PURDUE UNIVERSITY RETIREES ASSOCIATION
POLICIES AND PROCEDURES MANUAL

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Note: Items followed by dates need to be updated annually.
History of PACR

1.0 GENERAL

1.01 HISTORY OF THE PRESIDENT’S ADVISORY COUNCIL ON RETIREMENT

The President’s Advisory Council on Retirement (PACR) was created in 1976 by Purdue President Arthur G. Hansen in response to concerns raised by retirees that the university had become disconnected from the needs of its retired employees. At its beginning PACR stated that, “The purpose of PACR shall be to bring into closer association the retired staff members of Purdue University in order to carry out educational programs for such staff members, to enhance their welfare and fellowship, and to strengthen communication channels with the University in such a manner as to be mutually beneficial.”

Originally, the council consisted of an Executive Committee, which was composed of the council chairperson and other committee chairs, and three committees: Benefits, Program and Communications. Over the years, several other committees were formed, but in the early years the original three committees performed the majority of the council’s work. A top priority for the first chairman of the Advisory Council, Harland W. White, was to survey Purdue retirees in order to better assess their needs. The survey revealed that rising inflation in the mid to late 1970s had seriously affected the standard of living of university retirees. One of the retirees’ major concerns was the escalating cost of health care. The Benefits Committee urged the administration to include all retirees under the university’s group medical insurance coverage and in the summer of 1977 the Purdue Board of Trustees agreed. The Program Committee initiated a series of theatre trips to the Beef & Boards Dinner Theatre in Indianapolis. They also arranged monthly programs at the university that covered topics that ranged from tax tips to health care. The first annual retiree luncheon was held in the late summer of 1977 at Purdue’s Memorial Union. Another annual event was started that year, the retirees’ summer picnic, which was first held at The Hills and was later moved to West Lafayette’s Happy Hollow Park. The Communications Committee created the retiree newsletter, which first appeared in the winter of 1977, and published the biannual retiree directory.

Over the years, PACR worked with the university’s administration to provide retirees with comprehensive health care coverage, reduced prescription drug prices, and group life insurance. They also urged the administration to provide additional benefits such as tuition reductions, complementary campus parking permits and reduced rates for convocation programs, athletic events, recreational facilities, and golf courses. PACR and the retirees worked together to make significant contributions to the university. In 1982, retiree donors gave $5,500 to help equip the new undergraduate library. In the mid-1980s, PACR purchased and installed a $40,000 infrared sound system in both the Elliott Hall of Music and the Loeb Theatre to aid the hearing impaired. PACR used profits generated from baseball and theatre trips with additional funding provided by individual retirees. From 1979 to 1998, Purdue retirees donated more than $17,000,000 to the university.

In the 2001-2002 year, two major events occurred which would have a significant impact on PACR. The first was the creation and associated funding of the Arthur G. Hansen Recognition Award to be awarded to a department/school for cultivating and maintaining a particularly
meaningful relationship with its retirees. The second was the adoption of an official set of by-laws that changed the name of the organization to the Purdue University Retirees Association (PURA) and guaranteed a source of annual funding from the Office of the President. Both of these events showed that the organization was maturing and taking giant strides forward.
1.02 Yearly Overview of the Purdue University Retirees Association

2002-2003
THE YEAR IN REVIEW

Officers and Advisor:
President: Betty M. Nelson
Secretary/Treasurer: Michele A. Salla
Past Chair of PACR: Howard Diesslin
Advisor: Kenneth P. Burns

Committee Chairpersons:
Benefits: Charles M. Ehresman
Communications: Barbara G. Doster
Community Service: Betty M. Suddarth
Program: D. Eugene Courtanney
Trips and Tours: Truman G. Martin

Activities:

Annual Meeting:
Sally Frost Mason, Purdue University Provost was featured speaker at the morning session of PURA’s annual meeting June 9, 2003, and President Martin C. Jischke was luncheon speaker.

Award:
The master plaque for the Arthur G. Hansen Recognition Award was hung in the Purdue Memorial Union.

Benefits:
Committee accomplishments included:
The health benefits plan was renegotiated with Anthem.
Free flu shots were available to Purdue retirees for the first time.
The director of the Purdue University Pharmacy invited retirees to use the pharmacy’s services.
A survey was prepared to compare the medical benefits Purdue retirees receive with those received by retirees at other Big Ten and Indiana schools.

On-going discussions with appropriate personnel involved:
The point system used by the John Purdue Club for season ticket holders to athletic events, and
The increased cost for annual passes to the Purdue golf courses.

Big Ten Retirees Conference:
Betty Nelson and Betty Suddarth represented the PURA at the
Big Ten Retirees Conference hosted by The Ohio State University.

**Website:**
A process for updating of the website monthly was established.

**Campus Campaign:**
Retirees gave $948,300 in 2002 to The Campus Campaign for Purdue.

**Community Service:**
To encourage new retiree participation in PURA, the committee called all new clerical and service retirees to invite them to the fall kickoff luncheon. The Purdue Alumnus featured an article about retirees and volunteerism. After much discussion, it was decided to keep the Community Service Committee in place.

**Handbook:**
The retirees’ handbook was updated for distribution at the annual retirement banquet in May.

**Kickoff Luncheon:**
Two hundred members and guests attended the annual kickoff luncheon in August at the University Inn. President Martin C. Jischke was the featured speaker.

**Programs:**
Monthly meetings, held at MCL, featured a variety of topics presented by engaging speakers. A listing and description of the programs are included in the materials submitted for filing in the Purdue Archives.

**PERF Board:**
PUR Association supported Fred Ford’s nomination to serve as a member on the Public Employees Retirement Fund (PERF) Board.

**Reorganization:**
The 2002-2003 year was considered to be a transitional year for the retirees’ organization as it became the Purdue University Retirees Association (PURA).

**Spring Fling:**
To promote the organization, PURA sponsored a booth at Spring Fling.

**Telephone Directory:**
For the first time, The Purdue Student/Staff/Retiree Telephone Directory was sent to all retirees.

**Trips and Tours:**
Fall trips to Turkey Run State Park and the Ernie Pyle State Historic Site;
Brown County State Park and the T.C. Steele State Historic Site; and Ivy Hall at IVTC campus in Lafayette along with spring tours to Bioanalytical Systems, Inc. and the Purdue Cancer Center; the Indiana State Museum; the Indiana State Capitol during legislative session; Spring Mill State Park; and the Purdue Aquatic Center and the Ross-Ade Stadium press box provided much enjoyment for the many retirees and friends.

**United Way Campaign:**
Retirees pledged $57,300 to the 2002 United Way Campaign.

More detailed reports, regarding the PUR Association activities and accomplishments during the year beginning June 2002 and concluding May 2003, are filed in the Purdue Archives.

Prepared May 2008 by
Mary Alice Nebold, Historian
2003-2004
THE YEAR IN REVIEW

Officers and Advisor:
- President: Roy A. Johnson
- Vice President: To be nominated for 2004-05
- Secretary/Treasurer: Barbara A. Hansen
- Historian: Velma Schanke
- Past President: Betty M. Nelson
- Advisor: Kenneth P. Burns

Committee Chairpersons:
- Benefits: Charles M. Ehresman
- Communications: Barbara A. Hansen
- Hospitality/Community: Lois K. Wark and W. Scott Rumble
- Program: Dennis E. Courtaney
- Trips and Tours: Hannis W. Thompson

Ad-Hoc Committee Chairpersons:
- Kick-Off Luncheon: Mary Alice Nebold
- Living to 100 Securely: Program Committee was responsible

Activities:

Annual Meeting:
Ken Burns was the featured speaker at the luncheon May 26, 2004.

Archives:
Plans were made to place historical materials from PACR and PURA in the Purdue Libraries Archives.

Award Recipients:
- Arthur G. Hansen Recognition Award:
  Cooperative Extension Service, David C. Petritz, Director

Benefits:
Focusing on health related benefits for retirees, the Benefits Committee negotiated to have prescription drugs included in the medical options through Anthem.
A health benefits survey conducted with the Big Ten Retirees’ Associations in spring 2003 was repeated in spring 2004.
The committee members also met with the John Purdue Club and the Athletic Department to discuss the increased rate (700%) for a season pass to play at a Purdue golf course, the need for improved communication regarding promotion of events, and the John Purdue point system.
**Big Ten Retirees Association Conference:**
Roy Johnson and Chuck Ehresman attended the Big Ten Retirees’ Conference at the University of Michigan. Bylaws for the organization were adopted.

**Campus Campaign:**
Retiree giving to The Campus Campaign for Purdue totaled $3,705,000 in 2003.

**Council for Management Development:**
The purpose of the project, “Engaging Purdue Retirees,” was designed to identify additional methods for engaging Purdue retirees residing in the Lafayette, West Lafayette community through enhanced relationships and communications. It was determined by the executive committee that a potential survey could be very beneficial.

**Handbook:**
The revised handbook for new retirees was sent to members with the telephone directory mailing.

**Hospitality and Community Service:**
How to be more responsive to the needs of more clerical and service retirees and getting them involved with PURA was a priority for the Hospitality and Community Service committee at a brainstorming session held in September. The committee has chosen not to act as hosts for the monthly meetings at MCL. A University pre-retirement packet, similar to one used at Northwestern, was developed by the committee, which was renamed the Hospitality Committee.

**Kickoff Luncheon:**
“Purdue Family Reunion” was the theme for the kickoff luncheon September 8, 2003. One hundred eighty-two (182) retirees registered for the event at the University Inn.

**Living to 100 in Style:**
The first healthcare seminar was planned for September 2004.

**Procedures Manual:**
The PURA Procedures Manual was developed to be used as a reference by incoming committee chairpersons. Job descriptions of officers and standing committees were included.

**Programs:**
Monthly meetings, held at MCL, featured a variety of topics presented by engaging speakers. It was decided to discontinue the “entertainment” portion of the monthly meetings. A listing and description of the programs
are included with the materials submitted for filing in the Purdue Archives.

Spring Fling:
Standup calendars were distributed at Spring Fling.

Tribute:
A tribute was given Mayor Sonya Margerum for her leadership and cooperative spirit when she spoke at the December PURA meeting.

Trips and Tours:
Trips to Conner Prairie and Purdue’s Aquatic Center and Airport took place in the fall and to the Anson Wolcott House, the Myers Dinner Theater at Hillsboro, and Culver Military Academy in the spring.

Tutoring Project:
A retiree mentoring and tutoring project for student athletes was planned.

United Way:
Purdue retirees were selected to be pacesetters for the United Way Campaign.

Website:
Keeping the website current is a major goal. It was determined that annual reports should be placed on the web.

Comprehensive reports, regarding the above PURA activities and accomplishments during the year beginning June 2003 and concluding May 2004, are filed in the Purdue Archives.

May 2008
Mary Alice Nebold, Historian
2004-2005
THE YEAR IN REVIEW

Officers and Advisor:
President: Roy A. Johnson
Vice President: Emily M. Wadsworth – resigned 10/2004
Christian E. Keck – remainder of term
Secretary/Treasurer: Barbara A. Hansen
Historian: Velma Schanke
Advisor: Murray M. Blackwelder

Committee Chairpersons:
Benefits: Martha O. Chiscon
Communications: Lyn Doyle – resigned 2/2005
Oscar Hopkins – remainder of term
Hospitality: Lois K. Wark and W. Scott Rumble
Program: Paul L. Ziemer
Trips and Tours: Donald L. and Nadye J. Parman

Ad-Hoc Committee Chairpersons:
Kick-Off Luncheon: Mary Alice Nebold
Living to 100 Securely: Program Committee was responsible
Campus and Community: Richard C. Nelson

Activities:

Annual Meeting:
Martin C. Jischke, president of the university, was the featured speaker at the luncheon in May 2005.

Archives:
It was decided to house PURA materials in the Purdue Library Archives. With the assistance of the PURA historian, the library representative, Sammie Morris, established guidelines for what materials should be retained for the archives and organized the materials.

Award Recipients:
Arthur G. Hansen Recognition Award:
Department of Agronomy, William W. McFee, Head

Betty M. Nelson Special Recognition Award
Harland White, founder of PACR

Benefits:
Renewal of the health insurance plan was with Anthem.
Big Ten Retirees Association Conference:
Roy Johnson and Martha Chiscon represented PURA at the Big Ten annual meeting at the University of Minnesota.

Bylaws:
An amendment to the PURA bylaws changed the length of the president’s term to one year.
A second amendment to the bylaws allowed an exception to the committee membership rule of sitting out a year after six years of committee service before joining another committee.

Campus Campaign:
PURA representatives served on the Purdue Advisory Committee for the Campus Campaign for Purdue.

Communication Committee:
The new Communications Committee will be made up of a representative/liaison from each of the standing committees.

Dauch Center:
A request for volunteers to assist at the front desk of the Dauch Center has been communicated.

Executive Vice President and Treasurer:
PURA representatives participated in small group meetings with the five candidates for the position of executive vice president and treasurer. Morgan R. Olsen was selected.

Handbook:
The revised handbook for new retirees was included in the mailing of the Purdue Student, Staff, and Retiree Telephone directory.

Hospitality Committee:
The committee members continued efforts to encourage involvement of clerical/service retirees and again called these new retirees to invite them to PURA activities.

“Inside Purdue:”
The Executive Board discussed adding information for pre-retirees in each issue of “Inside Purdue” to educate them about preparing for retirement. Topics to be addressed included social security, estate planning, and distribution of retirement funds.

Kickoff Luncheon:
“A Purdue Tailgate Party” was the theme for the kickoff luncheon August 30, 2004. One hundred ninety-eight (198) retirees registered for
the event at the University Inn.

**Living to 100 in Style:**
One hundred eighty (180) retirees attended the first healthcare seminar held in September 2004. Sessions and exhibits received high ratings.

**New Brochure:**
“PURA: Serving Purdue in Countless Ways,” the new brochure accompanied with a letter from the president was distributed to list 39 recipients and retirees from each department.

**Newsletter:**
Two national (January and July) and four local (September, November, March, and May) issues of the PURA Newsletter were sent to retirees, deans and directors, the Purdue Libraries, Women’s Resource Center, and Big Ten Retirees groups. The newsletter also was posted on the website.

**Parking:**
A retiree, Lanny Wilson, was named to the University Parking Committee. Signage for the Speech and Hearing Clinic parking spaces in the parking lot north of Purdue Memorial Union was changed to notify guests that at 5:00 p.m. the parking was designated for the handicapped.

**Pre-retirement Meetings:**
Representatives of PURA have been invited to attend the pre-retirement meetings for Purdue employees nearing retirement. Executive board members of PURA suggested content items for the booklet, “Know Before You Retire,” that was developed by the Office of Staff Benefits.

**Programs:**
Monthly meetings, held at MCL, featured a variety of topics presented by engaging speakers. A listing and description of the programs are included with the materials submitted for filing in the Purdue Archives.

**Residence Halls:**
Because only six retirees assisted students as they checked into the residence halls in August, the discussion continued about other ways retirees can interact with students in the residence halls.

**Spring Fling:**
Standup calendars were distributed at Spring Fling.

**TIAA/CREF:**
TIAA/CREF established an office in Lafayette.
Trips and Tours:
A tour of the local underground railroad sites and trips to the Berghoff Restaurant and Shedd Aquarium in Chicago; the Air Force Museum in Dayton, Ohio; and Amish Acres in northern Indiana provided diverse entertainment for those attending.

United Way:
Purdue retirees again were selected to be pacesetters for the United Way Campaign. Giving increased 20% over the prior year.

Comprehensive reports, regarding the above PURA activities and accomplishments during the year beginning June 2004 and concluding May 2005, are filed in the Purdue Archives.

May 2008
Mary Alice Nebold, Historian
2005-2006
THE YEAR IN REVIEW

Officers and Advisor:
President Christiane E. Keck
Vice President Michael T. Drayer
Secretary/Treasurer Barbara A. Hansen
Historian Velma Schanke
Past President Roy A. Johnson
Advisor Murray M. Blackwelder

Committee Chairpersons:
Benefits Martha O. Chiscon
Communications Oscar Hopkins
Hospitality Lois K. Wark and W. Scott Rumble
Program Paul L. Ziemer
Trips and Tours Truman G. Martin

Ad-Hoc Committee Chairpersons:
Kick-Off Luncheon Lanny C. Wilson
Living to 100 Securely Program Committee
Campus and Community Richard C. Nelson

Activities:

Annual Meeting:
Executive Vice President and Treasurer, Morgan Olsen, was keynote speaker during the luncheon at the annual meeting May 24, 2006.

Award Recipients:
Arthur G. Hansen Recognition Award:
Department of Animal Sciences, Alan Grant, Head

Betty M. Nelson Special Recognition Award
The Ismail Center, Cody Sipe, Director

Benefits:
The health insurance plan transitioned to PacifiCare.

Big Ten Retirees Association Conference:
Michael T. Drayer, Christiane E. Keck, and Martha Chiscon represented PURA at the Big Ten annual meeting at the Michigan State University.

Campus and Community:
Visits on campus and in the local community included: Columbian Park and Jenks Rest Building; Pau Hall; the Dauch Center; Rawls Hall; and
Morgan, Bindley, and Birck Buildings in Discovery Park. Dinner in Ford Dining Hall prior to a women’s basketball game was also enjoyed by many.

Communication Committee:
The Communications Committee developed an extensive survey regarding retirees’ communications and distributed it in PURA’s March newsletter. The objective of the survey was to determine whether the current mix of communication vehicles and content was reaching and meeting needs of the intended audience. Although there was a small response, those who did respond indicated satisfaction with the current communication efforts. It was suggested that news about fellow retirees be included in future articles in the newsletter.

Handbook:
The revised handbook for new retirees was included in the mailing of the Purdue Student, Staff, and Retiree Telephone directory.

Hospitality Committee:
The committee members continued efforts to encourage involvement in PURA by retirees from all sectors of the University.

Kickoff Luncheon:
Approximately 225 attended the kickoff luncheon. President Martin C. Jischke was the keynote speaker.

Living to 100 Actively:

Newsletter:
A discussion about moving retiree publications to electronic communications (including the newsletter) began.

Pre-retirement Meetings:
Representatives of PURA made presentations at the pre-retirement meetings for Purdue employees nearing retirement.

Procedures Manual:
The PURA Procedures Manual, developed to be used as a reference by incoming committee chairpersons, was distributed at the annual meeting. Job descriptions of officers and standing committees were included.

Programs:
Monthly meetings, held at MCL, featured a variety of topics presented by engaging speakers. A listing and description of the programs are included.
with the materials submitted for filing in the Purdue Archives.

**Spring Fling:**

Three-dimensional standup calendars were distributed at Spring Fling by the Hospitality Committee members.

**Trips and Tours:**

Retirees enjoyed PURA organized trips to Holland, MI. at tulip time; the Museum of Science and Industry in Chicago; and Fair Oaks Dairy; Turkey Run State Park and Covington; Boggstown; and Fort Wayne in Indiana.

**United Way:**

Purdue retirees again were selected to be pacesetters for the United Way Campaign. The $70,453.53 given by retirees was almost 12% of Purdue’s total contributions in 2005.

Comprehensive reports, regarding the above PURA activities and accomplishments during the year beginning June 2005 and concluding May 2006, are filed in the Purdue Archives.

May 2008
Mary Alice Nebold, Historian
2006-2007
THE YEAR IN REVIEW

Officers and Advisor:
President | Michael T. Drayer
Vice President | Betty M. Suddarth
Secretary/Treasurer | Patricia J. Lawson
Historian | Mary Alice Nebold
Past President | Christiane E. Keck
Advisor | Murray M. Blackwelder

Committee Chairpersons:
Benefits | Martha O. Chiscon
Communications | Oscar Hopkins
Hospitality | Lois M. Gotwals and W. Scott Rumble
Program | Paul L. Ziemer
Trips and Tours | Truman G. Martin

Ad-Hoc Committee Chairpersons:
Campus and Community | Richard C. Nelson
Kick-Off Luncheon | Lanny C. Wilson
Living to 100 Securely | Lowell Landrum and Paul L. Ziemer

Activities:

Annual Meeting:
President Martin C. Jischke was featured speaker at the annual meeting.

Award Recipients:
Arthur G. Hansen Recognition Award:
School of Aeronautics and Astronautics in the College
of Engineering; Dr. Thomas N. Farris, Head
Betty M. Nelson Special Recognition Award:
Human Resource Services; John Beelke, Director

Benefits:
The Senior Supplemental Health and Prescription Plan was negotiated for
the second year with PacifiCare and UnitedHealthRx.

Big Ten Retirees Association Conference:
Past presidents of PURA, Betty M. Nelson, Roy A. Johnson, and
Christiane E. Keck, along with current president, Michael T. Drayer and
vice president, Betty M. Suddarth planned an outstanding 2006 Big Ten
Retirees Association Conference held on Purdue’s campus. Guests from
the other Big Ten schools were most impressed with the activities and programs.

**Campus Campaign:**
As of March 31, 2007, retirees had contributed $29,413,342.00 to “The Campus Campaign for Purdue” that was initiated in 2000. This amount is 51% of the total given by members of the campus community – faculty, staff, and retirees.

**Campus and Community Tours:**
Tours of new campus buildings (Lawson Computer Sciences, Biomedical Engineering, and Schwartz Tennis Center) and the new Journal and Courier facilities were offered.

**Endowment:**
PURA will establish an endowment with the Purdue Foundation using the $25,000.00 PacifiCare Performance Guarantee reimbursement. Monies earned by the endowment will benefit Purdue retirees only through means to be determined by PURA.

**Handbook:**
The revised handbook for new retirees will be formatted as a tri-fold and sent to members with the July PURA Newsletter.

**Kickoff Luncheon:**
Two hundred members and guests attended the annual kickoff luncheon in August at the University Inn. President Martin C. Jischke was the featured speaker.

**Living to 100 – Securely**
The third day-long “Living to 100” conference was held in October at University Inn. The presentations and discussions focused on financial concerns of retirees.

**Newsletter:**
All retirees receive the January and July editions of the PURA Newsletter. Local retirees receive four additional issues during the year. A special section, entitled “Exploring Senior Living Alternatives,” was distributed with the January PURA Newsletter. It was developed for Purdue University retirees and their families by Oscar Hopkins and Richard C. Nelson.

**Parking Issues:**
Provisions for handicapped parking near Stewart Center were addressed with the Purdue Police Department. As a result, more spaces were added near the Loeb Theatre entrance.

**President Martin C. and Patty Jischke Recognition:**
To recognize Martin and Patty Jischke’s leadership and accomplishments on campus and in our community and their support of PURA and Purdue retirees, PURA is recommending members contribute to the “Martin C. and Patty Jischke Opportunity Award Endowment.” The Purdue Opportunity Award is granted to students who have high financial need, personal hardship(s), and/or other extenuating circumstances. There is one award for each of Indiana’s 92 counties.

**Programs:**
Monthly meetings, held at MCL, featured a variety of topics presented by engaging speakers. A listing and description of the programs are included with the materials submitted for filing in the Purdue Archives.

**Resolution:**
At the November 1, 2006 meeting, the Executive Board passed the resolution that states PURA strongly supports the “Financial Learning Initiative” announced to West Lafayette Campus Faculty and Staff in a memorandum issued jointly by Dr. Sally Mason and Dr. Morgan R. Olsen October 3, 2006. This initiative is designed to provide opportunities for faculty and staff to understand retirement issues and to make choices that will ensure financial stability during retirement years.

**Spring Fling:**
The Hospitality Committee hosted a PURA tent at Spring Fling. They distributed informational cards that included a listing of ongoing benefits official Purdue retirees receive, and an offer from Staff Benefits to make a presentation about preparing for future retirement to all in the departments across campus. Also handed out were PURA tape measures designed to remind us to consider how we measure up for retirement.

**Trips and Tours:**
Trips to Indianapolis and Auburn, Indiana and Chicago and Springfield, Illinois were most enjoyable, educational, and entertaining for the more than 100 members and friends who participated.

**United Way:**
As pacesetters for the United Way Campaign, Purdue retirees gave $81,024.00 - an increase of eleven percent over the previous year.

Comprehensive reports, regarding the above PURA activities and accomplishments during the year beginning June 2006 and concluding May 2007, are filed in the Purdue Archives.

May 2007
Mary Alice Nebold, Historian
2007-2008
THE YEAR IN REVIEW

Officers and Advisor:
President Betty M. Suddarth
Vice President W. Scott Rumble
Secretary/Treasurer Patricia J. Lawson
Historian Mary Alice Nebold
Past President Michael T. Drayer
Advisor Murray M. Blackwelder

Committee Chairpersons:
Benefits Martha O. Chiscon
Communications Oscar Hopkins
Endowment Betty M. Nelson
Hospitality Lois M. Gotwals and Lois K. Wark
Program Dale R. McHenry
Trips and Tours Truman G. Martin

Ad-Hoc Committee Chairpersons:
Campus and Community Richard C. Nelson
Kickoff Luncheon Carolyn T. Jones
Purposeful Living in Retirement Lowell Landrum

Activities:

Annual Meeting:
President France Cordova was featured speaker at the annual meeting.

Award Recipients:
Arthur G. Hansen Recognition Award
No award was given in 2007-2008.

Betty M. Nelson Special Recognition Award:
Purdue Marketing Communications, David J. Brannan, Director

Benefits:
The Senior Supplemental Health and Prescription Plan was negotiated for the third year with PacifiCare and United Health Rx.

Big Ten Retirees Association Conference:
Betty M. Suddarth, W. Scott Rumble, and Martha O. Chiscon represented PURA at the Big Ten Retirees Association held on the campus of Pennsylvania State University.
Campus and Community Tours:
Tours of new campus buildings (Mann and Armstrong Halls); visits to the Columbian Park Zoo, the Animal Disease Diagnostic Lab, and the Lafayette Symphony; and lunch at the Athletic Dining Room prior to the Purdue Women’s exhibition basketball game comprised the campus and community organized tours for PURA members.

Endowment:
PURA established an endowment with the Purdue Foundation using the reimbursement from the United Health/ PacifiCare Performance Guarantee. Earnings generated by the endowment will benefit Purdue retirees. Betty Nelson, chair of the Endowment Committee, worked with Purdue Marketing Communications to develop a brochure announcing this endowment.

Handbook:
The updated handbook for retirees was formatted as a tri-fold and sent to members with the July 2007 PURA Newsletter. Sufficient copies were produced to cover two years distribution.

Kickoff Luncheon:
A record 379 Purdue retirees and friends attended the luncheon at University Plaza September 10th. Dr. France Cordova, Purdue’s new president, was the featured speaker.

Newsletter:
In the future, the PURA Newsletter will be distributed to all Purdue retirees four times each year in January or February, March, July, and November. Development of the new web site for PURA is in progress.

President Martin C. and Patty Jischke Recognition:
PURA has five years to reach the $20,000 contribution goal for the Martin C. and Patty Jischke Opportunity Award Endowment. To date, $12,000 has been given. The Purdue Opportunity Award is granted to students who have high financial need, personal hardship(s), and/or other extenuating circumstances. One award is designated for each of Indiana’s 92 counties.

Programs:
Monthly meetings, held at MCL, featured a variety of topics presented by engaging speakers. A listing of program titles and the presenters is included with the archival materials.

Purdue University Strategic Plan:
Betty Suddarth represented PURA on the Campus Design Committee, one of eight Tiger Teams, appointed by President Cordova to participate in the process of developing a meaningful and comprehensive university
strategic plan. Several retirees contributed ideas at the various open forums that were held on campus.

**Purposeful Living in Retirement:**
The fourth retirement conference (formerly Living to 100) was held April 23rd at University Plaza. The presentations focused on preserving family history, discovering one’s second career, personality and longevity in purposeful living, a spiritual bucket list, and solutions for caregivers.

**Spring Fling:**
The Hospitality Committee again hosted a PURA tent at Spring Fling. Informational brochures about ongoing benefits official Purdue retirees receive, and magnetic folders for addresses were distributed to attendees.

**State College Retirement Associations:**
Michael Drayer volunteered to research the possibility of organizing meetings with representatives from other Indiana college retirement associations. He found, however, that only Indiana University and Purdue University have organized retirement associations.

**Trips and Tours:**
One hundred nineteen (119) members and friends participated in enjoyable and entertaining trips around Indiana (French Lick and West Baden, the Railroad Museum and Jasper-Pulaski Wildlife Refuge, Rose Hulman Institute and the Clabber Girl Museum, Indiana University campus and the Oliver Winery), and to the Gerald Ford Museum and Frederik Meijer Gardens and Sculpture Park in Grand Rapids, Michigan.

**United Way:**
As pacesetters, Purdue retirees gave $83,949 to the United Way Campaign. This amount was only $51 short of the $84,000 goal.

Comprehensive reports regarding PURA activities and accomplishments during the year, June 2007 through May 2008, are filed in the Purdue University Library Archives and Special Collections. A guide to the PURA records can be accessed on the web at [http://www.lib.purdue.edu/](http://www.lib.purdue.edu/)

May 2008
Mary Alice Nebold, Historian
PURDUE UNIVERSITY RETIREEs AASSOCIATION
2008-2009
YEAR IN REVIEW

Officers and Advisor:
- President: W. Scott Rumble
- Vice President: Lois K. Wark
- Secretary/Treasurer: Patricia J. Lawson
- Historian: Mary Alice Nebold
- Past President: Betty M. Suddarth
- Advisor: Murray M. Blackwelder

Committee Chairpersons:
- Benefits: Martha O. Chiscon
- Communications: Richard C. Nelson
- Endowment: Betty M. Nelson
- Hospitality: Larry Ogburn and Eldon Fredericks
- Program: Dale R. McHenry
- Trips and Tours: Truman G. Martin

Ad-Hoc Committee Chairpersons:
- Campus and Community: Sue Graham
- Kickoff Luncheon: Carolyn T. Jones
- Purposeful Living in Retirement: Lowell Landrum

Activities:

Annual Meeting:
Provost Randy Woodson was featured speaker at the annual meeting, May 26, 2009.

Award Recipients:
Arthur G. Hansen Recognition Award:
The Hansen Award was presented to University Residences for their exemplary work in maintaining meaningful relationships with their retirees. On behalf of the Residences, Director Barbara Frazee accepted this award and a $2,500 stipend funded by TIAA-CREF.

Betty M. Nelson Special Recognition Award:
The Office of Special Events was presented The Nelson Award for its outstanding work in support of PURA and Purdue retirees. Catharine Adair, Director, and Janelle Musch and Gini Griener, Event Planners accepted the award.
Benefits:
The Senior Supplemental Health and Prescription Plan was negotiated for the fourth year with PacifiCare and United Health Rx for 2009.

Big Ten Retirees Association Conference:
W. Scott Rumble, Lois K. Wark, and Martha O. Chiscon represented PURA at the Big Ten Retirees Association held on the campus of the University of Illinois in August.

Calendar of Events:
PURA events will be posted on the University Calendar through the Purdue Alumni Association. An organizational calendar incorporating all activities/meetings of PURA was initiated for the board. The calendar, distributed by e-mail, is updated as activities are added.

Campus and Community Tours:
Throughout the year, approximately 100 persons enjoyed the campus and community tours of the Beck Agricultural Center and the Agronomy Center for Research and Education, Caterpillar’s Large Engine Center, the Food Science Building, Veterinary Medicine’s Large Animal Clinic and the Purdue University Greenhouses, and the Purdue Women’s Basketball Game outing.

Endowments:
PURA Activities and Opportunities Fund (PAO): The PURA PAO was established through the Purdue Foundation with the monies from the penalty for unmet performance guarantees from PacifiCare. Currently the PAO has a book value of $80,000. The earnings generated by the endowment will benefit Purdue retirees. Brochures, first distributed in 2008-09, describe the PAO Fund in detail.

PURA Jischke Purdue Opportunity Award (POA): The PURA POA was established to honor President Martin C. and Patty Jischke at his retirement. Currently the POA has a book value of $17,013. The agreement requires that at least $20,000 must be accumulated before a scholarship can be awarded. The POA must be fully funded by September 2012 or the agreement will be terminated. The Purdue Opportunity Award is granted to students who have high financial need, personal hardship(s), and/or other extenuating circumstances. One award is designated for each of Indiana’s 92 counties.
Financial Forum:
PURU, in partnership with Purdue University Human Resource Services, invited Purdue retirees to a forum, “The Economy and Your Retirement Income,” December 5, 2008. The panel discussion on how the changing economy affects pension benefits for retirees of Purdue University was led by Dr. Frederick R. Ford, Executive Vice President and Treasurer Emeritus. Expert panelists included: Dr. Richard Cosier, Krannert School Dean and Leeds Professor Management who presented an overview of economic considerations that affect everyone; Mr. Terry Magid, Executive Director, Public Employees’ Retirement Fund (PERF), who discussed the impacts on benefits provided through PERF and the fund’s financial stability; and Mr. Adam Polacek, director of client portfolio management, and Mr. Chris Day, director of individual client services, both representing TIAA-CREF. Polacek and Day discussed impacts on benefits provided through TIAA-CREF and comments on the financial stability of TIAA-CREF.

Handbook:
The updated tri-fold handbook for retirees will be sent to members with the July 2009 PURA Newsletter. 5000 copies will be produced to cover distribution for two years.

Kickoff Luncheon:
286 Purdue retirees and friends attended the luncheon at University Plaza September 8, 2008. Dr. France Cordova, Purdue’s president, was the featured speaker.

Newsletter:
The PURA Newsletter, to be printed four times each year, was distributed to all Purdue retirees in January, March, July, and November. Development of the new web site for PURA was introduced and continues to be improved.

Pre-Retirement Meetings:
PURA representatives were invited to participate in pre-retirement meetings, including those set-up for employees of Cary, Shreve, and Tarkington Residence Halls.
Programs:
Varied topics, presented by engaging speakers, were the programs for the monthly meetings held at MCL. A listing of program titles and the presenters is included with the archival materials.

Purposeful Living in Retirement:
140 attended the fifth retirement conference (formerly Living to 100) held April 29, 2009 at University Plaza. The presentations focused on things remembered, planning to die, gardening is exercise, and finances in today’s economy.

Spring Fling:
The Hospitality Committee again hosted a PURA tent at Spring Fling, May 21, 2009.

Trips and Tours:
One hundred twenty-nine (129) members and friends participated in enjoyable and entertaining trips around Indiana (French Lick and West Baden, the Indianapolis Museum of Art to view the Ming Dynasty treasures, and Crawfordsville). A new direction for the committee is being considered.

United Way:
As pacesetters, Purdue retirees gave $87,027.46 to the United Way Campaign, far surpassing the $84,000 goal.

Comprehensive reports regarding PURA activities and accomplishments during the year, June 2008 through May 2009, are filed in the Purdue University Library Archives and Special Collections. A guide to the PURA records can be accessed on the web at http://www.lib.purdue.edu/

May 2009
Mary Alice Nebold, Historian
Through the years, the top leadership of PACR and, subsequently, PURA has been drawn from many areas of the university, both academic and administrative/professional. The chairs/presidents of the organization are as follows:

**Chairs of the President’s Advisory Council on Retirement**

1976-1977  Harland W. White  (Admissions)
1977-1978  Max Steer  (Audiology and Speech Sciences)
1978-1979  John B. Peterson  (Agronomy)
1979-1980  Kathleen Johnston  (Consumer Sciences and Retailing)
1980-1981  John F. Stover  (History)
1981-1982  Russell Cosper  (English)
1982-1983  Vivian Johnson  (Physics)
1983-1984  Marion B. Scott  (Civil Engineering)
1984-1986  Jay W. Wiley  (Management)
1986-1987  Val Bergdolt  (Mechanical Engineering)
1987-1988  Hal Veenker  (Health Education)
1988-1990  Will Schalliol  (Chemistry)
1990-1991  Mary Fuqua  (Consumer and Family Sciences)
1992-1993  Richard McDowell  (Freshman Engineering)
1993-1994  Margaret (Peggy) Conte  (Consumer Sciences and Retailing)
1994-1996  Ed Frickey  (Agriculture)
1996-1998  Don Gustafson  (Veterinary Pathobiology)
1998-2000  Howard G. Diesslin  (Agricultural Economics)
2000-2002  Betty M. Nelson  (Dean of Students)

**Presidents of the Purdue University Retirees Association**

2002-2003  Betty M. Nelson  (Dean of Students)
2003-2005  Roy A. Johnson  (Registrar)
2005-2006  Christiane E. Keck  (Foreign Languages and Literatures)
2006-2007  Michael Drayer  (Human Resource Services)
2007-2008  Betty M. Suddarth  (Registrar)
2008-2009  W. Scott Rumble  (Field Extension)
2009-2010  Lois K. Wark  (Science Administration)
1.04  PAST COUNCIL, EXECUTIVE BOARD AND COMMITTEE MEMBERS

1.04a  President’s Advisory Council on Retirement  1976-2002

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1.04b Purdue University Retirees Association

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Council, Executive Board and Committee Members

Kickoff Luncheon 2002-03
Hospitality/Community Service 2003-04
Hospitality 2004-08
Vice President 2008-09
President 2009-10
Past President 2010-11
Benefits 2008-09

Wilcox, Mary Hospitality 2008-10

Williamson, June Program 2002-04

Wilson, Lanny Kickoff Luncheon 2004-07
Program 2007-10

Wood, Olivia Program 2008-11

Workman, Lenys Trips & Tours 2002-03

Yackel, James Benefits 2004-10

Yoder, Marilyn Kickoff Luncheon 2003-09

Yuochunas, Nancy Trips & Tours 2010-13

Ziemer, Paul Program 2002-05
Living to 100 2006-07

Zink, Robert Program 2002-06

Rev. 3/15/10
BY-LAWS
OF THE PURDUE UNIVERSITY RETIREES ASSOCIATION
Approved August 2, 2010
PURA Annual Meeting

ARTICLE I
General

Section 1.1. Name. The name of this Association shall be the Purdue University Retirees Association (the “Association”).

Section 1.2. Business Year. The business year of the Association shall begin on the first day of June and end on the last day of May next succeeding.

ARTICLE II
Membership

Section 2.1. Membership Qualifications. All official Purdue University (“Purdue”) or Purdue-USDA retirees, spouses of official retirees, and spouses of deceased employees who were eligible for official retiree status at their death are automatic members of the Association. Purdue policies then in effect shall define official retirees of Purdue and the benefits available to them, their spouses and eligible children.

ARTICLE III
Purposes, Powers, and Relationships

Section 3.1. Purposes. The purpose of the Association is to promote the interests and welfare of Association members, to facilitate their support of Purdue University (“Purdue”) and the greater Lafayette community, and to maintain liaisons with relevant Purdue and community organizations. The goals of the Association are as follows:

(a) To promote the image and presence of Purdue retirees as participating and valued members of the Purdue family;

(b) To provide a wide range of educational, informational, cultural, social, travel and volunteer opportunities to Purdue retirees;

(c) To provide advice and counsel to the President of Purdue on retiree or other issues through the Association Executive Board;

(d) To monitor and share information on benefits affecting retiree health, finances, lifestyle and other relevant issues through close associations with Purdue leaders who may act as advisors to the Association;
(e) To advance all modes of communication with members, as well as Purdue and the greater Lafayette community, via the Association’s Newsletter, electronic communications, Web page, reports and other appropriate avenues;

(f) To assist and serve Purdue in accomplishing its mission and goals; and

(g) To encourage and create opportunities for retirees to help other retirees.

Section 3.2. Powers. The Association exists and serves at the pleasure and discretion of Purdue under the direction and control of the President of Purdue. Subject to the foregoing and any limitation or restriction imposed by law, the Association shall have the power:

(a) To do everything necessary, advisable or convenient for the accomplishment of any of the purposes hereinbefore set forth, or which shall at any time appear conducive to or expedient for the protection or benefit of the Association and to do all of the things incidental thereto or connected therewith which are not forbidden by law; and

(b) To have, exercise and enjoy in furtherance of the purposes hereinbefore set forth all the general rights, privileges and powers granted to the Association by common law.

The Association shall be advisory, educational and promotional in character and shall have no power to bind Purdue or any person or entity to any action or conclusion that is not provided for in this instrument.

Section 3.3. Relationships. The Association advises the President of Purdue on all issues related to the preparation for, transition to and fulfillment in retirement from Purdue as well as other issues recommended by the President or Purdue. The Association will form liaison relationships with Purdue, community and governmental leaders who will act as advisors in areas of health and retirement benefits, communications, and fiscal, academic and other issues, as appropriate and in conformance with the purposes and powers specified herein.

ARTICLE IV
Officers of the Association

Section 4.1. Officers. The officers of the Association shall be a President, a Vice-President, a Past-President, a Secretary/Treasurer and a Historian. Officers shall be elected as provided in Article V. Each officer shall serve without compensation.

Section 4.2. Responsibilities, Terms of Office and Term Limits. The responsibilities, terms and term limits of the officers shall be as follows:

(a) The President shall preside over meetings of the Association and the Executive Board and perform such duties as usually pertain to the office. The President shall serve a one-year term, following a one-year term as Vice-President and followed by a one-year term as Past-President.
(b) The Vice-President, who is also President-Elect, shall serve in the absence of the President or at the request of the President. The Vice-President shall serve a one-year term and shall succeed to the Presidency the following year.

(c) The Past-President shall serve on the Executive Board as an advisory member with a vote and as the chair of the Nominating Committee. In the absence of a Vice-President, the Past-President shall, when necessary, assume the duties of the Vice-President. The Past-President shall serve a one-year term following his/her term as President.

(d) The Secretary-Treasurer shall record the minutes of all meetings and activities of the Association and of the Executive Board. The secretary-treasurer also shall maintain complete and accurate financial records of the Association. The Secretary/Treasurer shall be a permanent member of the Endowment Committee and shall maintain permanent records of the endowments. The Secretary/Treasurer shall collaborate with appropriate advisors and liaisons in Human Resource Services concerning reports, the PURA Newsletter and other communications. The Secretary/Treasurer shall serve a three-year term, but may be elected to serve a second three-year term with a maximum uninterrupted term of six (6) consecutive years.

(e) The Historian shall work with the University Archivist to document the current and past history of the Association. The Historian shall serve a three-year term, but may be elected to serve a second three-year term. The Historian shall also be responsible for updating the PURA Procedures & Policies Manual, as needed.

**Section 4.3 Election.** The officers shall be elected in accordance with the following procedures:

(a) A representative faculty/staff Nominating Committee, appointed by the President of the Association, chaired by the Past-President and with the approval of the Executive Board, shall solicit names from the Association membership for all open Officer positions and prepare a slate of candidates reflecting the diversity of the Association membership.

(b) The Nominating Committee shall obtain consent from the nominees to have their names placed on the slate of candidates. The slate of nominees shall be established in November and published in the January issue of the PURA Newsletter, along with an announcement that additional nominees may be submitted from the floor at the March monthly Association meeting and that the elections will be conducted at the April monthly meeting. A nominator must have the consent of the nominee to make a nomination from the floor.

(c) Those present, in person or by proxy, at the April monthly Association meeting shall constitute a quorum.

(d) Those candidates receiving a simple majority vote shall be declared elected.

(e) The new officers shall take office at the Annual Transition Meeting and hold office until his or her successor shall have been duly elected and qualified.
(f) The President of the Association shall inform the President of Purdue of the officers of the Association each year.

**ARTICLE V**

**Association Governance**

**Section 5.1. Duties.** The business and affairs of the Association shall be managed by the Executive Board of the Association (the “Executive Board”), subject to review and approval by the plenary Association and other limitations specified herein. Each member of the Executive Board shall be a person who demonstrates a commitment to the purposes of the Association. The specific duties of the Executive Board shall be as follows:

(a) To hold regular meetings;

(b) To prepare for the Annual Transition Meeting of the Executive Board and all members of the Standing Committees at which Association plans for the up-coming year are developed and the new officers, committee chairs and committee members assume their responsibilities;

(c) To receive and review reports;

(d) To prepare and disseminate an annual report of the Association’s activities;

(e) To present reports to the President of Purdue, the University Senate, its Committees, or other entities of the University or community as deemed necessary and appropriate by the President of Purdue;

(f) To develop policies for the planning and promotion of Association programs and activities;

(g) To maintain contact and relationships with other university retiree associations;

(h) To have general supervision of the affairs of the Association between monthly general meetings of the Association, to establish the hour and place of meetings, to make recommendations to the Association, and to perform such duties as are authorized by the Association. No action of the Executive Board shall conflict with actions taken by a general meeting of the Association;

(i) To maintain oversight of the Association’s endowments;

(j) To elect a successor to any member of the Executive Board when a vacancy occurs between elections.

**Section 5.2. Composition of Executive Board.**
(a) The Executive Board shall consist of the Officers of the Association and Chairs of the Standing Committees.

(b) Non-voting members of the Executive Board shall consist of *ex officio* members representing Purdue and the chairs of any *ad hoc* committees of the Association.

**Section 5.3. Removal.** Any member of the Executive Board may be removed, with or without cause, by the Executive Board. Any member may resign by filing a written resignation with the Executive Board.

**Section 5.4. Vacancies.** Any vacancy among the members of the Executive Board caused by death, resignation or removal shall be filled with the approval of the Executive Board. A member chosen to fill a vacancy shall hold office until the expiration of the term of the member causing the vacancy and until that member or his/her successor shall be elected and qualified.

**ARTICLE VI Committees**

**Section 6.1. Committees.** The activities of the Association shall be implemented by its various committees.

(a) The Standing Committees shall be: Benefits, Campus and Community Activities, Communications, Endowment, Hospitality, Kick-off Luncheon, Program, Retiree Seminar, and Trips and Tours. Standing Committee members shall be recruited by the Chairs of the Standing Committees and confirmed by the Executive Board. The President of Purdue acknowledges their service.

(b) Standing Committee membership terms shall normally be of three (3) years duration and until their successors are duly appointed, but may be adjusted due to unique circumstances. Approximately one-third (1/3) of the committee members shall be chosen each year. A Standing Committee member may serve a second three-year term with a maximum uninterrupted term on the committee of six (6) consecutive years. After a minimum of one year off all Standing Committees, a former member of any committee may be reappointed to the same or different Standing Committee.

(c) The Nominating Committee shall recommend a slate of Standing Committee chairs to the Executive Board for approval prior to the Association’s Annual Meeting in April.

(d) A Standing Committee chair may be appointed to the same or a different position for its specified term length with a maximum uninterrupted term on the Executive Board of six (6) consecutive years.

(e) The new chairs shall assume their responsibilities at the Annual Transition Meeting.
(f) The President of the Association shall inform the President of Purdue of the Standing Committee chairs and new committee members of the Association each year.

(g) The Executive Board may create and make appointments to other ad hoc or Standing Committees as it deems necessary and appropriate.

**ARTICLE VII**

**Meetings**

**Section 7.1. Schedule of Meetings.** Unless otherwise agreed, meetings of the full Association and the Executive Board shall occur monthly according to a schedule established at the Annual Transition Meeting. No notice shall be necessary for any regularly scheduled meeting of the Association or Executive Board.

(a) An Annual Transition Meeting of the Executive Board and all Standing Committee members shall take place in late May or early June of each year.

(b) The Annual Association Kickoff Luncheon shall replace the September Association meeting at a time and place to be determined each year – usually the last Monday in August or the second Monday in September. Notification shall be placed in the PURA Newsletter.

(c) The April meeting of the Association shall be designated as the Annual Association Meeting, at which officers shall be elected. Those elected shall take office at the Annual Transition Meeting.

(d) Special meetings of the Executive Board may be held upon the call of the President or of any two (2) members of the Executive Board and upon forty-eight (48) hours notice specifying the time, place and general purpose of the meeting. Notice shall be given to each member of the Executive Board either personally or by mail, telephone or electronic communication. Attendance at any special meeting of the Executive Board shall constitute waiver of notice of such meeting.

(e) Special meetings of the Association may be held upon the call of the President or of any two (2) members of the Executive Board and upon fourteen (14) days notice to the Association membership. Notice of a special meeting of the Association shall be given to the Association membership by mail and electronic communication.

**Section 7.2. Executive Board Meeting Attendance.** Any meeting of the Executive Board may be attended in person, by proxy or by means of any form of electronic voice communication, provided that all members can simultaneously hear the proceedings and be heard by all the other members in attendance at the meeting. A quorum for the meeting so held shall be computed on the basis of all persons in voice contact with each other. Any meeting so held shall be a formal meeting of the Executive Board for all purposes, and any business may be transacted at such meeting that could be transacted if the members were assembled in physical proximity to each other.
Section 7.3. Association Quorum and Action Requirements. Those members present in person or by proxy at any duly-called meeting of the Association shall constitute a quorum. The act of the majority of the members present at any such meeting of the Association shall be the act of the Association unless the act of a greater number is required by law or these By-Laws. In the event of a mail ballot, the action of at least 60% of properly returned mail ballots shall be the act of the Association.

Section 7.4. Executive Board Quorum and Action Requirements. A majority of the entire Executive Board shall be necessary to constitute a quorum for the transaction of any business by the Executive Board. The act of the majority of the entire Executive Board shall be the act of the Executive Board unless the act of a greater number is required by law or these By-Laws. Notwithstanding the foregoing, the following special procedures shall govern certain actions by the Executive Board:

(a) Any act or resolution of the Executive Board that changes these By-Laws must be treated in the same manner as an amendment to the By-Laws (see Article IX below).

(b) Any action of the Executive Board that is challenged in writing by at least ten (10) members of the Association must either be rescinded by the Executive Board or submitted to the full Association membership for a vote by the Association at one of the monthly general meetings of the Association or by a mail ballot, at the discretion of the Executive Board. In the event of a mail ballot, the vote must be tabulated within six (6) weeks.

Section 7.5. Conduct of Meetings. Any business or other action taken at either an Association or Executive Board meeting, including, the order of business, shall be conducted in accordance with *Roberts’ Rules of Order, Revised*, except insofar as these By-Laws or any rule adopted by the Executive Board or Association members may otherwise provide. The Executive Board or Association members may, by unanimous consent, waive the requirements of this section, but such waiver shall not preclude any member from invoking the requirements of this section at any subsequent meeting.

Section 7.6. Action or Consent. Any action required to be taken at a meeting of the Executive Board, or any action which may be taken at a meeting of the Executive Board, may be taken without a meeting but with the same effect as a unanimous vote at a meeting, if, prior to such action, a consent in writing, setting forth the action so taken, shall be signed by all members of the Executive Board entitled to vote with respect thereto, and such consent is filed with the minutes of the proceedings of the Executive Board.

ARTICLE XIII
Finances and University Support

Section 8.1. Finances. Purdue shall provide the Association such annual financial support as Purdue, in its sole discretion, deems necessary and appropriate. The Association shall assess no dues.
Section 8.2. University Support. Purdue shall, in addition to the above financial support, provide the Association with technical, secretarial, advisory, mailing and other related services which Purdue, in its sole discretion, deems necessary and appropriate. Such support shall be located within Human Resource Services under the supervision and advice of the Director of Human Resource Services – Staff Benefits and a designated assistant.

ARTICLE IX
Amendments

Section 9.1. Amendments. Subject to law and the limitations specified herein, the power to make, alter, amend or repeal all or any part of these By-Laws is vested in the Association.

Section 9.2. Procedure to Amend. Any proposed amendments to these By-Laws will be published in the PURA Newsletter and will be discussed and acted upon at the monthly Association meeting two months after publication. Any proposed amendments published in the January or June issues will be acted upon at the March and August meetings, respectively.

Reference document: Policy IV,3,1
Status and Privileges of Retired Faculty and Staff and Surviving Spouses and Children.
2.02 OFFICER JOB DESCRIPTIONS

The officers of the Association shall be a President, a Vice President, a Past President, a Secretary/Treasurer, and a Historian. Officers shall be elected as provided in Article IV of the Association By-Laws and shall perform the following duties:

2.02a President

The President shall:

- Serve a one-year term, following a one-year term as Vice President and followed by a one-year term as Past President.
- Preside over meetings of the Association and the monthly meetings of the Executive Board, and perform such duties as usually pertain to the office.
- Schedule and preside over the Association’s annual meeting.
- At the beginning of the term as President, serve as the official representative of the PURA at the University Retirement Banquet in May (or June) and welcome new retirees into the organization.
- Serve as an ex officio member of the Benefits Committee and attend its monthly meetings.
- Attend other committee meetings as needed.
- Serve as an ex officio member of the Kick-off Luncheon Committee and attend its meetings.
- Maintain communication with the University’s advisors to the PURA.
- Annually appoint a Selection Committee to receive nominations for the Arthur G. Hansen Recognition Award and recommend a recipient to the Executive Committee.
- Confirm name of award recipient, order award trophy, and update name plate on permanent plaque in the Purdue Memorial Union.
- Assist the Past President in the activities leading to the selection, preparation and presentation of the Arthur G. Hansen Recognition Award.
- Annually appoint a Nominating Committee to develop a slate of officers for the PURA, recommend the slate to the Executive Board, and forward it to the PURA membership for election.
- Serve as chair of the University’s United Way campaign for retirees.
- Serve as co-chair for retirees of Purdue fundraising campaigns that include PURA members.
- Make the appropriate announcements for PURA members at the monthly luncheon meetings.
- Work with the Executive Board regarding the Betty M. Nelson Recognition Award and, if needed, form an ad-hoc committee to review and select a recipient. Coordinate the award selection and procurement with input from the Executive Board and the Secretary, Staff Benefits.

2.02b Vice President

The Vice President shall:
Officer Duties

• Serve a one-year term, followed by a one-year term as President and a one-year term as Past President.
• Assume the duties of the President in the absence of the President or at the request of the President.
• Attend the monthly meetings of the Executive Board.
• Serve as an *ex officio* member of the Benefits Committee and attend its monthly meetings.
• Serve as an *ex officio* member of the Kick-off Luncheon Committee and attend its meetings.
• Attend other committee meetings as desired or as requested.
• Serve as co-chair of the University’s United Way campaign for retirees.

2.02c. Past President

The Past President shall:
• Serve a one-year term, following a one-year term as Vice President and a one-year term as President.
• Attend the monthly meetings of the Executive Board.
• Serve as co-chair for retirees of Purdue fundraising campaigns that include PURA members.
• Assume the duties of the Vice President in the absence of the Vice President or at the request of the President.
• Serve as chair of the Nominating Committee.
• Assume primary responsibility for the activities leading to the selection, preparation and presentation of the Arthur G. Hansen Recognition Award.
• Serve as an advisor to the President, as requested.

2.02d. Secretary/Treasurer

The Secretary/Treasurer shall:
• Serve a three-year term.
• Attend the monthly meetings of the Executive Board.
• Record the minutes of all meetings of the Executive Board and prepare them for distribution to board members.
• Prepare the annual PURA Budget for submission to and approval by the Executive Board.
• Work with the Secretary, Staff Benefits to review the monthly financial transactions of PURA and prepare a financial report for distribution prior to the monthly Executive Board meetings.

2.02e. Historian

The Historian shall:
• Serve a three-year term.
• Attend the monthly meetings of the Executive Board.
• Maintain an archive to document the current and past history of the Association.
Officer Duties

- Ensure that the archival material is organized on a yearly basis and stored through the University Archivist with other University documents.
- At the end of the organizational year, prepare a summary of that year’s activities, accomplishments, officers and committee members and add to the PURA written history.
- Update the PURA Procedures and Policies Manual annually and at other times as needed.
2.03 FUNDING – SOURCES AND RESTRICTIONS

Funds for PURA’s operations come from a variety of sources and are used for different purposes.

a. As part of the annual budget for Human Resources, PURA is allotted $15,000 (plus any carry-over from the previous fiscal year) to be used for normal administrative operating expenses. These funds are deposited into a designated PURA ‘Operation’ account within the University’s accounting system. In addition, a separate PURA ‘Function’ account has been established within the University’s accounting system for monies received from retirees participating in PURA functions such as trips, the Kick-off Luncheon, the ‘Purposeful Living in Retirement’ seminars, etc. A checking account is maintained at PEFCU for minimal expenditures/deposits that cannot be processed through the University’s accounting system.

b. Through Human Resources PRF (Purdue Research Foundation) funds, $1,500 is allotted to PURA for hospitality expenses (food, refreshments) at retiree functions. These include the PURA Annual Meeting, lunches for special guests at the annual Kick-off Luncheon, refreshments at PURA committee meetings, etc.

c. TIAA-CREF annually provides $3,000 for underwriting the Arthur G. Hansen Recognition Award. Of that amount, $2,500 is used for the award, itself, while the remaining $500 is used to underwrite administrative expenses (printing, etc.) associated with the award. The $2,500 is deposited into PURA’s checking account at PEFCU and a check is written to the department that is the recipient of the Arthur G. Hansen Award. The $500 is deposited into a special University account, Arthur Hansen Award.

d. Funds received from outside agencies like UnitedHealthcare, PacifiCare or other organizations that help underwrite expenses for the ‘Purposeful Living in Retirement’ seminars are deposited into the PURA Function account within the University accounting system.

e. The Purdue Employees Federal Credit Union (PEFCU) annually provides funding to help pay the cost of mailing the Purdue University Telephone Directory to each retiree. This money is deposited into the PURA Operation account mentioned above. The PURA president should meet with the CEO of PEFCU during the summer each year to request/confirm their willingness to continue supporting the directory mailing. PEFCU also occasionally provides additional funding for special activities such as the annual seminar on ‘Purposeful Living in Retirement’.

2.04 ACCOUNTING RESPONSIBILITIES

The accounting responsibility for PURA’s two University accounts and the PEFCU checking account rests with the Secretary, Staff Benefits. She receives monthly statements on each account and monitors those reports against the PURA budget for the year. She meets monthly with the PURA secretary-treasurer to advise him/her of the status of the budget. Since the monthly statements are issued at the end of the month, the financial report that the PURA secretary-treasurer presents at the monthly Executive Board meetings are usually one month behind.
An annual budget for PURA is established by the PURA treasurer, with the input of the Executive Board. A preliminary budget is usually prepared for the coming year prior to the end of the PURA administrative year, but may be modified following the Annual Planning Meeting based upon input from the committees. However, it reflects activity in the PURA accounts for the University’s fiscal year, July 1-June 30. The Secretary, Staff Benefits receives the monthly accounting statements from the Business Office and provides updated financial summaries on a monthly basis to the PURA secretary-treasurer for distribution to the Executive Board at its monthly meetings. Due to the timing of the reports, the financial information is usually a month behind in reaching the board. A copy of the current budget is attached.
2.06 STAFF SUPPORT

Purdue University is very generous in providing staff support to PURA to directly assist in its operations. Currently, three individuals from the Department of Human Resource Services are assigned to work with us. They are:

- **Director, Staff Benefits** – This individual is our chief liaison with the University, particularly in the area of benefits for retirees. S/He also serves as the liaison contact with the agency which offers the PURcare health insurance plan for retirees, with TIAA-CREF, PERF and with other agencies that may provide financial support for PURA activities and projects. S/He meets monthly with the PURA president concerning items of concern to retirees. S/He also serves as an *ad-hoc* member of the Benefits Committee, frequently participates in planning for the ‘Purposeful Living in Retirement’ seminar series, and participates in Hospitality Committee meetings when needed.

- **Secretary, Staff Benefits** – This individual handles all of the PURA funds, serves as secretary of the Benefits Committee, sends out e-mail messages to PURA members with information about PURA activities, assists with the mailing of materials about PURcare enrollment, handles correspondence for the Executive Board members as needed, and provides numerous other types of support to the organization.

- **Customer Service Supervisor, Staff Benefits** – As liaison between the insurance health company’s account manager and Purdue retirees participating in the health insurance plans, this individual is the point person for issues related to enrollment, billing, claims and communication. This employee identifies the global issues as well as the urgent individual issues that require the attention of the account manager for research and resolution. This employee participates in a bi-weekly conference call with the health provider account manager and PURA benefits chair to track issues and assists with assessment related to the company’s Performance Guarantees. S/He collaborates with the other members of the Staff Benefits team to facilitate the insurance enrollment process and inform/educate/provide guidance to retirees about their insurance options. S/He attends the Benefits Committee meetings, participates in retiree benefits presentations, and attends meetings for all PURA members related to health insurance.

These individuals are critical to the functioning of PURA.

2.07 OFFICER SELECTION PROCESS – NOMINATING COMMITTEE

The President appoints a Nominating Committee at the PURA Executive Board meeting in September. The committee’s responsibility is to recommend a slate of officers to serve as president-elect, vice president, secretary-treasurer, and historian for the following administrative year, keeping in mind the appropriate terms of office as specified in the PURA By-laws. The committee may also make suggestions for possible chairpersons of the several standing and *ad-hoc* committees, but does not solicit members of the several committees.

- The current past president serves as chair of the Nominating Committee.
• The Nominating Committee includes a minimum of three and not more than five appointed members. These additional members are not necessarily members of the Executive Board of PURA.
• The vice president serves as an ad-hoc member.
• The president and Nominating Committee chair recommend the slate to the Executive Board for approval at the November board meeting.
• If approved by the board, the slate of nominations is announced at the PURA monthly meeting in March, as well as being included in the PURA Newsletter published during that month. Additional nominations may be made from the floor at the March meeting, with the prior approval of the nominee.
• The slate is voted upon at the April monthly meeting.
• The new officers are installed at the Annual Planning Meeting.

2.08 LIABILITY INSURANCE

General Liability coverage and Directors and Officers coverage are provided for the Purdue University Retirees Association and those authorized to act on its behalf. More details about the liability coverage in specific situations are available through the Office of Risk Management in Freehafer Hall.

2.09 REPRESENTATION ON UNIVERSITY COMMITTEES

PURA has non-voting representatives participating on several University committees whose scope of responsibilities impact retirees – either directly or indirectly. Those committees are:

Faculty Compensation and Benefits
Voluntary Benefits
Parking and Traffic
Staff Memorial Committee
WorkLife Wellness Ambassadors (2 representatives)

Our representatives on these committees serve as advocates for PURA in areas dealing with benefits to retirees. They are expected to report regularly to the chair of the Benefits Committee, who passes on any appropriate information to the Executive Board.
2.10 ANNUAL TRANSITION MEETING

PURAs Annual Transition Meeting takes place at the end of the administrative year, at which time the new officers, committee chairs and committee members take office and the retiring officers, committee chairs and committee members relinquish their responsibilities. It also is an occasion for committees to do major planning of their activities for the coming year. The general format has morning sessions followed by a luncheon, at which a major university administrator is the guest speaker and the PURA officer transition occurs.

2.10a Date and Facilities

The date for the Annual Transition Meeting depends upon the availability of the guest speaker and the facilities. Customarily it falls toward the end of May. It should take place prior to the University Retirement Event. Meeting rooms in Stewart Center are reserved for a combined meeting for all participants, as well as for meetings of each of the standing committees. In addition, the Anniversary Drawing Room in the Memorial Union (or some comparable facility) is reserved for the luncheon. The Secretary, Staff Benefits handles the scheduling of the rooms and also arranges for light refreshments to be available prior to the start of the opening session. The cost of the food is paid using PRF funds.

2.10b Guest Speaker

The PURA president is responsible for selecting and inviting the guest speaker to represent the University at the luncheon, based upon input from the Executive Board. This contact should be made several months in advance due to busy schedules. A follow-up letter should be sent to the speaker at a later date confirming the engagement, providing some suggestions for topics to be covered in the speaker’s remarks, and outlining any other responsibilities the speaker may have at the luncheon. The benefits of having a speaker are two-fold: it provides an opportunity for PURA leadership to receive an update on University affairs and also provides an opportunity for the speaker to become better acquainted with PURA and its activities.

2.10c Typical Schedule

The typical schedule for the day’s events, subject to change, is as follows:

9:00 a.m. Coffee/Tea/ Juice, Fresh Seasonal Fruit Tray available
9:30 a.m. Welcome and Brief Summary of PURA Activities for the Year
9:50 a.m. Committee Meetings
11:15 a.m. Break
11:20 a.m. Committee Reports – Plans for the Coming Year
11:45 a.m. Adjournment
Annual Planning Meeting

12:00 noon  Luncheon
             University Speaker
             PURA officer transition

2.10d Invitations and Response Forms

Invitations to the Annual Transition Meeting are sent to all Executive Board members, new officers, current committee members and new committee members, along with the Director, Staff Benefits; the Secretary, Staff Benefits; and the Head, Office of Periodicals. A response form also is included to gain an accurate meal count for the luncheon. The Secretary, Staff Benefits mails these items three to four weeks prior to the event, but after new committee members have been notified of their appointments by the President of the University.

2.10e Participant Folders

Folders and name badges are prepared for each participant. The folders include printed copies of reports for the past year from the PURA president and committee chairs, a copy of the newest edition of the PURA Handbook, complete committee rosters (both by committee and alphabetical), a roster of committees showing appointment and term expiration dates, a blank sheet of paper for taking notes, and a pen. In addition to the printed annual report, the president gives a brief summary of PURA’s achievements for the past year to update all committee members.

2.10f Luncheon

The PURA president and the Secretary, Staff Benefits select the luncheon menu, which is paid for using PRF funds. Participants are seated at round tables. The outgoing and incoming PURA presidents, vice president-elect and as many committee chairs as possible are seated with the guest speakers. The Secretary, Staff Benefits prepares name cards for these individuals. All others are seated without specific seating assignments. The outgoing president arranges for someone (generally the vice president-elect) to give an invocation at the beginning of the luncheon, and also presides for the remainder of the program.

2.10g Gifts for Service

It is customary for PURA to provide a small token of appreciation to the outgoing officers and committee members to acknowledge their service to the organization. These are coordinated by the vice president and presented at the luncheon.

2.10h Conclusion

The ‘gavel is passed’ from the outgoing president to the incoming president following the gift presentations, at which time the new president may make some comments before concluding the luncheon. The new president retains the gavel for the administrative year.
2.11 UNIVERSITY DATA BASE AND E-MAIL LISTS

The Department of Information Technology (IT) maintains a master data base which contains all members of the Purdue community – students, faculty, staff, alumni and retirees. It is managed by the Office of University Development. The data base is used to create the Purdue Telephone Directory, the mailing files to retirees for printed materials, such as newsletters and benefits mailings, as well as for electronic communication.

2.11a Identifying Retirees

As part of the retirement process at Purdue, each future retiree has an exit interview with a benefits counselor in the Human Resource Services department to review benefits and other related issues. As part of that interview, each ‘retiree’ completes a Retiree Benefit Election Form with up-to-date information on addresses, telephone, home e-mail address, etc. That information is entered into the data system by HRS staff to update any existing information. Also included is the official date of retirement. The information in this file enables the production, as needed, of retiree lists by office, date of retirement, geographical location, and so forth.

2.11b Updating Information

Each of the PURA Newsletters includes a form for retirees to provide updated information as they move, etc. These are mailed to the Secretary, Staff Benefits, and forwarded to the update staff in Staff Benefits. Updates also are collected at the monthly retiree luncheons via colored index cards placed on the tables. An average of two or three updates per month are obtained in this manner.

2.11c E-mail Addresses

Currently, there are e-mail addresses in the system for approximately 900 (27%) of retirees. This percentage is gradually increasing as new retirements occur by faculty and staff who are more accustomed to working with computers and are likely to have a home computer. The Secretary, Staff Benefits receives an up-to-date list of retiree e-mail addresses on a monthly basis from the Development Office for use in sending e-mail messages to all retirees of a general nature – reminders about enrolling for PURcare, the schedule for flu shots, etc. A subset of this file also can be generated which contains only ‘local’ retirees – Tippecanoe and surrounding counties – for use in sending ‘local interest’ reminders about monthly retiree luncheons, trips and tours registration deadline reminders, and so forth.
3.0  STANDING COMMITTEES

3.01  TERM OF APPOINTMENT

Standing committee membership terms are of three (3) years duration and until their successors are duly appointed, with approximately one-third (1/3) of the committee members to be chosen each year. A committee member may serve a second three-year term with a maximum uninterrupted term on the standing committee of six (6) consecutive years. After a minimum of one year off all standing committees, a former member of any committee may be reappointed to the same or different standing committee.

3.02  MEETINGS AND REPORTS

The frequency of meetings by the standing committees varies by committee, depending upon the business at hand for each committee. Every standing committee, however, is expected to prepare a written annual report of its activities during the course of the administrative year. These reports are due to the Secretary, Staff Benefits no later than early May so they can be reproduced and included in the information packets for those attending the Annual Meeting in late May. These reports also are posted to the PURA website for informational purposes.

3.03.  COMMITTEE ROSTER, NOMINATIONS AND APPOINTMENTS

3.03a  Committee Roster

The Secretary, Staff Benefits prepares a roster of committee members that includes members of both standing and ad hoc committees, as well as a list of PURA officers. For each individual listed, it shows the date of the current appointment, the ending dates of each year of the original three-year appointment, and the ending dates of each year of a second three-year term, if the individual is in that category. This list is prepared and distributed at the Annual Transition Meeting at the end of May, as well as periodically throughout the year as changes in committee personnel take place. It facilitates the identification of committee members who may be eligible for a second term on a given committee when discussions of committee member staffing take place.

3.03b  Nominations and Appointment

In recruiting members for the various PURA committees, an effort should be made to have diversity on committees – retirees from different departments, new and seasoned retirees, and a gender mix. The approximate time sequence for filling vacancies on committees for the next administrative year is as follows:

- February – Review the roster of committee members at the Executive Board meeting to identify those individuals who are completing their second three-year term on each committee and who are not eligible to be reappointed. Also, identify those members completing their first three-year appointment. The committee chair can determine whether such an individual is to be invited to serve a second term and, if the invitation is to be extended, contact each such committee member concerning their willingness to serve again.
• March – Committee chairs report at the Executive Board meeting concerning the status of potential ‘carry-over’ committee members. Each committee chair then identifies the number of vacant positions needing to be filled on the committee. Suggestions may be solicited from board members concerning possible new committee members. A survey might also be distributed at the March MCL retiree luncheon soliciting volunteers who would be willing to serve. New committee chairs should attend the March Executive Board meeting and become involved in the process of selecting new members of the committee he/she will chair.

• April – Committee chairs report the names of new committee members at the Executive Board meeting and forward those names to the Secretary, Staff Benefits, who then forwards them to the Office of the President. The President of the University sends a formal appointment letter to each new committee member.
3.04 BENEFITS COMMITTEE

3.04a Responsibilities

The Benefits Committee monitors the medical plans for retirees, evaluates changes, and investigates alternatives where advantages may be gained. A key part of the execution of this committee’s responsibilities is through the support provided by the Purdue University Human Resource Services Department that handles the communication, gathers additional vital data, and provides a focal point for problem resolution. The committee also strives to keep retirees aware of additional University benefits and privileges and promotes program improvements where possible.

3.04b Mission Statement

The mission of the Benefits Committee is to initiate and encourage all activities that concretely contribute to the wellbeing of Purdue University Retirees, including retirees at all levels: clerical, service, administrative/professional, clinical and faculty.

The Purdue University Policy IV.3.1, Status and Privileges of Retired Faculty and Surviving Spouses and Children, originally issued on May 10, 1971 and revised December 12, 2001 outlines the specific benefits extended by the University. These include participation in Group Life Insurance up to age 65, a personal identification card, complimentary ‘A’ parking permits, purchase of tickets to various Purdue events at staff rates, and use of the University facilities.

It is the purpose of the Committee to expand upon and add to these specific University policies which contribute to the wellbeing of retirees. These activities have included affordable health insurance, activities which promote health, and a variety of voluntary insurance products. A part of this mission is to make these products user-friendly through exhorting the service providers to provide understandable literature and easy access to the resolution of problems.

Income is vital to retirees. The Committee has been concerned with the service provided to retirees by those from whom income is received, especially TIAA-CREF.

The committee has been concerned with making University activities more accessible to retirees through providing affordable fees for admission to University sponsored events, desirable seating arrangements and improved accessibility for those who are physically handicapped.

The committee seeks to reduce the number and severity of retiree’s problems through education/information programs that help active faculty and staff make decisions before retirement that improve the quality of life after retirement.

Finally, the committee is sensitive to resolving problems that are encountered by retirees, and tries to anticipate future problems through current activities designed to avoid such problems, or to minimize and mitigate them when they do arise.

3.04c Support from Human Resource Services Staff

Rev. 4/14/09
The advisor for the Benefits Committee is the primary administrator of Human Resource Services/Staff Benefits. The advisor serves as a critical liaison with the University – other administrators, University Senate committees, health and service vendors, consultants, etc. The Human Resource Services advisor monitors benefits provided to retirees through various plans including PERF, TIAA-CREF, Social Security and Medicare. The advisor is sensitive to services and benefits offered to active employees to ensure that retirees are offered similar opportunities when it is reasonable to do so (free annual flu shots, CityBus access, voluntary insurance plans, Employee Assistance Programs, discount purchasing services, etc.).

The Benefits Committee provides representatives for University pre-retirement programs, committees that review benefit packages, strategic planning groups, designated University Senate committees (Parking and Traffic, Faculty Compensation and Benefits), and other relevant committees as created (WorkLife Programs, etc.).

As needed, ad hoc committees are appointed to study and make recommendations on timely issues such as physical and program access to the University, John Purdue Club policies, and special programs/forums to address critical issues.

The secretary in Staff Benefits serves as the support staff for this committee. In addition, one Human Resource Services staff member is funded through PURcare and assists retirees with matters related to enrollment, distinctions among plans, claims problems, and general administrative issues.

3.04d  Medical/Pharmacy Plans – Structure

There are currently two medical/Rx plans supported by Purdue:

1.  PURcare, a Medicare supplement plan which has very comprehensive coverage and low financial risk, but a higher monthly premium; and
2.  A Private Fee for Service plan, which is a Medicare Advantage Plan and has a lower monthly premium but additional financial risk when a major medical event occurs.

**PURcare:**

With the aid of a consultant provided by Purdue University’s Human Resources office, this plan is negotiated year-by-year. During April, May and June the current plan is evaluated and the consultants begin the negotiations for the cost and structure of the next year’s plan. By August or September a final plan is approved by the committee and performance guarantees are agreed upon.

**PFFS Medicare Advantage:**

This plan replaces Arnett Gold and is a negotiated Medicare Advantage plan. The timeline for development and approval by the committee follows that for PURcare.

Once the plans are approved by the committee, a letter explaining the plans is prepared by the committee chair and Director of Staff Benefits, and mailed to retirees in mid-October over the signatures of the committee chair and PURA president. In November representatives of the companies carrying the insurance plans come to campus to explain the new plans and answer questions.
3.04e  **Optional Insurance Programs**

Retirees may continue participation in Group Life Insurance up to age 65. They may also participate in the following voluntary benefits programs: Dental; Universal Life; Auto/Homeowners Insurance; and a Prepaid Legal Services Plan. Additional information about these plans may be found in the Faculty and Staff Handbook.

3.04f  **Retirement Plans**

**TIAA-CREF:**
Most active faculty and administrative/professional staff are eligible to participate in TIAA-CREF, which is fully funded by the University. At retirement, HR staff counselors help in the transition from work to retirement. All employees, regardless of classification, may participate in supplemental tax-deferred accounts that are available from TIAA-CREF and four other companies. The Benefits Committee monitors issues that may arise from these plans during retirement.

**PERF:**
Many retirees at Purdue are eligible to receive PERF benefits from the Public Employees Retirement Fund. All of these retirees are also eligible to join Retired Indiana Public Employees Association or RIPEA. PERF retirees are represented by RIPEA at the legislative and executive branches of state government for the benefit of retirees. RIPEA members are also eligible to participate in Group Health Insurance, Whole Life Insurance, Long Term Care, Dental & Vision Insurance, Auto & Home Owners Insurance, Prescription Drug Card and Hearing Insurance. These programs are taken into consideration by the PURA Benefits Committee.

A Retirement Plan Subcommittee has been formed to deal with emerging issues involving retirement plans, primarily TIAA-CREF and PERF. The subcommittee has established a line of communication between the Benefits Committee and TIAA-CREF. Plans are to establish similar points of contact with groups dealing with PERF. The subcommittee also provides a collection point and assistance in finding solutions to problems of individual retirees with these plans. This subcommittee is made up of members of the Benefits Committee, representatives of TIAA-CREF, and Human Resource Services.

3.04g  **Wellness**

All Purdue retirees and their spouses/same sex domestic partners are eligible to participate in all wellness programs at Purdue except for incentives provided to active employees. These Wellness Programs include Wellness Screenings, Flu Shots, Nursing Center for Family Health, Speech and Hearing Screenings, Programs, Health Awareness, Employee Assistance Program, One-on-One Nutrition Counseling, and One-on-One Smoking Cessation Counseling. Two Wellness Ambassador positions have been designated by WorkLife as representing Purdue retirees and are filled by members of the PURA Benefits Committee.
3.05 COMMUNICATIONS COMMITTEE

3.05a Responsibilities

The Communications Committee is responsible for maintaining an information connection with Purdue’s retirees through a variety of media, both print and electronic. This includes the Purdue Retirees Website, PURA Newsletters, the Retirees Handbook, and publicity for the monthly luncheons and information concerning periodic seminars. Special communication projects, such as the ‘Purposeful Living in Retirement’ seminar brochure and the Deans, Directors and Department Heads Brochure are created and/or maintained by members of the committee. University retirees are included in the Purdue University Telephone Directory, which is updated and produced annually; updating this information is executed in collaboration with Human Resource Services.

When special needs arise requiring communication with the body of retirees, the Communications Committee will assist in providing the needed communication.

3.05b Committee Structure

The committee is made up of one representative from each of the other standing and ad-hoc committees, the PURA historian, members-at-large as appointed by the Executive Board, and a chairperson. In addition, the director of periodicals for Purdue University is invited to serve as an ex-officio member of the committee. The members-at-large should be appointed so that their terms on the committee expire on a rotating basis. The chair:

- shall not be a member of any other standing committee,
- shall serve as a coordinator of the committee’s activities, and
- shall not be responsible for preparing materials for publication.

3.05c Printed Newsletters

A number of newsletters are published each year, with the assistance of the Office of Periodicals, and mailed to all Purdue retirees. The committee is responsible for working with the director of periodicals, the PURA president and committee chairs in planning articles for the newsletters.

In order to meet communication needs, the publication schedule is determined by the Executive Board and reviewed periodically. There is always at least one printed newsletter per year, to ensure complete coverage, particularly of Benefits information, but over time, consideration will be given to emphasizing electronic communication over printed newsletters.

The current planned schedule for distribution of newsletters is described below. Planned inclusions need to be identified a month in advance, and final copy is due approximately three weeks prior to mailing.

- Mid-November. Contents are focused on health care benefits for the next year and a profile of the individual or departmental unit that received the Betty M. Nelson Special
Recognition Award, along with other updates and features. This issue date is adjusted based on timing of benefits package news.

- Early January. This issue includes the new PURA officer slate and proposed by-law revisions, and presents the spring luncheons, spring trips and tours, and campus & community activities.

- Mid-March. This issue includes Spring Fling information, and a save-the-date announcement for the fall Kick-off Luncheon.

- Mid-July. Contents include information about the new PURA officers and committee members, the Kick-off Luncheon invitation and registration form, an article about the recipient unit or department for the Arthur G. Hansen Award, and fall trips and tours and campus/community activities.

In addition to the copies mailed to retirees, additional copies of the newsletter are mailed to the following:

- The deans, directors and department heads on the West Lafayette campus, and regional campus chancellors. (‘List 39’)

- The contact person at each of the Big Ten university retiree associations. The Secretary, Staff Benefits maintains this list of contacts. Ideally, an updated list of contacts for the associations is distributed at the annual Big Ten Retirees Association conference (typically in August) and a copy given to the Secretary, Staff Benefits. In the event an updated list is not published, it may be necessary to periodically check the various Big Ten retiree association web sites, most of which have links from the Big Ten Retirees Association web site, www.umich.edu/~hraa/umra/big10.

3.05d Web Site

The committee is responsible for ensuring that the PURA web site, located at www.purdue.edu/retirees, is updated in a timely manner. Useful information and links to information from outside sources are available within the web site. The following items are updated or added to the site each year:

1. A welcome letter from the current PURA president
2. The annual report of the prior PURA president
3. The annual reports of the standing committees
4. A list of the PURA monthly luncheon programs
5. A list of the trips and tours with reservation forms
6. The PURA newsletters
7. Information about the Arthur G. Hansen Recognition Award
8. Information about the Betty M. Nelson Special Recognition Award
9. Information about the PURA Endowment and how to contribute
10. Timely information about the annual fall Kick-off Luncheon
11. Information about Spring Fling and retiree volunteer opportunities
12. Information about the PURcare medical insurance program
13. The Retiree Handbook
14. The PURA History
15. Information about other special events, as appropriate
16. Links to University/PURA Calendars
17. Special articles and profiles

The actual maintenance on the web site is done by the staff in the Office of Periodicals, with the director of periodicals being the contact person. The committee coordinates and forwards current information to the director of periodicals for maintaining the web site and provides links to relevant outside information sources.

3.05e Retiree Handbook

The Retiree Handbook contains University policy information and important contacts for benefits and other issues important to each retiree.

1. The handbook is published so as to be available for distribution to new retirees at the Purdue Retirement Banquet in May or June.

2. Appropriate information is collected continuously to update the handbook, and contact is made with Purdue Marketing Communications in early spring for the selection of an editor and designer.

3. The number of copies of the handbook printed may vary from year to year, depending upon the projected number of retirees. This count can be obtained from the retirement counseling staff in Staff Benefits. Additional copies are printed for distribution to participants at the on-campus Staff Benefits Pre-Retirement Seminars, at the Big Ten Retirees Association annual conference and to meet other needs.

4. In those years when a new handbook is not printed, updated contact information may be included in an issue of the PURA Newsletter or in some other way.

5. An earlier decision has been made by the executive board to provide a new edition of the handbook for every retiree in alternate years and to mail it in the same shrink-wrap package with the Purdue Telephone Directory. If the additional weight increases the amount of postage needed for each unit, PURA will pay the difference.

6. A current copy of the handbook is maintained on the web site (www.purdue.edu/retirees).
3.06 HOSPITALITY COMMITTEE

3.06a Responsibilities

The Hospitality Committee encourages retirees from all sectors of the University to take part in PURA’s on-going activities such as the fall Kick-Off Luncheon, the monthly MCL luncheons, trips, tours, and other special events. The committee may serve in a liaison capacity for special events such as flu shot administration, health fairs, retirement receptions, and so forth. The committee also strives to improve our communications to retirees and pre-retirees and gather ideas that might result in interesting new programming for PURA. The committee attempts to identify and consider programs and services that will attract the broadest participation of University retirees possible. Recommended ideas and projects are presented to the PURA Executive Board for approval, recognizing that committees other than the Hospitality Committee should be further involved.

3.06b Committee Structure

Members of the committee are retirees selected from as many of the various sectors of the University as possible. Those who enjoy and employ creative thinking, but are also task oriented, are particularly appreciated. A chair with tolerance for the exploration of ideas and the ambiguity of formulating new projects is helpful.

3.06c Meetings

Meetings normally are held monthly throughout the year at University Place with an agenda and recorded minutes sent to all members of the committee. For a meeting at which catered food is served, such as a brainstorming session, the bill should be given to the Secretary, Staff Benefits for payment using PRF funds.

3.06d Greeters at PURA Luncheons

To extend a warm welcome to retirees attending the monthly PURA luncheons, the Hospitality Committee provides a greeter outside the dining room at MCL Cafeteria to greet people as they enter with their food trays. The greeters are drawn on a rotating basis from the membership of the committee. For the Annual Kick-off Luncheon in the fall, multiple greeters may need to be provided. The chair of the Hospitality Committee usually attends the planning meetings for the KOL to be kept aware of any needs the Hospitality Committee will need to meet.

3.06e Contacts with New Retirees

One of the committee’s important focuses is to try to involve more clerical/service retirees in PURA and its activities. To encourage this involvement, the Secretary, Staff Benefits provides the committee with an annual listing of new clerical and service retirees shortly after July 1 of each year. Members of the Hospitality Committee personally telephone each new retiree on the list to welcome them to PURA, briefly explain our activities and benefits, and encourage them to attend the monthly luncheons and become involved in the organization.
3.06f Purdue Spring Fling Involvement

Spring Fling is the annual all-campus appreciation event for all employees which takes place in late May. It is organized by staff in Human Resource Services, working with representatives of other departments across campus. A chair of the PURA Hospitality Committee attends the monthly planning meetings for the event.

- Retirees are encouraged to volunteer their assistance for the event to assist in the food lines, distribute pop corn and ice cream, and so forth. A post card is sent to all ‘local’ retirees early in the spring by HRS asking for volunteers. An article about Spring Fling and volunteer opportunities also is included in a spring issue of the PURA Newsletter.
- The Spring Fling committee erects a tent near the RecSports Center which is used by PURA to distribute retiree-related information. Chairs also are provided. The tent is staffed by members of the Hospitality Committee and Executive Board, using approximately three people per hour.
- Special handouts may also be distributed at the tent.

3.06g Volunteer Activities

PURA was directly involved in the creation of the Boiler Volunteer Network (BVN) and remained close to its operation for the first few years. Since then, our involvement has lessened considerably. During the 2004-2005 administrative year, the Executive Board established a policy of not formally sponsoring volunteer projects within PURA due to the wide variety of opportunities within the community.
3.07 PROGRAM COMMITTEE

3.07a Responsibilities

1. The Program Committee provides a program for PURA for the monthly luncheon meetings at MCL on the first Monday of each month except the month of September. The first Monday in September is close to the time when the annual “Kickoff Luncheon” is normally held, so no regular monthly meeting is scheduled. The Program Committee is not responsible for the “Kick-off Luncheon.”

2. The committee sets the luncheon meeting schedule for the coming year beginning with October and running through August of the following year. If the first Monday of the month falls on a national holiday, PURA will not meet during that month. Once the schedule is established, the MCL management is informed of the upcoming yearly schedule.

3.07b Committee Structure

1. The Program Committee chair is responsible for obtaining the necessary members to serve on the committee for a three-year term. Persons eligible for membership are official retirees of the administrative/professional, faculty, clerical and service staffs and their spouses. An effort should be made to have as broad a representation as possible from the various categories. Normally, the committee is composed of 11 members plus the chair. Thus, each member, except the chair, is responsible for coordinating one meeting per year. If a committee member is unable to attend his or her scheduled meeting, the chair will serve as master of ceremonies for that meeting or arrange for a substitute.

2. The chair keeps a record of committee members in terms of their status regarding their three-year term. Members may serve one additional three-year term if the chair and the respective member mutually agree. Thus, the chair needs to know the termination date for each committee member. This information is provided to the PURA president and to the Secretary, Staff Benefits.

3.07c Planning Meetings

The Program Committee has its main annual planning session as part of PURA’s Annual Transition Meeting, usually in late May or early June. All continuing committee members, as well as outgoing members and new members, are invited and encouraged to attend this planning meeting. The chair usually contacts all continuing and new members prior to this meeting to outline their responsibilities at the monthly meetings and to suggest they begin thinking about possible topics and speakers, as well as a possible month in which the program might be offered. The planning meeting then consists of putting together a rough draft of programs and coordinators for the coming year. The committee chair may also have received suggestions from other PURA committees or the PURA Executive Board regarding important issues they feel would be of interest to retirees and serve as a program topic. These suggestions should be taken into account when developing the schedule for the year. Once a draft schedule is completed, members can be given additional time to research possible speakers and confirm their
Program Committee

willingness to participate. An additional planning meeting may be scheduled, if necessary, although this normally is not needed. The program schedule for the coming year should be finalized by July 31.

3.07d Program Schedule Distribution

Once the year’s program schedule is finalized, copies of the schedule are distributed as follows:

1. To the chair of the Kick-off Luncheon Committee for printing and distribution at the Kick-off Luncheon

2. To the chair of the Communications Committee for inclusion in the Retirees Newsletters.

3. To the Secretary, Staff Benefits for inclusion in the printed programs at the monthly luncheon meetings.

4. A member of the committee is responsible for getting the program information to the Journal and Courier for publication prior to the meeting as a reminder to retirees.

3.07e Coordinator Responsibilities

The monthly coordinator, a committee member, makes all arrangements for the assigned month.

1. Invite the speaker and obtain biographical data for an appropriate introduction. Confirm details of where and when.

2. Check with the speaker about any audio/visual equipment needs. MCL can provide a small screen, but using a lowered window shade may be better. Presenters usually provide their own projection equipment. In cases where presenters cannot provide their own projection equipment, the coordinator should try to borrow or rent the needed devices. There are a number of departments at Purdue that may be able to assist.

3. Provide the Secretary, Staff Benefits with details of the program by the 15th of the month prior to the program. This includes any related printed material pertaining to the topic which should be included in the printed program.

4. Meet the speaker at MCL. Ask the speaker to be present to go through the food line by 11:20 a.m. Pay for his or her lunch, then forward the receipt from MCL for the speaker’s lunch to the Secretary, Staff Benefits for reimbursement. The PURA budget provides for the cost of the speaker’s lunch.

5. The program should begin at 12:00 noon and end at 1:00 p.m.

6. Lead the Pledge of Allegiance.

7. An invocation or moment of inspiration presented by the coordinator or someone else is recommended, but optional.
Program Committee

8. Recognize birthdays among luncheon attendees; music is an option to be decided on by the coordinator.


10. Call on the PURA president (or a substitute) for announcements.

11. Introduce the presenter.

12. Thank the presenter.

13. Adjourn the meeting.

3.07f Monthly Meeting Arrangements

The MCL Cafeteria is to set up the room and equipment as listed below by 9:00 a.m. on the day of the luncheon.

1. Arrange tables and chairs to accommodate 100 attendees as follows:
   a. Three long tables end-to-end set east-west across the north end with 24 chairs
   b. Four long tables end-to-end set east-west across the center with 32 chairs
   c. Four long tables end-to-end set east-west across the south end with 32 chairs
   d. One long table set east-west in the southwest corner with 8 chairs
   e. Two front tables set north-south flanking the podium at west end with 2 chairs each
   f. Note: place extra chairs in the east end of the room when needed to seat overflow attendees who have eaten in the public dining room.

2. Vacuum the floor carpet before program participants start arriving at 10:30 a.m.

3. Set the American flag at the front left (west end) of the room.

4. Install and test podium microphone. A working microphone is always required.

5. Provide and erect a projection screen in the northwest corner of the room unless the program coordinator has advised that a screen is not needed.

6. Provide electronic keyboard in front of the screen and connect electrical power unless the program coordinator indicates that the keyboard is not needed.

7. Close darkening shades.

8. Verify that the permanent wall-mounted coat rack at the back of the room near the entrance is accessible.

9. Turn down the volume for the background music. (Do not turn the power off as this will also shut down the power to the lectern microphone.)
Program Committee

10. Provide an electrical power strip and plug in extension cords for a computer, projector and electronic keyboard. Always anticipate that a Power Point or slide show presentation will be used by the speaker.

11. Provide a waste basket/trash receptacle at the back of the room.

12. Provide a table at the back of the room for coffee, iced tea and water refills.

13. Provide a small table by the room exit for handouts.

14. MCL staff are expected to clear dirty dishes starting at 11:15 a.m. and continuing until the program begins at 12:00 noon.

3.07g Guest Speaker Lunches

As mentioned above, the Executive Board has approved reimbursement of costs for the guest speaker’s lunch as well as other reasonable and necessary out-of-pocket expenditures.
TRIPS AND TOURS COMMITTEE

3.08a Responsibilities

The primary mission of the Trips and Tours Committee is to provide informative, educational and entertaining opportunities for members of the Purdue University Retirees Association. The committee meets three to five times per year to list possible destinations and to select six or more tours to be offered during the year. Normally, three tours are offered during the fall season and three are offered during the spring season each year. Members should be knowledgeable about available destinations in Indiana and neighboring states and should be capable of obtaining information on the destinations chosen.

3.08b Committee Structure

The committee consists of a chairman and four to six members. The chairman should attempt to appoint new members each year to assure carryover and consistency of policy from year to year.

3.08c Policies on Destinations

Destinations are chosen to represent a variety of interests including cultural (historical, art, drama, music, etc.), technological and manufacturing. Trips are generally planned to be completed in one day because the attempts to do overnight trips have not been well attended. The destination is generally within 250 miles of the Purdue campus to assure reasonable start and return times. The committee may also include ‘local’ destinations which require long-term and/or detailed planning. Campus and community destinations which do not require long-term planning may be scheduled, instead, by the ad hoc Campus and Community Activities Committee. Trips planned for late Fall (November) and early Spring (February) are planned for destinations near the campus because of weather uncertainties. The scheduling of trips requires careful attention to avoid critical dates such as Easter, Labor Day, Purdue’s calendar dates and other scheduled PURA activities.

3.08d Establishing Cost Per Person For Each Trip

A representative of the Trips and Tours Committee submits a description of the destination, along with an estimate of mileage and time required to the Purdue Transportation Department. The Transportation Department provides an estimate of the transportation cost of the trip. Twenty-five (25) participants has been established as the break-even point. The transportation estimate is divided by 25 to set the charge for transportation, and the cost per person for admissions and lodging (if required) is added to provide the total cost for each participant. Some meals may also be included in the charge for the trip.

3.08e Bus Charter Procedures

Actual chartering is handled through the Office of Human Resource Services by the Secretary, Staff Benefits. The Purdue Transportation Department will bill the PURA Function account for actual trip charges.
3.08f **Trip Planning**

Each trip is assigned to one or two committee members who work with the committee chair to establish exact itinerary, admission charges, meal charges and, if overnight, lodging charges. This plan includes persons contacted (name, title, telephone number, address, e-mail address) and costs established for each item of specific charges. A description of the destination is also included. The responsible committee members are also expected to conduct the trip. Each committee member is provided with a copy of all trips for that season. This allows a committee member other than the planner to conduct any trip, should the need arise. The time schedule, description and charges are used to prepare the publicity material.

3.08g **Publicity**

The committee chair uses the trip plans to prepare material for the *PURA Newsletter* for each season. Trip descriptions and registration forms for each trip are published in a local issue of the *PURA Newsletter*. Spring trips are included in a Winter (December or January) issue and fall trips are in a Summer (July) issue. The schedule of tours with accompanying descriptions and registration forms should be entered in the PURA web site in a timely manner. Reminders of the trips schedule and registration deadlines should be included in the programs of the monthly PURA luncheons in the MCL Cafeteria. E-mail reminders of trips and registration deadlines can be sent to the ‘local’ list of retiree e-mail addresses by the Secretary, Staff Benefits. The Trips and Tours Committee must work closely with the Communications Committee to facilitate the publicity.

3.08h **Collection of Funds**

All funds are collected by the Secretary, Staff Benefits. As reservation slips and fee payments are collected, a roster of those attending is compiled. Funds collected are deposited into the PURA Function account. The Secretary, Staff Benefits sends an acknowledgement of receipt of payment via e-mail or telephone. A trip reminder postcard is sent to each participant no less than one week prior to the event by the Secretary, Staff Benefits with the assistance of the trip conductor from the Trips and Tours Committee.

3.08i **Payment of Bills**

The Secretary, Staff Benefits pays the Transportation Department for bus costs out of the funds collected and deposited in the PURA Function account. The trip conductor (Trips and Tours Committee member) usually pays the admission and meal charges and obtains receipts which are submitted to the Secretary, Staff Benefits for reimbursement. Reimbursement is in the form of a check.

3.08j **Disposition of Funds**

All funds in excess of those necessary to pay expenses for a given trip remain in the PURA Function account. This could arise if more than 25 attend and create excess transportation funds or if there are registrants who do not actually attend the trip. General policy is not to reimburse registration funds after the trip registration deadline has occurred.
3.08k Report to Executive Committee

A follow-up report is prepared for each trip by the committee member in charge of the trip and the committee chairman, using the Trip Summary Report sheet (sample attached). The report includes the number in attendance, total funds collected, expenses, trip description and trip evaluation. The evaluation of the trip assesses the quality of the visit, noting such factors as convenience, satisfaction, and the general feeling of the participants about scheduling the site again. The Secretary, Staff Benefits provides the number of registrants and, consequently, the total funds collected. The trip conductor provides the record of expenditures other than transportation, and Purdue Transportation provides the actual transportation costs. Copies of the Trip Summary Report are distributed to members of the PURA Executive Board at a subsequent meeting.

3.08l Past Planned Destinations

<table>
<thead>
<tr>
<th>SEASON</th>
<th>YEAR</th>
<th>DESTINATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall</td>
<td>1997</td>
<td>Ernie Pyle State Memorial in Dana, Indiana</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Mounds State Park</td>
</tr>
<tr>
<td>Spring</td>
<td>1998</td>
<td>Wolcott House and George Ade House</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Tippecanoe County Jail and 911 Facility</td>
</tr>
<tr>
<td>Fall</td>
<td>1998</td>
<td>Subaru-Isuzu Plant</td>
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<tr>
<td></td>
<td></td>
<td>Wabash College, Lane Mansion &amp; Ben Hur Museum in Crawfordsville, Indiana</td>
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<tr>
<td>Spring</td>
<td>1999</td>
<td>Eli Lilly Tippecanoe Laboratory</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Turkey Run State Park</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Tippecanoe County Court House (canceled, schedule conflict)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Red Barn Theater in Frankfort (canceled, lack of interest)</td>
</tr>
<tr>
<td>Fall</td>
<td>1999</td>
<td>Indiana State Museum and Scottish Rite Cathedral</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Indianapolis Zoo</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Tippecanoe County Court House</td>
</tr>
<tr>
<td>Spring</td>
<td>2000</td>
<td>Commandant’s Home at Indiana Veteran’s Home and John Christian’s Frank Lloyd Wright Home</td>
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<tr>
<td></td>
<td></td>
<td>Studebaker Museum and Capshaholm House in South Bend</td>
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<tr>
<td></td>
<td></td>
<td>Purdue Aviation Technology in Indianapolis and United Airlines Repair Facility</td>
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<tr>
<td>Fall</td>
<td>2000</td>
<td>Architectural Tour of Columbus, Indiana</td>
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<tr>
<td></td>
<td></td>
<td>Delphi Canal Park and Museums at Prophetstown</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Peters-Revington Furniture Factory (canceled)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Madison, Indiana and Clifty Falls State Park (overnight)</td>
</tr>
<tr>
<td>Spring</td>
<td>2001</td>
<td>Subaru-Isuzu Plant</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Greentown Glass and Elwood Haynes Museum in Kokomo</td>
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<tr>
<td></td>
<td></td>
<td>Field Museum of Natural History in Chicago</td>
</tr>
<tr>
<td>Fall</td>
<td>2001</td>
<td>Minnetrista and Oakhurst in Muncie, Indiana</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Morris-Butler House and Indianapolis Art Museum featuring</td>
</tr>
<tr>
<td>Season</td>
<td>Year</td>
<td>Trips and Tours</td>
</tr>
<tr>
<td>--------</td>
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</tr>
</tbody>
</table>
| Spring | 2002 | ‘Gifts to the Tsars’.  
Kingma Christmas Tree Farm and Valparaiso University Chapel  
Caterpillar Factory in Lafayette  
Benjamin Harrison Home and NCAA Hall of Champions  
Amish Acres in Napanee  
Historic Prophetstown and Tippecanoe Battlefield |
| Fall   | 2002 | Lafayette Ivy Tech building and facilities  
Turkey Run State Park and Ernie Pyle State Memorial in Dana  
Brown County State Park and T.C. Steele Home and Art Studio |
| Spring | 2003 | Bioanalytical Systems in Purdue Research Park and Cancer Research Laboratory in Hansen Hall on campus  
Indiana State Museum and State House in Indianapolis  
Spring Mill State Park |
| Fall   | 2003 | Purdue Aquatic Center and Purdue Airport  
Conner Prairie at Noblesville  
Vincennes and New Harmony  
(overnight, canceled due to low enrollment) |
| Spring | 2004 | Woolcott House and George Ade House  
Culver Military Academy  
Myers Dinner Theater in Hillsboro, Indiana |
| Fall   | 2004 | Eiteljorg Art Museum and Speedway Museum in Indianapolis  
Air Force Museum in Dayton, Ohio  
Amish Country, Shipshewana |
| Spring | 2005 | Fair Oaks Dairy  
Underground Railroad in Lafayette area  
Shedd Aquarium and Berghoff Restaurant in Chicago |
| Fall   | 2005 | Turkey Run State Park and Covington Courthouse to view Depression Era murals  
Boggstown Dinner Theater  
IPFW Campus and Lincoln Museum in Fort Wayne |
| Spring | 2006 | Fair Oaks Dairy  
Museum of Science and Industry in Chicago  
Tulip Gardens and Dutch Village in Holland, Michigan |
| Fall   | 2006 | Field Museum of Natural History featuring King Tut artifacts  
Auburn-Cord-Duesenberg Museum and Pokagon State Park  
Indianapolis Art Museum and Oldfields-Lilly House |
| Spring | 2007 | Beef & Boards Dinner Theater in Indianapolis  
Studebaker Museum, Capshaholm House and College Football Hall of Fame, South Bend |
| Fall   | 2007 | Overnight trip to French Lick-West Baden, Indiana  
Jasper-Pulaski Wildlife Refuge and Whistlestop Restaurant |
<table>
<thead>
<tr>
<th>Trips and Tours Committee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rose-Hulman Institute, Clabber Girl Museum in Terre Haute and Attica Hotel for dinner</td>
</tr>
<tr>
<td><strong>Spring 2008</strong></td>
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<tr>
<td></td>
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<tr>
<td></td>
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<tr>
<td><strong>Fall 2008</strong></td>
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<td></td>
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<tr>
<td><strong>Spring 2009</strong></td>
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<td></td>
</tr>
</tbody>
</table>
Date of Trip:

Destination(s):

Registration Fee:

Trip Description:

(Continue on reverse side if necessary)

Number of Participants:

Funds Collected: $ 

Expenses
   Bus: $ 
   Meals: $ 
   Admissions: $ 
   Lodging: $ 
   Total Exp.: $ 

Evaluation and Recommendations:

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3.09 ENDOWMENT COMMITTEE

3.09a History

The framework for the Endowment Committee was included in the original PURA By-laws approved in August 2002; however, a committee was not convened until November 2007 at the request of the PURA president. At that time funds became available from PacifiCare through a Performance Guarantee agreement and became the basis of the endowment.

The PURA endowment agreement was constructed in consultation with the staff in the University Development Office and with the University’s general counsel. “The Endowment Agreement Establishing The Activities and Opportunities Fund for the Purdue University Retirees Association” was signed on September 14, 2007, by the President of the Purdue University Retirees Association, the General Counsel – University Development Office, and the Senior Vice President for Advancement.

Subsequently, a statement of understanding about the nature of the PURA endowment and the related procedures was developed by the Endowment Committee (reference materials from NACUBO AND C&UBA were used).

3.09b Purpose

It is specified in the agreement that the endowment income from the Activities and Opportunities Fund will be used for the general good of Purdue retirees for activities such as:

- Programs related to health matters,
- Educational opportunities, or
- Targeted fellowship activities as might be related to new retirees.

In general, the income will not be used for purposes that benefit individual retirees.

3.09c Responsibilities

The responsibilities of the committee include maintaining an awareness of the growth of the endowment from two sources – additional gifts and the appreciation of the funds under management through the Purdue Foundation. The committee publicizes the opportunity the endowment provides for donations to the University that benefit retirees. It receives and reviews requests for grants for programs and makes recommendations to the Executive Committee about funding the requests.

3.09d Structure

This standing committee has a membership of five with staggered three-year tenures; the president of PURA appoints the chair. The secretary/treasurer of PURA is a designated member and is responsible for maintaining the necessary records for the committee. Other committee members are recruited by the chair and approved by the PURA president. As with other standing
committees, the President of the University sends a formal appointment letter to each new committee member.

3.09e Relationships

The work of the Endowment Committee makes it essential to collaborate with other units at Purdue.

- University Development Office (UDO) – is a source of information and advice about ways to make gifts; receives gifts for PURA; communicates with the HRS fiscal advisor to PURA about the gift from a donor.
- Purdue Foundation – the UDO transfers stock or real estate to the Foundation to be converted to cash that will be invested as part of the University funds under management.

3.09f Timeline

On June 30 and December 31 each year an endowment report for the Activities and Opportunities Fund is distributed and includes:

- The book value (initial principal plus any additions since the last report).
- Income available for expenditure through the supported fund.
- Income distributed or reinvested for the previous six month period.
- Market value of the endowment.

Around May 1, the committee chair prepares a report of the committee’s activities for the Annual Planning Meeting. If new members are needed for the committee, those names are submitted to the incoming president of PURA.

3.09g Grant Request Process

Individuals or groups interested in requesting funds from the Activities and Opportunities Fund prepare a letter outlining the specifics of their proposal – need addressed, benefit, use of the funds, assessment. After reviewing details of the grant request, the committee makes a recommendation to the Executive Committee for a final decision.

3.09h Purdue Opportunity Award in Honor of Martin C. and Patty Jischke

At the time of the retirement of President Martin and Patty Jischke, the PURA leadership voted to honor them with a Purdue Opportunity Award in their name. This separate endowment has a $20,000 goal. Once the endowment is funded, income can be used for a scholarship for a student with exceptionally high need.

Once this POA endowed fund achieves its goal, PURA’s responsibilities will cease. The fund was established July 1, 2007.
3.10 ANNUAL KICKOFF LUNCHEON

3.10a Purpose

The luncheon celebrates the start of the program year for PURA. It provides an opportunity for retirees to hear about the “State of the University” from the University president and a chance to reconnect with friends and former colleagues. It generally is held on a Monday in September, preferably the first Monday after Labor Day.

3.10b Committee Structure

The PURA president appoints the committee chair, and the chair selects the other committee members. The committee is comprised of four or five retirees plus the chairperson. An effort is made to have representation of both faculty/administrative and clerical/service staff retirees. In addition, the PURA president and vice president serve as ex-officio members. The out-going president remains on the committee in an ex-officio capacity each year from the time he/she leaves office in June through the luncheon in September. A representative of the Hospitality Committee may be invited to attend committee meetings and provide input.

3.10c Establishing the Date

The PURA president is responsible for setting the date of the Kickoff Luncheon, which should be done as soon as possible following the preceding year’s event. Traditionally, the president of the University has been the invited guest speaker; thus, his/her schedule is key in setting the luncheon date. In general, the process is as follows:

- Check with the sales manager at the University Plaza Hotel to ascertain the availability of the facility the committee plans to use for the luncheon – ex. Grand Ballroom, University Square – on each Monday in September following Labor Day.

- Given the dates available, contact the Office of the President requesting her/his participation as the featured speaker. Include a preferred Monday if PURA has one. The president’s availability usually determines the actual date chosen for the luncheon. If the President is not free on any of the dates the desired facility is available, different dates or an alternate speaker will need to be selected.

3.10d Operational Time Line

A typical operational time line for organizing the luncheon is as follows:

<table>
<thead>
<tr>
<th>Time</th>
<th>Responsible</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>September</td>
<td>Cmte. Chair</td>
<td>Select the luncheon planning committee.</td>
</tr>
<tr>
<td>Oct./Nov.</td>
<td>PURA President &amp; Cmte. Chair</td>
<td>Contact University Plaza to determine which Mondays in September after Labor Day the desired facility – ex. Grand Ballroom, University Square – is available.</td>
</tr>
</tbody>
</table>

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Kick-off Luncheon Committee

Oct./Nov.  PURA President
Invite the President of Purdue to be the featured speaker. If the president is not available, work with the committee to identify other dates or an alternate speaker.

Oct./Nov.  Cmte. Chair
After a date has been selected and a speaker confirmed, negotiate a Booking Confirmation Agreement and Contract with University Plaza. Have the PURA president sign these agreements.

Jan./Feb.  Cmte. Chair
Meet with the University Plaza Catering Manager to get information for the committee to consider re: menu options and prices. Establish date by which final meal guarantee count will need to be provided.

Mar./Apr.  Cmte. Chair
Convene the Luncheon Committee to discuss and determine menu; program content and participants; dining room decorations (table linens, centerpieces, etc.); and facility needs (risers, podium, microphones, flag, electronic piano, tables, etc.). Set reservation deadline, luncheon starting time, and time doors will open (usually 30 minutes prior to luncheon). Establish a preliminary budget and prepare a recommendation for PURA Executive Committee review and action re: the ticket price for the luncheon. Assign areas of responsibility for the upcoming luncheon to the various committee members.

April  Cmte. Chair
Convene committee meeting to finalize budget, discuss door prizes, review PURA Newsletter article and registration form, confirm music/entertainment, etc.

Apr./May.  Cmte. Chair
Meet with University Plaza Catering Manager to finalize the detailed Banquet Event Form (menu, tables, podium, risers, keyboard, microphones, flag, room arrangements, reserved table location and signs, tablecloth and napkin colors, table mirrors, etc.). Have the PURA president sign the form.

Apr./June  Cmte. Chair
Communicate via e-mail/phone with committee members for updates from them re: progress they are making in their respective areas of responsibility. Periodically compile and share these responses as needed with the entire committee.

June  Cmte. Chair
Confirm with the Hospitality Committee chair and PURA president the participation of hosts and hostesses to assist with greeting and distribution of name badges (Hospitality Committee members and Executive Board members).

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<table>
<thead>
<tr>
<th>Month</th>
<th>Role</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>June</td>
<td>Cmte. Member</td>
<td>Provide copy for the article and reservation form to the PURA Newsletter editor.</td>
</tr>
<tr>
<td>July</td>
<td>PURA President &amp; Cmte. Chair</td>
<td>Invite former Purdue presidents and their spouses to be special guests at the luncheon. (Complimentary)</td>
</tr>
<tr>
<td>July</td>
<td>Hospitality Cmte.</td>
<td>Call new retirees and invite them to luncheon.</td>
</tr>
<tr>
<td>July</td>
<td>Cmte. Member</td>
<td>Visit the activities directors at University Place, Westminster Village and other retirement communities to invite their Purdue retiree residents to the luncheon and arrange for the distribution of reservation forms to them.</td>
</tr>
<tr>
<td>July</td>
<td>Cmte. Chair or PURA President</td>
<td>Send invitation letter to other special guests to the luncheon. (Complimentary)</td>
</tr>
<tr>
<td>July</td>
<td>Cmte. Member</td>
<td>Provide copy for luncheon program to the Secretary, Staff Benefits. Proof copy before it goes to Printing Services and again before the program is printed.</td>
</tr>
<tr>
<td>August</td>
<td>Cmte. Chair</td>
<td>Meet with University Plaza Catering Manager to discuss estimated attendance and confirm menu, physical arrangements, and tax exempt status.</td>
</tr>
<tr>
<td>August</td>
<td>Cmte. Chair</td>
<td>If not already done, sign detailed banquet event order form (tables, podium, keyboard, microphones, flag, room arrangement, napkin and tablecloth colors, etc.).</td>
</tr>
<tr>
<td>August</td>
<td>Cmte. Member</td>
<td>Confirm table centerpiece order with vendor.</td>
</tr>
<tr>
<td>10-14 days prior to</td>
<td>Luncheon registration deadline.</td>
<td></td>
</tr>
<tr>
<td>Event</td>
<td></td>
<td>Two weeks prior to Event Committee meets to confirm event plans and determine responsibilities for day of luncheon – ex. cut, alphabetize and distribute name badges; check facilities and arrangements; place centerpieces; put sticker on back of one program at each table to denote after-luncheon centerpiece recipients; place programs and other handouts on tables; arrange additional handout materials on table in lobby; organize door prize materials; decide who will remain in the lobby after the luncheon begins to greet latecomers, etc.</td>
</tr>
<tr>
<td>10 days prior to</td>
<td>Name Badge Creator</td>
<td>Obtain list of attendees from the Secretary, Staff Benefits. Create and proof name badges. Prepare an alphabetical list.</td>
</tr>
</tbody>
</table>
Event list of attendees (excluding Luncheon Committee members and special guests) that can be cut up and used for door prize drawings.

Cmte. Chair Arrange for a University photographer to be present to take appropriate photographs during the event.

One week prior to Event Send the speaker a letter confirming the luncheon arrangements and expectations. Ascertain A/V equipment needs, if any. Include a list of the names of people who will be seated with him/her at the head table along with a short biographical sketch of each person. Also include some information about PURA.

Submit meal count guarantee to University Plaza.

Day of Event Arrive at University Plaza Hotel (or other facility) about 1¼ to 1½ hours prior to the opening of the doors for the luncheon.

Check:

- reserved table signs
- podium placement
- American flag
- keyboard
- microphone(s)

Place on luncheon tables:

- programs (8 on each table)
- Hansen Award nomination forms
- table centerpieces
- place cards on President’s table
- other agreed-upon materials

Arrange door prize materials on a table next to the podium.

Discuss with banquet captain:

- Time for starting meal service
- Estimate time program will begin and table clearing to end

Place name badges in alphabetical order on skirted tables outside ballroom. Attach stickers identified with table numbers for those to be seated at reserved tables.

Place handouts on another skirted table outside ballroom:

- *Inside Purdue* issues
- Additional Hansen Award nomination forms
- United Way posters
- Intercollegiate Athletics schedules
- Convocations brochures
- PURA Handbooks and Endowment brochures

Ask University Plaza to put extra chairs in lobby near ballroom entrance door as appropriate for retirees arriving

Rev. 2/19/10
One hour before event | Hospitality Cmte. & Exec. Board | Greeters arrive.
--- | --- | ---
30 minutes before event | | Open ballroom doors.
Following luncheon | Cmte. Chair | Arrange for payment for facility rental and meal with Secretary, Staff Benefits. Have PURA’s University credit card and tax exempt form available. Payment comes from the PURA function account.
Week after luncheon | Cmte. Chair | Write thank you notes to the Purdue president and others who participated in or helped with the event – ex. name badge maker; piano player; Hospitality Committee chair; activities directors at University Place and Westminster Village; Secretary, Staff Benefits, etc.
One to two weeks after luncheon | Committee | Hold a wrap-up meeting to evaluate all aspects of the event and prepare recommendations for Executive Board consideration and action re: Future Kickoff Luncheons.
October | Cmte. Chair | Attend Executive Board meeting to present final report and financial statement re: the recent luncheon and recommendations, if any, for the following year’s event.
October | Cmte. Chair | Write Annual Report. Give copies to the PURA President and the historian.

**3.10e Special Guests**

The following special guests are invited annually to the luncheon:
- University president and spouse or an alternate speaker and spouse
- Past Purdue University Presidents Hansen, Beering, and Jischke and spouses
- Board of Trustees and spouses
- University Advisor to PURA
- Director, Staff Benefits
- Secretary, Staff Benefits
- Benefits Manager, Human Resource Services
- Director of Periodicals
- Director of Publications
- Head of Department/College that received the Arthur G. Hansen Award
- Recipient(s) of the Betty M. Nelson Award
- The person in the Office of Periodicals that maintains the PURA web site
- The person in the Purdue Marketing and Media Office that designs the PURA brochure
Kick-off Luncheon Committee

- Piano player and spouse

In addition to introducing the special guests, the PURA president will recognize the committee chairs of PURA, including the ad-hoc chairs, and introduce the past presidents of PURA who are in attendance.

3.10f Seating Considerations for Reserved Tables

1. Several tables need to be reserved at the front of the room for special guests (see list above), PURA Executive Board members and their spouses/guests, members of the Kick-off Luncheon Planning Committee, and other program participants and their spouses/guests. The number of tables will depend upon the number of people who will be seated at them. Standards holding signs indicating “Reserved” with a table number on each should be placed on these tables. The University Plaza can provide these. Individual place cards also should be made (the Secretary, Staff Benefits has done this) for at least the head table.

2. It is customary for the PURA vice president to give the Invocation and for the PURA president to emcee the program.

3. If retirees who nominated the recipient department for the Hansen Award are in attendance, they (and their spouses/guests) should also be seated at the reserved tables and be recognized during introductions. Those seated with the president and the president’s spouse should include the committee chair, the PURA president, the invocator, and other persons as appropriate. Another PURA officer should serve as host and be seated at the table where the Nelson Award Recipient(s) is (are) seated.

4. Two or more additional unassigned tables should be reserved at the back of the room to accommodate latecomers and committee members who are working in the lobby up to or after the start of the luncheon.

3.10g Table Decorations

Floral centerpieces are ordered for each table. Contact is made in April with various local florists to obtain cost estimates, based on an estimated count of attendees seated at table of eight. For the past several years, Bennett’s Flowers was selected to provide the centerpieces. The vendor delivers the centerpieces to the University Inn at 9:30 a.m. for the committee to set out at the tables. A delivery charge is often added by the vendor. If the table arrangements were contracted with the instructor of the advanced flower arranging class at Purdue, this fact should be included in the script for the luncheon.
3.11 CAMPUS AND COMMUNITY ACTIVITIES

3.11a Responsibilities

The ad hoc Campus and Community Activities Committee provides informative, educational and entertaining opportunities in the Greater Lafayette-West Lafayette area for members of the Purdue University Retirees Association. These events are usually ones that do not require bus transportation and don’t involve the collection of funds in advance. Some events may be gatherings with little advance notice. These events differ from those organized by the Trips and Tours Committee that can be scheduled well in advance, for which bus arrangements would likely be made, and for which a fee would normally be charged.

3.11b Committee Structure

This ad hoc committee functions informally. In its first year, the members had one brainstorming session and organizational meeting, and functioned via e-mail and telephone. Individuals agree to plan the organization of various events, largely those they, themselves have suggested. As an ad hoc committee with light responsibilities for the individual members, the length of term of service on the committee is treated informally. The chair of the committee is invited to attend the monthly PURA Executive Board meetings.

3.11c Some Past Activities

Because of the many educational facilities and athletic events at Purdue, and the equally wide variety of cultural organizations and business ventures in the Greater Lafayette/West Lafayette community, a wide variety of tours can be planned for retirees at no cost. Samples of recent campus tours include:

<table>
<thead>
<tr>
<th>MONTH</th>
<th>YEAR</th>
<th>EVENT/DESTINATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>November</td>
<td>2004</td>
<td>Athletic Training Table Lunch &amp; Women’s Exhibition Basketball Game</td>
</tr>
<tr>
<td>May</td>
<td>2005</td>
<td>University Place Luncheon and Nature Center Presentation</td>
</tr>
<tr>
<td>September</td>
<td>2005</td>
<td>Pao Hall, Dauch Alumni Center and Rawls Hall</td>
</tr>
<tr>
<td>November</td>
<td>2005</td>
<td>Campus lunch and Women’s Exhibition Basketball Game</td>
</tr>
<tr>
<td>March</td>
<td>2006</td>
<td>Discovery Park tour of the Morgan, Bindley and Birck Bldgs.</td>
</tr>
<tr>
<td>September</td>
<td>2006</td>
<td>Lawson Computer Science Building</td>
</tr>
<tr>
<td>October</td>
<td>2006</td>
<td>Lafayette Journal and Courier facility</td>
</tr>
<tr>
<td>November</td>
<td>2006</td>
<td>Campus lunch and Women’s Exhibition Basketball Game</td>
</tr>
<tr>
<td>April</td>
<td>2007</td>
<td>Schwartz Tennis Center</td>
</tr>
<tr>
<td>May</td>
<td>2007</td>
<td>Birck Nanotechnology Center</td>
</tr>
<tr>
<td>October</td>
<td>2007</td>
<td>Columbian Park Zoo</td>
</tr>
<tr>
<td>November</td>
<td>2007</td>
<td>Campus lunch and Women’s Exhibition Basketball Game</td>
</tr>
</tbody>
</table>
### Campus and Community Tours

<table>
<thead>
<tr>
<th>Month</th>
<th>Year</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>March</td>
<td>2008</td>
<td>Lafayette Symphony Rehearsal and Tour</td>
</tr>
<tr>
<td>March</td>
<td>2008</td>
<td>Animal Disease Diagnostic Laboratory</td>
</tr>
<tr>
<td>April</td>
<td>2008</td>
<td>EPICS and Armstrong Hall</td>
</tr>
<tr>
<td>October</td>
<td>2008</td>
<td>Caterpillar Large Engine Center</td>
</tr>
<tr>
<td>March</td>
<td>2009</td>
<td>Food Science Building</td>
</tr>
<tr>
<td>April</td>
<td>2009</td>
<td>Large Animal Clinic</td>
</tr>
<tr>
<td>April</td>
<td>2009</td>
<td>Greenhouses</td>
</tr>
</tbody>
</table>

### 3.11d Publicity

If time permits, descriptions of tours/activities (and registration forms, if needed) are published in a local issue of the PURA Newsletter. Announcements of activities should, when time permits, be added to the PURA web site in a timely manner through contact with the chair of the Communications Committee. Announcements and descriptive handouts should be distributed at the monthly MCL luncheons. E-mail reminders can be sent to the ‘local’ retiree distribution list by the Secretary, Staff Benefits.
3.12 “PURPOSEFUL LIVING IN RETIREMENT” SEMINAR
(Formerly “Living to 100”)

3.12a Responsibilities

The Purposeful Living in Retirement Committee is an *ad hoc* committee established to develop a program for a symposium that is presented in the spring of each year. The intent is to provide qualified speakers in areas that would benefit the PURA retirees during their retirement years. The committee is to request funding for sponsorship from such companies as United Health Care and TIAA/CREF. Companies and organizations are invited to present their products by having display tables at the seminar. Sometimes outside organizations are invited to attend, such as WALLA and AREA IV Council on Aging and the Coalition on Aging After 50.

3.12b Committee Structure

Members of the committee are retirees from various segments of the University. Also, representatives from WALLA and the AREA IV on Aging and the Coalition on Aging after 50 may be invited to be members of the committee. The chair normally serves for two years. The chair selects the members with recommendations from other members of the committee. An Event Planner from the University Special Events Office at Purdue is assigned to assist the committee with the physical arrangements at the meeting facility, the brochure development and mailing, and the registration of the attendees.

3.12c Operational Timeline

The Purposeful Living in Retirement Committee meets during the year to plan and develop the symposium to be presented in the spring of the next year. The seminar should be on a day when the preferred conference facilities (usually the University Plaza Hotel) are available and one which will not conflict with other major University and/or community events.

A typical Operational Timeline for organizing the seminar is as follows:

<table>
<thead>
<tr>
<th>Time</th>
<th>Responsible</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>May/June</td>
<td>Committee Chair</td>
<td>Selects committee members. Some of the previous members may remain and new members will be needed to replace those leaving. The past president of PURA is a member.</td>
</tr>
<tr>
<td>July</td>
<td>Committee Chair</td>
<td>Convenes the committee to review the evaluations of the last seminar and to start planning topics and possible speakers for the upcoming program. Decides on date for the symposium.</td>
</tr>
<tr>
<td>July</td>
<td>Events Planner</td>
<td>Confirms date with facility, usually University Plaza Hotel.</td>
</tr>
<tr>
<td>August</td>
<td>Committee</td>
<td>Confirms topics and begins contacting potential presenters.</td>
</tr>
</tbody>
</table>

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<table>
<thead>
<tr>
<th>Month</th>
<th>Role</th>
<th>Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>September</td>
<td>Committee Chair</td>
<td>Seeks major financial support from United Health Care and TIAA/CREF through the Secretary, Staff Benefits. Contacts local senior living communities, such as Westminster Village, University Place, Rosewalk Village and Greentree at West Lafayette, along with other potential sponsoring entities to request additional financial support.</td>
</tr>
<tr>
<td>October</td>
<td>Committee</td>
<td>Confirms topics, speakers and prepares Program Agenda.</td>
</tr>
<tr>
<td></td>
<td>Events Planner</td>
<td>Makes arrangements with University Plaza Hotel for the program meal and break refreshments.</td>
</tr>
<tr>
<td>November</td>
<td>Events Planner</td>
<td>Contacts companies who may be interested in having an exhibit at the seminar.</td>
</tr>
<tr>
<td>December</td>
<td>Committee/Events</td>
<td>Finalize Program Agenda and begin to prepare the brochure for printing.</td>
</tr>
<tr>
<td></td>
<td>Committee Chair</td>
<td>Submits article for the January <em>PURA Newsletter</em>.</td>
</tr>
<tr>
<td>January</td>
<td>Events Planner</td>
<td>Prepares brochure draft for committee approval.</td>
</tr>
<tr>
<td>February</td>
<td>Events Planner</td>
<td>Submits brochure draft to Printing Services for printing.</td>
</tr>
<tr>
<td></td>
<td>Committee Chair</td>
<td>Recruits Hospitality Committee to assist with greeting and giving directions to attendees when they arrive.</td>
</tr>
<tr>
<td>March</td>
<td>Events Planner</td>
<td>Mails printed brochures. Meets with University Plaza Sales Office regarding A.V. needs, room layout and table decorations.</td>
</tr>
<tr>
<td>April</td>
<td>Events Planner</td>
<td>Prepares program materials, receives registrations and contacts University Plaza Hotel with meal count. Prepares name badges for participants and attendees.</td>
</tr>
<tr>
<td></td>
<td>One Week Prior to Event</td>
<td></td>
</tr>
<tr>
<td>Day of Event</td>
<td>Events Planner</td>
<td>Attends the registration table at the University Plaza Hotel. Passes out name badges and conference materials. Arranges decorations, labels exhibitors’ tables and reserves tables for presenters.</td>
</tr>
<tr>
<td></td>
<td>Committee</td>
<td>Arrives early at the seminar to assist with greeting and directing the attendees.</td>
</tr>
<tr>
<td></td>
<td>Committee Chair</td>
<td>At the conclusion of the program, collects attendees’ and exhibitors’ written evaluations and compiles summary of their ratings and suggestions for the next seminar. Sends “Thank You” letters to each of the presenters. Sends</td>
</tr>
</tbody>
</table>
“Thank You” letters, along with a statement of their portion of the break costs to University Place, Westminster Village, and any other supporting entities.

3.12d  **Contact with PURA Executive Board**

The Committee Chair meets monthly with the PURA Executive Board and attends the Annual Planning Meeting in June.
4.0 AD-HOC COMMITTEES

4.01 GENERAL

The Executive Board may create and make appointments to special *ad-hoc* committees as it deems necessary and appropriate. Membership terms on *ad-hoc* committees are of varying length, depending upon the purpose for which the committees are appointed. *Ad-hoc* committees are normally dissolved once the purpose for which they were created has been fulfilled.

4.02 ARTHUR G. HANSEN AWARD COMMITTEE

The Arthur G. Hansen Recognition Award is presented each year at the conclusion of the Spring Semester at the annual Purdue Retirement Event. It goes to a college, department, or division of the University judged to excel in fostering a strong relationship between that unit’s retirees and Purdue. (See the complete description elsewhere in this Procedures & Policies Manual.) An *ad-hoc* selection committee is appointed by the PURA president to review nominations submitted and make a recommendation to the Executive Board concerning a recipient unit for the award. The committee should contain at least five members who represent the faculty, administrative/professional staff and the clerical/service staff. The chair of the committee is appointed by the president. Each year, the new committee should, if possible, include about half of the previous year’s committee to provide continuity in the standards applied in selecting a recipient.

4.03 BETTY M. NELSON AWARD COMMITTEE

The Betty M. Nelson Special Recognition Award is presented annually to an individual, group or unit that provides outstanding service to retirees in general, regardless of the department or unit from which they retired. (See the complete description elsewhere in the Procedures & Policies Manual.) The *ad-hoc* selection committee is comprised of the members of the Executive Board, which has the prerogative to bring a name or agency forward to consideration and may select a recipient at one of its monthly board meeting.
5.0 AWARDS

5.01 ARTHUR G. HANSEN RECOGNITION AWARD

5.01a History

In the spring of 2001, Purdue retirees attending the Monthly Luncheon Series were asked to complete a form that requested information about the best practices of their department, division, or school in maintaining a strong relationship between their former employment unit and its retirees. Along with learning about a variety of positive strategies, the responses also highlighted that many retirees have had no contact with their departments since they left employment status. One retiree commented that his department failed to invite him to attend the spring reception at which a scholarship named for him was presented to a student. This statement became the impetus for discussions about how to develop a community culture that remembers, values, and acts to foster a strong relationship between the University and its retirees.

Operating from the belief that a strong relationship between the University and its retirees is mutually beneficial, PURA began the exploration of an award that could recognize the school, department, or division judged each year to excel in fostering a strong relationship between that unit’s retirees and Purdue.

Discussions about the creation of this recognition award included representation from several areas of the University: the Offices of the President, Executive Vice President and Treasurer, Vice President of University Relations, the Director and Assistant Director of Human Resource Services, the Director of Purdue Marketing and Communication, the Director of the Purdue News Service, and the Director of the Purdue Memorial Union.

Arthur G. Hansen served as president of Purdue from 1971 to 1982. During this time, he and a group of University retirees formed the President’s Advisory Council on Retirement (PACR) to serve the president as an advisory group on retiree matters. In addition, the name “Purdue University Retirees” (PUR) was adopted as the term for the total group of retirees. (Subsequently, these two groups dissolved and became the Purdue University Retirees Association.) Because of the support he gave to the formation of the initial Purdue retirees’ organization, the Executive Board of the Purdue University Retirees Association (PURA) approved naming its new award in honor of President Emeritus Arthur G. Hansen.

In consultation with representatives of the Office of the President, the decision was made that the AGH Recognition Award would be jointly sponsored by that office and PURA. The Arthur G. Hansen Recognition Award was approved by PACR (which subsequently became PURA) on December 6, 2001, and by the Office of the President on May 30, 2002.

To highlight the importance of the AGH Recognition Award, PURA sought and received financial support from TIAA-CREF to provide a $2,500 stipend to accompany the trophy presented to the chosen unit. TIAA-CREF funds also include $500 to PURA to cover the administrative cost of creating and maintaining the master plaque, acquiring and etching the
annual trophy, and producing the application material. This agreement with TIAA-CREF provides $3,000 annually to support the AGH Recognition Award beginning in 2003 and can be renewed indefinitely.

5.01b Award Presentation

The AGH Award is presented at the conclusion of the Spring Semester at the annual Purdue Retirement Banquet. The presentation is made by the President of the University, assisted by the PURA president. If he is in attendance, Dr. Hansen is included in the ceremony. A subsequent public acknowledgement of the recipient unit is made at PURA’s annual Fall Kickoff Luncheon. The meals for the head of the recipient unit and the nominator(s), and their guests, are paid by PURA, unless the unit head is already attending the banquet on behalf of unit retirees. PURA pays for the meals from any unused funds from the TIAA-CREF monies, or from PRF funds, if necessary.

5.01c Funding

The funding for the AGH Recognition Award comes from TIAA-CREF with an endorsement from the head of the regional office in Indianapolis. The agreement was developed in 2002 that TIAA-CREF would provide $3,000 per year to be renewed annually. This includes:

- $2,500 stipend to accompany a trophy to the winning unit
- $ 500 administrative funds to pay for the master plaque, the individual unit’s trophy and printed material used for the nomination process.
- $3,000 total

These funds are deposited by the Secretary, Staff Benefits into the University ‘005’ account for PURA. A check in the full amount is then written to “PURA” and the money deposited in the PURA checking account at PEFCU. The $2,500 award check to the recipient college/department is written from this account. A check request should be made by the PURA president to the Director, Staff Benefits in preparation for presentation at the Retirement Banquet. A $500 check is written from the checking account and deposited to the special “Arthur G. Hansen” account which the University maintains.

Consultation is essential with the Director, Staff Benefits about the process for confirming each year’s funds from TIAA-CREF for this project.

5.01d Coordination Responsibility

The responsibility for the management of all AGH activities belongs to PURA. The officers designated to coordinate matters related to the award are the president and past-president.

5.01e Brochure Preparation and Distribution

A brochure outlining the nature of the AGH award and the process for making nominations is prepared each summer for distribution in the fall at the Kickoff Luncheon, monthly retiree
luncheons and on other occasions, as appropriate. A nomination form is included in the brochure. The brochure is produced with the assistance of staff in Purdue Marketing Communications and is updated annually. A sufficient number of copies are printed to cover the needed distribution on campus, as well as at other events such as the Big Ten Retirees Association annual meeting. The most recent printing was 350 copies.

The AGH award information on the PURA web site should be updated at the same time the brochure is being prepared.

5.01f **Permanent Plaque**

The permanent plaque listing past recipients of the AGH Recognition Award is located in the main hallway of the Purdue Memorial Union (PMU), across from the Office of the Director. The formatting for the plate for each year’s recipient is available in the electronic file through Schugg Awards, Inc. (Sharon Schugg, contact person). Once engraved, the yearly plate is returned to the director or assistant director of the PMU with the request that the plate be attached to the master plaque in a timely fashion.

5.01g **Recipient Trophy**

The trophy presented to the head of the recipient unit is an acrylic pyramid-shaped obelisk etched with appropriate text, an image of Arthur Hansen and the TIAA-CREF logo. It is purchased through Schugg Awards, Inc. The file (electronic and hard copy) for the current design, font and wording is available through Sharon Schugg. (See sample attached.) The file location is “FILES2/1ACRYLIC/PURDUE/HANSEN”. The work order for engraving the plate and etching the trophy should be prepared by the Secretary, Staff Benefits. The past-president is responsible for ordering the trophy.

5.01h **Selection Committee**

A Selection Committee is appointed by the PURA president to review the nominations submitted and make a recommendation to the Executive Board concerning a recipient unit for the award. The committee should contain at least five members who represent the faculty, administrative/professional staff and the clerical/service staff. The chair of the committee is appointed by the president. Each year, the new committee should, if possible, include about half of the previous year’s committee to provide continuity in the standards applied in selecting a recipient.

5.01i **Publicity for Presentation**

Using information contained in the winning nomination, appropriate material is forwarded to the Director of Periodicals for use in preparing an article for the *PURA Newsletter*, as well as a press release for the University News Service. The articles are released in mid-May, prior to the time the award presentation takes place at the Retirement Banquet. UNS also provides appropriate press releases to local media.

Rev. 3/30/09
5.01j Calendar for Selection Process

The PURA officers responsible for the overall coordination and promotion of all AGH activities are the president and the past-president. A breakout of those responsibilities, by month, is shown below.

June (New PURA Officers in place)

Past-President
- Encourage the inclusion of articles about the AGH Award just presented and the recipient unit in *Inside Purdue*, *Purdue Now*, *Perspective*, and *PURA Newsletter*.
- If the recipient unit is part of a college, school or division that has its own newsletter, electronic or otherwise, contact the editor or responsible person to encourage the use of an article in the next issue about the AGH award.
- Review the AGH presentation procedures for the award with the PURA president and consider needed changes.
- Review the previous year’s AGH nomination brochure and form with the PURA president and the Director, Staff Benefits. Determine changes that should be made in either.
- If changes to the brochure are to be made, request an editor for the AGH brochure/nomination form update from the scheduling director for Purdue Marketing Communications (PMC). Work with the designated project editor to produce new material. The new materials should be available no later than August 1 and should be delivered to the Director, Staff Benefits upon completion.
- The printing order should request enough copies to distribute at the Fall Kickoff Luncheon, to make copies available at the monthly luncheon meetings in October and November, and to distribute as needed. The work order for printing should be prepared by the Secretary, Staff Benefits.
- Communicate with the chair of the Kickoff Luncheon Committee about the AGH-related guests to include in the luncheon plans – who will invite them, to whom RSVP information should be directed, who will host them, how the award will be woven into the luncheon agenda, who will introduce them and highlight the factors that contributed to the unit’s selection, etc.
- Request the Director, Staff Benefits to confirm with the regional representative of TIAA-CREF the renewal of funding to support the following year’s AGH award.

President
- Following the Retirement Banquet, send a letter of congratulations to the head of the unit that received the award and thank you letters to the nominators. Inform the head of the winning unit and its nominators about the PURA Fall Kickoff Luncheon – its date, time and location – and that the AGH recipient will be introduced again along with the factors that contributed to the selection. Mention that this activity serves as the launch of the AGH nomination process for the following year.
- Send a letter of appreciation to the area TIAA-CREF representative for the organization’s ongoing support for the award.
- If President Hansen does not attend, send a letter and news release to him confirming the outcome of the selection process. His mailing address should be obtained from the Office of the President.
July
Past-President
• The president of PURA is to appoint a task force to periodically evaluate the impact of the award and determine whether the award has been useful in fulfilling its original purpose – to foster a stronger relationship between Purdue units and their retirees.

August
Past-President
• Provide AGH nomination materials to the chair of the Kickoff Luncheon Committee for placement on the luncheon tables at that event.
• Review table and hosting assignments for all guests related to the AGH Award.
• A copy of the new nomination material should be given to the chair of the Communications Committee with the request to have the PURA web site updated as it is related to the AGH Award. The current nomination form should be available for downloading from the Internet.

President
• At the luncheon, present a very brief history of the award, introduce the head of the recipient unit at the luncheon, acknowledge nominators who may be in attendance and give a brief summary of the retiree-support activities of the unit.
• Call for nominations for the next year’s AGH.

October
Past-President
• Promote the submission of nominations at the monthly luncheon meetings and through e-mail reminders. E-mail messages should be coordinated through the secretary/administrative assistant to the Secretary, Staff Benefits.

November
Past-President
• Promote the submission of nomination at the monthly luncheon meeting and through e-mail reminders.

President
• Appoint a Selection Committee (description elsewhere) to select a recipient for the award.

December
• The deadline for new nominations. Nominations received the previous year are also eligible to be considered for the award. Nominations not resulting in the awarding of the AGH are discarded after being considered twice.

January
Past-President
• Contact the authors of the previous year’s unsuccessful nominations and request any updated material to be considered for resubmission of the nomination.
**February**

**President**

- Convene the Selection Committee. Prepare a packet of information for each committee member that includes a copy of all nominations that have been submitted for the current year, unused nominations from the previous year, and the AGH nomination brochure. Provide these materials for reading prior to the first committee meeting. Convene and chair the committee’s meeting(s).
- By February 28, the recommendation of the Selection Committee for the latest AGH recipient should be submitted to the PURA president, or indicate that there not be an award presented in the current year.

**March**

**President**

- The PURA Executive Board reviews and determines whether to approve the recommendation of the Selection Committee. Agree whether the name of the new AGH Award recipient unit will be made public immediately or controlled until the Retirement Recognition Banquet.
- Communicate with the head of the unit selected for recognition, as well as the dean or similar next level administrator, letting them know about the award, the date and event at which it will be presented, and whether the information will be controlled until the time of the event.

**April**

**Past-President**

- Provide the name of the AGH recipient to the following individuals or person with the listed responsibility:
  a. Staff in the Office of the President who prepares comments for the president to use in presenting the AGH award;
  b. Director of Periodicals, who prepares a news release to be printed in mid-May, prior to the award presentation;
  c. Employee Group Services Consultant, who plans the Purdue Retirement Banquet and sets the agenda for the program.
- Check with Schugg Awards or a similar firm about the availability of the desired trophy (description elsewhere) to be given to the head of the new recipient unit. If necessary, order an appropriate trophy (perhaps for two years).
- Confer with the Retirement Banquet coordinator regarding any needed modifications to a flyer about the AGH award to be placed on the tables at the Retirement Banquet. (Sample attached.)
- Confer with the Director, Staff Benefits, who will communicate with the appropriate TIAA-CREF representative and extend the invitation to attend the Retirement Banquet.
- Arrange to have the name(s) of the TIAA-CREF representative(s) forwarded to the banquet coordinator and to the Office of the President.
- Verify with the PURA president, the Director, Staff Benefits and the banquet coordinator that the AGH nominators will be invited to the Retirement Banquet and that their meals will be paid for by PURA.
• Orient the next PURA officers (president and president-elect) about the activities s/he will be responsible for related to the AGH award.

President
• Communicate information about the AGH recipient to President-Emeritus Arthur G. Hansen and invite him to attend the banquet.
• If President-Emeritus Hansen will attend the banquet, inform the Office of the President and the banquet coordinator in HRS.
• Toward the end of the month, send letters of invitation for the Retirement Banquet to the head of the recipient unit and the individual(s) who prepared the nomination. Advise them to RSVP to the banquet coordinator regarding their attendance.

May
Past-President
• With help from the PMU director or assistant director, remove the plate from the master plaque and deliver to Schugg Awards or similar firm for engraving; return the plate to PMU for application to the plaque after the banquet.
• Request from the Director, Staff Benefits that a $2,500 check be prepared for presentation at the Retirement Banquet, in addition to the etched trophy.
• Determine with the banquet coordinator who will be responsible for delivering the check and trophy to the PMU Ballroom for the banquet and where they will be placed prior to the banquet for easy access by the president during the program.
• Clarify with the staff in the Office of the President, the banquet coordinator and the president of PURA the responsibilities related to the actual presentation of the trophy.
• Designate a PURA member who will welcome the guests related to the AGH Award presentation and assist them in locating their tables.
• Consult with the banquet coordinator about guests who will be attending the banquet in connection with the AGH award and considerations for seating at the dinner tables.
• Confirm with the banquet coordinator that the photographer who is serving the event will photograph the award presentation.

5.01k Past Recipients

The following University units have received the Arthur G. Hansen Award:

2003 – Cooperative Extension Service
2004 – Department of Agronomy
2005 – Department of Animal Sciences
2006 – School of Aeronautics and Astronautics
2007 – (No Award Presented)
2008 – Housing and Food Services
2009 – Cooperative Extension Service
5.02 BETTY M. NELSON SPECIAL RECOGNITION AWARD

5.02a History

In the spring of 2001, Purdue retirees attending the Monthly Luncheon Series were asked to complete a form that requested information about the best practices of their department, division or school in maintaining a strong relationship between their former employment unit and its retirees. The results of that survey led to discussions by the Executive Board about how to develop a community culture that remembers, values and acts to foster a strong relationship between the University and its retirees. Those discussions led to the creation of the Arthur G. Hansen Recognition Award that recognizes the college, school, department or division judged each year to excel in fostering that strong relationship with its retirees. The Hansen Award, described elsewhere, was awarded for the first time in 2003.

Although the Hansen Award was designed to recognize the strong relationship between a specific unit and its retirees, a number of the nominations submitted for the 2003 award were actually made for areas that provide outstanding service to retirees in general, regardless of the department or unit from which they retired. In response to those nominations, a subcommittee was established in the fall of 2003 to investigate the feasibility of establishing an additional award from PURA designed to recognize service to a broad range of retirees.

The subcommittee recommended that such an additional award would, indeed, be appropriate and in its December 10, 2003 meeting, the Executive Board approved the creation of the ‘PURA Special Recognition Award’. The award was subsequently renamed in honor of Betty M. Nelson, former president of PURA. She worked diligently as president to establish the Purdue University Retirees Association as a formal organization with by-laws and guaranteed annual funding from the University, formalize the administrative structure, and make major gains in PURA’s visibility within the University community. The Betty M. Nelson Special Recognition Award was presented for the first time in 2004.

Past Recipients
2004 – Harland W. White, the first chair of the President’s Advisory Council on Retirement.
2005 – Ismail Center for Health, Exercise, and Nutrition (Purdue)
2006 – Department of Human Resource Services
2007 – Purdue Marketing Communications
2008 – Office of Special Events, University Development

5.02b Criteria

The purpose of the award is to recognize persons or entities that have greatly improved the lives of Purdue retirees or made outstanding contributions to PURA. The recipient might represent an area within the University that doesn’t explicitly meet the criteria for the Hansen Award or be a person or agency in the community that has been invaluable to the functioning or development of PURA. The award need not be made yearly, but rather as awardees logically come forward over time.

5.02c Selection Process
There is no formal nomination process for the award. The Executive Board has the prerogative to bring a name or agency forward for consideration and may select a recipient at one of its monthly board meetings. If desired, an ad hoc committee can be formed as needed.

5.02d Award Presentation

The award is presented at the Annual Fall Kickoff Luncheon by the PURA president. A letter of invitation is sent by the chair of the Kick-off Luncheon Committee and the president of PURA to the individual recipient or to a representative of the community agency or University unit receiving the award. A brief statement of the history of the award and the special qualifications of the recipient are usually included in the presentation remarks. A photographer should be present to take appropriate photos of the presentation for inclusion in subsequent press releases.

5.02e Funding

The award is not a monetary one, such as the Hansen Award, but is a recognition of service to retirees. As such, outside funding is not required. Expenses related to the award are paid from PURA funds.

5.02f Recipient Award

The nature of the award presented to the recipient will vary, depending upon the individual or organization receiving it. In some situations, a trophy may be appropriate. In other situations, a wall plaque may be suitable. In still other situations, a gift to an organization with which the recipient is associated may be appropriate. (The actual award presented to the recipient is usually paid for from the PURA ‘10’ account. A gift to an associated agency, such as recorded books presented to Westminster Village on behalf of Harland White, may be paid from the PURA ‘05’ account, with the approval of the Executive Board.) The selection of the award(s) is made by the PURA president, with input from the board or other appropriate sources.

5.02g Permanent Plaque

A permanent plaque listing past recipients of the Betty M. Nelson Special Recognition Award is located in the main hallway of the Purdue Memorial Union (PMU) across from the Office of the Director. The formatting for the plate for each year’s recipient is available in the electronic file through Schugg Awards, Inc. (Sharon Schugg, contact person). Once engraved, the yearly plate is returned to the director or assistant director of the PMU with the request that the plate be attached to the master plaque.

5.02h Publicity

The PURA president provides appropriate background information concerning the award recipient and the relationship with Purdue retirees to the director of periodicals, who prepares a press release for distribution to local media and inclusion in various Purdue publications, such as the PURA Newsletter, Inside Purdue, etc.
6.01 UNITED WAY CAMPAIGN

For many years, Purdue University has been an active supporter of the Greater Lafayette-West Lafayette United Way campaign each year. As part of the overall area campaign, the University has its own United Way campaign which is coordinated by several staff members and is chaired by a major university official, such as a vice president or dean, on a rotating basis. One year’s vice chair of the campaign becomes the campaign chair the following year.

6.01a PURA Participation

Purdue retirees have traditionally been very generous in their support of the United Way campaign. A separate portion of the campaign is geared specifically toward local retirees. The PURA president and vice president serve as PURA’s representatives in the campaign solicitation efforts and meet regularly with the University staff members coordinating the campaign.

6.01b General Calendar

For the past several years, Purdue retirees have been a ‘Pacesetter’ group in that the retiree solicitation takes place prior to the start of the on-campus campaign and normally concludes at the time the regular campaign begins. The concept is for retirees to ‘set the pace’ for the entire Purdue community. While the specific overall campaign schedule may change slightly from year to year, the general schedule of activities for the retiree campaign is as follows:

Early May  A ‘Kitchen Cabinet’ meeting with key university officials concerning the overall theme of the campaign for the year and soliciting suggestions for ways to publicize the campaign.

June-August  PURA may have guest speakers or short presentations at the monthly MCL luncheon meetings concerning local United Way agencies to begin focusing retirees’ attention on the needs within the community and gain their support for the campaign.

Mid-July  A postcard is sent to local retirees alerting them to the forthcoming campaign and PURA’s involvement as a Pacesetter group. The card is co-signed by the University’s campaign chair and the PURA president.

Early August  A solicitation letter is mailed to local retirees concerning PURA’s role as a Pacesetter group, along with a pledge card. The letter is co-signed by the University’s campaign chair and the PURA president.

Early September  An article regarding the United Way campaign and PURA’s role appears in the September issue of the PURA Newsletter.

Mid-September  Kickoff Breakfast for the University Campaign.
Early October  The retiree solicitation campaign concludes. A special reception or other activity may be scheduled to ‘celebrate the successful conclusion of the retirees campaign’.

It should be noted that the retiree response to the solicitation is not the total support being provided to the United Way campaign by retirees. Many retirees give to the United Way through their housing unit, such as the solicitation at Westminster Village. Many retirees also volunteer at local United Way agencies.
6.02 PURDUE UNIVERSITY DEVELOPMENT CAMPAIGNS

Historically, the leadership of Purdue University has supported a culture of inclusion of its retirees in the ‘Purdue Family’. With approximately two-thirds of its retirees remaining residents in the Lafayette area, this group is a significant force in the community’s pool of volunteers and an appropriate source to involve in the University’s gift campaigns.

6.02a PURA Representation

Representatives of PURA work closely with designated members of the University Development Office to design strategies to follow during special campaign projects. A possible scenario is described below.

1. The UDO staff coordinator for the campaign and the president of PURA engage in initial discussions.

2. The president of PURA continues as the primary campaign contact for the organization or appoints a representative to work with the UDO coordinator.

3. The UDO coordinator and the PURA representative develop an action plan to begin work on the campaign.

6.02b Retiree Advisory Committee

PURA and UDO may invite a group of representative retirees to serve as an advisory committee and assist in laying the framework for their segment of the campaign.

1. This group should include retirees from the faculty, administrative and professional staff, and the clerical and service staff, recent and more seasoned retirees, representatives of varied disciplines, men and women.

2. These retirees are invited to meet for discussion about issues related to fund-raising and the focus of a specific campaign.

3. Suggestions from this group are incorporated as appropriate in the campaign contacts with the retirees.

4. Update sessions may be scheduled with the advisory group as the campaign progresses.

5. The advisory group members may be invited to progress and recognition gatherings throughout the campaign.

6.02c Involvement in Special Events

The Office of Special Events in the Department of Advancement will provide support to PURA for the annual Purposeful Living in Retirement seminar. The responsibility level will be approved by the Sr. Vice President of Advancement on an annual basis.
1. An event staff member will meet regularly with the PURA Seminar committee.
2. The event team will provide registration and logistical support for the conference.
3. The event team will provide on-site event coordination for the day of the event.
6.03 PRE-RETIREMENT SEMINARS

Twice each year, usually in May and September, the Department of Human Resource Services sponsors programs for Purdue employees who are beginning to plan for retirement. There are usually two sessions on each presentation date – one aimed at clerical/service staff and one aimed at faculty and administrative/professional staff. Refreshments are provided by the University. The general format includes a presentation by PURA, along with information about University retirement benefits and Social Security. Presentations from TIAA-CREF are given to faculty and administrative/professional staff; PERF and other retirement benefits agencies are included for clerical/service staff. The PURA Hospitality Committee provides a greeter at the beginning of each session.

The PURA presentation normally takes about 60-70 minutes and is divided into three parts:

1. The PURA president introduces the seminar participants to PURA and gives a brief summary of PURA activities and opportunities.
2. The chair of the Benefits Committee provides an overview of the PURcare medical/drug plan available to retirees, along with information pertaining to other medical/drug plans offered by other agencies.
3. A third PURA representative focuses on “Things I Wish I Had Thought Of Before Retiring” and attempts to alert the potential retirees to various facets of their lives that need to be considered before retirement: decisions on where to retire, what type of lifestyle they anticipate, family and cultural considerations, updating critical legal documents (wills, trusts, medical and financial power of attorney), and so forth.

PURA involvement in these seminars is coordinated with HRS. Receiving advance information from HRS on timing and scheduling is essential. A PowerPoint presentation covering the three presentations has been developed and is maintained by the HRS staff member responsible for organizing the seminars. An opportunity is provided prior to each pre-retirement seminar to update the PowerPoint presentation as information and concerns change.
6.04 UNIVERSITY RETIREMENT BANQUET

6.04a Responsibility for Planning and Coordination

The University Retirement Banquet is held on the West Lafayette campus at the end of the academic year to honor retirees from all campuses who have retired anytime from July 1 of the preceding year through June 30 of the current year. Responsibility for planning and coordinating all aspects of the banquet lie with the Department of Human Resource Services, specifically with the Employee Group Services Consultant.

6.04b Establishing the Date

The President of Purdue University is normally the featured speaker at the banquet, so the date of the event is set to coincide with his/her availability, whenever possible. It usually takes place in late May or early June. In the event the president is not available during that period, either the executive vice president and provost or the executive vice president and treasurer serves as the featured speaker. The banquet usually occurs shortly after the new president of PURA has assumed his/her responsibilities.

6.04c Program Format

The general order of the program is as follows:

- Welcome from PURA president
- Invocation by PURA vice president
- Congratulatory remarks from the president or his representative
- Presentation of the Arthur G. Hansen Recognition Award
- Presentation of retirement certificates to all retirees in attendance
- Remarks from the PURA president
- Closing

6.04d PURA President’s Responsibilities

The new PURA president has two major responsibilities at the Retirement Banquet:

- Assist the President of Purdue University in presenting the Arthur G. Hansen Recognition Award, if one is presented
- Present remarks welcoming the new retirees into membership in PURA. This role is similar to that taken by the president of the Purdue Alumni Association in welcoming new Purdue graduates into the PAA at commencement ceremonies. The PURA president briefly explains the association, some of the benefits retirees receive, mentions the monthly luncheon meetings and trips available, and encourages them to attend PURA functions and get involved in the organization. Additional comments of congratulations on retirement, etc., also may be included. It should be a warm and cordial representation of PURA to the new retirees.
6.04e  **Handouts**

- Each retiree attending the banquet receives a copy of the newest edition of the PURA Handbook. When printed, the handbooks are shipped to the Secretary, Staff Benefits, who then works with the banquet coordinator to ensure that a sufficient number of copies are available for distribution.

- A single page flyer explaining the Arthur G. Hansen Recognition Award is printed by the banquet coordinator and several copies are placed on each table at the banquet to inform the banquet guests of the nature of the award. (Sample attached)

6.04f  **Coordination of the Hansen Award Presentation**

Preparations related to the presentation of the Hansen Award at the banquet are the responsibility of PURA. The officers referred to below are the PURA officers in place for the new administrative year.

- The trophy for the award is ordered by the past president during late April. When ready, the trophy is delivered to the banquet coordinator who is responsible for getting the trophy to the banquet.

- The check for the award is requested from TIAA-CREF by the Director, Staff Benefits. When received, the Secretary, Staff Benefits processes it (see write-up of the Hansen Award), prepares a check in the amount of $2,500, the value of the award, and delivers it to the banquet coordinator.

- During late April, the PURA past president provides a list to the banquet coordinator of PURA-related guests who should be invited to the banquet. This list includes:
  - The new PURA president, who is to be seated at the same table as the President of the University
  - The new PURA vice president, who is to host and be seated at the table with the representatives of TIAA-CREF
  - The PURA past-president, who is to host and be seated at the table with the representative of the Hansen Award recipient unit
  - Members of the PURA Hospitality Committee and others who serve as greeters to the retirees as they arrive, and are randomly assigned to tables
  - The head of the college/department/unit receiving the Hansen Award
  - The retirees from the recipient unit who prepared and submitted the award nomination

- During early May, the Director, Staff Benefits contacts TIAA-CREF to determine the number and names of representatives who will attend the banquet. The names are forward to the banquet coordinator.

- During early May, the PURA past president provides background information to the president’s office concerning the recipient unit so that information can be included in the banquet script for the President of the University.

- Shortly prior to the date of the banquet, the new PURA president clarifies with the staff in the Office of the President, the banquet coordinator and the new vice president of PURA the responsibilities related to the actual presentation of the trophy. The new president also ensures that the photographer who is serving the event will photograph the award presentation.
7.0 MISCELLANEOUS PROCEDURES

7.01  IDENTIFYING SURVIVING SPOUSES AND CHILDREN OF RETIREES

(To be written)
8.0 POLICIES

8.01 DEFINITION OF AN OFFICIAL RETIREE

Employees of the University who retire from their position at the University are considered to be Official Purdue University Retirees if they are age 55 or more with at least 10 years of service to the University, AND the age plus years of service equals or exceeds 70. For the purposes of our organization, the spouse (or widowed spouse) of an Official Retiree is also considered to be an official retiree and is entitled to all the benefits which the spouse receives.

8.02 BENEFITS FOR RETIREES

Purdue University grants a variety of privileges to official retirees. The following list enumerates some of them.

- Purdue faculty/staff photo identification card. The cards facilitate access to computer services, recreational facilities, sports events, cultural events, University Libraries, CityBus service, and the Purdue discount programs offered by local businesses.

- Discounts on event tickets. Purdue retirees may purchase tickets at staff rates to attend convocations, lectures, and athletic events. The discounts are applicable for retirees themselves, their spouses and dependent children.

- Staff rates. Purdue retirees can use University recreational facilities and golf courses at special reduced rates.

- Free issues of the PURA Newsletter. Special announcements are mailed or e-mailed as needed.

- The Purdue telephone directory includes an address, phone information and former department listing for each retiree.

- Complimentary “A” parking permit. This may be obtained from the Parking Facilities office in the Visitor Information Center.

- Medical plan participation. Participation in a University-supported medical plan (if retiree is under 65) or Medicare supplemental plan is available at cost to the retiree. Members of PURA serve in a liaison role to the Faculty Compensation and Benefits Committee.

- Group life insurance. Retirees under the age of 65 can participate at cost in the University’s group life insurance plan.

- Use of Purdue University Pharmacy. Licensed pharmacists, graduate student instructors and pharmacy students staff the pharmacy, which accepts the PURcare prescription drug plan.
• Services at the Nursing Center for Family Health. During the academic year, retirees have access to free health screenings and to services with a fee, such as physical exams, blood pressure monitoring, glucose screening, and cholesterol tests. Information about free flu shots is available in the Working Well health newsletter or by calling WorkLife Programs in Human Resource Services.

• Purdue discount programs offered locally. Retirees can take advantage of discounts for a variety of services and items. Detailed information can be found at www.purdue.edu/cssac/Employee_Discounts/Welcome.html.

• Computers. Retirees can contact ITaP in Stewart Center, Room G-65 for discounts on computers and peripherals from Apple, Dell, HP, and others.

• Eligibility to retain their Purdue e-mail account or apply to activate one.

• Fee privileges. Retired faculty/staff and their qualified children have the same privileges for class enrollment as current faculty/staff. Information about enrolling in classes is available through the Office of Admissions, and information about fees is available from the Office of the Bursar. Free tuition is available for qualifying Indiana residents age 60 and older through the Ivy Tech Community College Senior Scholars Program.

• Free rides on CityBus. With the Purdue faculty/staff/retiree ID, retirees can ride CityBus routes through the Lafayette-West Lafayette area – including the Campus Loop routes.

• Employee Assistance Program (EAP). EAP provides free confidential and professional services to help Purdue retirees and family members resolve personal problems.

• Purdue University Libraries. Retirees have access to the wide-ranging Purdue University Libraries’ facilities.

• Non-official retirees of the University may participate in PURA activities, but may not be eligible for some of the above Purdue benefits.

8.03 ACCESS TO UNIVERSITY ELECTRONIC MAIL SERVICES

• Effective November 1, 2009, all official retirees are eligible to retain their Purdue e-mail account or apply to activate one. All new retirees are offered this option at their retirement counseling session.

• Current retirees who wish to receive an account should contact Staff Benefits at (765) 494-4768. The counselor will ask specific questions to verify identity and will then complete the paperwork needed to establish the e-mail address. Policy and other information related to having a purdue.edu e-mail address will be sent to users.

• It takes about two weeks to set up the account. A retiree should check https://www.itap.purdue.edu/directory until he/she finds his/her name listed in the directory.
• Purdue policies relating to e-mail apply. These policies are displayed at: http://www.purdue.edu/policies/pages/information_technology/v_3_1.html.

• E-mail stored on Purdue servers is subject to public record requests. See: http://www.purdue.edu/policies/pages/records/vi_4_1.html.

8.04 PURA RESPONSE TO DEATH OF A CURRENT OR FORMER COMMITTEE MEMBER

Upon the death of a current or past PURA committee member only, PURA will respond by contributing $25 (or the approximate value of this amount) in memory of the deceased to the charity or foundation designated by the family. PURA will not make a memorial gift upon the death of the spouse of a committee member.

8.05 USE OF PURA’S E-MAIL DISTRIBUTION LIST

On occasion, PURA is asked by various agencies, both on and off campus, to inform our retirees about their activities through our e-mail distribution process. Since PURA consistently seeks opportunities to reach out to retirees with information that might be of interest, the following policy has been established:

a. Using our e-mail distribution list, PURA will inform our retirees about those activities which will occur under the auspices of Purdue University, e.g. convocations, lectures, concerts by Purdue groups and items of similar interest to our retirees.

b. Entities from outside Purdue will not be permitted to use PURA’s e-mail distribution as a way of reaching Purdue’s retirees.
9.0 BIG TEN RETIREES ASSOCIATION

9.01 By-Laws

The By-Laws of the Big Ten Retirees Association were adopted at the 2003 Annual Conference held at the University of Michigan.

Article I Name

The name of the organization is the Big Ten Retirees Association.

Article II Purpose

The purpose of this Association is to enhance individual member’s retirees associations through a process that includes:

A. A yearly conference that is rotated among the member institutions;
B. Sharing newsletters; and
C. Exchanging information that includes but not limited to:
   1. Universities rosters, directories, etc.
   2. Members’ benefits
   3. Universities profiles

Article III Members

Membership is open to retiree associations of Big Ten Universities. Each member will have two voting representatives who are members in good standing in their association. Each representative will have voting privileges. Other representatives may attend conferences and business meetings.

Article IV Governance

Section 1 Executive Board
The Executive Board is composed of the ‘Chair’, ‘Chair-Elect’, and the ‘Immediate-Past-Chair’. The ‘Chair’ is the host university for the current year’s conference; the ‘Chair-Elect’ is next year’s host university, and the ‘Immediate-Past-Chair’ is last year’s host university. The duties of the Board are:

1. To serve as an advisory body to the ‘Chair’ in planning the annual conference.
2. To keep records of the annual conference and submit an annual report.
3. To review the By-laws of the Association and edit or add By-laws as needed.
4. Develop the agenda for the annual business meeting to be held at the annual conference.

Section 2 Actions of the Board
1. Propose changes or additions of By-laws to the membership
2. Any action of the Board that is challenged in writing by the representatives of the member institutions must either be rescinded by the Board or submitted to the members for a vote.
3. The three Board members must have consensus on all issues.

Section 3  Chair
The ‘Chair’ presides over all meetings. The ‘Chair’ is the designated representative of the host institution. The host institution is the member institution that is in charge of the annual conference.

Section 4  Terms of Office
Each position is one (1) year and is rotated to the next university according to a rotation schedule agreed upon by the Association members.

Article V  Meetings
There shall be an annual conference to be planned and hosted by the host institution. There shall be an annual business meeting to be held in conjunction with the annual conference. The members present constitute a quorum.
9.02  WEB SITE

The web site for the association currently is maintained by the University of Michigan. The site address is: www.umich.edu/~hraa/umra/big10. The site contains a variety of material, including information about the up-coming Annual Conference, profiles of each university’s retiree association, and links to the respective association web sites.

9.03  CONTACTS AT OTHER INSTITUTIONS

The prime contacts at each of the other Big Ten institution retirees associations are listed on each association’s web site. These may be reached via the links on the Big Ten Retiree Association web site mentioned above.

9.04  ANNUAL CONFERENCE

9.04a  Site Schedule

The Annual Conference is usually held in mid- to late-August, prior to the start of fall classes, and is hosted by the various universities in the Big Ten on a rotating basis. Northwestern University does not have a retiree organization and, consequently, does not attend or host the conference. The schedule of locations for recent and near-future years is as follows:

- 1992 – Ohio State University
- 1993 – University of Michigan
- 1994 – University of Minnesota
- 1995 – Michigan State University
- 1996 – Purdue University
- 1997 – Penn State University
- 1998 – University of Illinois
- 1999 – University of Iowa
- 2000 – Indiana University
- 2001 – University of Wisconsin
- 2002 – Ohio State University
- 2003 – University of Michigan
- 2004 – University of Minnesota
- 2005 – Michigan State University
- 2006 – Purdue University
- 2007 – Penn State University
- 2008 – University of Illinois
- 2009 – University of Iowa
- 2010 – Indiana University
- 2011 – University of Wisconsin
- 2012 – Ohio State University
- 2013 – University of Michigan
- 2014 - University of Minnesota
- 2015 – Michigan State University
- 2016 – Purdue University
- 2017 – Penn State University
The cycle repeats in this order for future years.

9.04b **Purdue Participants**

Whenever possible, PURA sends three representatives to the Annual Conference: the president, the vice president, and the chair of the Benefits Committee. The Benefits chair usually serves as PURA’s spokesperson on issues related to medical/pharmacy insurance plans. Following the conference, the delegates should present a summary of the conference at the next Executive Board meeting.

9.04c **Travel Budget**

In preparing the annual PURA budget, it is important to budget sufficient funds for the three representatives to attend the Annual Conference. Realistic estimates can be made using the prior year’s registration and housing fees, plus appropriate allowances for transportation. Whenever possible, a University vehicle should be schedule to transport the attendees. Funds for attending the annual conference come from the ‘10’ funds provided by the Office of the President.

9.04d **Travel Authorization**

Prior to attending the conference, the HRS secretary/PURA assistant (Michele Salla) prepares a University Travel Request Form for each attendee, which must be signed by the attendee and approved before any reimbursement for conference expenses can be issued. It is important that each attendee obtain receipts for housing and registration fees paid to enable reimbursement.

9.04e **General Conference Format**

The Annual Conference usually begins on a Friday evening with an opening banquet, and concludes with lunch on Sunday. The Friday banquet often features a major official of the host university speaking on a topic related to issues in higher education. Saturday morning and a portion of Saturday afternoon feature sessions with speakers on topics related to retiree issues and/or roundtable discussions on issues related to retiree associations. A campus/community tour is often scheduled for a portion of Saturday afternoon. A Saturday evening banquet usually features a speaker on a ‘lighter topic’ and/or musical entertainment. Sunday morning features additional general sessions, with or without guest speakers, and concludes with the annual business meeting of the Big Ten Retirees Association. The various retiree associations normally distribute materials about their respective associations at one of the Sunday morning sessions.

9.04f **Purdue’s Report to the Conference**

The information which PURA distributes to other attendees regarding our activities is at the discretion of the PURA president. This may include a written summary report about our structure, financial support, projects, etc. It may also include such things as copies of our PURA
Newsletters, PURA Handbooks, information about the Arthur G. Hansen Recognition Award, and other informative materials.