In 2005 we celebrated achieving a membership of 1,000. Since there were no official records or membership reports at that time, we do not know whether these were all current members, but it is nice to think that they were. By the beginning of this decade, our record-keeping and reporting were

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reliable, and we officially had 660 members. Although our numbers declined during the middle of the decade, by the end of the 2020-2021 year we had 830 members.

Being a great association with services and activities that retirees value is not the only reason we've experienced growth. Growth also happened because we have been proactive about finding ways to attract and retain members. Some of our efforts have paid dividends, some not so much.

During this decade we:

- Loosened membership eligibility requirements.
- Reached out to current ASU employees to raise awareness of and interest in ASURA.
- Reduced barriers to joining.

ASURA membership eligibility is defined in the bylaws, so changing that can be a major undertaking. However, in 2012 President Bill Moor thought that there were several areas of the bylaws that needed clarification and he created an ad hoc Bylaws Committee for this purpose. Mary Stevens chaired the committee, and looking back on the work said, "I don't remember too much about this exciting subject, except that we laughed a lot-for a committee working on bylaws!" The bylaws revision project provided the opportunity needed to expand eligibility. In making its recommendation, the committee was partly inspired



Elmer Gooding - 2005



Mary Stevens

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by the ASU Emeritus College, which admitted retired faculty from other universities. The eligibility requirements recommended and adopted added:

- Retired persons who were former employees of ASU.
- Retirees from other universities.
- Other individuals with approval of a majority vote of the Board of Directors.

We have had only a few people from the added categories join the ASURA. However, one of these was Tara Roesler, a former ASU employee. She became President, which by itself makes the broadened eligibility worth celebrating!



ASURA Table at West Campus Staff Appreciation BBQ

If broadening eligibility had little impact, what about reaching out to current ASU employees? We have several organized ways this happens: The chair of the Membership Committee gives a ten-minute presentation to the employees attending HR pre-retirement workshops; we offer pre-retirement seminars (see Chapter 2), and we staff a table at some ASU Staff Council events, primarily Staff Recognition barbecues. Beginning in 2020, each spring we give a brief introduction of our association to the University Senate and hope they take the information back to their colleagues.

We generally get a few questions at the HR workshops and hand out our trifold brochure. At the barbecues we have good discussions with those dreaming of retirement. Over the decade we have enhanced our table to

CHAPTER 1 – VIBRANT MEMBERSHIP

include a nice table drape, a large poster, and branded giveaways (the luggage tags are popular). We do not have quantifiable results for this outreach effort, but Jan Thompson, President 2019-2020, is not alone when she says, “I had never heard of the Retirees Association before the HR workshop



*Board Meeting 2012
Barry Bruns, Bill Moor, Barry Leshowitz, Dave Schwalm, Connie McNeill*

presentation.” Thus, we can celebrate our success in attracting yet another President.

While the previous two efforts did help recruit members and volunteers, the big increases in membership occurred when we started thinking about reducing barriers to enrollment. As things stood at the beginning of the decade, each calendar quarter new retirees were mailed an invitation to join and an enrollment form. Some joined, some did not. In 2012, Elmer Gooding, chair of the Membership Committee, suggested that we should try making the first year of membership “introductory”, i.e., free. Elmer explained, “The hope was that this would help new retirees experience the benefits and programs provided by ASURA during their first year of retirement and would encourage them to continue their membership after the free first year.”

The change was enthusiastically agreed upon by the Board and was implemented beginning January 2013. Membership numbers for the 2014-2015 year were, disappointingly, somewhat lower than the prior year’s, so it seemed that the cost of membership was not by itself a major barrier.



Tara Roesler

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So, what other barriers to enrollment could we remove? In November 2016 Tara Roesler suggested that we follow the Alumni Association’s practice of automatically enrolling newly eligible people as members. As the Introductory membership idea had been, this idea was enthusiastically endorsed by the Board. It was implemented in January, 2017, and resulted in our biggest one-year gain in membership: we had about 130 more members in 2018 than we had in 2017. Most importantly, introductory members are re-enrolling in increasing numbers. We have:

- Three times as many people who are in their first two years of paying membership as we had two years ago.
- Fifty percent more who are in their 3rd through 5th years of membership.

Obviously, this bodes well for the future of the organization. The “free trial period” with automatic enrollment is working!

ACTIVE & COMMITTED VOLUNTEERS

Because our organization is operated entirely by volunteers, our success is completely dependent on having volunteers who are creative, committed, energetic, and effective in their roles. It seems safe to say we have had exactly that during this decade. Our officers, Board members, office staff,



Some Board Members, Committee Chairs, and Office Staff - December 2012

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and committees have made sure that our members are well-served and that the purposes of the organization are actively pursued. You can find a list of many of these volunteers in Appendices 2 and 3.



Barry McNeill Handing the Presidential Gavel to Jo Madonna - Annual Meeting 2014

Not only have existing volunteers carried out their responsibilities with amazing creativity and dedication, but they have also made sure that there are people positioned to take over when they are ready to step aside. They make a point of involving and encouraging those who express interest and those who might be interested if asked. This active recruitment of new volunteers is an

essential reason that the organization has been able to stay healthy and relevant.

While healthy organizations need to recruit well, they also should guard against asking too much of their volunteers. Hal White, President of ASURA 1998-99, expressed this opinion in a 2013 Board meeting. He counseled that functions that lack volunteer leaders should be dropped. The alternative is to recruit someone who is reluctant, thereby gaining a reputation for expecting too much.

Happily, in this decade only the Veterans Day Golf Tournament had to be dropped for lack of a volunteer leader.

While this entire book celebrates our great volunteers, we now focus on those who have served as President of the Association. They exemplify the best in selfless service.

They have handled the



Hal White, Dave Scheatzle, Bob Beeman - 2013

CHAPTER 1 – VIBRANT MEMBERSHIP



A Group of Past Presidents at the 2018 Holiday Potluck

Jeri Meeks (16-18), Doug Johnson (07-08), Connie McNeill (10-11), Hal White (98-99), Jo Madonna (14-15), Mary Stevens (09-10), Jim Fordemwalt (15-16), Dave Scheatzle (04-05), Barry McNeill (13-14), and Elmer Gooding (05-06)

leadership role with vision and dedication, and have fostered an organization that is inclusive, collegial, participative, and fun. Most have stayed active in ASURA after concluding their years as Vice President, President, and Past President, with the happy result that their experience, knowledge, and enthusiasm continue to provide strength and continuity.

As you can see when you read through the following vignettes, each President has brought something different to the role. Together they demonstrate the depth of leadership talent that exists at ASU across campuses, disciplines, and roles. One of the most common comments that Board members make is how much they like the



Jim Fordemwalt Passing the Presidential Gavel to Barbara White - 2016

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opportunity to get to know and work with people that had different work experiences from theirs. Former faculty members say they find it refreshing and interesting to work with those who served in staff roles, and former staff members enjoy serving on an equal footing with former members of the faculty.

Dave Schwalm,

President for the 2011-2012 year, was an ASU faculty member in the English department and administrator from 1986 to his retirement in 2008. He held positions at the Tempe, West, and Polytechnic campuses, and was therefore well known and respected by many. Not surprisingly, he was actively recruited for a role in the ASURA shortly after he retired.



Both during and after his presidency, Dave focused on encouraging others to join the ASURA and to enjoy participation. He took on the role of chair of the Membership Committee in 2013 and has continued to serve in that role ever since. He says, “It was an honor to serve as President of ASURA, and it was a pleasure as well because of all the great people who really do the work.” He says he marvels “at the vitality of this organization and richness and usefulness of the work our fellow retirees have voluntarily been doing. It’s really impressive.”

Bill Moor, President for the 2012-2013 year was an ASU faculty member in the Industrial Engineering department from 1968 until his retirement in 2007. He also held several faculty leadership and administrative positions. Before assuming the ASURA presidency, Bill served as ASURA Treasurer,



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a role that he held again from 2017-2019. Clearly, he feels it is important to have healthy finances!

Bill says, “I thoroughly enjoyed my tenure [as President] and am continually impressed by the breadth and depth of services that our Board, Committees and highly motivated members provide to all members of our organization and to the larger community.” He often has commented that ASURA has the best group of volunteers of any of the many organizations that he has served with. Bill commissioned a revision of the bylaws, an accomplishment which is mentioned in the first part of this chapter. He also made a special effort to formally recognize the service of past ASURA presidents.

Barry McNeill, President for the 2013-2014 year, was a faculty member in the Mechanical Engineering department from 1976 until his retirement in 2006. Like Bill Moor, he held several faculty leadership and administrative positions during his ASU tenure.

Barry served as chair of the ASURA Retirees Day committee from 2011-2014, and post-presidency has served as Chair of the Events Committee, E-News editor, Chair of the Video History Committee, event photographer, and member of the Website and Database Committee. During and after his presidency he led the membership survey project, which is highlighted in “Chapter 5 – Engaging Communications”.



Barry places great emphasis on creating and maintaining procedures and documentation, so you will also see his name associated with accomplishments highlighted in “Chapter 8 – Sustainable Operations”. Barry says, “I wanted to be President. I thought I could bring some new ideas to the Board. I am proudest of getting the Board to approve an annual process,

CHAPTER 1 – VIBRANT MEMBERSHIP

developed by Barry Bruns and the Finance Committee, to assess the financial health of the association.”

Jo Madonna, President for the 2014-2015 year, began her career at ASU’s West campus in 1990 and retired from there in May 2006 as Associate Vice Provost of Student Affairs and Dean of Students. She knew about the Retirees Association and expressed interest in being active in the organization when she joined.



She was soon recruited by Mary Stevens (ASURA President 2009-2010) to serve on the Luncheons Committee, and she chaired the committee from 2008-2010. She served four terms as ASURA Secretary, and two terms as chair of the Events Committee before becoming Vice President and President.

Jo says, “I agreed to become President because I felt an obligation to step up to the plate and serve. I appreciated what ASURA had done and continued to do for ASU retirees and I believe that the responsibility to keep the association alive and well should be shared.”

After completing her year as Past-President, Jo has served as the first E-News editor, served another term on the Board, and chaired the Events Committee. Jo says, “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.”

Jim Fordemwalt, President for the 2015-2016 year, participated in the infancy of the microelectronics industry beginning in 1960. He joined the ASU faculty in 1987 and retired in 2001 from the Electronics & Computer

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Technology Department of the Polytechnic campus. Prior to accepting the role of President, Jim had served with ASURA as Legislative Liaison, University Club Liaison, Board member, and member of the Travel Committee.

Jim felt that it was natural for him to assume the ASURA leadership role, as he had previously led the ASU Faculty Association. During his term as President, the ASU administration expressed interest in phasing out ASU's participation in the Arizona State Retirement System (ASRS). Jim led the Board's effort to become educated about the proposal. The Board wanted to be sure that we would have the opportunity to represent retirees on any change that might come about.

Jeri Meeks served as ASURA President for nearly two full terms, from 2016 to 2018. Barbara White had expected to be President for the 2016-2017 year with Jeri as her Vice President. However, when Barbara took the gavel at her first Board meeting in May 2016, she announced that she and her husband had decided to move to North Carolina. So, Jeri took over as President for the rest of that year and, as specified in the bylaws, also served the next full year. She asked Tara Roesler to serve as her Vice President for both terms. Jeri had a 30-year career at ASU. Her progressively responsible positions were in financial and business operations management, with her final position being Associate Director of Finance for the Office of



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the Senior Vice President, Office of Knowledge Enterprise Development. She retired at the end of 2014.

Upon joining ASURA in 2015, Jeri worked with Hal White to rejuvenate the Government Liaison Council. She has continued that work with a changing group of associates. The successful work she and her fellow volunteers have been doing is highlighted in “Chapter 3 – Active Retiree Advocacy”. Jeri says, “I am pleased to be counted among this intelligent and fun group of active volunteers.”

Tara Roesler, President for the 2018-2019 year, is the daughter of a former ASU faculty member. She has been connected to ASU since her birth, having grown up living in faculty housing and attending ASU football and baseball games. She began her ASU career as a student worker in 1972. After graduation, she joined the Comptroller’s Office as a payroll accountant. Later, she worked in the University Budget Office. In 1985 she left ASU to accept an assignment in Arizona State government, where she served in a variety of administrative capacities. She retired at the end of 2004.



In 2013 she was surprised to discover that a recent revision of the ASURA Bylaws allowed her to become a member. She says, “Upon joining ASURA, I was approached by Linda Van Scoy, whom I had known since my days at ASU, to volunteer in the ASURA Office.” Tara agreed, and over time she also took on assignments as University Club Liaison, ASRS Health Insurance Liaison, and member of the Government Liaison Committee. During and after her term as President she continued in all these roles except the University Club. She has since also joined the Travel Committee.

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As you can see, Tara is interested in and active with pretty much everything that ASURA does. She is especially pleased about gains made in association membership, some of which can be credited to her idea of providing automatic Introductory membership to new retirees, as mentioned in the first part of this chapter. Another point of pride for her is the recruitment of Dean Chris Callahan of the Walter Cronkite School of Journalism to speak at the ASURA Annual Meeting. She says, “Given all the talk about the media and ‘fake news’, his remarks about what was happening in the field and what he saw for the future of journalism were fascinating.”

During her presidency Tara came to recognize that ASURA receives better support from our University administration than our sister retiree associations at NAU and UofA receive from theirs. She made sure to express our appreciation to President Crow, and her effort was rewarded when ASURA received a nice letter of recognition from him. About our volunteers Tara echoes the sentiments of pretty much every past president, saying, “It is amazing to me that an association that depends solely on the volunteer efforts of its members is able to accomplish so much.”

Jan Thompson, President for the 2019-2020 year, came to ASU in 1977 as an Instructor in the School of Music and retired in 2012 as Full Professor. She is a professional pianist.

Before taking on the job of President, Jan served ASURA as a Board member (two terms) and Seminar Chair (3 years). About agreeing to become President she says, “I think that Tara called me at least three times before I agreed to be VP, primarily because I knew that the Presidency was part of the package deal that came with being VP. I finally said yes because the time seemed right (other activities had settled down) and, having already been asked several years earlier, I had a premonition that I would keep being asked until I



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ultimately said yes. When I actually became President, I felt that the job took on a life of its own and there was no time to worry! Now it feels good to know that I played a small part in the history of our organization and helped to carry us on into what will soon be the 4th Decade of Success! Being ASURA President feels like a kind of capstone of my career, a way of cementing my own legacy with ASU in an entirely new and unexpected way outside of my



2019 Volunteers Barry Bruns, Ginny Sylvester, Dave Schwalm and Trudy Perez

academic accomplishments.”

Jan is proud and happy that the Pre-Retirement Seminars program took off and became reliable and popular during her presidency. She found the right people and structure to make them go and gave them her active support. She is also rightfully proud of having created a warm and friendly working atmosphere.

About her fellow volunteers she comments, “I soon came to appreciate how many people were involved in the day-to-day functioning of ASURA and what a magnificent, capable and dedicated group of volunteers we had! People were so knowledgeable, cooperative, and responsive and it was a pleasure to work with my fellow officers, Board members and committee chairs throughout the year.”

Carl Cross, President for the 2020-2021 year, worked with the University Library for over 50 years, retiring in 2015. His last



CHAPTER 1 – VIBRANT MEMBERSHIP

forty years involved cataloging Arizona state and local documents. He also helped develop the ASU Digital Repository.

A highlight of Carl's time at ASU was his role in saving the ASU Carillon. While working in the archives, he assembled a file of clippings about the carillon. Years later, Judith Smith, who wrote for ASU promoting people and accomplishments in the humanities and liberal arts, came across the file. She became interested and learned that the Carillon was still around, forgotten in storage for nearly 30 years. She and Carl founded the ASU Carillon Society, and together they raised funds to refurbish the instrument. It was installed in Old Main in 2005 and has since been ringing out across the campus daily.



ASU's Symphonic Carillon

When Carl retired, he joined the ASURA Video History Project, where he continues to serve. That project is highlighted in “Chapter 4 – Invested Community Service”.

At the request of Jan Thompson, Carl agreed to become Vice President, which meant of course being President the following year. Carl frequently says, “I’m a support person. I’m not one who likes to be up in leadership.” He says that he nevertheless took on the leadership role for ASURA because “it is such a great organization.”

He had something of a “baptism of fire” early in his term as Vice President, as shortly before the scheduled September 2019 Board meeting Jan’s mother was hospitalized with a grave illness in Wisconsin. Carl had to jump in to chair the meeting and take on all duties during the month of September. Jan says, “I’ll always be especially grateful to Carl for agreeing to be my VP and for jumping into the fire a full year before his Presidency.”

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Of course, the greatest challenge of Carl's presidency has been keeping the organization alive and well during the COVID-19 pandemic. The 2020 Annual Meeting had to be canceled, so there was no ceremonial and photogenic moment when Jan handed the gavel to Carl, officially signaling the start of his Presidential term. Social events planned for summer and fall had to be canceled. Everyone scrambled to learn to use the Zoom video conferencing tool. Committee chairs showed amazing flexibility by quickly switching from in-person to video for seminars. Carl was up to the challenge, and successfully held Board meetings, spoke at seminars, and held planning meetings all via Zoom. The organization was able to continue with its projects and its active communications with membership. Everyone missed the chance to be together in person, but with Carl's leadership, we made the best of a bad situation, as did so many people and organizations around the world.



*Board Meeting via Zoom - November 10, 2020
Carl upper left*

CHAPTER 2 – INVITING EVENTS

For many of us, one of the nicest things about being a member of the ASU Retirees Association is the opportunity to get together with like-minded people. Some are colleagues we knew at ASU and others are new friends we met through the association.



Karen Schwalm and Marilyn Wurzburger - 2019

Typically, our events combine the opportunity to socialize with education, travel, or entertainment (usually with food!). During the decade covered by this book we offered over 125 events. Of these about 45 were mainly educational, 30 were focused on traveling to an interesting place, and the remaining 50 had an element of entertainment along with the fellowship.



Len Gordon and Carleton Moore - 2012

If we measure event success by attendance, we have plenty to be happy about. Approximately 380 of our current 830 members have attended at least one ASURA event. Total attendance for the decade was in the thousands. Some regular events have

CHAPTER 2 – INVITING EVENTS

really grown! For example, the Fall Medicare and Health Insurance seminar attendance tripled from 2012 to 2020, from 60 to 180.

Success and the COVID-19 pandemic have meant that event planners had to get creative about venues and means of delivery. In 2019 the Holiday Potluck was held in a large conference room at Ability360 in Phoenix because it no longer fit in the rooms we had been using in the ASU Community Services Building. In 2020 the pandemic forced us to go exclusively to video conferencing (Zoom) for meetings and seminars.



*2018 Health Insurance Open Enrollment Seminar
Tempe History Museum*



Jean and Chet Duncan - Ice Cream Social 2019

As you can imagine, selecting and putting on these programs has required significant time and effort from our four events committees: Luncheons and Special Events, Seminars, Pre-retirement Seminars, and Travel. During the decade we had many energetic and effective chairs spearheading the work:

- Seminars: Gary Kleemann, Jan Thompson, and Bev Buddee
- Pre-retirement seminars: Trudy Perez and Liz Badalamenti
- Travel: Bill Stasi, Gary Anderson, and John Brock

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- Luncheons & Special Events: Barbara Bradford Eschbach, Joyce Hartman Diaz, Bonnie Scheall, Jean Duncan and Trudy Perez
- Retirees Day: Barry McNeill
- Golf Tournament: Dave Schwalm

To make sure that the events are spread out on the calendar effectively, we added an overall events coordinator beginning in 2013.

These have been: Jo Madonna, Barry McNeill, and Trudy Perez.



*Joyce Hartman Diaz with Marshall Trimble
Spring Luncheon 2017*

The interests of our members have changed some over time, and ASURA has responded by revising its offerings. Significant additions and expansions are highlighted in the sections below.



*Alleen Nilsen and Gary Kleemann
Annual Meeting 2017*

Two events were discontinued early in the decade. Attendance at the once-popular annual Retirees Day dropped to the point that it was not financially viable to offer it anymore, so it was not offered after 2012. The Veterans Day Golf tournament was discontinued after 2013 because donors that were needed to make

it a successful fund-raiser dropped out, and attendance by members was dwindling. We have not yet had a new volunteer who thinks they could overcome these problems and resurrect the tournament. Maybe next decade!

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THE MEET & GREET PIZZA PARTY & SEMINAR

One of ASURA’s most well-attended events is the fall “Meet and Greet Pizza Party,” an event which has become traditional since it was established in Fall 2011. The idea for the event came from Barbara Bradford Eschbach, who was Chair of the Luncheons & Special Events Committee from 2010 through 2015. Barbara says,

“At the last ASURA Board meeting of 2010-2011, I had an idea. Why not make the first event of the new year like a ‘homecoming’ event in school! It would be an opportunity to renew friendships and share ‘What I did

on my summer vacation!’ It would also be an event to welcome and become acquainted with ‘the new kids.’ Another idea that I had was to offer free food. What better way to entice people to come? So, to me, the easiest thing to offer and serve was pizza! Plus cookies for dessert.”

Barbara continues, “I presented my idea to the Board, calling it an ‘ASURA Meet & Greet Pizza Party.’ Not only would this be a social event with attendees visiting with one another, but also it would be a perfect opportunity to have a ‘program.’ The focus of the program would be to introduce all the officers and members of the ASURA Board. In addition, all committee chairs could make a ‘pitch’ about the committee’s function and recruit volunteers to serve on each committee. The Board immediately approved my recommendation with a budget of \$400.”

Barbara put on the Meet and Greet herself during the remainder of her years as committee chair. The event has been increasingly popular, with more attendees every year.



Barbara Bradford Eschbach Serving Pizza 2014

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Beginning in September 2012, the pizza party was preceded by a seminar called, “Things I Wish I Had Known When I First Retired”. This is an opportunity for members who are a year or two post-retirement to share their experiences and lessons learned with our newest members – and then all can continue to chat over pizza. Like the pizza party, the seminar has been popular, and participation has grown substantially from year to year.



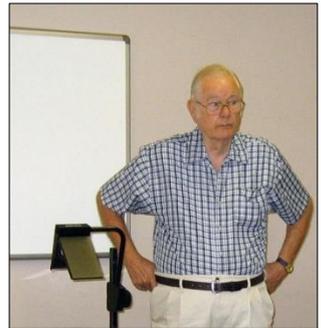
*Larry Carlson and Jeff Chapman
Pre-Pizza Party Seminar 2019*

Barbara says, “I’m sad that the Fall 2020 Meet & Greet could not be held due to the COVID-19 pandemic. Bummer! But I continue to feel gratified about the popularity and meaningfulness of my idea!”

THE RISE OF SEMINARS

ASURA has been offering seminars since its founding in 1991.

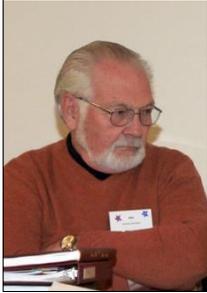
For the first two decades, however, there was no Seminars Committee and only one seminar per year was offered. That was an annual information session put on by Dick Murra in October to help members make choices during the health insurance open enrollment period. Dick was one of the founding members of ASURA and a former ASU Director of Personnel (Human Resources). He was a tireless advocate for retirees, seeking to protect and expand State-provided retiree benefits. He continually encouraged people to study their health insurance options. He counseled that each person’s situation



*Dick Murra
Health Insurance 2004*

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is different, so each must make an informed choice. He would say, “If you aren’t happy with your health insurance choice, you have only yourself to blame.” In 2011 declining health forced Dick to relinquish his role in the ASURA.



Dick Jacob

Meanwhile, at the December 2010 Board meeting, Connie McNeill presented the idea of establishing a Seminars Committee that would offer, “informative group sessions to the ASURA membership and to potential members on topics related to retirement and aging.” The Board was in favor. The committee was created and a charge for it approved at the January 12, 2011, meeting. The new committee began thinking about suitable topics under Dick Jacob’s leadership. Dick had been (and is) a leader in the Emeritus College, and he liked the idea that our seminars would complement those offered by the Emeritus College. The latter focus on scholarly and research interests.

Gary Kleemann took over as Chair of the Seminars Committee in Spring 2011 and served until Spring 2013. He got things moving with an offering about Facebook in Fall 2011, one on genealogy in Fall 2012, and of course the Health Insurance Open Enrollment seminar (hereafter referred to as “the October Seminar”) for each of his two years. For the October Seminar the committee found speakers from the state agencies that offer insurance (ADOA and ASRS), and after the first couple of years added someone from AARP to talk about options outside of the State system.



Genealogy Seminar September 2012

In Spring 2013, Jan Thompson took over as Seminars Committee Chair. She says Barry McNeill recruited her. They met when Barry approached her after her first ASURA event, the 2012 Meet and Greet Pizza

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Party. “I had retired 3 months before and knew very little about ASURA. I remember that I really enjoyed the discussion and opportunity to meet several interesting new fellow retirees.” Barry asked if she would join the Retirees Day Committee that he chaired. Jan says, “By this time, I knew that I liked this group and, being a natural ‘joiner’ at heart, I said yes.”



*Barry McNeill Recruiting Jan Thompson
2012 Meet & Greet*

A good experience working on the 2013 Retirees Day led Jan to again say “yes” when Barry asked her to serve on the ASURA Board beginning in April 2013. Jan says, “Then, a few months later, Barry was on the phone again asking me to chair the Seminars Committee. This time I had to be convinced, but eventually I caved in and took on the task of coordinating 14 seminars over the next 3 years, 2013-2016.”

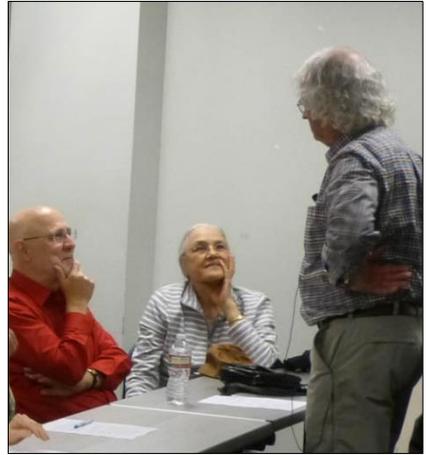


*Aleksandra Gruzinska, Etsuko Reiman, and Jan Thompson
2013 Retirees Day*

Under Jan’s leadership the seminars really took off and became a much-appreciated cornerstone of ASURA’s event offerings. Soon it was the norm to offer one seminar each for January, February, and March, in addition to the October Seminar.

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Attendance was good right from the beginning and interest high. Jan reports that she is “most proud of the appealing variety of topics and speakers that we were able to offer and of the resulting growth of attendance and popularity of the seminars. I had excellent committee members to help brainstorm possible topics each fall and then coordinate efforts for individual seminars. These were Karen Hammann, Gary Kleemann, and Bev Buddee. Each person on the committee took principal responsibility for securing the speaker and chairing publicity details for one seminar.



*Bob Barnhill, Marigold Linton, Jay Braun
Healthy / Alzheimer's Brain 2015*

We often relied on the depth of expertise offered by ASU faculty and tapped them as speakers. A highlight was our 2014 Wellness for Seniors Seminar, featuring five faculty from the School of Health Promotion and Nutrition who got all 60 audience members happily engaged in breathing and stand-up stretching exercises.” Jan concludes, “The friendships that I made



*2014 Wellness for Seniors Presenters
Cheryl Der Ananian, Jared Dickinson, Pamela Swan, Sarah Wherry, and Rick Hall*

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with ASURA members and presenters gave me the most lasting satisfaction of the job. It is rewarding to know that our seminars are well-received, that they've grown to become mainstay offerings of our organization, and that they spawned the successful pre-retirement seminar series that extends ASURA's outreach to all four campuses."

When Bev Buddee took over as chair in Spring 2016, the seminars had a great reputation. Bev was challenged to continue the good work. Undaunted, she and her committee (Ruth Jones, Jay Q. Butler, Jeff Chapman, and Pat Schneider) put on a well-received slate of offerings, and even extended the schedule to add seminars in April 2017 and 2018. Bev says, "There are so many benefits to committee participation. These include meeting and working with folks you had not known before, i. e. new committee members, speakers, and staff at different venues. There is a great sense of accomplishment when speakers are lined up, the event details are under control (at least at that particular moment...), and the technology is working."



*Bev Buddee (right) introducing Kathryn Wexler
Hearing Seminar 2017*

Altogether, during this decade ASURA offered 24 seminars. Topic areas included health and wellness, financial and estate planning, elder housing and care options, frauds and scams, technology – and of course health insurance. There was even a seminar on container gardening, and one on how to declutter your home.

In Spring 2020 the COVID-19 pandemic forced cancellation of the seminars planned for March and April, but the October Seminar went on as scheduled – via Zoom videoconferencing instead of in person. Bev was outstanding at figuring out how to make this happen. Those of us who feel

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“technology challenged” will surely appreciate her can-do attitude. She reports, “My stress levels rose to unprecedented heights in preparing for the Fall Health Care Open Enrollment Seminar that would be a ZOOM meeting. How does this technology work? How do you share a screen? How do you smoothly switch from presenter to presenter? How will the process of the audience submitting questions on Chat work? -- Enter Trudy Perez and her expertise in using the ZOOM platform for meetings. And Trudy came with an IT support person. Fear diminished.”

The October Seminar 2020 was recorded, and the recording was made available on our website. That way it reached more than the initial 180 attendees, with over 20 people viewing it later instead of “live”. Per Bev, this effort “launched online ASURA seminars.”



*Bev Buddee Hosting on Zoom
Oct 2020 - Video Recording*

With the October 2020 seminar under her belt Bev launched the Spring 2021 seminar series, starting with the delayed “Email, Tech Tools, and You” by Connie McNeill. Registration skyrocketed to over 90, far exceeding registration for any previous spring seminar. Bev and Pat Schneider handled the attendance and summarized Chat questions, of which there were many, for Connie. Again, the seminar was recorded and a link to the recording posted on our Past Events webpage, and again many people viewed it at their convenience.

The February 2021 Seminar, “Brain Health & Aging Well: A Focus on Diet”, broke the January registration record with over 100 registrations within minutes of its announcement. As may become more of a norm, many of the registrants did not actually view the seminar “live”.

Dick Murra would have been amazed and gratified at what we have done with the tradition he started.

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PRE-RETIREMENT SEMINARS

Unless you have retired quite recently, you probably found it difficult to find information you could use to make decisions about post-retirement health insurance, financial planning, and social security. As Carl Cross, ASURA President 2020-2021 says, “When I did this pre-retirement thing, I was going everywhere trying to get the kind of information I needed. I remember going to three different classes, coming home and reading all the material, and still I didn’t have a clue what I was supposed to do.”

ASU HR offers information about ASU retirement policies and benefits at “finalizing your retirement” meetings and on the ASU website. Prospective retirees are referred to advisors from their selected retirement program for one-on-one financial planning and to the State agencies ASRS and ADOA for health insurance options.

Still, many future retirees find that they need more information to make good choices. Jan Thompson says, “As a still-recent retiree in 2014, I recognized that the existing HR seminars didn’t offer employees nearing retirement enough information on such important topics as health insurance, Medicare, Social Security, and financial and emotional readiness for retirement. There was a knowledge gap.”



Slide from Video of Understanding Medicare Pre-Retirement Seminar - January 2020

So, in late 2014, the ASURA Board resolved to help fill this information gap by holding “pre-retirement seminars” (PRS). These were to be available on all campuses at a time and length that would accommodate

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work schedules and allow for reasonable in-depth information and for questions.

Trudy Perez, who was an ASURA Board member and still employed at ASU, volunteered to chair the new Pre-Retirement Seminars Committee, and to recruit members. She has continued as chair right through to the present and has been a driving force for the success of the program.

In May 2015, a committee was formed and met. Topics for two or three seminars were decided upon. Jan Thompson was on the committee and she reports that, “The first PRS took place on October 13, 2015, at the Biodesign building. Approximately 40 people attended. Trudy arranged publicity through *Insight* and the Classified Staff Newsletter.” In December 2016 Trudy reported that, “Pre-retirement seminars are included in the ASU Staff Council Lunch & Learn series held monthly and shared at all campuses via Video Conference or webcast.” Indeed, a pre-retirement seminar was offered in December 2016 and another in March 2017.



Trudy Perez



ASU Biodesign Institute

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The seminars were offered sporadically until Jan became ASURA President in April 2019. She made it her mission to help Trudy put together the resources that were needed to offer a consistent and reliable schedule of pre-retirement seminars. Liz Badalamenti, a Program Manager in the ASU Human Resources Employee Assistance Office, was recruited to co-chair with Trudy. Together, Liz, Trudy, and Jan worked out an arrangement that resulted in the offering of monthly or almost-monthly pre-retirement seminars. These began in July 2019 with a seminar entitled, “Social Security – With You Through Life’s Journey.”



Liz Badalamenti

The seminars are all offered from a room in the Computing Commons building on the Tempe campus, with the Zoom conferencing system making



Zoom Became A Part of Life in 2020

them also available at all campuses and for those working from home. They have an average attendance of 40 to 50, with half of these attending via Zoom (or all, during COVID times). When the presenter permits it, video recordings are offered on our website so that people can watch them at their

convenience. The recordings have been viewed from 10 to over 40 times each. Clearly, we are filling a need!

Liz, Trudy, and Jan continue to find as many ways as they can to publicize the seminars. Jan used her presentation to the University Senate to bring awareness of the PRS to Senators and their constituents. We purchased a second set of marketing materials (mobile cart, table banner and drape)

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because one was not enough now that it was being used so often to advertise ASURA at the PRS. Now announcements of PRS seminars reach university-wide via *Insight* and the *ASU Staff Council News*.



Bonnie Scheall and Jan Thompson Staffing an ASURA Information Table

The PRS program is quickly becoming a major success for ASURA. Not only are we helping our ASU colleagues, but we are increasing awareness of and appreciation for our organization by our future members. Jan summarizes by saying, “I think that the PRS Series will serve a need and help bring wider awareness of ASURA across the University. I’m proud of what we accomplished this past year and hope that the PRS Series will continue to bring credit to ASURA.”

INTERNATIONAL TRAVEL

Why do we have a Travel Committee but not a Car Repair Committee or a Knitting Committee? Travel is something many of us like to do, car repair not so much. The desire to travel seems to be part of our DNA. We travel to

CHAPTER 2 – INVITING EVENTS

see places we have read about, to sample different cuisines, to see new flora and fauna, or maybe to just get out of the house.

A travel committee has been part of our organization since its inception, organizing trips to sites around Phoenix, Arizona, and the world. During the third decade we offered thirty-one travel events: fifteen to Phoenix metro-area locations, four further afield in Arizona, and twelve to international destinations. We even managed to sneak in one travel event in 2020 before the pandemic forced us all to stay home.



John Denver Tribute Event - February 3, 2020

The dramatic change that occurred during the third decade was the rebirth of international travel. In our early years there were four or five international trips. Denis Kigin, our second President, led members on international trips to England and Ireland, on a European Odyssey, and to Spain and Portugal. Forty-two members went on the Ireland tour. In 1996 Denis turned the organization and guiding of international tours over to others. And like Rip Van Winkle, international travel went to sleep -- until Gary Anderson arrived, just before the beginning of the third decade.

As Gary tells it, “I retired from ASU in December 2000. I discovered ASURA and joined it. I saw they had a travel committee and volunteered to

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join it. I had always traveled. Got an email from Bill Stasi, Chair, asking me to join in and I did.”

When asked why we should travel Gary often quotes Mark Twain: “Travel is fatal to prejudice, bigotry, and narrow-mindedness.” After a couple of meetings Gary noted that, “Most all the travel was local. Day trips around the Valley with an occasional overnight trip. No international trips.” He suggested that the Committee should consider some international travel events. The committee agreed and said, “You put it together,” which he did!



Bill Stasi and Gary Anderson

In May 2010 we offered our first international trip in over fourteen years, a trip to China, organized by Gary and led by Gary’s friend Lucky Wang. Twenty members, dubbed “Chopsticks”, went. Gary remembers, “It was an incredible trip. We cruised the Yangtze River for four days, visited the panda reserve in the eastern jungles, visited the summer palace, went down into the Ming tombs, walked on the Great Wall, ate the wonderful food and learned how friendly and cordial Chinese people are to visitors.”



*Gary Kleemann, Marge Anderson, Vina Kleemann, guide Oliva, Jerry Snyder
Great Wall*

The China trip broke the ice and the Travel Committee started offering at least one international trip per year until the pandemic put a stop to travel. The second trip in 2011 was

to Australia and New Zealand, an area Gary was very familiar with, having spent two sabbaticals Down Under. Eighteen “Boomerangers” spent twenty-four days visiting nine cities learning about Australian and New Zealand history, geography, culture, and wildlife. Travelers snorkeled in the waters of

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the Great Barrier Reef, zip-lined in the jungle rain forest, slept under the squawking flying foxes, or petted wallabies.

As Gary points out, “When you travel you have options. You can do the planning, or you can let someone else do the planning.” As Denis Kigin was, Gary was ready to let others do the planning and simply go along for the ride. So, the



*Debbie Duffy with Wallaby
Adelaide Australia*

committee turned to a travel company, Overseas Adventure Travel (OAT), which offers trips that are educational, interactive with the people of the host country, have small groups, have a meal with a local family, and visit a school classroom. These features are right in line with what the travel committee was looking for.



*Gary Kleemann The Fisherman
Amazon 2012*

All remaining trips, except for the 2015 China trip organized by Gary, were taken using OAT. Gary Anderson, and later Gary Kleemann, proposed possible OAT trips to the committee and, when approved, became the trip leader working with OAT.

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One of the more amazing trips, led by Gary Kleemann, was taken in March 2016 when a group visited Cuba. Gary characterized Cuba as a country of contradictions: crumbling infrastructure but a place of beauty, a third world country with a well-educated population, etc.



A Singing Trio in Cuba

During the decade, our members have:

- Traveled to Australia and New Zealand, Thailand, Laos, China, Rivers in Europe & Russia, Italy, Spain, Portugal, England, Scotland, Wales, Peru, Chile, Argentina, Cuba, Botswana, Zambia, and Zimbabwe.
- Seen Victoria Falls, herds of Zebras, Machu Picchu, the Great Wall, the vast stations in Australia.
- Sampled the cuisines of each country visited.
- Visited a local home for a meal and a local elementary school for a short program in each country.

Our travel activities should bring a smile to Mark Twain's face.



Gary & Vina Kleemann in Cuba

CHAPTER 3 – ACTIVE RETIREE ADVOCACY

Active advocacy is the heart and soul of our association. Of the six stated purposes in our organization’s bylaws (see Appendix 1), five address advocating for retirees and our members.

Our Board of Directors has responsibility for initiating advocacy efforts, but it cannot act without information. The needed information comes from a variety of sources:

- Information about what the legislature and ASRS are doing and thinking about doing comes from our government liaisons and from the University Affairs liaison.
- Information about what ADOA and ASRS are doing and thinking about doing comes from our health insurance liaisons.
- Information about what ASU is doing comes from our liaisons from Human Resources, the University Club, the Emeritus College, the Alumni Association, the University Senate, University Affairs, and the University Staff Council.

OUR GOVERNMENT & HEALTH LIAISONS – WHAT THEY DO

Our liaisons are dedicated, and they get satisfaction from their efforts, but what exactly do they do? Jeri Meeks says that during the legislative session, “I spend 10-15 hours a week tracking bills and possibly going to live sessions at the Capitol.” Tara Roesler points out that, “With over 1,000 bills introduced each legislative session, it is a constant challenge to make sure that all bills



Tara Roesler

CHAPTER 3 – ACTIVE RETIREE ADVOCACY

affecting ASURA are identified, and all relevant bill hearings are covered by a team member and testimony given if appropriate.”

But there is more to being a liaison than covering the legislative sessions. Jeri says “Starting in the fall I spend a couple of hours a week looking at *Capitol Times* and reading emails from retiree-related organizations. I attend the Governor’s Advisory Council on Aging (GACA) one-hour meetings, ASU Legislative Breakfasts, Day at the Capitol, Tri-University meetings and ASRS board meetings. And then there are the *Prime Times* and *E-News* writing commitments.” She goes on to say that “I would say that being president was much easier than being a Government Liaison.”



Bill Stasi and Jeri Meeks

One or two of our Government Liaisons are registered lobbyists with



*Alan Johnson and Jeri Meeks
Government Liaisons*

the legislature. This gives them access not available to others and permission to actively lobby legislators. Jeri says, “I regularly use the online AZLEG.gov Request to Speak system to indicate ASURA’s support for individual bills.”

Jeri and Tara are two in a long line of dedicated liaisons. Jerry Aronson led the liaisons in the

early years of the decade, along with Hal White. Alan Johnson served during much of the second decade. In 2014, after a year with no one serving, Hal and Alan returned long enough to help Jeri rejuvenate the function.

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While the Government Liaisons spend their time poring over the various bills in the legislature, the Health Insurance Liaisons have the equally tedious task of understanding the various health insurance options offered by ASRS and ADOA. In 2011



Elmer Gooding, Rose Minetti & Doug Johnson

Doug Johnson said, “many problematic assumptions must be made to make realistic comparison [of the health insurance options].” That is still true today.

As with our Government Liaisons, we have had a dedicated set of Health Insurance Liaisons during the decade, a group for each of the two programs. On the ADOA side, Doug Johnson started the decade, handed it off to Art Ashton, and we are ending with Tara Roesler and Larry Carlson. For ASRS, Rose Minetti began the decade, was followed by Joyce Hartman Diaz, and finally by Tara Roesler and Dick Jacob.



Joyce Harman Diaz

To get a handle on what ADOA and ASRS are thinking, our liaisons attend, when invited, ADOA and ASRS meetings where future health insurance options are discussed. Joyce Hartman Diaz, as a member of the ASRS dental advisory board, attended several meetings reviewing dental proposals. In January 2020 Tara Roesler attended two ASRS meetings where a proposal for ASRS to self-insure their group health insurance plans was discussed. The annual Tri-University meeting attended by ASU, UofA, NAU, and ASRS gives yet another opportunity to learn what health insurance changes are on the horizon.

CHAPTER 3 – ACTIVE RETIREE ADVOCACY

Our liaisons use personal contacts with these two organizations to keep informed. We were fortunate to have Dick Jacob as our ASRS liaison for much of the decade. Dick attended ASRS Board of Trustees meetings and reported on both the ASRS legislative and the ASRS health insurance issues. During his tenure Dick was appointed by the Governor and approved by the Arizona Senate to the ASRS Board of Trustees. Dick did a great job



Dick Jacob



Art Ashton

of keeping us informed. Commenting on his experience Dick stated, “I have found the experience to have been interesting, informative and cordial.” Dick continues today serving on the ASRS Health Insurance Advisory Committee and keeping us abreast of relevant ASRS activities.

In addition to representing retirees’ interests, our health insurance liaisons can be helpful to members who are having trouble resolving health insurance issues. Art Ashton and Larry Carlson each helped resolve several questions and problems during their tenures.

ADVOCATING FOR RETIREES – ASRS RETIREMENT PLAN

In 2010, Jerry Aronson reported to the Board that during the recent Tri-University meeting the group discussed the possibility that a bill that would close the ASRS Defined Benefit Retirement Plan (DB) to new hires would be introduced in the Legislature. Instead, new hires would be offered a new defined contribution plan (DC). A bill was subsequently submitted in the Senate but died without a committee hearing. A committee was set up to study the feasibility of the change with a final report due December 2012.

CHAPTER 3 – ACTIVE RETIREE ADVOCACY

Not much happened until the fall of 2015 when the Arizona Board of Regents (ABOR) issued a directive indicating they were considering requesting to change the retirement system options to offer only the defined contribution retirement plan to new employees.



ABOR Meeting

To get some perspective on this issue, at the October 2015 Board meeting Jeri Meeks brought in two speakers from the Arizona Education Association to present a case against such a change. The arguments against were the lack of assurance that the defined contribution funds would last the life of the retiree and the uncertainty as to how ASRS would be compensated for the loss of income.

To get ABOR's and ASU's view on this change Kevin Salcido, ASU Vice President of HR and Chief Human Resources Officer, was invited to the December 2015 Board meeting. Kevin made the case for the change based on the changing demographics of the workforce, i.e., they are more likely to leave after only a short period of employment. He also showed how the change would save money for ASU. When questioned about the potential impact to current retirees he said there were no apparent impacts as benefits were guaranteed by state law, but he promised to research the issue. President Jim Fordemwalt asked that the ASU committee working on this ABOR directive include at least one retiree.



Kevin Salcido

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Our liaisons breathed a sigh of relief in January when no bill was introduced to implement the ABOR directive. But that did not mean this idea disappeared. During the following year Larry Carlson attended several ASRS External Affairs meetings as ASRS looked for ways to quantify the cost of having the three state universities switch to a defined contribution plan for new employees. The resulting legislation was ASRS sponsored bill SB1178 which passed the Senate but died in the House. The next year a similar bill was passed and signed by the Governor.



Larry Carlson & Jeri Meeks

ADVOCATING FOR RETIREES – ADOA OPTIONS

When Tara Roesler started working as an ADOA Health Insurance Liaison, she “was very surprised by the lack of information about employee benefits, and in particular proposed changes to employee benefits, shared by ADOA with the ASURA. This was very apparent in 2019 when ADOA tried, by rule, to eliminate the option that allows retirees to make an annual choice to move between ADOA and ASRS Health Insurance as long as the retiree keeps dental insurance with ADOA throughout retirement. A rule change could be made with no public input. Tara, Larry Carlson, and several ASURA members mounted a lobbying effort which caused ADOA to pull the rule. Tara says getting the rule pulled is, “the accomplishment I am most proud of”.

ADVOCATING FOR RETIREES WITH ASU

Unlike retirement from many business entities, retirement from the university does not generally cause a complete break in the relationship. Retirees continue to receive many services and benefits from ASU such as library access, technology tools, event discounts, etc. Many of us continue scholarly efforts with former colleagues, attend classes and events at ASU,

CHAPTER 3 – ACTIVE RETIREE ADVOCACY

and donate time and money to ASU programs. Chapter 6 of this book describes the healthy relationship our association has with ASU.

Despite the generally positive and supportive attitude towards retirees that is the culture at ASU under President Crow, it is easy for busy people to overlook us when planning changes to policies and programs. Therefore, we in the ASURA make it our business to try to be as visible and vocal as possible, and to look for opportunities to defend and enhance the retirement relationship with ASU. Examples from the past decade follow.

The opportunity to purchase a retiree/Gold Permit for parking at ASU was negotiated by ASURA in Fall of 2011. While emeritus/emerita faculty had long had access to a complimentary parking permit, there was no parking benefit for other retirees. The lack of a parking permit was for some a major roadblock to taking part in activities on the ASU campuses. Sheila Stokes, then Vice President of the ASURA, negotiated the introduction of the retiree/Gold Permit *for members of the ASURA*, and it was approved by the ASU President and Provost. For an annual cost of \$280, the permit allows parking in several desirable structures at the Tempe and Downtown campuses, and all surface permit lots at the West and Polytechnic campuses.



Sheila Stokes



Connie McNeill

In July of 2014, the University Technology Office (UTO) at ASU implemented a change in the “help desk” system used both for self-help and for requesting help from UTO personnel. The change unexpectedly meant that ASU retirees no longer had access. Connie McNeill, long-time chair of the Web and Database Committee and volunteer ASURA

CHAPTER 3 – ACTIVE RETIREE ADVOCACY

technology manager, reported the problem. UTO personnel assured her that retiree access would be restored as soon as possible. It took several months and more urging, but service was finally restored, in February 2015.

In April of 2019, a manager in the ASU University Technology Office contacted Connie to say that beginning July 1, 2019, “ASU Retirees will no longer be able to keep their ASU Exchange Account. Our licensing does not



ASU Outlook Sign-in

cover ASU Retirees so this is something we can no longer provide.” She went on to say, “At some point we will need to remove Exchange from current retirees too. It could be in a couple of months or it could be in a year.” Connie says, “This really worried me, as I knew that the number of retirees who would have to change their email system was probably in the hundreds, and many or most of them would need a lot of help to do it.” She continued, “If access was to be removed so soon, I felt I had to let people know and try to help them get started on migrating to

an alternative email service. So, I worked with the ASURA Seminar Committee to plan a Fall 2019 seminar on ‘Leaving ASU Outlook.’” When the ASURA membership understood what was going to happen, the resulting uproar gave Connie plenty of ammunition to ask the UTO to reconsider. She reports that, “By August, I was notified that there would not be any plans to close ASU Outlook accounts for anyone who retired from ASU prior to July 1, 2019. I was very relieved and grateful.”



This eye-opening experience caused the UTO to do what they could to negotiate coverage for retirees in their software licenses. Most licenses do now cover emeritus/emerita faculty so on-going scholarly work is not impacted when someone retires. A few licenses cover all retirees.

CHAPTER 4 – INVESTED COMMUNITY SERVICE

Through their active participation and support ASURA members have shown that they have high regard for the community service projects that our organization undertakes. The result is that the projects have been decidedly successful. We have contributed much valuable and interesting information about the history of ASU to the ASU Library's Digital Archives, helped ASU students achieve their educational goals through our scholarship program, and helped brighten the lives of hard-working families through our Adopt-a-Family program. The following sections highlight each of these accomplishments.

VIDEO HISTORY PROJECT

Our Video History Project has been and continues to be highly successful, as measured by volunteer participation, output produced, number of times the interviews have been viewed, and appreciation expressed.

The project began in 2001 at the suggestion of Mat Betz, ASURA's 11th President, who thought that retired administrators, faculty, and staff should be interviewed to create an oral history for ASURA and the University. The idea was acted on that same year, and the work to videotape interviews with people who have been influential at ASU has progressed without interruption since.



Dave Scheatzle and Mat Betz

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The interviews are interesting, informative, and often entertaining. For example, you can learn about the special arrangement between ASU Polytechnic Campus and Chandler Gilbert Community College from David Schwalm, the birth of the ASU Research magazine from Conrad Stora or winning the Sudler Trophy from Robert Fleming.

The ASURA Video History library of interviews has become a real treasure for researchers, family members, and anyone curious about the history of ASU and the people who helped shape it. Robert Spindler, ASU University Archivist, reported in 2020 that, “The videos have been used by a number of ASU journalists and event organizers. Some interviews show thousands of file downloads (not including streaming views) according to the repository download counter.” Rob goes on to say, “This project is a source of great pride for Arizona State University and especially for the University Archives.”



During the first years the interviews were conducted and edited by a professional videographer and interviewer but by the beginning of the third decade we had taken these tasks in-house.

During the decade, the Video History Project:

- Scheduled and conducted fifty-nine interviews.
- Obtained space in the Community Services Building to use as a recording studio and enhanced the studio’s technology.
- Brokered an agreement with the ASU Library to house our interviews in the ASU digital repository, and with that move switched from DVD production to streaming video.
- Edited the raw interview videos to make them ready for publication.

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- Added information to Repository interviews to make them findable by subject.
- Created numerous short clips from interviews and posted them on our website.
- Trained new video editors.

This amazing list was achieved through the efforts of many volunteers. The Video History Project Committee currently has a dozen or so members, making it our largest committee. Some volunteers select interview candidates, some schedule interviews, some conduct interviews, and some edit the interviews, add metadata, and publish them.

The members of the selection committee change from year to year but two stalwarts, Elmer Gooding and Kathy Church, are long time members. As it turns out, selecting interviewees is one of the easier tasks. According to Kathy, “The challenge is to attempt to prioritize the list (of potential



Elmer Gooding, Linda Van Scoy, and Kathy Church

interviewees), which generally grows faster than our capacity to conduct the interviews. This is because there are so many faculty, staff and administrators who have made significant contributions to the growth and success of ASU.”

Selecting an interviewee does not automatically mean they will agree to be interviewed. Cajoling is sometimes necessary. Again Kathy, “In general women are more reticent than men and faculty more reticent than administrators to be interviewed. It helps to convince faculty to participate if you know them personally.”

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For scheduling, the project was fortunate to have Becky Reiss and Linda Van Scoy with their extensive meeting scheduling experience. Linda mentions that, “while scheduling is not difficult, it is time consuming and involves coordinating a date that works for the interviewee, the interviewer and the crew.” It is particularly difficult for interviewees who do not live in the Valley. Linda recruited Becky who “did an outstanding job and created templates and checklists to keep us organized and on track!” As Dave says, “We were most productive in scheduling and completing interviews when Becky Reiss was coordinating that aspect of the process.” When asked by Linda to do scheduling, Becky accepted because, “I believe the project is valuable and worthwhile. Also, I had experience with scheduling and could work at the task from home.” Becky echoes the experiences of many of our



Gary Krahenbuhl

volunteers; saying, “I’m thankful that I had the opportunity to work with the VH crew and meet the candidates and interviewers even though it was usually only through emails.”

We have used several interviewers. Dave Scheatzle has done the most, but Elmer Gooding and Gary Krahenbuhl also have done more than a few. According to Dave, Gary “has a comfortable, conversational style and good sense of when to probe for more depth with a topic and bring out the best in the guest.”

In 2012, we changed from recording “on location” to recording in a studio in the basement of the Community Service Building. We shared the room with the Music Therapy Program. In 2013, we acquired our own dedicated space on the 2nd floor of CSB. Linda Van Scoy was instrumental in having this space assigned to the ASURA. Linda says, “It’s nice to have the equipment in place so we don’t have to assemble and disassemble it for each

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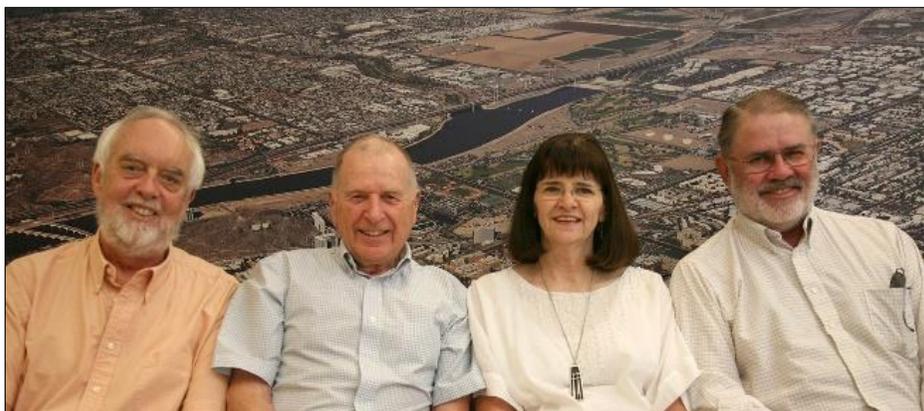
interview.”

Improvements made over the decade include a good filming background, window blinds, and LED lighting.



Video History Interview Studio

The work of the interview team of Roger Carter (audio), Dave Scheatzle (co-director), Linda Van Scoy (co-director), and John McIntosh (video) account for a large part of the project’s success. In many instances Dave was both co-director and interviewer. When asked about their incredible effort John pointed out that, “We were astoundingly lucky to have a BBC trained professional media engineer” (Roger) on the team. And while conducting fifty-nine interviews might begin to be tedious, Roger points out that, “The amazing variety of interviewees, interviewers and their numerous passions kept us interested and amused.” Roger also mentioned something that is true for many of our committees, saying, “Most importantly, we all enjoy working together and have become firm friends”.



Roger Carter, Dave Scheatzle, Linda Van Scoy, and John McIntosh

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The agreement with the Library to house our completed interviews in the ASU Digital Repository was brokered by Dave Scheatzle in 2014. Through that agreement the library gained a great collection, and we gained assurance that our work is protected, long-lived, and accessible.



*Bogart Interview with Photo of Steven Allen.
Quentin tells of Steve coming to the ASU University Club.*

This decade’s editing has all been done by volunteers who do not have a background in video editing. Dave Scheatzle, Linda Van Scoy and Barry McNeill put in countless hours learning to use video-editing software and applying their hard-won knowledge to this task. Dave says, “We were constantly advertising to find volunteers to help reduce the backlog of unedited interviews. Barry joined the team in 2017 and quickly became the most productive editor in producing high quality interviews.” Roger Carter has been helpful in sharing some of the industry standards that he learned in his professional life. Barry says, “Learning to edit these videos has been challenging and time-consuming. It is a good way for me to keep mentally sharp, I hope. But the real fun comes from hearing the incredible stories contained in the interviews. I often find myself researching topics mentioned by interviewees because I want to know more.” Both Dave and Barry add photos to the interviews they edit, thereby enriching the stories being told.

We want people to see our completed interviews. That is the whole point of the project, after all. The presentation of a medley of clips at the ASURA Annual Meeting is popular, but it is a limited use of the work. To

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reach a wider audience, we need a way for researchers and others to find something of interest in the Repository. Therefore, in 2018 we began adding “metadata” to each interview in the Repository. This means we added tables of contents and keywords for subjects covered. Carl Cross and Barry McNeill have developed subject dictionaries that provide consistency for terms used in the metadata, and Carl oversees their continued development and use. Carl’s extensive work experience at the ASU Library has made him invaluable in this effort.



Carl Cross

Pat Schneider and a few other volunteers have taken on the job of adding metadata to the older interviews. Pat’s comment about this task mirrors John’s comments about interviewing. She says, “These (interviews) are really interesting and even after being at ASU for 33+ years I’m learning so much! I am thoroughly enjoying doing this! I can sit on my patio in the mornings with a cup of coffee and afternoons with a glass of wine and do something useful! Almost better than Netflix!”



Pat Schneider

As another means of making the interviews available and of creating interest in them, we add short “clips” to our ASURA website. The clips are from one to five minutes long and are selected to highlight something especially interesting. During the decade we created over one hundred twenty clips, mostly by Linda Van Scoy. We have had more than five thousand hits on the clips already. Nick Salerno’s alone had over three hundred hits.

We can take considerable pride in the work done by this group. Validation comes both from the interviewees themselves and from those who use the material. We noted above that some of the interviews have been downloaded thousands of times.

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Some example comments from interviewees:

- (Robert Fleming) “I will NEVER be able to thank you enough for this video. The best response I got was from my daughter who said, “Your grandsons now know that you are Truly the best grandpa they could possibly have”.
- (Kristin Valentine) “I was pleased with the video AND all the photos you had inserted that made it richer. Thank YOU for the skillful editing. When next you see the production crew, please thank them for their camera and audio work.”
- (Marilyn Wurzburger) “I forgot to tell you how much the photos complemented the various topics I was talking about. You had to do a bit of research for those.”
- (Bob Barnhill) “This recording of me is great! Excellent work. You’ve done an especially nice job of capturing my warm thoughts about many ASU people, such as Michael Crow and Cindy Ryan.”



Bob Barnhill Being Interviewed

Linda Van Scoy sums

things up when she says, “It’s nice to be associated with a project that seems to be never ending. The oral histories of our retired employees will always be available as long as the university exists.”

SCHOLARSHIP PROGRAM

The ASU Retirees Association Scholarship is awarded annually to an undergraduate student who is re-entering university after a time away. It was first awarded for the Fall 1996 semester. The scholarship is one of ASURA’s most successful projects, most importantly because the students chosen to receive it have gratefully taken full advantage of our support and have gone on to complete their educations and to further their goals.

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Joy Shearman and Sue Blumer have served as leaders of the Scholarship Committee during the entire decade covered by this book. They are both very proud of the students selected and what they have achieved. Sue takes special pride in the diversity the recipients display, both in their academic fields and in their personal backgrounds. She says, “The outstanding students and their fascinating lives and academic stories never grow old.” Association members love hearing their stories each year at the ASURA Annual Meeting.



Sue Blumer with Nicholas Smith and Krissy Jo Bergen

Sue points out that because the scholarship is for a fairly generous amount, “Many of these students are enabled to work fewer hours and take a full schedule of classes, thus hastening graduation and the next phase of their lives.” Joy shares the following comments from students who have received the scholarship:

- “Thank you for granting the Scholarship to me this year. It served as an important sign to me that I was on the right path. So, from the bottom of my heart, thank you for selecting me.”
- “The gift of this scholarship, freely given, helps me obtain this important milestone in my life. Without this my graduation would not be possible.”
- “Your gift of this scholarship, I promise you, will be put to good use, and fulfills a dream I never thought would be possible.”
- When notified of her award, “Are you kidding me----no---is this a scam—are you sure---is this for real?” Then tears, saying how hard she had worked in her life and how things did not seem to ever go her way, to

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finish her degree and better her life and her children's. "Thank you, thank you for this blessed gift."

- "How can I donate to this scholarship? When I can, I want to contribute to be a part of helping someone's future dreams come true, like mine have."

Most scholarship recipients have a plan for what they want to accomplish and have selected majors that will move them towards their goals. This is apparent in the following look at the decade's recipients.

2011-2012 - Nicholas Smith

Major: Business Information Systems in the W.P. Carey School of Business.

Nicholas is a member of the San Carlos Apache tribe. He continued his education and in 2017 earned an MS in Global Technology and Development from ASU. He is a self-employed web developer and has an interest in "researching the applications of language preservation to develop rural communities economically, politically and socially".



2012-2013 - Krissy Jo Bergen

Major: Psychology / pursuing Master's degree in counseling in fall.

Krissy is a member of the White Mountain Apache tribe and wanted to develop a nonprofit on the reservation. "The mission of the nonprofit, and my great goal, is to end child abuse and suicide ideology among young adults. The impact I would like to make is to help create healthy children who grow up to be healthy productive leaders."



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2013-2014 - Tomas Espinosa

Major: BS Mechanical Engineering / planning to pursue Master's degree in engineering.

Tomas, pictured here with Sue Blumer, planned for a career in energy technology, economic growth, and sustainability.

2014-2015 - Tara Pryts

Major: Degree from the School of Sustainability.

Tara looked forward to beginning her career in sustainability, with particular interest in cities, in designing sustainable products, and implementing sustainable urban policies.



2015-2016 - Kazuko Niimi

Major: Chemical Engineering.

Kazuko described herself as a wife, a mother, a student, and a practical thinker with a unique ability to apply life lessons, believing that she will be a better engineer because of her life experiences. She looked forward to making an impact on the world for good.



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2016-2017 - Marcene Hoover-Bennett

Major: Communications, then Law School concentrating on Indian and Environmental Law

Marcene is a member of the Many Goats clan of the Navajo tribe. She has three children. “I am a Native American woman who decided in her thirties to begin a new chapter in life. I want my people to have more than thirteen percent graduates from college and learn to lead by example to inspire my people.” She hoped to eventually work to help bring jobs and businesses to the reservation, assist companies with communication, and teach native peoples how to succeed and improve their communication.



2017-2018- Stephani Renay Watson

Major: Political Science and Interdisciplinary Studies, concentrating in Justice Studies and Sociology and then to Law School (graduated December 2019).

Stephani, pictured here with Joy Shearman, is a member of the Choctaw Indian Tribe. She says, “My place in society should be that of a change-maker and to dedicate myself

to academics and community involvement.”

Joy Shearman says, “One of my special memories is when Stephani Watson sent us a big, framed Certificate of Appreciation for choosing her, with her picture in cap and gown. I keep in touch with students and this student continued



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her education and graduated from Sandra Day O’ Conner, College of Law with a 4.07 GPA.”

2018-2019 - Jennifer Beth Pelloni

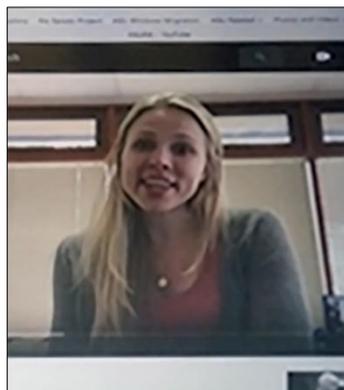
Major: Family and Human Development and then Master’s in Management Strategy Leadership.

Jennifer plans to open a child development center for children who are deaf and hard of hearing. She wants to, “create a place where



these children can learn and thrive in their natural language (ASL)

and interact with others who are like them, as well as be around adult role models who use their language.” Her dream has already started, with expansion of her Child Care Facility for the Deaf and Hard of Hearing, in progress as of this writing.



Of Jennifer, Joy Shearman says, “Another special student was a single mom of twin boys, and a Nationally Certified Sign Language Interpreter, who had a dream of working with the Deaf Community. She graduated during the pandemic with a degree in Family and Human Development and is now in a Master’s program for Management Strategy Leadership.”

2019-2020 - Francis Marie Romero

Major: Health Care Compliance and Regulations (Edson College of Nursing and Health Innovation).

Francis’s immediate plan is to work in a large community hospital or clinic in a Data Analytic position, with a focus on care regulations and protocols in both rural areas and smaller health care facilities. Her long-term career goal is to



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work for Medicare as a recovery audit contractor (RAC), allowing her to identify health care fraud, abuse and misuse to control health care costs.

2020-2021 - Monique Rodriguez

Major: Social Work following with a Master of Social Work (MSW).

Monique has six children. Her goal is to help improve the lives of those families who have gone through trauma, as she has, and ultimately open a group home for children.



Being chair of the committee involves many interactions with the Scholarship Office, the Scholarship Committee, and the ASURA Office. What motivates someone to be willing to tackle this job? Joy says, “I was motivated to volunteer for this committee when I retired, because when I was teaching at ASU I was involved with scholarships, loved students, and needed to still be involved in some way. This led to just reading applications, then to co-chair, and now chair, for a total of somewhere around 15 years. It has been and still is perfect for me, and something I look forward to every spring. I also have enjoyed meeting all the different volunteers, that I otherwise would not have gotten to know.” Sue, who was the founding committee chair in 2001, says part of her motivation is that she was a returning graduate student herself.

Joy added, “I guess I am proud that I am still able to do this, mentally and physically at 90 years old. I feel a sense of satisfaction every year when I hear the excitement and gratefulness in the voice of each recipient of the \$10,000, when I call them and tell them they were chosen to receive it. How can you not feel a sense of satisfaction when you know your efforts have helped a returning student finish their education and achieve their dreams? I always let the volunteers who read the applications know how the recipients react, the tears, the disbelief, their words, when I tell them. So, the volunteers also feel satisfaction for their part in the choosing.”

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Following are some comments reflecting the rewards for serving:

- “Thank you for asking me to help with this committee. It has been an eye opener for me, to read about all the hardships, and struggles these students have been through. Yet they persevere to get their degree, sometimes one course here and there, through the years.”
- “I feel so humbled and privileged, to be allowed into the private lives of these students, as they write about their struggles, never giving up, to get their degree.”
- “Thank you for letting us know how the student reacted when you told them they were chosen. I must admit, I was tearful hearing it. I so appreciated this fulfilling experience.”

Because of Joy’s involvement with the Philanthropic Educational Organization (PEO), the reach of our scholarship program is extended beyond our single annual recipient. PEO supports several grants and scholarships, and Joy has served with PEO as chair for a scholarship called Program for Continuing



Joy Shearman and Sue Blumer - 2017

Education. The criteria for that scholarship are quite similar to the criteria for our ASURA Scholarship. Therefore, when students who applied for our



scholarship are notified that they were not selected, Joy has arranged to have those of them who might be eligible contact her about the PEO scholarship. Those who contact her are taken through the PEO process. As a result, Joy says, “In the last 10

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years, between 10 and 12 other students have benefited from the ASURA Scholarship Project.”

In the 2014 Survey of Members the scholarship was rated the third most important project or activity of our association, behind advocating for retirees and monitoring health insurance programs.

ADOPT-A-FAMILY

Of our three projects, the Adopt-a-Family project is the longest running. It was initiated by Denis Kigin, our first elected President, in 1992, when we adopted one family from the Tempe School District. In 2001 we added another Tempe School District family.

In 2004 we dropped one of the Tempe families and added an ASU family. Joan Leard became chair of the Committee in 2006, a position she held until 2019 when she “retired,” passing the mantle on to Ginny Sylvester.



Denis Kigin

During the decade we adopted twenty families and over sixty children. Examples:

- Several Tempe families of six.
- An ASU family of seven.
- A family headed by an older sister who claimed her four siblings.
- A pair of grandparents.

The Committee never meets the adopted families. All communication is done via a third-party contact, a social worker from the Tempe Elementary School District #3 and an ASU employee who coordinates ASU’s Adopt-a-Family efforts. In the fall the Committee requests names and details for the two families.

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Joan Leard

toys and grocery cards for food.”

The gifts are wrapped and then distributed by the third-party contacts. An unusual aspect of our program is that we make three distributions each year, at Thanksgiving, Christmas, and Easter. Ginny mentions that, “We even managed to get each family a food card during the COVID-19 shut down in March (2020).”

Aside from the usual items, we occasionally fill unusual requests, e.g., a desk-top computer for two boys, 12 & 14, and a juice extractor so healthy juices could be made for the father.

While we do not meet the families, Joan says we “do receive many thanks from the social worker and ASU employee. I am continually told that our effort does make a big difference in the lives we touch.”

- 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.”



Wrapped Christmas Gifts - 2019

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

Since the efforts of this committee do not directly impact our members, the only recognition the committee receives is from their third-party contacts. So what motivates someone to take on this important task? Joan says, “I joined the board of the Retirees Association shortly after I retired. At a meeting soon after, the Chair of the Adopt-A-Family position was discussed, and since I had newfound time, I decided I could handle spending the \$2,000.” As for Ginny, she says, “I am motivated by several things. First, when I was a department head at ASU Libraries, my department always adopted a needy family at Christmas. It was always a happy and rewarding experience. I really missed that experience.” Ginny goes on to say the program gives her “a great feeling of personal satisfaction.”

What more can you say?



Ginny Sylvester

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Some ASURA members like to get materials delivered by snail mail, some by email, some prefer websites, others like to have something to hold, yet others like to use the phone, and some just like to look at pictures. Amazing as it may seem, during the decade we have managed to address all these communication preferences. This chapter highlights ways in which we have extended and improved our lines of communication and kept them humming.

OFFICE VOLUNTEERS – A FRIENDLY AND KNOWLEDGABLE FRONT LINE

Even in these times when communications seem to be dominated by texts, websites, emails, and social media, in-person conversations are very often the most satisfying. Many of us would much rather pick up a phone to get help than to look for answers on a website. It is also very pleasant to be greeted by friendly, competent, and knowledgeable people at events or in the office.



Nancy Lesko and Linda Van Scoy

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Our office volunteers are thus essential to a full and satisfying membership experience. It is they who can be reliably reached in person – on the phone or in the office. Even during the COVID-19 pandemic when we had to close our office, they picked up and responded to phone messages, and found ways of handling mail addressed to ASURA, keeping those lines of communication intact.

It has been our great good fortune to have stability, competence, and good nature in those who volunteer as office staff. Our office coordinators not only volunteer themselves, but also recruit and train others who cover the various shifts. We have benefited from the longevity and leadership of these coordinators: Carol Moore from 2008 to 2015, and Linda Van Scoy and Nancy Lesko (Co-Coordinators) from 2015 to the present. Linda was involved in the creation of the ASU Retirees Association while she was still working at ASU, and she has been active in many facets of our doings ever since. Jan Thompson says that during her presidency she, “especially came to appreciate the office staff. Linda Van Scoy and Nancy Lesko know EVERYTHING. They could find the answers to all my questions, research past orders of supplies and equipment, find the right people to contact for any problem, coordinate with everyone involved in an issue, and do it all in a day!” You can find a list of all our office volunteers in Appendix 3.



Office Volunteers - 2014

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Although the basic functions of the office staff have not changed a great deal during the past ten years, there have been a few additions:

- Our Book Drive fundraising program began in about 2012. The office staff took on responsibility for receiving the donations, providing donation receipts, and coordinating with the Friends of the Phoenix Public Library for book pickup.
- In 2012 our event registration process moved to our new membership and event management software system (“Wild Apricot”), and the office volunteers learned to use it to help manage registrations.
- In 2013 we began producing our Trifold brochure, highlighted below. Jeannette Robson was the office volunteer who took on responsibility for updating and printing the Trifold.

PRIME TIMES – AN ENDURING TRADITION

Our *Prime Times* newsletter has been the key publication of the ASURA since early in our existence as an organization. Its Fall, Spring, and Summer issues are a welcome and readily recognizable sight in member mailboxes. When E-News announces a new issue and provides a website link,



Jeannette Robson and Jo Madonna

those who like their news on a screen click to read a nice color copy.

The overall substance of what *Prime Times* publishes has not changed much since the first issues were mailed in the early 1990s. Each issue includes lists of

current officers, Board members, and office volunteers, articles about our past and planned activities, reports from our legislative liaisons, and occasional

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articles of general interest to retirees. At the back there is a list of names of current and former ASU employees who passed away during the time since the last issue. More recent issues list and welcome new members.

A few changes have occurred over the past decade:

- We switched from printing obituaries in *Prime Times* to publishing them on our website in 2011.
- In 2015 we worked with ASU’s graphics experts to update the banner that appears at the top of the first page.
- We began publishing on the website and announcing each issue via E-News in Spring 2015.
- In 2017 the Board approved the back-cover printing of no-cost service advertisements. So far, that option has seldom been taken advantage of.



This updated banner was first used in about 2015.

The tradition of outstanding *Prime Times* publishers – June Payne, Carolyn Brown, Rocky Mackey, Dave Scheatzle, and Janet Soper – has been carried on with great dedication and flair by Jeannette Robson, who published her first issue in 2010. Jeannette will be putting out her thirty-second issue in the summer of 2021. She says, “I take pride in making sure that each issue of *Prime Times* is interesting, attractive, and has as few errors as possible. I know our members rely on it and enjoy reading it.”

For several years, Wilma Mathews helped Jeannette by editing some of the submitted articles. Wilma was also proud of putting out a quality product.

We know our members really like receiving *Prime Times* because almost 750 of our members opted to receive the Spring 2021 issue! Based on

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our website statistics, most of the rest read it online. As Becky Reiss says, “*Prime Times* seems to get better and better with content, layout and pictures. Kudos to Jeannette.”

TRIFOLD – PROMOTING ASURA

Sometimes we attend events to promote and inform about our organization, for example ASU’s “Finalizing Your Retirement” meetings, ASU’s employee picnics, and the ASU Day at the Capitol. A mainstay handout for us at such events is our colorful “Trifold”. The Trifold provides an overview of our organization on two sides of one sheet of paper. When folded into thirds, it makes a nice take-away brochure.



*Barry McNeill, Jo Madonna, Dick Jacob – ASU Day at the Capitol
Trifolds on the Table – February 2013*

Although the idea of a brochure had been discussed earlier, it was not until 2013 that we produced and used our first Trifold. Those who were planning to staff an ASURA table at that year’s ASU At the Capitol Day really wanted to have one. Barry McNeill was President, and he spearheaded the initial development. Jeannette Robson volunteered to do the layout. We reviewed options for printing the Trifold and decided that both cost and flexibility were best served by investing in our own color laser printer. Since the first Trifolds rolled off the printer that spring, Jeannette has made sure that

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this little publication is kept up to date and that we have a supply of them ready whenever there is a need.

E-NEWS – SPREADING THE WORD BY EMAIL

In early 2014 Barry McNeill proposed to the Board that we send an email to members after every Board meeting to share information from that month’s meeting. Barry says, “Since I started attending Board Meetings in the fall of 2010, I always left the meetings thinking that things discussed there would be of interest to more than just those who attended. Posting meeting minutes on the website was not effective in bringing this information to the membership.”



Barry McNeill reading E-News

The Board agreed and enthusiastically supported the idea of a post-meeting email report. In March of 2014, the first issue was sent out and E-News was born. Today, Linda Van Scoy says, “E-News is a helpful summary of important and interesting items for ASURA members, and it creates a positive connection.”

Initially E-News was prepared by the ASURA President, but after a short time a separate E-News editor was assigned. The first editor was Jo Madonna. Barry McNeill took over from her in September 2017. In addition to the regular post-meeting reports, there have been numerous “extra” issues sent when something comes up that cannot wait. Jo comments, “This ASURA electronic news publication has been a resounding success. It

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has been especially useful in getting time-sensitive information to members that might otherwise be missed or become outdated if not published before the next issue of *Prime Times*. The monthly list of and quick electronic links to upcoming ASURA and ASU Affiliated events is a handy reference for members.”



Barry McNeill designed this "letterhead".

Since Jo and Barry both felt strongly that members would be interested in the things covered by E-News, the effort required was worthwhile to them. Barry reports, “I enjoy editing E-News, especially trying to think of something interesting or germane to begin each issue. I feel proud that E-News is valued by ASURA members.” Both Barry and Jo made improvements in format and appearance as they gained experience. In addition, in 2020 Barry began posting issues on the ASURA website, so if members remember something they read in an E-News and want to see it again, they can.

Comments received from members show that it has indeed been a success, and is appreciated:

- “Thanks! Really appreciate the voter info & look forward to a longer article.” – Rocky Mackey
- “I really appreciate the E-News you publish; such a concise, helpful resource” – Becky Reiss

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- “Thank you for the latest ASURA newsletter that was uplifting to read in this time of coronavirus. I especially appreciated the piece on “One Important Recommendation You May Not be Hearing”. My academic background is literary criticism; therefore, I delight in all the references to *Love in the Time of Cholera!* My home turf.” – Angelita Reyes
- “Great job as always.” – Aleksandra Gruzinska
- “Thanks for teaching me a new word, Barry! I have been using it as much as possible ever since.” [This when Barry included the word “aestivating” in an issue.] – Roger Carter
- “Thanks for the excellent news.” – Bob Barnhill



Angelita Reyes

ASURA’S WEBSITE – A RICH SOURCE OF INFORMATION

ASURA first had a presence on the web in 2001, when Bob Beeman created a site and added some basic content to it. Since he had little help in adding or maintaining content, there was not much change until 2008, when Connie McNeill offered to take over website responsibility. She says her goal was to make the ASURA website a reliable source of association news and information, and with that in mind she set up a new website and began to populate it.

By the beginning of the 2011-2012 year the website had a solid base of information, with about 250 pages covering events, people, and topics of interest to retirees. Examples:

- Names of officers, Board members, and other volunteers, both current and historical.
- Membership enrollment forms and “how to join” information.
- Help in choosing health insurance.

CHAPTER 5 – ENGAGING COMMUNICATIONS

- Organization bylaws, Board meeting minutes, committee responsibilities, project descriptions, annual reports, and organizational history.
- Information about upcoming events, and stories and pictures from past events.
- Links to related organizations and information.



Barry and Connie McNeill

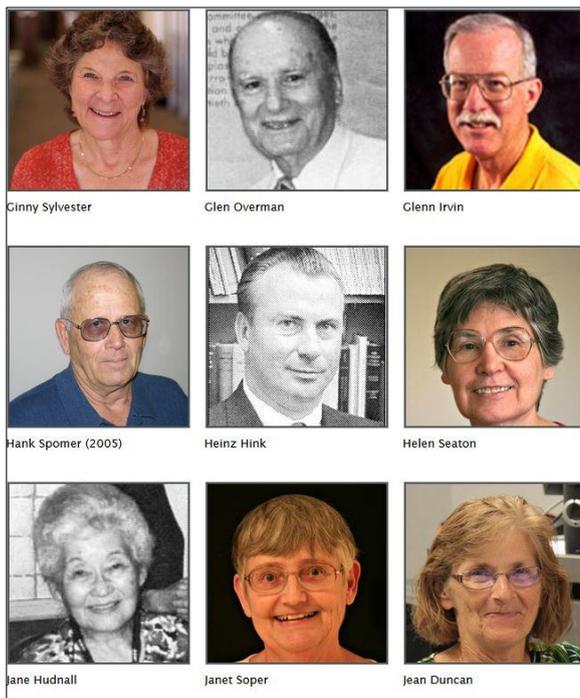
The original goal of making our website an important communication medium had been achieved. The challenge for the 3rd decade of ASURA's existence was to maintain and expand its relevance.

Several ASURA volunteers have successfully taken on that challenge. Barry McNeill, Carolyn Minner, Linda Van Scoy, and the ASURA Office Staff joined with Connie, spending countless hours making sure that what we present on our website is accurate, relevant, and interesting. The site has quadrupled in size over the last 10 years. Original content has been maintained and extended, and new content has been added. Examples:

- A member directory that is available only to active members, added in September 2012.
- The ability to register for our events and to self-maintain membership profile information, also September 2012.

CHAPTER 5 – ENGAGING COMMUNICATIONS

- A wonderful photo gallery of ASURA people and events. The earliest photos are from the 1990s. Connie did the initial work of gathering, digitizing, organizing, and presenting our historical photos for the gallery’s debut in Summer 2013. In April 2014 she and Barry McNeill moved the gallery to a much better platform, Zenfolio. Since then, our photographers have kept the photos coming: these include Elmer Gooding, Barry McNeill, Don Nilsen, and Dave Scheatzle. Most of the pictures in this book have been copied from the photo gallery.



A Snip From Our Website’s Volunteer Portrait Gallery

- The ability to pay annual membership fees by credit card, added Summer 2013. PayPal as a method of payment was added in 2020.
- A “technology tips section” created in 2012. In 2019 and 2020 Connie added “how-to” help for those who need to find

CHAPTER 5 – ENGAGING COMMUNICATIONS

and move to a new email service. The technology tips pages account for about 50% of our site’s total usage.

- A contact form that can be used to send messages to the ASURA. Carolyn Minner and Connie McNeill monitor the messages, responding to some and referring others to the “right” ASURA volunteer.
- Links to video recordings of our pre-retirement and retirement seminars, beginning in 2020.

Retirement Information

Retirement Info

COVID-19
Retiree Benefits and Discounts
Choosing Health Insurance
ASRS and ADOA Health Insurance
Governor's Council on Aging
Technology for Retirees
Life Care Planning
If Your Spouse Dies
Other Retirement Topics

Retirement can be:
Volunteering
FUN Freedom
Challenges
Working Less
Hobbies
Sun Travel
Shine Friendship
Family
New Business

*The ASURA Website’s Retirement Information Menu -
February 2021*

- A helpful collection of information on topics of special concern to retirees such as choosing health insurance, life care planning, retiree benefits and discounts, what the Governor’s Council on Aging is discussing, and where to find out about COVID-19 vaccinations. Most of this was added in 2018-2021.
- Lots of information for our volunteers to use in carrying out their responsibilities. More about this is in Chapter 8.

CHAPTER 5 – ENGAGING COMMUNICATIONS

Initially, her edited versions were published in *Prime Times* three times a year. In 2010 she added email notifications for those who want to receive them.

In 2011 we decided to switch the publication of obituaries from *Prime Times* to our website, leaving just a list of names in *Prime Times*. With that decision, Carolyn Minner began posting Becky’s emailed obituaries to our website, which she has continued to do since.

In about 2013 Becky added the service of notifying members’ surviving partners of their opportunity to replace their partner on ASURA’s membership roster.

Becky says it does not take a great deal of her time to do all of this, as she pretty much has her procedures honed to a high degree of efficiency.

She gets satisfaction out of knowing that her service is important to our members and that it is much appreciated. Carolyn says she enjoys the task of posting to the website because it is a different sort of challenge from the rest of what she does.

We know the service is appreciated: partly because Becky receives occasional thank-you notes, but mainly because the obituary pages are among the most-viewed on our website.

THE 2ND DECADE OF SUCCESS – READABLE AND INFORMATIVE

In the March 2011 Board meeting, when the associations’ second decade of existence was ending, the possibility of preparing a book covering the events and accomplishments of that second decade was discussed. The book about our first decade of existence had been an excellent and readable



Becky Reiss

CHAPTER 5 – ENGAGING COMMUNICATIONS

source of information and inspiration for incoming Board members and committee chairs. It also had been helpful in recruiting members.

After some discussion, the Board agreed that a book would capture history better than our collection of annual reports and Board meeting minutes could, and Val Peterson was asked to lead the creative effort. With his acceptance of the assignment, the project to create *A Second Decade of Success* was born.



Val Peterson

The book did not appear overnight. It took two years of work by Val and a dedicated group of members to bring it into existence. First there were over six months of meetings with various members interested in the project to establish project parameters. These guidelines were presented and approved at the December 2011 Board meeting.

Research and writing efforts began at the beginning of 2012. Over the next twelve months the committee collected statements and photos, and Val wrote connecting text. A draft copy was complete in January 2013. Wilma Mathews contributed her considerable editing expertise, and Connie McNeill worked on formatting the book and inserting photos. At the May 2014 Board meeting, Val announced the book was ready for printing. The Board authorized the printing of five hundred copies, mainly funded by sponsorships that Val collected. A color version was added to our website, where it joined the digitized version of the first decade book.

Like the first *Decade of Success* book, the second provides a readable story about what the organization has accomplished and what kinds of things members of the ASURA can expect from it. Copies are made available at various events and in our office and are given to incoming Board members and committee chairs.

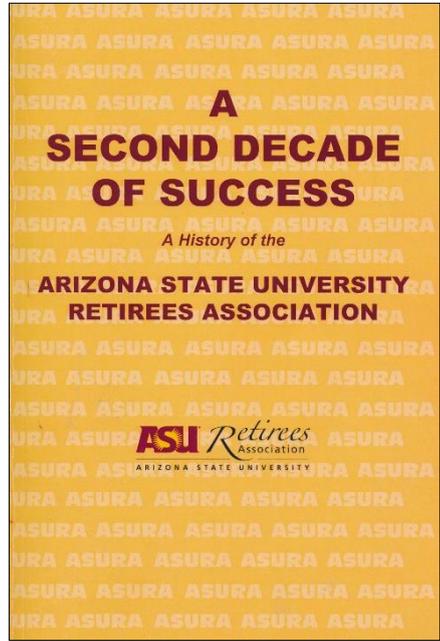
CHAPTER 5 – ENGAGING COMMUNICATIONS

Val says, “When the ASURA Board appointed me to oversee the process of writing a book for the association’s second decade by chairing a committee to do so, I wondered if a committee could, in reality, write a book. The people working on this history made contributions in a variety of ways. So the work was truly a group effort. And yes, I have determined a committee can write a book. Thanks to all involved, this history of ASURA’s second decade is a welcome companion to that of the first decade.”

THE 2014 MEMBERSHIP SURVEY – PROVIDING GUIDANCE

Useful membership surveys are not easy to create. It is hard to motivate people to respond to them, and there is much work in analyzing responses. So, what motivated Barry McNeill, as President in 2013, to suggest such an activity? “I wanted to give the Board information that it could use as it made decisions about what the association does. I thought it would be helpful to take the pulse of the association and to learn how we could increase our membership, better serve our members, and learn what they thought about our projects. I wanted more direct input from the members to the Board.”

So, Barry recommended to the Board that a survey be conducted. The Board approved his recommendation and created an Ad hoc Membership Survey Committee with subcommittees for the three groups to be surveyed: members, past members, and retirees who had never joined ASURA. Barry chaired one of the subcommittees, feeling confident but apprehensive. “I had never done anything like this before and relied heavily on the experience of Bill Moor and Gary Kleemann to keep me on track.”



Book Cover

CHAPTER 5 – ENGAGING COMMUNICATIONS

Surveys were developed and sent by email and by regular post, using postage-paid return envelopes. Response was good enough to make the results useful. Barry and his committee worked hard to summarize the data and the key findings, and to write a report for the Board. “I was pleased that so many



*Barry McNeill, Elmer Gooding, Gary Kleemann, and Bill Moor
Working on the Surveys*

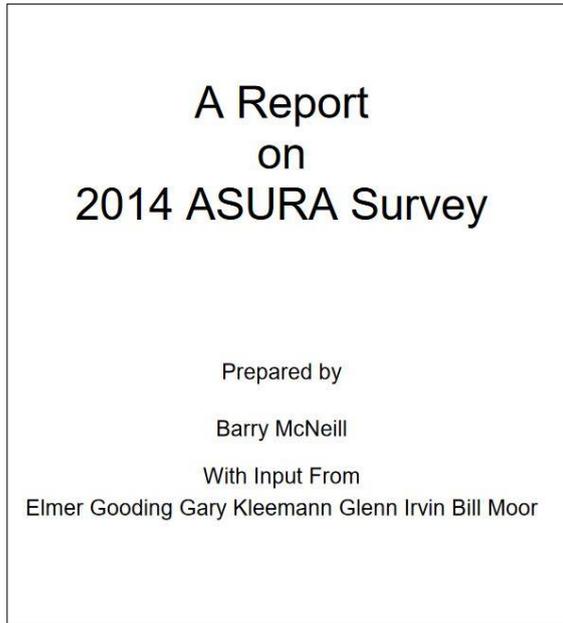
of our members were willing to respond to the survey. And while it turned out to be a lot of work, I am proud that we were able to accomplish what we set out to do and that the Board has used the information in the following years.”

Key results of the survey:

- Members view ASURA’s advocacy in the areas of retirement plans and health insurance as the most important association activity.
- Members are pleased with the activities and projects of ASURA and with the type of information being provided. Seminars are more important than luncheons and travel.
- The scholarship and the video history project are important.
- ASURA members are busy people and fit ASURA in among many other organizations and activities.
- New members were noticeably more comfortable with electronic communication than the older members were. The average age of members was getting higher [happily, this has turned around in recent years].
- Cost, transportation, and location are not barriers to attending events.

CHAPTER 5 – ENGAGING COMMUNICATIONS

More than six years later, these findings are still relevant, and are continuing to be referred to by the Board of Directors when questions about priorities arise.



The 2014 Survey's Cover

CHAPTER 6 – BENEFICIAL ASU RELATIONSHIP

The Preface to *A Decade of Success* states, “Of major importance to the operation and financial strength of the association is the support of the Arizona State University administration.” This support has been present from our founding and has been reaffirmed during our third decade of existence. The relationship is official in that we have a “sponsoring” ASU administrative organization. We should feel quite lucky, as the retirement associations at our sister Arizona universities do not have such strong administrative support. ASU recognizes that we add value both to the university and to our community, and that therefore our relationship is mutually beneficial.

BEING TREATED AS PART OF ASU HAS MANY ADVANTAGES

One of the best features of our support from ASU is that many services are provided to us just as if we are a “regular” ASU department. For example, we have technology support from the University Technology Office, including deskside support for our office computers and website hosting and support services. We are provided with phones, mail service, help from accountants and purchasing agents if we need it, moving, repair and installation services from Facilities, conference room and classroom scheduling support, and so forth. We have been treated especially generously when it comes to providing building space for our offices and activities.



Book Storage During Pandemic

CHAPTER 6 – BENEFICIAL ASU RELATIONSHIP

“*A Second Decade of Success*” chronicled the moving of our office from the Visitor Information Center to the Community Services Building (CSB) in December of 2006. Dave Scheatzle and Linda Van Scoy remember, “When we moved to the CSB, we were given a 3-office suite and a storage room. This was very good space and served us well for several years.”

They go on to say, “As the organization began to grow in membership and programs, we soon needed additional space, specifically for the Book Donation Program and The Video History Project.” For the Book Donation Program, we needed storage space, because book collections were increasing, and we often had many boxes of books waiting to be picked up by the Friends of the Phoenix Library. For the Video History Project, we needed our own interview room, as discussed in Chapter 4.

Dave and Linda continue, “As the situation became untenable, we began making inquiries to individuals we knew in the Administration to explore the possibility of acquiring additional space in the CSB. As luck would have it, at that time several units were moving to other locations and campuses so there were offices available. We approached Space Management & Facilities Management about getting some of these rooms. Jean Robinson in Facilities was especially helpful in identifying possible spaces and in ushering our requests through the process.” Eventually, Dave and Linda’s perseverance paid off, and in 2014 we acquired two spaces:



Dave Scheatzle and Linda Van Scoy

- Three connected rooms to use for book storage.
- A room to use for our Video History Project interviews.

CHAPTER 6 – BENEFICIAL ASU RELATIONSHIP

The additional space has been a real asset for both programs and has allowed each to expand.

OUR ASU “SPONSOR”

At the beginning of our third decade, our official ASU sponsor was Public Affairs. This had been established in 2002 by President Crow when he met with Quentin Bogart, then ASURA President. As sponsor, Public Affairs was established as our “go-to” for facilitating our interaction with ASU. As part of the agreement reached, Public Affairs helped cover some of our expenses. By the start of our third decade, we were receiving a fixed annual “allowance”.

In 2015 our sponsor shifted to Human Resources (HR). This change was suggested by Ray Jensen, Associate VP for Integrated Business Relationships, when we consulted with him after a major reorganization dissolved Public Affairs. Ray thought it would be an obvious fit for us to be sponsored by HR. Barry Bruns remembers, “Business and Finance had a much larger local fund base compared to Public Affairs, which we hoped would better ensure that funds for us would continue to be there.”



Ray Jensen

Ray set up a meeting to discuss our organization with Morgan Olsen, Executive Vice President, Treasurer and Chief Financial Officer, and Kevin Salcido, Vice President for Human Resources. Barry Bruns, Jo Madonna, and Connie McNeill, attended the meeting. They outlined the mission and activities of ASURA, and both Olsen and Salcido pledged to continue the type and level of support that we had been receiving from Public Affairs. Ray was close to retirement at this time, and we hoped to recruit him to be on the ASURA Board of Directors. Sadly, he moved to Florida when he retired.

Salcido appointed his assistant Katie Aguilar to be our point of contact. Katie has been supportive of our association from the beginning, and

CHAPTER 6 – BENEFICIAL ASU RELATIONSHIP

has been responsive to all requests for assistance, including approval of financial transactions against our allocated funds. Katie makes sure our Business Manger’s affiliate ID remains current to enable access to the University accounting system. Every quarter Katie also sends us a file of ASU employees who retired the previous quarter. This allows us to quickly welcome all the new retirees to our association. It is easy to celebrate this relationship.



Katie Aguilar

OUR ASU LIAISONS

Another indication of our good relationship with ASU is the willingness of several ASU units and groups to assign someone to serve as liaison to the ASURA Board. These people are ex-officio members of the Board, and as such are invited to our meetings and events. They help keep us in touch with what is happening at ASU, and we keep them informed about our activities. When appropriate, we also express our willingness to step forward if our



Abby Polito - Public (University) Affairs

assistance or participation might benefit ASU. Not all the units regularly send an attendee, but we often hear from the Emeritus College, University Affairs, the University Senate, University Staff Council, and the University Club liaisons.

One of our most involved liaisons was Abby Polito of University Affairs, who served from 2012 to 2019. She regularly came to our late fall and early winter Board meetings to keep us apprised of what ASU was trying to accomplish during the current legislative session. Abby

CHAPTER 6 – BENEFICIAL ASU RELATIONSHIP

also often attended our events, saying that she really enjoyed the people she met.

OUR SUPPORT FOR ASU

Our relationship with ASU is not just one way. We enhance ASU’s reputation through our community service programs and our active presence at the Legislature and in the retirement community. We also participate in or support some ASU initiatives, such as ASU Day at the Capitol and the ASU United Way campaign. When appropriate, we may also help ASU support or oppose legislation that would have an impact on the university.

The annual ASU Day at the Capitol is hosted by the ASU Office of Government and Community Engagement in collaboration with the ASU Alumni Association. Its purpose is to provide legislators with an opportunity



Jo Madonna & Barry McNeill with House Representative Martin Quezada

to learn about many of the things ASU is engaged in, and to highlight ASU’s impact on the local community and economy. The event is held in February on the Wesley Bolin Plaza.

We always staff a table and talk to legislators about the interests of

retirees. Jo Madonna remembers one of these days when, “Among the legislators that stopped at our table was State Representative Martin Quezada. He was a former student leader at ASU West while I worked there and with whom I had many positive interactions. It was rewarding to see that he was continuing to use his leadership skills. He subsequently was elected as State Senator for District 29 and continues to serve today.”

CHAPTER 6 – BENEFICIAL ASU RELATIONSHIP

Each year we supply the ASU United Way coordinator with our mailing list so they can contact our members directly and ask them to be part of the ASU United Way effort. Those of our members who choose to participate help ASU meet its goal, which in turn helps ASU’s community service reputation.

In a few instances we have lobbied on behalf of ASU. Probably the most visible was our active opposition to a “Guns on Campus” legislative bill.

During the 2011 legislative session, at the request of the Board our lobbyist Jerry Aronson actively opposed legislation (SB1201) that would permit concealed weapons on the campuses of universities and other educational institutions. SB1201 passed but was vetoed by the Governor because of some “vague areas”.

The bill was reintroduced in the 2012 session with the “technical” issues resolved. In the January 2012 Board meeting, Gary Anderson introduced a successful motion to solicit our members’ views about the legislation. Gary and Bill Moor prepared a survey that was sent to 650 ASURA members. While the survey was being sent, Rose Minetti, one of our legislative liaisons, lobbied on-line on behalf of ASURA, opposing the legislation.



Bill Moor and Gary Anderson

About 40% of the surveys were returned, with 99% responding that they were either “extremely opposed” or “opposed”. The results were shared with Abby Polito. She used the results in her discussions with legislators and was very appreciative of our efforts. The legislation did not pass.

CHAPTER 6 – BENEFICIAL ASU RELATIONSHIP

TENDING THE RELATIONSHIP

To nurture our relationships, from time to time we meet with officials at ASU. In the spring of 2013, our liaison from Public Affairs, Abby Polito, helped us arrange a meeting with Virgil Renzulli, VP for Public Affairs. ASURA President Bill Moor, five of our past presidents, and Linda Van Scoy met with Virgil. We outlined our activities and had a generally pleasant and



Meeting with Virgil Renzulli, VP of Public Programs

positive meeting. He suggested we might help Public Affairs by participating in the KAET fund raising drive, which we did in August. We gave Virgil a copy of the newly printed *A Second Decade of Success*.

We are both proud and grateful that President Crow has recognized the importance of our association from the start of his presidency. In 2002, his first year at ASU, he made sure that we were formally recognized as a legal and integral entity under the University's broad umbrella of official entities.

In April 2014, President Crow walked over to the Memorial Union from his office and spent an hour with us during our Annual Meeting. He thanked us for our contributions while employed and as retirees. He then went on to lay out the goals for the university and reported on the progress ASU

CHAPTER 6 – BENEFICIAL ASU RELATIONSHIP

was making in meeting the goals. By the end of the talk most of us were really impressed with what had happened at ASU since our retirement. We gave President Crow a copy of our *Second Decade of Success* to help him further appreciate what we are about.

After the 2019 Annual Meeting, outgoing President Tara Roesler suggested we send President Crow a copy of the Annual Report, which was done. In early May, Jan Thompson, our incoming president, received a letter from President Crow



President Michael Crow & President Barry McNeill

thanking her for the report. He wrote, “I continue to be impressed by the ongoing commitment and productivity of our amazing retirees. Your work is not only advancing ASU and its mission but also creating opportunity for others, building meaningful connections, enriching our communities, and

providing empowering learning experiences. I appreciate your outstanding endeavors.”

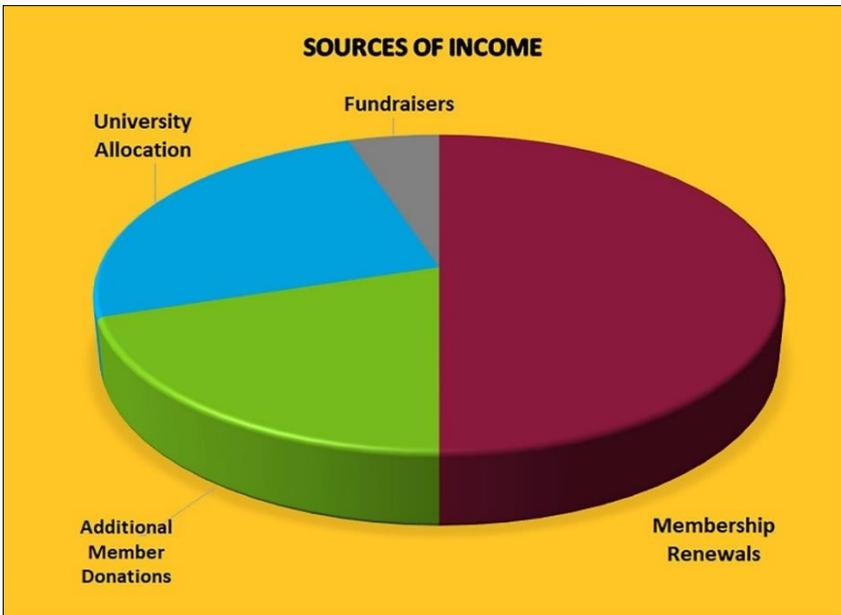


Bill Stasi, Tara Roesler, and ASU President Michael Crow - 2020

It is nice to have President Crow confirm we are not alone in viewing our relationship with ASU as mutually beneficial.

CHAPTER 7 – HEALTHY FINANCES

While you may think a chapter on finances will be boring, it is possible that you will be pleasantly surprised if you read on. You may come to understand and appreciate what makes it financially possible to run our programs, i.e., to pay for our scholarship and Adopt-a-Family programs, for equipment, for office expenses like supplies, printing and mailing, for event venue fees and food, and for technology services. We can proudly say that we have been able to financially support the kinds of growth and success celebrated in previous chapters, while still balancing our budget. It is all possible because of stable income and good financial management.



CHAPTER 7 – HEALTHY FINANCES

We have four sources of income to support our activities:

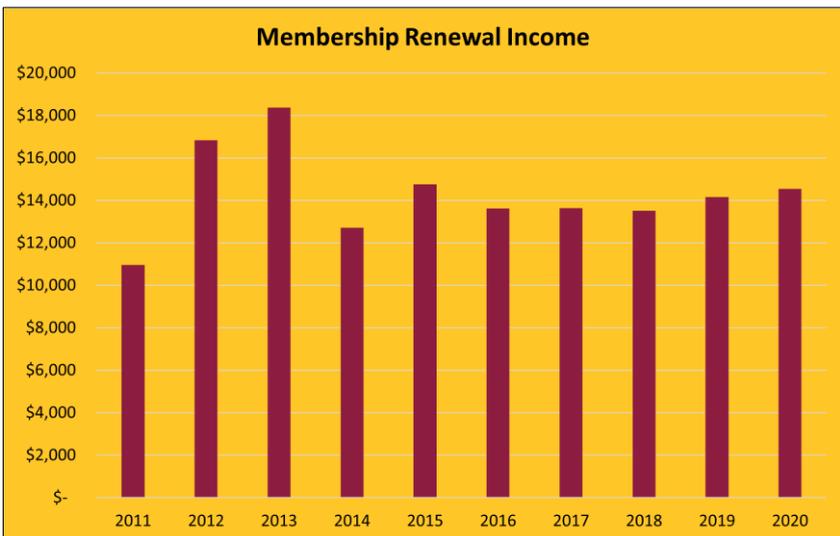
- Membership renewal donations.
- Additional member donations.
- A University allocation.
- Fundraisers.

The chart on the previous page highlights the relative size of these four sources. About 70% of our total income is derived from the combination of membership renewals and additional member donations.

DONATIONS BY MEMBERS – OUR MAIN SOURCE OF INCOME

The chart below shows our membership renewal income for the decade. The income that each bar represents depends on two things: the number of members and the cost of renewing. Clearly, the membership growth and stability that we have enjoyed, as described in Chapter 1, is a crucial factor in our financial health, but so is the cost of renewing.

In setting the cost of renewing, the Board has sought to keep the rate affordably low but not so low that we cannot cover our expenses. Indeed, the renewal cost has been changed only twice in the association’s history:



CHAPTER 7 – HEALTHY FINANCES

- Renewal was set at \$10 when the association was established in 1991.
- In May of 2009 it was raised to \$20 per year, in part to help support an increase in the ASURA Re-entry Student Scholarship award from \$5,000 to \$6,500.
- In May of 2012 it was raised to \$30 per year, again in part to help support an increase in the scholarship award, this time from \$6,500 to \$10,000.

The first two bars in the previous chart show the impact of the 2012 increased cost of renewing. Happily, the increase did not drive members away and did result in an almost 50% increase in income over the previous year. Barry Bruns remembers, “When I first joined the Board in 2012, Bill Moor indicated that our carryforward balance was decreasing each year, and it was something we needed to address. As such, the increase in the renewal cost made that May was critical. The increased revenue over the years helped stabilize our budget.”



Being able to generate about 20% of our income through voluntary contributions, i.e., contributions made in addition to membership renewal, is special and worth celebrating. The chart above shows the magnitude of these

CHAPTER 7 – HEALTHY FINANCES

donations during the past decade. The donations are earmarked for our Adopt-a-Family and Video History projects, and in support of our general operations. We also receive voluntary donations for our Scholarship Fund, an endowed fund that is separate from our operations – it is discussed in a later section of this chapter.

We have not always asked members for additional donations. We first began soliciting additional donations with the membership drive conducted in May 2009. A new Membership Enrollment form was introduced, and at the suggestion of Wilma Mathews it included lines to write in additional donations for operations, Adopt-a-Family, the Video History Project and the ASURA Scholarship. Just this small innovation generated a gratifying response that has continued every year since.

In 2020 we added a “donate” page to our website and occasionally we include an article in *Prime Times* to remind our members that they can contribute at any time, not only as part of the annual membership drive. In 2020 we also worked with the Foundation to highlight our giving opportunities on the Foundation giving site, with nice photos, descriptive text, and flexible payment methods.

The screenshot shows the ASU Foundation website's donation page for the ASURA Adopt-A-Family Program. The page layout includes a top navigation bar with categories like 'World Initiatives', 'Environment', 'Health and Welfare', 'Arts and Community', 'Education and Scholarship', and 'Colleges and Programs'. Below the navigation is a breadcrumb trail: 'Home / Colleges and Programs / Programs and centers / ASU Retirees Association'. The main content area features a photograph of a family (a woman, a man, and two children) gathered around a table. To the right of the photo is the program title 'ASURA Adopt-A-Family Program'. Below the title is a 'Select gift amount:' section with buttons for \$25, \$50, \$75, and \$100, and a text input field for 'Enter \$ Amount'. Underneath is a 'One-time or recurring gift?' section with radio buttons for 'One-Time Donation' (selected) and 'Recurring Donation'. At the bottom of this section are two buttons: 'Add Gift, Keep Exploring' and 'Complete Your Gift'. Below the buttons is a text block: 'You can help provide underserved families in the Tempe School District with clothing, food and holiday gifts each Easter, Thanksgiving and Christmas/holiday season.' At the very bottom, there is a small text block: 'The ASURA works with the Tempe School District and ASU's off-campus Student Services to select families in need, and provides them with clothing, food and gifts during the holidays. Families often write thank-you letters that show the impact of these gifts. One mother wrote, 'Although it has been years since Santa provided gifts in our household, my children truly appreciate Christmas now more than ever thanks to your generosity.' Because of you, two families will have much happier holidays every year.'

The Adopt-a-Family Donation Page - Foundation Giving Site

It should be noted that because we hold our accounts at the Foundation, donations to our accounts, including our Scholarship endowment, are split – 95% to our designated fund, such as the Video History Project, and 5% unrestricted for the Foundation to use to support university initiatives.

CHAPTER 7 – HEALTHY FINANCES

Donors receive acknowledgment for the full gift. This is one way that we provide direct financial support back to ASU.

UNIVERSITY CONTRIBUTION AND FUND RAISERS – ROUNDING OUT OUR INCOME

As noted in the previous chapter, we have been well supported by ASU since our founding. The university has provided a steady, reliable contribution of \$7,000 per year, or about 25% of our annual income.

Prior to fiscal year 2015, university support came in the form of approving charges against our sponsor’s account, up to the limit of \$7,000. At the start of fiscal year 2015, our then-sponsor Public Affairs opened a separate local account for us and transferred \$7,000 to it. Each year since then our sponsor has made a transfer of \$7,000 at the beginning of the fiscal year. Although this did not materially change the level of support we receive from ASU, it made the allocation independent of what happened to the sponsor’s other accounts, and it allowed us to easily monitor our status and to carry over any unexpended funds to the next fiscal year.

Although our fund raisers are not the major financial success that they were when the Veterans Day Golf Tournament was in its prime, they do provide a steady portion of our income – about 5%. The last Veterans Day Golf Tournament, held in 2013, raised a small amount of money for the Video History Project and the Endowed Scholarship fund. Our on-going fundraisers include the Holiday Bake Sale which typically nets \$150 to \$250 for our operations and the Book Drive, which has generated between \$1,000 to \$2,500 per year for our Video History Project and our Scholarship Endowment. Recent improvements in our Book Drive advertising efforts have had beneficial



*Trudy Perez
Holiday Bake Sale 2017*

CHAPTER 7 – HEALTHY FINANCES

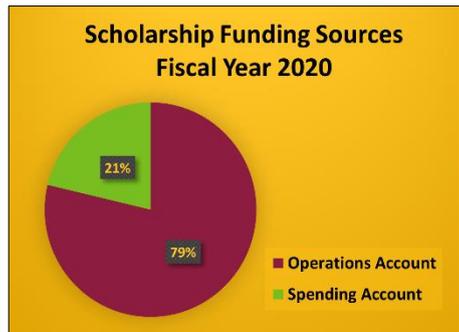
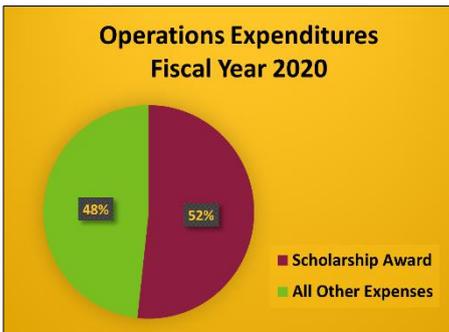
results, as book collections have been up considerably over what they were five years ago.

MANAGING OUR SCHOLARSHIP– IMPORTANT TO LONG-TERM FINANCIAL HEALTH

We have a long history of supporting a scholarship for a returning ASU student. The success of this program is highlighted in Chapter 4.

It is one thing to want to have a scholarship and another to pay for it. The first scholarship was paid entirely out of surplus operating funds, but by the second year the Board had decided an endowed scholarship made sense, and they created one with the ASU Foundation. The advantages of an endowed fund are that it is dedicated to the purpose established by its associated gift agreement, and it is invested by the Foundation with returns added to the fund.

The fraction of our scholarship endowment that can be spent each year on the scholarship award is determined by a Foundation formula. Once a year the Foundation places the calculated amount in a spending account associated with our scholarship endowment. This money can be spent only on the scholarship, or it can be re-invested in the endowment fund if we wish.

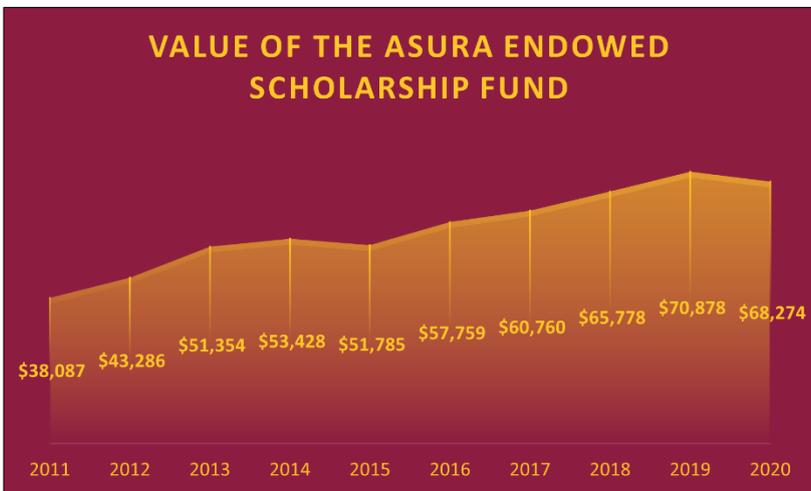


Currently, to pay for the scholarship each year we use all the money in the spending account and augment it with funds from our operations account. The two charts above show that in 2020 the scholarship made up more than 50% of our entire operations expenditures and that the spending account supplied about 21% of the scholarship.

CHAPTER 7 – HEALTHY FINANCES

This heavy reliance on operations funds means our Treasurer and Finance Committee must assess the financial health of our association to ensure we can afford the scholarship. We have not always used the spending account to pay toward the scholarship. In March of 2014, the Board adopted the Finance Committee’s policy recommendation that we routinely re-invest the spendable earnings from the Scholarship Endowment back into the endowment. In December 2016, the Board changed course on this and directed that the spendable earnings should be used to help fund the current scholarship.

It is interesting to note that when the endowment was established it was with a view that it would eventually have earnings sufficient to cover a year’s tuition and fees for an in-state student, which at that time totaled about \$2,000. At this point, that goal seems distant since current tuition and fees total around \$12,500. According to an analysis that Barry Bruns performed in February 2014, the fund balance would have to be about \$280,000 to yield \$10,000 per year. Perhaps the next decade will be able to quadruple the endowment fund. That would really be a wonderful achievement!

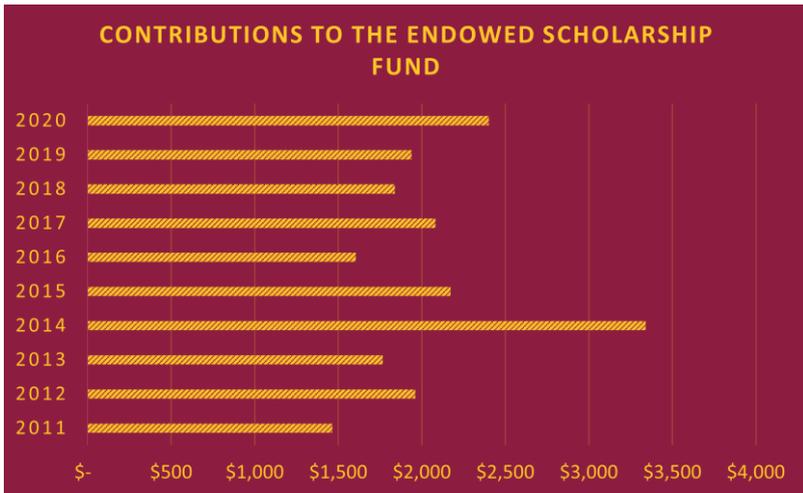


While the endowment is not yet big enough to pay for the scholarship, the chart above shows that the value of our scholarship endowment has come close to doubling over the past decade – from about \$37,000 at the start of the decade to over \$68,000 in March 2021. We can certainly feel some sense of

CHAPTER 7 – HEALTHY FINANCES

satisfaction about that! Growth in the endowed fund over the decade has come from:

- Member donations, which average about \$2,000 per year (see chart below).
- Fund-raising revenues -- about \$3,200 from the Book Drive project and \$1,300 from the 2013 Golf Tournament.
- Investment income, i.e., our share of what the Foundation earns on its combined invested funds.



FINANCIAL MANAGEMENT – A KEY TO FINANCIAL HEALTH

During the past decade we have benefited from good financial management practices created, improved, and followed by our Treasurers and Finance Committees. The people serving as Treasurer and Finance Committee Chair have been:

- Bill Moor (2011-2012 and 2017-2018)
- Barry Bruns (2012-14, 2015-2017, 2019)
- Connie McNeill (2014-15 and 2021)
- Jill Massara (2020).

CHAPTER 7 – HEALTHY FINANCES

One of the essential tools used by these officers and the Board is a budget, something that was not in evidence when Val Peterson took over the ASURA Presidency in April 2008. Although there *had* been budgets in previous years, the practice had lapsed. Val was an experienced manager and knew we should have a budget. He therefore saw to it that our financial records were reviewed and used to get us back on track with an official, approved budget. Treasurers since then have carried on the practice, annually presenting a proposed budget to the Board at its September meeting. Of course, it is not enough to have a budget: we also need to track income and expenditures against the budget. We do this via a Financial Report that our Business Manager prepares for Board meetings. Using these tools, the Board has the information it needs to make good financial decisions.

ASU Retirees Association ARIZONA STATE UNIVERSITY		ASURA Financial Report 7/1/2019 - 6/30/2020	
Account Categories	FY20 Approved Budget	Actual YTD Amount	COMMENTS
ASURA Operations			
ASURA Operations - Income			
Balance Forward	36,854	36,854	
Current Year Revenue			
Event Registration Fees & Donations Collected	2,000	2,375	
Membership Dues	14,000	14,559	
General Operations Donations	2,000	2,115	
Holiday Bake Sale 2019	200	131	
Transfer In	0	30	Credit card donation posted incorrectly
5% Gift Assessment	-780	-965	
Total ASURA Operations Current Year Revenue	17,420	18,236	
ASURA Operations - Expenses			
Printing and Mailing Costs			
Membership Drive	700	677	
Prime Times	2,300	4,199	Includes order for shells
Event Costs			
Paid Events	2,500	2,767	
Annual Meeting	1,500	200	
Meet & Greet Luncheon	400	858	
Holiday Potluck & Fundraiser	300	322	
Other Operations Costs			
Scholarship Award	7,700	7,700	\$10,000 award - \$2300 paid from Endowment
Business Luncheons & Service Appreciation	150	72	
Technology Services	3,500	191	Wild Apricot (2 yrs) Zenfolio (1 yr)
Office Equipment & Supplies	700	1,105	Includes postage
Marketing Supplies	500	449	
Seminars	1,200	300	
Foundation Transaction Fees	200	93	
Transfer to Adopt-A-Family	1,000	1,000	Cover possible shortage of funds
Total ASURA Operations Expenses	22,850	19,933	
Increase (Decrease) in Fund Balance for Current Year	-5,430	-1,697	
Uncommitted ASURA Operations Funds	31,424	35,157	

The Final Financial Report for Fiscal Year 2020

To ensure that member donations to our projects are spent on those projects, and to comply with Foundation policy, in January 2013 we established separate accounts for the Video History Project, our Adopt-a-Family project, and the history book. These had formerly all been lumped into a single account called “Special Projects”. It took some analysis of historical records to determine how much of that single lumped account belonged in each of the new accounts – but doing so led to a definite improvement in the handling of our finances.

CHAPTER 7 – HEALTHY FINANCES

Another major step forward in improving our financial management came in 2014, with the establishment of the annual Financial Health Report. The Finance Committee prepares this report each September to accompany the proposed budget. It is a means of assessing our longer-term financial status, and therefore provides context for the proposed budget.

At the request of then-President Barry McNeill, Barry Bruns and his Finance Committee developed the definitions that the Financial Health Report uses, along with a recommendation about how much of a cash reserve the organization should have and what to do if the reserve becomes “too big”. Barry McNeill says, “I wanted the Board to have a better sense of how our organization is faring financially over time, primarily so that we would be able to make an informed decision about funding the ASURA Scholarship, which is by far our biggest single expense.” The Financial Health Report caused a recommendation in 2017 that we lower the amount of the scholarship award until our financial health improved, which it had done by the next year.



Barry Bruns

Our bylaws require that the Finance Committee shall “annually review expenditures of the association for reasonableness and consistency with the budget.” This has been faithfully done every year of the past decade, with the help of Jerry Snyder. Jerry has conducted a review of our budget, financial records, and Foundation account reports, then presented his findings and recommendations to the Finance Committee. The Committee then reviews everything and presents its final findings and recommendations to the Board. The process has routinely found that everything is in order, and on a few occasions has resulted in small changes to reporting and expenditure patterns.

CHAPTER 7 – HEALTHY FINANCES

The fact that our accounts are held at the ASU Foundation provides us with several financial management benefits. Foundation procedures assure that we have proper approval on transactions and review credit card expenditures monthly. Foundation accountants are available to help resolve problems that we may run into. We use Foundation software for entering



Jerry Snyder

transactions and obtaining reports on our accounts. The Foundation issues gift receipts for all donations to our accounts. And the Foundation holds overall tax-exempt (501C3) status, so that we have not had to apply for that status on our own nor file the required annual returns.

FINANCIAL PROCESSES & RECORDS – ORDERLY AND RELIABLE

In order for any of the financial management measures described above to work, we need reliable and careful handling of the day-to-day business: purchases have to be made, donations have to be processed, records have to be maintained, reports generated, etc.

During this past decade, this has been the province of our Business Manager Carolyn Minner. Carolyn and Connie McNeill had worked together at the West campus prior to their retirements, and when Corinne Irvan stepped aside from the office manager role for the association in 2007, Connie immediately asked Carolyn to volunteer. Carolyn saw that there was little in the way of records or information to begin with, but she said enthusiastically, “You and I can whip this organization into shape in a year!” Carolyn certainly has done her part to bring order, reliability and openness to our financial transactions and records. Barry Bruns says, “Carolyn makes the job of Treasurer very easy.”

CHAPTER 7 – HEALTHY FINANCES

Here are a few examples of what Carolyn does as our Business Manager:

- Process purchase requests.
- Work with the Foundation to issue credit cards to volunteers who need them, and review charges to the cards.
- Prepare mailings for ASU Mail Services.
- Keep local books and use them to prepare our regular Financial Reports.
- Reconcile the local books with the Foundation records.
- Process donations.
- Provide reports to the Finance Committee for its annual review of finances, and respond to any request for further research or information.

Carolyn also maintains records in our membership database. The membership database is discussed in Chapter 8.

About her work for the ASURA Carolyn says, “I am happy to be involved in the procedures for maintaining membership and financial records. It is so similar to the responsibilities I had when working that it seemed the perfect way for me to contribute to the success of the organization.”



Carolyn Minner

CHAPTER 7 – HEALTHY FINANCES

Other officers and Board members also have great confidence in the records. So much so that in February of 2021 the Board voted to commend Carolyn as follows, “Resolved: That Carolyn Minner, ASURA Business Manager, be commended by the Board of Directors for her record of outstanding work on behalf of ASURA. Our organization has long benefited from Carolyn's financial expertise, wise judgment, and overall management of our detailed budget. We hereby recognize her valuable continuing service to ASURA and heartily thank her for the important role she plays in maintaining the success of our organization.”



Carolyn Minner and Mary Stevens

CHAPTER 8 – SUSTAINABLE OPERATIONS

We are an all-volunteer organization with a new president every year. There are over twenty other officers, Board members, committee chairs, and office staff, and many more committee members. When someone decides to step aside from one of these positions, there may not be much transfer of knowledge from the predecessor about what was done and how it was done. In fact, there have been some periods in our history when we suffered from a loss of continuity, particularly when the long-time business manager Corrine Irvan left in 2007.

In the past decade, however, we have continued to carry out our mission with hardly a hiccup, even when the global pandemic made it difficult to chat with colleagues to share ideas and information. What was different? There is no question that we benefited from having many dedicated long-term volunteers who know a lot about what and how to do things and who are happy to share their knowledge. But we also made tremendous improvements in the documentation, systems, and records that our volunteers use to carry out their duties. Even long-term volunteers now rely on the documentation and systems to stay on track, and new volunteers use them to get a running start.



*A Knowledgeable ASURA Group - March 2015
Presidents Elmer Gooding, Dave Scheatzle, Hal White, Barry McNeill, Connie McNeill, Dave Schwalm, and Bill Moor*

CHAPTER 8 – SUSTAINABLE OPERATIONS

Our Board relies on the records and reports that our volunteers capably maintain and produce. Truly, great progress toward making our operations sustainable was made during this past decade.

PROCESS DOCUMENTATION

During the last decade, we created a web of interconnected documents describing how and/or when various operations are carried out. This documentation web helps guide the volunteers in making things happen. The project to create it started at the end of the second decade, when then-President Connie McNeill created an Administrative Operations Calendar/Checklist to help future presidents. That single document has become one of well over 75 process documents in use at the end of this third decade. Documentation covers everything from that “umbrella” Operations Checklist, to how to set up and advertise an event, down to how to add a video clip to our website.

Date	Task	Responsibility Of
April	Organize and deliver New Board Member Orientation	President and/or delegate
late April	Update Executive & Board Members, Chairs, and Liaisons Groups	Secretary
late April	Review and update as necessary the Apricot "Menu Access" group and website Admin privileges	Technology Manager

The Top of the 4-Page Operations Checklist

The lack of formal process documentation was not keeping the association from operating, but as President Barry McNeill said in 2013, “It is difficult to recruit someone to chair a committee if I cannot tell them how the committee has operated.” Barry, who has an engineering systems background and is very detail-oriented, started the non-trivial task of creating documentation for each volunteer position. He asked current volunteers to document their processes. He collected their responses and posted them on our

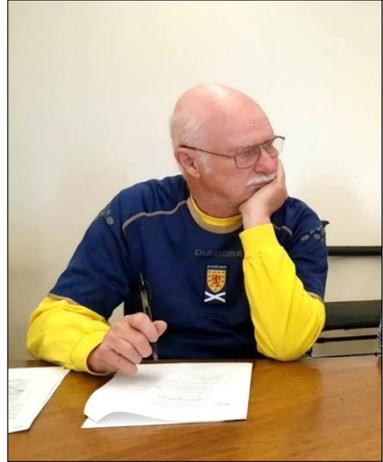
CHAPTER 8 – SUSTAINABLE OPERATIONS

website in an area reserved for volunteers. Over the decade many volunteers added to and/or updated these initial descriptions.

It is one thing to create this web of information, but it is another to know if it is used. Comments from volunteers show that it is used.

- Jeri Meeks says, “The Operations Checklist was my lifeline as President. I really appreciated the calendar format listing the responsible person(s) and links to the procedures.”
- Tara Roesler says, “This checklist (Operations) is the BEST thing the organization has developed for those serving as officers.”
- Becky Reiss, who has been responsible for publishing obituaries since 2002, says, “Even though I’ve been editing and posting obituaries for as long as I have, I still refer to Barry and Connie McNeill’s documentation.”

Process documentation is important to the ASURA office volunteers when they are registering people for events. Linda Van Scoy, Co-Office Manager, says “I think I speak for all the office volunteers when I say we would be lost without the ASURA Event Processes. They are pretty much our Go-To Bible. With office volunteers coming and going, or simply, time passage between events, the Event



Barry McNeill



Carol Berg and Bev Buddee Registering Attendees

CHAPTER 8 – SUSTAINABLE OPERATIONS

Registration process documentation is key to our operation.”

Retirees forget steps particularly if the process is not done every day. Documentation is a useful way to bridge the gap. Pat Schneider, Board Secretary mentioned, “When you only do something once a month, the step-by-step instructions serve to keep you on track!” Jane Carey adds, “After a summer away, I relied heavily on the step-by-step instructions to refresh my memory. This documentation is instrumental to the ongoing success of ASURA.”



Jane Carey and Jo Madonna

Joy Shearman, Scholarship Chair, comments on the importance of the documentation to continuity, saying, “When I became chair, I had the written information available to update, keep current and make changes to fit the present needs, and that is now stored. I am now referring to that detailed, step by step document, to orient someone to take over for me. This is so important to keep the committees in an organization moving and functioning smoothly through changes. It certainly makes new chairs very happy to have all the information available!!”

Jo Madonna - Past President, Board Secretary, and chair of numerous committees summarizes when she says, “I can’t imagine how much harder it would have been to take on the tasks and responsibilities of the various roles

CHAPTER 8 – SUSTAINABLE OPERATIONS

that I had with ASURA without the “how-to’s” documented by others who had served in these roles. These documents provide the institutional memory that allows us to carry on without becoming frustrated and overwhelmed by the need to start from zero.”

MEMBER AND EVENT MANAGEMENT SOFTWARE

During the second decade we had begun to move into the digital age. Bob Beeman, our fourth President, created a website, Dave Scheatzle, our fourteenth President, moved our membership data to a computer database, and we began communicating with our members via email.

As the third decade began to unfold it was clear that our membership database was not sustainable over the long term. It required specialized software skills to maintain and use for reporting. Connie McNeill had taken it over, and she was now our only volunteer with the necessary knowledge. Implementing new policies and features was becoming increasingly complex, and she had no luck recruiting someone else to help or take over. We needed to move to a commercially available system for our membership processes. We also needed technology that would help us advertise and manage our events more efficiently.



Connie McNeill Demonstrating Wild Apricot to a Group of Past Presidents - January 2013

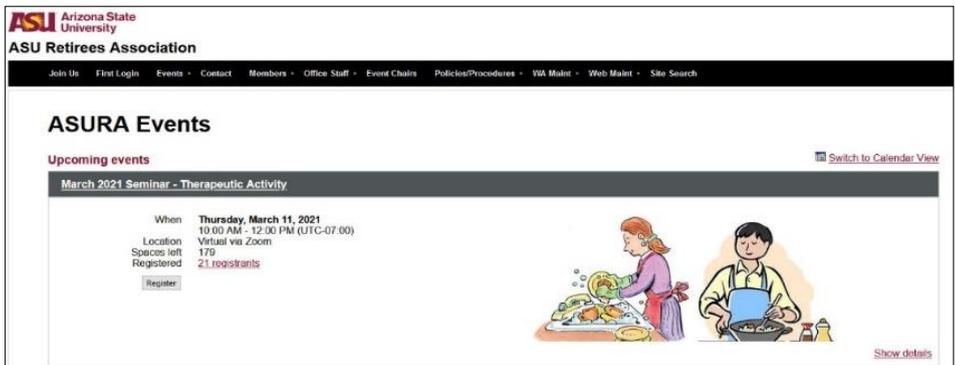
Therefore, during the summer of 2012 Connie led a small team to review possible solutions. They quickly settled on Wild Apricot, a web-based product that is designed to help small groups manage membership and events. It was also affordable – a key feature! In August, after taking advantage of a free trial period to learn more about Wild Apricot’s features, the team asked

CHAPTER 8 – SUSTAINABLE OPERATIONS

the Executive Committee to approve signing up for the first year. With their approval in hand, the team began to migrate our member data to Wild Apricot.

Using Wild Apricot was a functionality sea change: we now had access to a wide variety of membership and event management features. We could easily, i.e., without programming skills:

- Create and advertise events and provide for on-line registration.
- Allow members to update their own member profiles and access a member directory.
- Manage our annual membership drive, including sending automated emails and keeping track of renewals.
- Mail and email to subsets of our members, e.g., those who want to receive obituary notices or Board meeting materials.
- Authorize specific volunteers to access and update records via a web interface.
- Import new membership records for new retirees.
- Get lists of potential volunteers for use by committee chairs.



The screenshot shows the ASU Retirees Association website. At the top, there is a navigation bar with links: Join Us, First Login, Events, Contact, Members, Office Staff, Event Chairs, Policies/Procedures, VIA Maint, Web Maint, and Site Search. Below the navigation bar, the page title is "ASURA Events". Underneath, there is a section for "Upcoming events" with a "Switch to Calendar View" link. The main event listed is "March 2021 Seminar - Therapeutic Activity". The event details are as follows:

When	Thursday, March 11, 2021 10:00 AM - 12:00 PM (UTC-07:00)
Location	Virtual via Zoom
Spaces left	179
Registered	21 registrants

Below the event details, there is a "Register" button and an illustration of two people, a woman and a man, preparing food. A "Show details" link is located at the bottom right of the event advertisement.

An Event Advertisement on Wild Apricot – February 2021

Of course, we cannot do any of these things unless the membership database is current and accurate. Much day-to-day effort goes into adding and updating records, creating emails, and checking for accuracy. Carolyn Minner has been doing most of the member record maintenance since before we made the move to Wild Apricot. Barry McNeill posts most new events and creates the event announcements. The office volunteers record event registrations for

CHAPTER 8 – SUSTAINABLE OPERATIONS

those who choose not to register online. Beginning in 2020, Paul Harper took over the job of importing new retirees from files provided by HR. Others also help maintain various aspects of the membership database.

The Wild Apricot system has proved flexible enough to support changes in policy that the Board has chosen to make, such as the decision to provide free introductory memberships to new ASU retirees.

The Board uses the monthly Membership Report to inform discussions about how we are doing with recruiting, retaining, and engaging members. Carolyn Minner runs a set of database integrity tests and prepares the report every month except June and July.

All our volunteers appreciate the tremendous improvement it makes to have a good system to manage our membership and events. Dave Schwalm speaks for many when he says, “It makes my job easier when I am provided with such good information.”



Carolyn Minner

There is little doubt that ASURA is benefiting from the major improvements made to our operations during this past decade.

CONCLUSION

So there you have it. You completed your tour of ASURA's third decade museum. But before you exit the building, perhaps you would like to take a moment to reflect on the people and exhibits you have seen.

You met our members and should feel heartened that our membership renewals are getting stronger. You got a personal look at each of the last decade's presidents and their universal feeling of being proud of their own service and impressed by the volunteers who worked with them.

You had a tour of our many events and had a chance to appreciate the variety of ways available for our members to socialize and learn together. So much new was added in these past ten years!

You must have been surprised and grateful to learn how much work our government and health liaisons do to make sure that we are represented in decisions that affect us, and how often our association has used its strength to argue on behalf of retirees, especially ASU retirees.

Doubtless you loved meeting the students who were awarded our ASURA Re-entry Scholarship. Aren't you proud to have helped support these deserving students and the families reached by our Adopt-a-Family program? And you mostly likely were impressed by what the Video History Committee has done to preserve the interesting stories told by people who have helped build ASU.

When you met the volunteers who produce our many forms of communications and talked with them about what they do to keep you informed, did you feel appreciative, and maybe inspired to take more advantage of information the association provides?

CONCLUSION

Perhaps you had not realized what a beneficial relationship we have with ASU, and how lucky we are to have it. When you walked the Beneficial ASU Relationship Corridor and talked to the people there, were you gratified to know that not only does ASU help us, but we also help ASU?

Not everyone is interested in finances, but healthy finances are essential to any organization's existence. After viewing the graphs and meeting the people who take good care of the money, are you satisfied with our overall good financial health? Perhaps you were motivated to help raise money for our scholarship endowment fund – a project for the fourth decade!

And lastly, did you get a feeling of well-being as the fourth decade begins, knowing that our association has documentation, systems, and procedures in place that will help those who take on the new challenges get off to a good start?

As you exit the building, celebrate! And then begin to build the fourth decade's legacy.



APPENDIX 1 – ASURA BYLAWS

APPENDIX I – ASURA BYLAWS

BYLAWS
ARIZONA STATE UNIVERSITY RETIREES ASSOCIATION

ARTICLE I. Name

The name of this organization shall be The Arizona State University Retirees Association, also referred to as ASURA or Association herein.

ARTICLE II. Purposes

- A. To work on behalf of retired Arizona State University personnel to ensure that they receive maximum retirement benefits and to communicate membership concerns to representatives of the University, legislators, state government agencies and other groups affecting the welfare of retired persons.
- B. To work for the improvement of the retirement program of Arizona State University and to ensure that Association members are made fully aware of the nature and extent of their retirement benefits.
- C. To contribute to the general public understanding about the issues of concern to retired persons.
- D. To assist ASU retired persons so that they can continue their association with the University and continue to receive University benefits including, but not limited to, course registration and entertainment event discounts, volunteering for University programs, and continuing in their professional and educational activities.
- E. To facilitate continuing contributions by members to the furtherance of the objectives of Arizona State University.
- F. To sponsor educational, charitable, service, historical and other programs relating to interests of ASURA retired members.

ARTICLE III. Membership

A. Eligibility

Persons eligible for membership are:

- Retired employees of Arizona State University.

APPENDIX I – ASURA BYLAWS

- Retired persons who were former employees of ASU.
- Those who are approaching retirement from ASU.
- Retirees from other universities.
- Surviving partners of deceased ASURA members.
- Other individuals with approval by a majority vote of the Board of Directors.

The Board of Directors may also appoint individuals of their choice to “Honorary Member” status through a majority vote. The appointment may be for an indefinite or a fixed term. Honorary Members do not pay dues, and therefore do not vote. Honorary status for an individual may be revoked through a majority vote of the Board.

B. Dues

Members, except for Honorary Members, shall pay annual dues in an amount set by the Board. Dues shall be for a fiscal year beginning July 1. Payment of dues covers participation of a member’s partner in all ASURA activities, except voting.

C. Vote Entitlement

Payment of annual membership dues entitles the member to one vote.

D. Association Meetings

Association meetings are meetings open to all ASURA members.

1. Annual Meeting

The President shall call an annual meeting of all members of ASURA in each fiscal year. The annual meeting shall be held in April, at a time and place designated by the Board. At this meeting the members of the Association shall transact such business as may be properly presented for action by the members and the Board.

2. Other Meetings of the Association

Additional Association meetings may be initiated by the Board, or upon written request of ten (10) members, submitted to the Board.

APPENDIX I – ASURA BYLAWS

3. Quorum

The voting members present at an Association meeting shall constitute a quorum.

ARTICLE IV. Board of Directors

A. Purpose

The Board of Directors shall manage the affairs of the Association and shall establish policies as needed to carry out the purposes of the Association.

B. Composition

The Board of Directors shall consist of fifteen (15) elected voting members. In the case where the regular Board term of the current President, Vice President, or Immediate Past President has expired, this officer will sit as an additional member of the Board. To facilitate communication between ASURA and ASU organizations (as determined by the Board), representatives from those organizations will serve on the Board as ex-officio members in a non-voting, advisory capacity. Ex-officio members have automatic Honorary Member status in the ASURA for the duration of their service.

C. Eligibility for Board Membership

All current members, except Honorary Members, are eligible for membership on the Board.

D. Term of Office

Members of the Board shall be elected for a term of three (3) years. Board members shall not be eligible to serve consecutive terms whether elected, appointed, or serving by virtue of office. One third of the members shall be elected annually. Any mid-term vacancy on the Board shall be filled by nomination by the President and approval by the Board.

E. Elections

The members of the Board shall be elected by ballot according to the following timeline. Election shall be by a plurality of votes cast.

APPENDIX 1 – ASURA BYLAWS

1. By Mid-December: The Immediate Past President shall inform the membership of ASURA’s nominating procedure and invite suggestions from the membership through a *Prime Times* issue, notice on the ASURA Web site, and email notice to members. At this time the Past President shall also appoint a Nominating Committee, which shall include at least four members of the Association. The committee membership shall be representative of the various constituencies in the membership.
2. By January 31: The Nominating Committee shall prepare a slate of at least five names for the ballot. To the extent possible, the Board shall be representative of the several constituencies of the Association. The slate shall include the names of members agreed upon by the committee and also names of members nominated through petitions received by the Chair of the Nominating Committee by this date. Such nominating petitions must bear the signatures of at least ten ASURA members.
3. By February 7: The ballots shall be distributed to the membership.
4. By February 28: Ballots must be received in the ASURA Office in order to be counted in the election.
5. By March 5: The Executive Committee shall count the ballots. The President shall announce the results to the Board prior to its March meeting and to the membership at the Annual Meeting.
6. Newly elected members of the Board shall assume their duties at the conclusion of the Annual Meeting.

F. Board Meetings

1. Regular Meetings

The Board shall meet monthly during the academic year, unless otherwise agreed to. The time and place of such meetings shall be established by the Board.

APPENDIX I – ASURA BYLAWS

2. Special Meetings

Special meetings of the Board may be held upon the call of the President or upon request of any three (3) members of the Board.

3. Notice of Meetings

The Secretary shall provide the agenda for upcoming Board meetings, along with meeting date, time and place to each Board member at least three days prior to the meeting date.

4. Quorum

A majority of the members of the Board shall constitute a quorum.

ARTICLE V. Officers

A. Composition

The officers of the Association shall be President, Vice President, Secretary, Treasurer, and Immediate Past President.

B. Election

The incoming President in consultation with the Executive Committee shall propose a slate of officers. The Board shall elect the officers from among its continuing members at its March meeting.

C. Term

The term of office shall normally be one year. The Presidency, Vice Presidency and Past Presidency are limited to one full term. The other officers are limited to two consecutive full terms.

Any mid-term vacancy on the Executive Committee other than the President shall be filled from among the current Board membership through nomination by the President and approval by the Board.

In the event of the President's resignation, permanent disability or death, the Vice President shall succeed to the Presidency for the remainder of the term of office, and will then serve the subsequent full term as well, during which time there will be no Immediate Past President.

All officers serve at the pleasure of the Board.

APPENDIX I – ASURA BYLAWS

D. Duties

1. Executive Committee

As a group, the officers shall form the Executive Committee. Under the President's leadership, the Executive Committee shall plan meetings of the Board and meetings of the Association, and shall administer the various functions of the Association consistent with the Board's policies. Annually, between May and September, the Executive Committee shall select chairs of the Standing Committees for the year. The Executive Committee shall present the list of committee chairs to the Board for ratification at the September Board meeting. The Executive Committee shall appoint personnel as needed to carry out the operations of the ASURA, for example a business officer and an information technology officer.

2. President

The President shall serve as the chief elected officer of the Association and shall preside at all Executive Committee and Board of Directors meetings and at meetings of the Association. The President shall be responsible for community and University relations. The President shall ensure that an Annual Report is generated for distribution to the membership at the Annual Meeting. The President shall have signature authority on all ASURA financial accounts.

3. Vice President

The Vice President is President-Elect and will succeed to the Presidency automatically. In the case of temporary absence or disability of the President, the Vice President shall perform all the duties of the President and when so acting shall have all the powers of, and be subject to, all restrictions upon the President. The Vice President shall have signature authority on all ASURA financial accounts.

4. Secretary

The Secretary shall prepare or cause to be prepared minutes of all Board meetings and all Association meetings, and shall submit such minutes to the Board for approval at its next meeting. The Secretary

APPENDIX I – ASURA BYLAWS

shall also keep or cause to be kept at the principal office of the Association, or such other place as the Board of Directors may order, all records, including, but not limited to, the Bylaws and a Book of Minutes of all meetings of the Board of Directors and of the Association, with the time and place of holding, the notice thereof given, the names of those present at Board of Directors meetings, the number of votes represented at meetings of the Association, and the proceedings thereof. The Secretary shall give, or cause to be given, notice of all Board meetings to the Board of Directors and notice of all Association meetings to the members.

5. Treasurer

The Treasurer shall keep and maintain, or cause to be kept and maintained, adequate and correct accounts of the properties and business transactions of the Association, including accounts of its assets, liabilities, receipts, disbursements, gains, losses, and surplus. The Treasurer shall deposit, or cause to be deposited, all monies and other valuables in the name of, and to the credit of the Association, with such depositories as may be designated from time to time by the Board of Directors. The Treasurer is authorized to disburse the funds of the Association, or cause them to be disbursed, within the limits of the annual budget as approved by the Board of Directors without the necessity of further authorization, subject to further directions of the Board and consistent with policies of the financial institutions used by the ASURA. The Treasurer shall have signature authority on all ASURA financial accounts. The Treasurer shall present a statement of current financial status of the Association as directed by the Board, and shall arrange for an annual review of the financial records of the Association by the Finance Committee. On request, the President or Treasurer shall provide any Board member access to the ASURA books of accounts.

6. Immediate Past President

The Immediate Past President shall serve as a voting member of the Board and Executive Committee, and shall serve as Chair of the Board

APPENDIX I – ASURA BYLAWS

Nominating Committee. The Immediate Past President shall have signature authority on all ASURA financial accounts.

ARTICLE VI. Committees

A. Standing Committees and Liaisons

Standing Committee chairs are appointed annually by the Executive Committee, and their appointments are ratified by the Board. Committee chairs shall appoint members to their committees with the assistance of the Executive Committee as needed, shall oversee committee meetings and activities, and shall report regularly to the Board on their activities.

1. Government Liaisons

The Government Liaisons shall act as agents 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. The liaisons shall be responsible for planning and directing any ASURA membership efforts to exert influence on designated agencies. They shall consult with the Board in the planning of their activities, and base their advocacy activities on prior approval by the Board. The liaisons shall include a person assigned to oversight of the Legislature, and a person assigned to oversight of the ASRS.

2. Community Outreach Committee

The Community Outreach Committee shall identify and promote opportunities for members to donate or volunteer resources to better our community and to oversee any outreach programs designated by the Board, such as Adopt-a-Family, Scholarship, Video History, and other volunteer programs.

3. Events Committee

The Events committee shall plan and provide for educational programs and for activities such as the Retirees Day, luncheons, tours and travel, and other interests as indicated by the members.

4. Finance Committee

The Finance Committee shall make recommendations regarding current and future financial matters related to the business of the

APPENDIX I – ASURA BYLAWS

Association. It shall also annually review expenditures of the Association for reasonableness and consistency with the budget. Results of the annual review shall be presented to the Board within five months of the close of the fiscal year.

5. Health Insurance Liaisons

The Health Insurance Liaisons shall monitor existing health insurance programs for University retirees, propose improvements in insurance programs, and suggest actions that should be taken by the Association to provide the best possible health insurance coverage for its members. The liaisons shall also help make the members aware of their health insurance options.

6. Membership and Communications Committee

The Membership and Communications Committee shall stimulate and develop Association membership. The committee shall promote and facilitate communication with the membership using such methods as direct mailings, newsletters, electronic mail, and the Association Web site.

B. Subcommittees

The Standing Committees may appoint such subcommittees as may be essential to the accomplishment of their business. The subcommittees shall report directly to the committees that appointed them.

C. Term of Office

Members of the Standing Committees shall serve a one-year term and are eligible for successive reappointment.

D. Other Committees

The Board may appoint other committees as necessary. These committees shall report to the Board and shall serve at its pleasure.

ARTICLE VII. Association Fiscal Year

The fiscal year of the Association shall close on June 30 of each year.

ARTICLE VIII. Amendments

The Bylaws may be amended by a two-thirds majority of the ballots returned in a written and/or electronic poll of the members. The Board shall approve proposed amendments to the Bylaws before they are submitted to the ASURA membership for a vote. A period of thirty (30) days from the date of mailing must be allowed for the receipt of valid ballots.

ARTICLE IX. Rules

A. Parliamentary Rules

The current edition of Robert’s Rules of Order, Newly Revised, governs this organization in all parliamentary situations not provided for in the bylaws or rules of the Association, or of the University, or relevant State or Federal law.

B. Regulating Rules

Such Rules as may be deemed appropriate and consistent with these bylaws may be adopted for the purpose of regulating the business procedures and other ongoing activities of the association. Regulating rules may be added, modified, or deleted by a majority vote of the Board of Directors.

APPENDIX 2 – OFFICERS AND LEADERS

APPENDIX 2 – OFFICERS AND LEADERS

2011-2012 OFFICERS AND LEADERS

President: Dave Schwalm
Past President: Connie McNeill
Vice President: Sheila Stokes
Secretary: Barry Leshowitz
Treasure: Bill Moor

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

Committee Chairs / Liaisons

Community Outreach

Adopt-a-Family	Joan Leard
Scholarship	Sue Blumer
Video History Project	Linda Van Scoy

Events

Luncheons & Special Events	Barbara Bradford Eschbach
Retirees Day	Barry McNeill
Seminars	Gary Kleemann
Travel	Bill Stasi & Gary Anderson

Finance

Mary Stevens

Legislative / Insurance Liaisons

State Legislative	Jerry Aronson
ASRS	Dick Jacob
Health Insurance Liaisons	Rose Minetti / Doug Johnson

Membership and Communications

Membership	Elmer Gooding
Obituaries	Becky Reiss
Prime Times	Wilma Mathews & Jeannette Robson
Web & Technology	Connie McNeill

Business Manager

Carolyn Minner

Office Coordinator

Carol Moore

APPENDIX 2 – OFFICERS AND LEADERS

2012-2013 OFFICERS AND LEADERS

President: Bill Moore
Past President: Dave Schwalm
Vice President: Barry McNeill
Secretary: Barry Leshowitz / Jo Madonna
Treasure: Barry Bruns

Board Members: Art Ashton (beg. Oct 2012), Barry Bruns, Barbara Bradford Eschbach, Elmer Gooding, Dick Jacob, Dick Kelly, Gary Kleemann, Barry Leshowitz (through Sept 2012), Jo Madonna, Wilma Mathews, Barry McNeill, Bill Moor, Jeannette Robson, Dave Scheatzle, Dave Schwalm, Joy Shearman, Bill Stasi

Committee Chairs / Liaisons

Community Outreach

Adopt-a-Family Joan Leard
Scholarship Sue Blumer
Video History Project Linda Van Scoy

Events

Luncheons & Special Barbara Bradford Eschbach
Events
Retirees Day Barry McNeill
Seminars Gary Kleemann
Travel Bill Stasi & Gary Anderson
Golf Tournament Dave Schwalm

Finance

Mary Stevens

Legislative / Insurance Liaisons

State Legislative Jerry Aronson
ASRS Dick Jacob
Health Insurance Rose Minetti / Doug Johnson / Art Ashton
Liaisons

Membership and Communications

Membership Elmer Gooding
Obituaries Becky Reiss
Prime Times Wilma Mathews & Jeannette Robson
Web & Technology Connie McNeill

Business Manager Carolyn Minner

Office Coordinator Carol Moore

APPENDIX 2 – OFFICERS AND LEADERS

2013-2014 OFFICERS AND LEADERS

President: Barry McNeill
Past President: Bill Moore
Vice President: Jo Madonna
Secretary: Glen Irvin
Treasure: Barry Bruns

Board Members: Art Ashton, Barry Bruns, Barbara Bradford Eschbach, Cecelia Fiery, Elmer Gooding, Karen Hammann, Glenn Irvin, Dick Kelly, Gary Kleemann, Jo Madonna, Barry McNeill, Bill Moor, Jeannette Robson, Bill Stasi, Jan Thompson, Hal White,

Committee Chairs / Liaisons

Community Outreach

Adopt-a-Family	Joan Leard
Scholarship	Sue Blumer Joy Shearman
Video History Project	Linda Van Scoy

Events

Luncheons & Special Events	Barbara Bradford Eschbach
Retirees Day	Barry McNeill
Seminars	Jan Thompson
Travel	Gary Anderson
Golf Tournament	Dave Schwalm

Finance

Barry Bruns

Legislative / Insurance Liaisons

State Legislative	unstaffed
ASRS	unstaffed
Health Insurance Liaisons	Art Ashton / Patricia Moore / Phyllis Primas

Membership and Communications

Membership	Dave Schwalm
Obituaries	Becky Reiss
Prime Times	Wilma Mathews & Jeannette Robson
Web & Technology	Connie McNeill

Business Manager

Carolyn Minner

Office Coordinator

Carol Moore

APPENDIX 2 – OFFICERS AND LEADERS

2014-2015 OFFICERS AND LEADERS

President: Jo Madonna
Past President: Barry McNeill
Vice President: Jim Fordemwalt
Secretary: Glen Irvin
Treasure: Connie McNeill

Board Members: Larry Carlson, Joyce Hartman Diaz, Jim Fordemwalt, Elmer Gooding, Karen Hammann, Glenn Irvin, Ruth Kingsley, Gary Kleemann, Jo Madonna, Barry McNeill, Connie McNeill, Trudy Perez, Jeannette Robson, Bill Stasi, Jan Thompson, Hal White

Committee Chairs / Liaisons

Community Outreach

Adopt-a-Family	Joan Leard
Scholarship	Sue Blumer
Video History Project	Dave Scheatzle

Events

Luncheons & Special Events	Barbara Bradford Eschbach
Seminars	Jan Thompson
Pre-retirement Seminars	Trudy Perez
Travel	Gary Anderson

Finance Connie McNeill

Legislative / Insurance Liaisons

State Legislative	Hal White
ASRS	Larry Carlson
Health Insurance Liaisons	Art Ashton / Larry Carlson / Joyce Hartman Diaz

Membership and Communications

Membership	Dave Schwalm
Obituaries	Becky Reiss
Prime Times	Wilma Mathews & Jeannette Robson
Web & Technology	Connie McNeill

Business Manager Carolyn Minner
Office Coordinator Carol Moore

APPENDIX 2 – OFFICERS AND LEADERS

2015-2016 OFFICERS AND LEADERS

President: Jim Fordemwalt
Past President: Jo Madonna
Vice President: Barbara White
Secretary: Bev Buddee
Treasure: Barry Bruns

Board Members: Barry Bruns, Bev Buddee, Larry Carlson, Joyce Hartman Diaz, Jim Fordemwalt, Bob Francis, Karen Hammann, Glenn Irvin, Ruth Kingsley, resigned and replaced 2/2016 by Barry McNeill, Jo Madonna, Larry Mankin, Trudy Perez, Jeannette Robson, Jan Thompson, Barbara White, Hal White

Committee Chairs / Liaisons

Community Outreach

Adopt-a-Family Joan Leard
Scholarship Sue Blumer & Joy Shearman
Video History Project Dave Scheatzle

Events

Luncheons & Special Joyce Hartman Diaz
Events
Seminars Jan Thompson
Pre-retirement Seminars Trudy Perez
Travel John Brock

Finance

Barry Bruns

Legislative / Insurance Liaisons

State Legislative Jeri Meeks
ASRS Larry Carlson
Health Insurance Larry Carlson / Joyce Hartman Diaz
Liaisons

Membership and Communications

Membership Dave Schwalm
Obituaries Becky Reiss
Prime Times Wilma Mathews & Jeannette Robson
Web & Technology Connie McNeill

Business Manager

Carolyn Minner

Office Coordinator

Carol Moore

APPENDIX 2 – OFFICERS AND LEADERS

2016-2017 OFFICERS AND LEADERS

President: Barbara White / Jeri Meeks
Past President: Jim Fordemwalt
Vice President: Tara Roesler
Secretary: Bev Buddee
Treasure: Barry Bruns

Board Members: Tony Brazel, Barry Bruns, Bev Buddee, Jay Q. Butler, Larry Carlson, Joyce Hartman Diaz, Jim Fordemwalt, Bob Francis, Larry Mankin, Barry McNeill, Jeri Meeks, Trudy Perez, Jeannette Robson, Tara Roesler, David Schwalm, Barbara White (resigned 9/2016 replaced by Connie McNeill)

Committee Chairs / Liaisons

Community Outreach

Adopt-a-Family Joan Leard
Scholarship Sue Blumer & Joy Shearman
Video History Project Dave Scheatzle

Events

Luncheons & Special Joyce Hartman Diaz
Events
Seminars Bev Buddee
Pre-retirement Seminars Trudy Perez
Travel John Brock

Finance

Barry Bruns

Legislative / Insurance Liaisons

State Legislative Jeri Meeks
ASRS Larry Carlson / Tara Roesler
Health Insurance Larry Carlson / Tara Roesler
Liaisons

Membership and Communications

Membership Dave Schwalm
Obituaries Becky Reiss
Prime Times Jeannette Robson
Web & Technology Connie McNeill

Business Manager

Carolyn Minner

Office Coordinator

Nancy Lesko & Linda Van Scoy

APPENDIX 2 – OFFICERS AND LEADERS

2017-2018 OFFICERS AND LEADERS

President:	Jeri Meeks
Past President:	Vacant filled by Barry McNeill
Vice President:	Tara Roesler
Secretary:	Bev Buddee
Treasure:	Bill Moor

Board Members: Tony Brazel, Barry Bruns, Bev Buddee, Jay Q. Butler, Bob Francis, Betty Landon, Larry Mankin, Connie McNeill, Jeri Meeks, Bill Moor, Don Nilsen, Kathleen Renshaw, Tara Roesler, Pat Schneider, David Schwalm

Committee Chairs / Liaisons

Community Outreach

Adopt-a-Family	Joan Leard
Scholarship	Sue Blumer & Joy Shearman
Video History Project	Dave Scheatzle

Events

Luncheons & Special Events	Bonnie Scheall
Seminars	Bev Buddee
Pre-retirement Seminars	Trudy Perez
Travel	John Brock

Finance

Bill Moor / Marry Stevens (Book Sales)

Legislative / Insurance Liaisons

State Legislative	Jeri Meeks / Tara Roesler / Larry Carlson
ASRS	Dick Jacob
Health Insurance Liaisons	Larry Carlson / Tara Roesler

Membership and Communications

Membership	Dave Schwalm
Obituaries	Becky Reiss
Prime Times	Jeannette Robson
Web & Technology	Connie McNeill

Business Manager

Carolyn Minner

Office Coordinator

Nancy Lesko & Linda Van Scoy

APPENDIX 2 – OFFICERS AND LEADERS

2018-2019 OFFICERS AND LEADERS

President:	Tara Roesler
Past President:	Jeri Meeks
Vice President:	Jan Thompson
Secretary:	Pat Schneider
Treasure:	Bill Moor / Barry Bruns

Board Members: Tony Brazel, Barry Bruns (replaced Moor), Bev Buddee, Jay Q. Butler, Jeff Chapman, Jean Duncan, Jo Faldtz, Betty Landon (resigned), Jo Madonna, Barry McNeill (replaced Landon), Jeri Meeks, Bill Moor (resigned), Don Nilsen, Kathleen Renshaw (resigned), Tara Roesler, Pat Schneider, David Schwalm, Bill Stasi (replaced Renshaw), Jan Thompson

Committee Chairs / Liaisons

Community Outreach

Adopt-a-Family	Joan Leard
Scholarship	Joy Shearman
Video History Project	Dave Scheatzle

Events

Luncheons & Special Events	Bonnie Scheall / Jean Duncan
Seminars	Bev Buddee
Pre-retirement Seminars	Trudy Perez
Travel	John Brock

Finance Barry Bruns / Marry Stevens (Book Sales)

Legislative / Insurance Liaisons

State Legislative	Jeri Meeks / Tara Roesler / Gary Anderson
ASRS	Dick Jacob
Health Insurance Liaisons	Larry Carlson / Tara Roesler

Membership and Communications

Membership	Dave Schwalm
E-News	Barry McNeill
Obituaries	Becky Reiss
Prime Times	Jeannette Robson
Web & Technology	Connie McNeill

Business Manager Carolyn Minner

Office Coordinator Nancy Lesko & Linda Van Scoy

APPENDIX 2 – OFFICERS AND LEADERS

2019-2020 OFFICERS AND LEADERS

President: Jan Thompson
Past President: Tara Roesler
Vice President: Carl Cross
Secretary: Pat Schneider
Treasure: Barry Bruns

Board Members: Barry Bruns, Jane Carey, Larry Carlson, Evelyn Cesarotti, Jeff Chapman, Carl Cross, Jean Duncan, Frank Koonce, Jo Madonna, Barry McNeill, Connie McNeill, Don Nilsen, Tara Roesler (extra year as Past President), Pat Schneider, Bill Stasi, Jan Thompson

Committee Chairs / Liaisons

Community Outreach

Adopt-a-Family	Ginny Sylvester
Scholarship	Joy Shearman
Video History Project	Barry McNeill

Events

Luncheons & Special Events	Jean Duncan
Seminars	Bev Buddee
Pre-retirement Seminars	Trudy Perez & Liz Badalamenti
Travel	John Brock

Finance Barry Bruns / Marry Stevens (Book Sales)

Legislative / Insurance Liaisons

State Legislative	Jeri Meeks / Tara Roesler / Pat Schneider
ASRS	Dick Jacob
Health Insurance Liaisons	Larry Carlson / Tara Roesler

Membership and Communications

Membership	Dave Schwalm
E-News	Barry McNeill
Obituaries	Becky Reiss
Prime Times	Jeannette Robson
Web & Technology	Connie McNeill

Business Manager Carolyn Minner

Office Coordinator Nancy Lesko & Linda Van Scoy

APPENDIX 2 – OFFICERS AND LEADERS

2020-2021 OFFICERS AND LEADERS

President: Carl Cross
Past President: Jan Thompson
Vice President: Larry Edmonds
Secretary: Jane Carey
Treasure: Jill Massara

Board Members: Jane Carey, Larry Carlson, Evelyn Cesarotti, Jeff Chapman, Carl Cross, Jan Duncan, Larry Edmonds, Kathy Gunn, Mark Henderson, Frank Koonce, Jo Madonna, Jill Massara, Connie McNeill, Trudy Perez, Jan Thompson

Committee Chairs / Liaisons

Community Outreach

Adopt-a-Family Ginny Sylvester
Scholarship Joy Shearman & Barbara Fargotstein
Video History Project Barry McNeill

Events

Luncheons & Special Trudy Perez
Events
Seminars Bev Buddee
Pre-retirement Seminars Trudy Perez & Liz Badalamenti
Travel John Brock

Finance

Jill Massara / Marry Stevens (Book Sales)

Legislative / Insurance Liaisons

State Legislative Jeri Meeks / Tara Roesler / Pat Schneider
ASRS Dick Jacob
Health Insurance Larry Carlson
Liaisons

Membership and Communications

Membership Dave Schwalm
E-News Barry McNeill
Obituaries Becky Reiss
Prime Times Jeannette Robson
Web & Technology Connie McNeill

Business Manager

Carolyn Minner

Office Coordinator

Nancy Lesko & Linda Van Scoy

APPENDIX 3 – OFFICE VOLUNTEERS

APPENDIX 3 – OFFICE VOLUNTEERS

- 2011 2012 Carol Berg, Betty Norris, Carol Moore, Linda Van Scoy, Jeannette Robson, Nancy Lesko, Maxine LaRoux, Mary Williams, Anna Marie Shivers, Bill Wootten, Joan Leard, Jack Sarrett, Helen Seaton, Ed Scannell
- 2012 2013 Carol Berg, Jeannette Robson, Carol Moore, Linda Van Scoy, Nancy Lesko, Maxine LaRoux, Mary Williams, Anna Marie Shivers, Bill Wootten, Joan Leard, Jack Sarrett, Helen Seaton, Dorothy Meunier
- 2013 2014 Carol Moore, Carol Berg, Maxine LaRoux, Joan Leard, Nancy Lesko, Dorothy Meunier, Jeannette Robson, Bonnie Scheall, Helen Seaton, Anna Marie Shivers, Linda Van Scoy, Mary Williams
- 2014 2015 Carol Moore, Carol Berg, Bev Buddee, Maxine LaRoux, Joan Leard, Nancy Lesko, Dorothy Meunier, Jeannette Robson, Bonnie Scheall, Helen Seaton, Anna Marie Shivers, Linda Van Scoy, Mary Williams
- 2015 2016 Carol Berg, Bev Buddee, Maxine LaRoux, Joan Leard, Nancy Lesko, Dorothy Meunier, Carol Moore, Jeannette Robson, Tara Roesler, Bonnie Scheall, Helen Seaton, Linda Van Scoy
- 2016 2017 Mena Bell, Bev Buddee, Maxine LaRoux, Joan Leard, Nancy Lesko, Dorothy Meunier, Jeannette Robson, Tara Roesler, Bonnie Scheall, Helen Seaton, Linda Whatley, Land Van Scoy
- 2017 2018 Nanci Beardsley, Bev Buddee, Joan Leard, Nancy Lesko, Dorothy Meunier, Jeannette Robson, Tara Roesler, Bonnie Scheall, Helen Seaton, Linda Whatley, Lind Van Scoy
- 2018 2019 Nanci Beardsley, Bev Buddee, Gail Horney, Nancy Lesko, Dorothy Meunier, Jeannette Robson, Tara Roesler, Bonnie Scheall, Helen Seaton, Linda Van Scoy

APPENDIX 3 – OFFICE VOLUNTEERS

- 2019 2020 Nanci Beardsley, Bev Buddee, Gail Horney, Nancy Lesko, Dorothy Meunier, Jeannette Robson, Tara Roesler, Bonnie Scheall, Helen Seaton, Jan Shore, Linda Van Scoy, Sharon Wielert
- 2020 2021 *The office was closed much of the year due to the pandemic.*
Bev Buddee, Gail Horney, Nancy Lesko, Dorothy Meunier, Jeannette Robson, Bonnie Scheall, Helen Seaton, Linda Van Scoy, Sharon Wielert