

Purdue University Retiree Association  
2012 – 2013 Annual Report

Sue Hiser, President

The Annual Transition Meeting was held on May 24, 2012 at Stewart Center and the Purdue Memorial Union, West Faculty Lounge. Reports of the past year's activities were followed by planning sessions for the new year. The luncheon speaker was John C. Hertig, Director of the Alfred Mann Institute for Biomedical Development at Purdue. He spoke about several medical research projects and discoveries at Purdue and the process of commercializing these discoveries. The new officers were installed. Retiring members of committees were recognized and new committee members were welcomed.

The PURA officers for 2012 – 2013 are:

President, Suzanne (Sue) Hiser  
Vice President and President-Elect, Robert (Bob) Bain  
Secretary/Treasurer, Melinda Bain  
Historian, Carolyn Jones  
Past President, Chip Rutledge

The PURA standing committees and their chairpersons for 2012 – 2013 are:

Benefits, Don Gentry  
Campus and Community Activities, Diane Stevenson  
Communication, Jill May  
Endowment, Betty Nelson  
Hospitality, Jeris Eikenberry, John Miller  
Kickoff Luncheon, Sarah Johnson, Ann Pickett  
Program, Reuben Peterson, John Trott  
Purposeful Living in Retirement, Scott Rumble  
Trips and Tours, Jim Marciniak, Dan Collins

This has been a very good, active, productive, and successful year for PURA. Below are events and activities of the association that PURA participated in during the year.

Special Activities and Events

New retirees were welcomed into PURA by Sue Hiser, PURA President, on June 19 at the University Retirement Luncheon. Bob Bain, PURA Vice President, offered a moment of inspiration. Dr. France Córdova, Purdue University President, was the speaker. She thanked the retirees for their loyal service to the University and encouraged them to enjoy this new stage of their lives and to continue to serve in the community and at the University. The PURA President gave remarks about the joys and challenges of being retired and the benefits, activities and events sponsored by PURA. Each new retiree was given a framed certificate and received a special gift from Purdue at a later date.

In June Sue Hiser and Bob Bain represented PURA at a dinner and dance for departing Purdue President France Córdoba. Prior to this event, Sue Hiser spoke for PURA at a special reception recognizing the contributions of President Córdoba to Purdue University.

The Big 10 Retirees Association Conference was held at The Ohio State on August 3 - 5. Purdue was represented by Sue Hiser and Don Gentry, chairman of the PURA Benefits Committee. It was an interesting meeting on topics relevant to retiree associations: Enhancing Membership, Programming, Financial and University Support, and Effectively Communicating with Retirees. Don Gentry gave a short presentation about how PURA researches, negotiates, and selects health insurance for PURA members because of the interest of members of other Big 10 associations. Short presentations were given of best activities, events, or practices from the Big 10 associations. The 2013 conference will be held at the University of Michigan.

Sue Hiser and Bob Bain met with Anne Washburn, Director of the Purdue United Way Campaign, in May to determine the 2012 United Way goal for retirees, \$90,000. They attended the Training Session in August. Retirees were encouraged to contribute to United Way at the monthly luncheons and by e-mail. Sue Hiser attended the Purdue United Way celebration at the close of the campaign. The total giving to United Way by retirees in 2012 was \$100,945—13% over the goal.

The Annual Kickoff Luncheon was held September 10 at Four Points by Sheraton. The event was planned and organized by co-chairs, Sarah Johnson and Ann Picket and their committee. The event was enjoyed by a large number of retirees and special guests including Past President Steven Beering and Past President Martin Jischke and their wives and Acting President Tim Sands and his wife. The speaker for the luncheon was Dr. Sands who gave an excellent and enlightening presentation about the state of the university during this transitional year, several special projects on campus, and thoughts on the possibility of a three semester school year in the future. The Betty M. Nelson Recognition Award was presented to Katherine (Kate) LaMar, our health insurance liaison who has been the Purdue face and voice of the Purdue retiree health plans for the past 8 years. She has worked with providers and the PURA Benefits Committee to provide the best possible plans and with retirees and their families to educate them about their medical plan options. The winner of the Arthur G. Hansen Award, the Department of Nutrition Science in the College of Human and Health Sciences, was also recognized. The award is given to a university unit that excels in fostering a strong relationship between Purdue and the unit's retirees. The generous financial support of this award by TIAA-CREF is much appreciated.

After learning that Purdue would no longer publish a printed directory, the Executive Board decided that the possibility of having a printed retiree directory should be pursued. Betty Nelson, who has extensive knowledge of PURA's history, and Sue Hiser met with Vice President of Human Resources, Luis Lewin, to explain the need for a printed directory and the contributions of retirees to the University. His support and direction in making the Purdue Retirees Directory a reality is greatly appreciated. In February over 4000 Purdue Retiree Directories were mailed to PURA members. We are grateful for the generous support of Vice President Lewin and Richard Rodner of the Office of Development that provided funds for the development and printing of the directory and the assistance of all who contributed to the

directory. The Purdue Federal Credit Union provided \$3000 toward the mailing expenses. Additional funds were drawn from the PURA account.

The officers and committee chairs were asked to review, revise, and update their sections of the PURA Procedures and Policies Manual. Carolyn Jones, Historian, chaired this rather tedious project and collected and reviewed all the sections with Sue Hiser. Many thanks to everyone for helping with this project and special thanks to Carolyn Jones, Michele Salla, and her student assistant, who typed, printed, and proof read the material. The revised sections were distributed to the Executive Board at the May meeting.

All University volunteers per University policy were required to complete a Volunteer Registration form for permission to conduct a criminal and sex offender background check. Thanks to Michele Salla for collecting the forms and checking the backgrounds in a very efficient and positive manner.

Teresa Wesner, Acting Director of Human Resources Service Center, explained at an Executive Board meeting how the Center for Healthy Living will impact Purdue retirees. Only active employees and retirees with Cigna health insurance plans are eligible to use the Center. Flu shot clinics will still be available to retirees and their spouses. Other programs and publications that had been offered by Work Life are no longer available. The members of the Executive Board expressed their concern that retirees were not represented in the discussions and decisions and expressed their hope that retiree use of the Center be considered in the future.

The Purposeful Living in Retirement conference was held on April 24 at Four Points by Sheraton. This event was very ably chaired by Scott Rumble. The committee planned an excellent program with speakers on a variety of topics of interest to retirees—hearing aid technology, improving balance, medications, beyond the will. John Norberg gave an interesting and fun talk on *Is 65 the new 18...and other musings*. More than thirty vendors provided information about their services and products. Many vendors gave very nice door prizes. The capacity crowd was very pleased with and appreciative of this event.

On May 14, Bob Bain, Betty Nelson, and Sue Hiser will meet with Purdue President Mitch Daniels to discuss an important group in the Purdue family, the Purdue retirees. PURA's activities and events and the contributions and service of retirees to Purdue and the community will be highlighted. The support of the Office of the President, the Office of the Vice President of Human Resources, and the Office of Development is deeply appreciated. Areas of concern will be addressed such as the need for a high level administrator to be the PURA advisor to inform the PURA Executive Board about issues and changes happening at the University that impact students, faculty and staff and retirees.

The Arthur G. Hansen Award will be awarded at the University Retirement Luncheon on June 27, 2013 to the Department of Biochemistry for their inclusion of retirees in activities and events of the department. In October the information sheet and nomination form were revised to allow the material to be sent by e-mail. A letter from Acting President Tim Sands, a letter from Sue Hiser, PURA President, the information sheet, and nomination form were e-mailed to deans,

department heads, and development officers. Retirees were encouraged to submit nominations. Two nominations were submitted.

Retirees have been exceptionally generous in providing gifts to the University amounting to \$5,143,522 in fiscal year 2012 and \$4,412,183 for this fiscal year to March 31, 2013, according to the report provided by Bob Ford, Development.

### Executive Board

The PURA Executive Board consists of the officers and the committee chairpersons. The Executive Board meets on a monthly basis to discuss the various activities of PURA. Many thanks to Bob Bain who has been a supportive and helpful vice president, to Melinda Bain who provided accurate treasurer's reports and minutes, and to Carolyn Jones, Historian, who gathered materials for inclusion in the PURA archives and coordinated the revision of the Procedures and Policy Manual.

### University Support

The financial support of the University that allows PURA to provide the activities, events, and benefits to retirees is very much appreciated. Our University advisor was Lisa Calvert, Vice President for Development and Robert Ford, Director of President's Council. Bob Ford attended our monthly Executive Board meetings and shared information about the Council and Development. It is helpful to know how the retirees are contributing to the University and his thoughtful comments are appreciated. Teresa Wesner, Acting Director of Human Resources Service Center (HRSC), provided updates on changes in Human Resources and in benefits that affect retirees. We are most grateful for their interest and support of PURA.

PURA benefits greatly from the support and help given by Michele Salla, Assistant, HRSC, who provides immeasurable administrative support to PURA officers and chairpersons. Her cheerful and helpful manner and extensive knowledge of PURA and Purdue make her a valued member of the PURA team. Michele attends meetings, helps with correspondents, answers questions, and solves numerous problems. She is also the person who answers phone calls for PURA. Kate LaMar, Benefits, HR, and retiree liaison for medical insurance provides tremendous support to the PURA Benefits Committee, answers the many questions of new and continuing retirees about health insurance, and monitors benefits provided to retirees. She is a critical liaison with the University—other administrators, University Senate committees, health and service vendors, and consultants.

### Committees

The details of specific events and activities will be described in the various committee reports.

The Benefits Committee, chaired by Don Gentry, after reviewing other insurance plans worked diligently with UnitedHealthCare and the consultant to provide an excellent health insurance supplement plan and a Medicare Advantage plan for Purdue retirees. Over 2200 retirees enroll

in these plans. PURA values the efforts of all the members of this committee that researches and negotiates with health insurance providers to provide the best plan for the retirees. The efforts of members who represent PURA on University Committees are also appreciated.

The Campus and Community Activities Committee, chaired by Diane Stevenson, provided several very interesting tours this year. The tour of the Córdova Recreational Sports Center was especially well attended and appreciated by the retirees.

Jill May is chairperson of the very effective Communications Committee. The PURA Newsletter provides interesting and informative articles about PURA and the University that are important to retirees. The PURA website was revised and updated this year and is easy to use. It provides up-to-date articles, a variety of PURA information, and links to the University. The change in the link to Benefits has been very helpful. Kim Delker, Media Specialist from Marketing and Media has been very helpful.

The Endowment Committee, chaired by Betty Nelson, is a good steward of two endowments-- the PURA Activities and Opportunities Fund and the Martin and Patty Jischke Purdue Opportunity Award. The first scholarship was awarded to a student this year.

PURA is grateful for Jeris Eikenberry and John Miller, co-chairs of the Hospitality Committee, and the committee members for meeting and greeting at the MCL luncheons, the Fall Kickoff Luncheon, the Purposeful Living in Retirement conference, Spring Fling and at other events and activities. The committee also is instrumental in providing new ideas to serve our retirees.

The Program Committee, chaired by Reuben Peterson and John Trott, has provided excellent, interesting programs at each of the monthly luncheons. Each member of the committee is responsible for hosting one of the monthly lunches. The lunches are well attended by retirees. Many times the room at MCL is at capacity.

A special thank you is given to Jeris Eikenberry and Roy Johnson who generously give of their talents to lead the retirees in music appropriate to the program at our monthly luncheon meetings.

The Purposeful Living in Retirement Committee, chaired by Scott Rumble, provided a very excellent conference this spring. The committee was very effective in selecting good presenters with interesting information and having many vendors with services or products for retirees. The committee is very grateful for the support of Kirk Milburn, Sarah Lewis, and Kenneth Ferraro.

The Trips and Tours Committee, chaired by Jim Marciniak and Dan Collins, arranged several trips and special events for the retirees this year. Everyone enjoyed the evening at the Monon Theater and look forward to meeting friends at Pappy's in May and the garden tour near Elkhart in June.

The Nominating Committee that selected the slate of officers for 2013 - 2014 was chaired by Chip Rutledge, Past President. The committee selected Dan Collins as Vice President and President-Elect. The slate was presented and approved at the PURA Annual Meeting on April 1, 2013.

## The Officers for 2013 – 2014

President – Robert Bain  
Vice President – Dan Collins  
Secretary/Treasurer – Melinda Bain  
Historian – Carolyn Jones  
Past President – Sue Hiser

These officers will assume office at the Annual Transition Meeting on May 22, 2013.

As PURA President, I am very grateful for the support of the Purdue administration and the dedication of the PURA officers and committee chairs, committee members, and our retirees. I also received much appreciated encouragement, support, and wisdom from PURA Past Presidents Betty Nelson, Scott Rumble, Chris Johannsen, Chip Rutledge, and Lois Wark. Bob Bain, PURA Vice President, was very helpful throughout the year and always gave good counsel and good stories. I am especially thankful for the tremendous support of Michele Salla, Kate LaMar and Teresa Wesner from Human Resources.

PURA is as strong as its members and its leaders. It is because of you, the officers and committee chairs and members, that we have had so many excellent programs, activities and events. Your enthusiasm and interest and the sharing of your talents and experience has helped make this year a success. I thank each of you for your many contributions. You have made PURA the great organization that it is. It has been an honor to serve as your president. Thank you for the opportunity to work with you and to serve our Purdue retirees.

**PURDUE UNIVERSITY RETIREES ASSOCIATION  
BENEFITS COMMITTEE  
ANNUAL REPORT  
2012-2013**

**Benefits Committee Members**

George Asteriadis, North Central	Harry Morrison
Marion Bonacorsi	Linda Mura, PU Calumet
Charles H. Brown	Betty M. Nelson
Robert Bane (ex-officio)	Joseph Pearson
Judy Davis, PU North Central	Clifford Swensen
Fred Ford	Joseph Uhl
Don Gentry, Chair	Lois Wark
Sue Hiser (ex-officio)	Sandra Singer, New for 2013
Kate LaMar (ex-officio)	Leon Thacker, New for 2013
Michele Salla (staff/secretary)	Larry Pherson, New for 2013
Annette Eicholz (ex-officio)	

**Annual Planning/Transition Meeting** - The Benefits Committee began its year at the Annual Planning/Transition Meeting held in May of 2012. Several goals for the year were established. These included: 1) Negotiate renewal of health insurance plans for 2013. 2) Continue the excellent service to health insurance members through the Benefits Committee and the staff of Purdue Human Resources. 3) Continue to build strong leadership for the committee and target adding a member from clerical and service staff retirees. 4) Maintain communications with Purdue Human Resources. 5) Review three to four possible vendors of Health Insurance to inform members of options. 6) Monitor the development of a statewide network by IU Health for possible future benefit to our members. 7) Implement the communications plans developed by a special committee the previous year by populating the PURA web-page with all Benefits and Health Insurance information. 8) Actively market and provide information to pre-retirees on health insurance options. 9) Involve a health care consultant and Purdue Human Resources in the renewal of health insurance plans for 2013 and in the preparation for bidding or renewal of plans. 10) Monitor state and federal actions on health care that could impact our members.

**Major Accomplishments of Committee for 2012-2013**

The Benefits Committee of the Purdue University Retirees Association accomplished several major goals for 2012-2013.

1) **Renewal of Health Insurance Plans** The committee spent several months in the renewal process for the PURcare Medicare Supplement and Medicare Advantage PPO Health Insurance Plans with UnitedHealthcare for 2013. After reviewing the options offered by four major health insurance providers, the committee decided that UHC provided the best plans for our members. These two plans cover the health insurance needs for over 2,500 Purdue Retirees. The greatest accomplish was the renewal of the PURcare plan for a premium lower than 2012.

2) **Communications** After renewal, the committee provided many communications opportunities to retirees through the form of mailings and informational meetings on the new plans. After this was accomplished the committee turned its attention to the up-dating the Benefits and Health Insurance page on the PURA web page. By the end of the year all current information needed for members about Benefits and Health Insurance was on this web page. This was accomplished with the cooperation of the PURA Communications Committee.

3) **Vision Care Claims Processing** With the growing number of members having difficulty getting vision claims processed by UnitedHealthcare, the committee detailed the concerns with UHC and met with them to find an improved process. UHC responded with a total up-date of their business process that included many check points. By the end of the year, claims processing was greatly improved and continues in 2013. The Benefits Committee plans to monitor this issue for the first several months of 2013 and will be prepared to make any necessary changes in the plan for 2014 as needed.

### **University Funded Health Care Consultant and PU Human Resources Support**

As in the past, Purdue University has provided the financial resources for PURA to hire an outside consultant to assist the committee in negotiating the plans with United Healthcare. The committee greatly appreciates the University's support on behalf of Purdue Retirees.

Renewal negotiations were accomplished with the great assistance of the Aon Hewitt Company and their representative, Laurie Cooper; the Human Resources Services staff working with members of the benefits committee.

The Purdue Human Resources Services Benefits staff continued outstanding customer service throughout the year helping our members negotiate the sometimes-difficult issues that can arise. We really rely on the assistance of Kate LaMar, the full-time staff person in HRS working with retirees, supported by funds provided through the retiree health insurance premiums. We continue to receive outstanding service from Michele Salla for secretarial support.

The Chair of the Benefits Committee joined representatives of UHC and Purdue Human Resources for informational sessions for changes in the 2013 plans for participants as well as letters were sent to each participant outlining the changes in the plans.

### **Relationship between PURA and University Committees**

A member of the PURA Benefits committee, Cliff Swensen, serves on the University Faculty Compensation and Benefits Committee to assure participation and coordination between University plans and the needs of retirees and Lanny Wilson served on the Parking and Traffic Committee. Lanny has decided to step down from this assignment after many years of service on this committee and Larry Pherson has agreed to represent retirees on this very important committee.

### **Healthy Purdue**

All retirees continue to be advised of immunizations and other accessible health care that is available to them. There is a website devoted to resources available to both active employees and retirees [www.purdue.edu/worklife](http://www.purdue.edu/worklife). In the coming year, many services will be provided to retirees through the new center opened by Purdue in Purdue West.

### **Pre-retiree Informational Sessions**

PURA leadership joined the staff of Human Resource Services in presenting information to active employees concerning retirement planning. These sessions were well attended and well received.

### **Big Ten Retirees Meeting**

The Chair of the Benefits Committee along with the President of PURA attended the annual Big Ten Retirees meeting held at the Ohio State University. It was very informative to compare the retiree medical and other benefits provided by each Big Ten Institution as well as to explore the



kind of retiree programs offered to retirees at each institution. Many institutions expressed interest in how PURA provides Health Insurance options for our members.

**Our Continuing Goal:**

No activity or service of PURA is more important to Purdue University Retirees than the continuing availability of reliable, dependable and affordable health insurance options; this is the continuing goal of the PURA Benefits Committee.

Submitted by:

Don K. Gentry, Chair

PURA Benefits Committee-April 30, 2013

## Campus and Community Activities Committee 2012-2013

Members of the Committee: Diane Stevenson (chair), Shay Kohne, Dick Nelson, Suzanne Topping

New member May 2013: Sue Hiser

Marriott and Hadley Halls  
May 10, 2012 44 attendees

Columbian Park Zoo  
September 6, 2012 26 attendees

Indiana University School of Medicine-Lafayette, Lynn Hall  
October 9, 2012 24 attendees

France A. Córdova Recreational Sports Center (CoRec)  
March 11, 2013 over 100 attendees

A tour of the art collection at Ivy Tech is scheduled for May 11, 2013

Each member of the committee planned an event, wrote an article for newsletter that the chairman submitted for the newsletter and posting on the PURA website.

Michele Salla did an outstanding job coordinating the sign up for each event.

## PURA Communications Committee

Committee members:

Sam Conner, Kimberly Delker – ex-officio, Internal Publications, William “Bill” Evers, Robert “Ted” Luce, Karen Lembcke, Jill May – chair, James “Jim” McCammack, Jo Ann Thomas.

### **Who Is Responsible for Information Printed in the Newsletter?**

*Jill May*, as committee chairperson, is responsible for all final copy and its placement in the newsletter and on the web.

*Kim Delker*, as the Purdue University contact person, takes all copy from Jill and follows it through to page-proofs. At that time, she turns copy over to Jill and Karen for final review and then submits it for printing and distribution. Kim is directly responsible for the final stages at Purdue University.

*Sam Conner* is the “point man” for each newsletter issue. He works directly with the PURA committees chairs or their designated member, gathering copy and checking it for grammar and spelling errors. Once he has gathered the materials for the newsletter, he submits it to Jill.

*Karen Lembcke* is the newsletter proofreader. She reads the final mock-up copy with Jill, checking for typos or misprints from the final copy submitted to Kim Delker.

*JoAnn Thomas* is the column editor for “Those Were the Days” and “PURA Member Awards.” She solicits articles, edits and proofreads them, and sends them to Jill for final approval. She is also responsible for getting photos for these columns.

### **Who Is Responsible for Information on the PURA Web Page?**

*Bill Evers* and *Jim McCammack* are PURA’s web masters. Bill places all copy on the web July–December; Jim is responsible for postings January–June. Copy for the web should be submitted to Jill for approval and placement. She contacts the acting web master each week with any updates she has received, suggesting what to remove from the front page and post in other places, to simply remove, or to add.

### **What Did the Communications Committee Accomplish This Year?**

This year PURA members have received four newsletters. A great deal of the work has fit within our committee assignments, and Sam, JoAnn, Karen, and Kim have been responsible for the success of the newsletters. Also important for the newsletter’s publication has been the timely and succinct articles that have come from PURA committees. Photos, whenever possible, were submitted by Ted Luce. Sometimes members from the respective committees also submitted photos. JoAnn has agreed to help with photographs for the Monday luncheons since

Ted has another commitment at that time.

Web masters Bill Evers and Jim have worked with ITAP to solidify the page formats for all the PURA tabs. They both were given learning sessions on maintaining the web page. It now holds timely information about events and PURA health insurance/benefits.

### **What Will the Communications Committee Change in 2013–2014?**

Our “work structure” will remain the same next year, and we expect to release four newsletters in a timely fashion. In addition, Jill, Jim and Bill will collaboratively look at the web page for ways to streamline information, eliminate content overlap and make the web easier to access for information concerning upcoming events. The PURA president’s welcoming message, a calendar of events, and the need to archive past newsletters will also be considered.

Newsletter dates for 2013–2014:

*Summer 2013.* Stories should be given to Sam by May 15. Jill’s submissions should get to Kim by May 22. The newsletter should be mailed by June 20<sup>th</sup>.

The issue will include regular columns and information about upcoming events; an announcement of the Arthur Hanson award winners; names of new officers and committee members and chairs; the 2013–2014 president’s welcoming message; information about the Kick-off Luncheon; an article about the Purposeful Living event (hopefully with pictures).

*Fall 2013.* Stories should be given to Sam by September 6. Jill’s submissions should get to Kim by September 20. The newsletter should be mailed by October 31<sup>st</sup>.

The issue will include regular columns and information about upcoming events; an announcement of the Betty Hanson award; information about benefits program changes and signing up for this year; information about the process of the Hanson award submissions; an article about the Kickoff Luncheon with pictures.

*Winter 2014.* Stories should be given to Sam by December 6. Jill’s submissions should get to Kim by December 20. The newsletter should be mailed by January 17.

The issue will include regular columns and information about upcoming events; an announcement of the Purposeful Living conference; information about benefits program changes; information about Spring Fling; an article about PURA’s contribution to the Purdue drive for United Way.

*Spring 2014.* Stories should be given to Sam by March 14. Jill’s submissions should get to Kim by March 21. The newsletter should be mailed by April 18.

The issue will include regular columns and information about upcoming events; information about benefits program changes; information about the the fall kickoff luncheon; registration for Spring Fling.

**ENDOWMENT COMMITTEE**  
ANNUAL REPORT  
PURDUE UNIVERSITY RETIREES ASSOCIATION  
2012-2013

**COMMITTEE MEMBERS**

Griggs, William D.	<a href="mailto:bill.roberta@frontier.com">bill.roberta@frontier.com</a>	Member-at-Large
Bain, Melinda	<a href="mailto:melindahbain@comcast.net">melindahbain@comcast.net</a>	Secretary-Treasurer
Hiser, Sue	<a href="mailto:landshiser@gmail.com">landshiser@gmail.com</a>	PURA President
Nelson, Betty M.	<a href="mailto:bmnelson@purdue.edu">bmnelson@purdue.edu</a>	Chair
Rumble, Scott	<a href="mailto:scottr1024@att.net">scottr1024@att.net</a>	Past President

**HISTORY OF THE ENDOWMENT**

The PURA By-Laws approved August 5, 2002, acknowledged the Association's authority to establish a Standing Committee related to an endowment and included details about the appointment of the committee's chair, the selection of its members, and the tenure of those members.

The original committee that established the characteristics of the *PURA Activities and Opportunities Fund* included Ken Burns, EVP&T; William Griggs, Purdue Research Foundation; Pat Lawson, School of Agriculture; Betty Suddarth, Registrar; and Betty M. Nelson, Dean of Students. **Endowment Management** (from **College and University Business Administration**, fifth edition, NACUBO-C&UBA) provided the reference material used in creating the parameters of the PURA endowment.

The basic understandings of the *PURA Activities and Opportunities Fund* included:

- The endowment fund is a True Endowment with Restricted Earnings.
- This endowment fund is expected to continue in perpetuity
- The income is to 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 is not to be used for purposes that benefit individual retirees.

**The Endowment Agreement Establishing the Activities and Opportunities Fund for the Purdue University Retirees Association** was made official on September 13, 2007, when the document was signed by:

Betty M. Suddarth, PURA President,  
Murray M. Blackwelder, Senior Vice President for Advancement, and  
Gordon D. Chavers, General Counsel

**SOURCE OF FUNDS**

PacifiCare/United HealthCare, the provider of the Senior Supplement Plan for the Purdue retirees, had an unmet performance guarantee several years. As a result, PC/UHC returned to PURA a portion of our payments:

• For 2006 paid on 10/01/07	\$55,000
• For 2007 paid around 11/08	\$25,000
• For 2008 check dated 3/25/11	\$40,000
• For 2009 check dated 3/23/11	<u>\$16,000</u>
TOTAL	\$136,000

All of these funds have been deposited in the PURA A&O Fund.

### 2011-2012 RECOMMENDATIONS AND IMPLEMENTATION IN 2012-2013

- The Endowment brochure was distributed again at the 2012 Kickoff Luncheon.
- A separate flyer about the Jischke Purdue Opportunity Award (POA) was distributed at the Kickoff Luncheon and at an MCL Lunch Meeting.
- Periodic announcements about the endowment have been made at the monthly PURA meetings.
- It was agreed that the best publicity for attracting new donor funds will be the actual beneficial use of some part of the income from the endowment. As the income from the endowment grew during the year, there were conversations with department heads informing them of PURA's capacity to partner financially on projects related to aging; considerable interest was expressed but no request has surfaced to date.

### PURDUE OPPORTUNITY AWARD IN HONOR OF MARTIN AND PATTY JISCHKE

With the completion of the \$20,000 scholarship contract through the contributions of members of PURA and the additional \$5,000 gift from Fidelity, the Jischke POA had sufficient funds to generate a small amount of income to contribute to a scholarship for a high-need student. The first award was made for the 2012-13 academic year to **Michael McCormick**, a first-year student in ENGR from Colfax, IN.

### SUMMARY UPDATE OF PURA A&O FUND AND PURA JISCHKE POA

	PURA A&O Fund	PURA Jischke POA
Book value on 12/31/12	\$136,000	\$26,108.44
Market value on 12/31/12	\$132,712.44	\$23,938.28
Income available for expenditure on 12/31/12	\$18,455.85	\$1,545
Income reinvested on 12/31/12	\$3,238.83	\$584.21
Awards granted	\$0.00	Award to Michael McCormick First-Year ENGR
<b>Current available funds</b>	<b>\$21,694.68</b>	<b>\$2,128.77</b>

### COMMITTEE MEMBERSHIP FOR 2013-2014

Member	Position	Term Ends
Bob Bain	PURA president for 2013-2014	06/15
Melinda Bain	secretary-treasurer	06/18
Bill Griggs	member-at-large	06/14
Sue Hiser	immediate past-president	06/14
Betty M. Nelson	chair	06/14
Scott Rumble	member-at-large	06/14

**Purdue University Retirees Association (PURA)**  
**Hospitality Committee**  
**2012-2013 Annual Report**

**Committee Members:** Gayle Archer, Jane Brown, Gail Carlton, Doris Cox-Peterson, Eldon Fredericks, Deanna Johns, Dorothy Jones, Lyle Lloyd, John Moser, Hubert Schmieder, Co-Chair John Miller, and Co-chair Jeris Eikenberry

**Mission:** The mission of the committee is to encourage retirees from all sectors of the University to participate in PURA's on-going activities. The committee seeks to improve communication to retirees and pre-retirees about the value and usefulness of PURA's benefits and programming. The committee also provides detailed discussion of new ideas and concepts that might further improve PURA's programming and services to the post-retirement Purdue community,

**Activities for the 2012-2013 year**

Members served as greeters and welcomed participants in such activities as:

- monthly luncheons at MCL on the first monday of each month
- decorated tables for luncheons during holidays
- the annual kick-off luncheon in September
- the various venues for receiving flu-shots in October and November
- handed out literature and bags provided by Fidelity at the annual Purdue Spring Fling
- Served as greeters at the "Purposeful Living in Retirement" Seminar in April.

Projects during 2012-2013 Year

- worked with the Programs Committee on MCL monthly meeting room set-ups
- Reviewed the Hospitality Committee section of the Procedures Manual
- Reviewed the PURA web page

Discussion Items during the "brain storm" sessions during committee meetings

- the issue of having a retiree phone book
- the difficulties in obtaining nominees for the Hansen Award
- the effectiveness of greeting function at the flu shot venues
- the effect of the new worklife programs on retirees
- working with TIAA-CREF and other approved vendors, as well as Fidelity

In addition to the above, the Co-Chairs serve as a member of the PURA Board of Directors and serve as the PURA representative on the University-wide Spring Fling Committee.

The Co-Chairs wish to thank all the committee members for their good attendance and unselfish committee work during the year. A special thanks to Gayle Archer who took notes during the meetings and to Doris Cox-Peterson who arranged our meeting place at University Place during the year.

John Miller, Co-Chair

Jeris Eikenberry, Co-Chair

**Purdue University Retirees Association  
Kickoff Luncheon Committee  
Annual Report, 2012-2013**

**Committee Members**

Sarah Johnson, Co-Chair  
Ann Pickett, Co-Chair  
Elizabeth Arvidson  
Mike Drayer  
Jeanie Kalhust  
Sue Robinson  
Sue Hiser, PURA President, ex-officio  
Bob Bain, PURA Vice President, ex-officio

**Purpose**

The Kickoff 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 a University administrator and a chance to reconnect with friends and former colleagues.

**2012 Luncheon**

The 2012 Luncheon was held on September 10 at the Four Points by Sheraton Hotel (formerly University Plaza Hotel). There were 267 reservations; 256 people attended. Acting President Tim Sands was the speaker. The Betty M. Nelson Award was presented to Kate LaMar. The Arthur G. Hansen Award, given to a department or unit that works closely with its retirees, was presented to the Department of Nutrition Science in the College of Health and Human Sciences.

A popular aspect of the luncheon is the array of door prizes given throughout the meal. More than 55 attendees received prizes donated by 29 vendors with a collective value in excess of \$2000.

Sue Robinson will be leaving the committee this year after serving loyally for 8 years. We welcome Karen Ferry and Katherine Markee as new members of the committee.



**Purdue University Retirees Association  
Program Committee  
Annual Report 2012-2013**

**Committee Members**

Reuben Peterson, co-chair; John Trott, co-chair; Ken Coleman; Ann Hunt; Don Jones; Dale Margerum; Eldon Ortman; Doug Sprenkle; Sue Scholer; Betty Suddarth; Olivia Wood; Marilyn Ziemer

**New 2013-2014 committee members:** Lyle Lloyd and Sue Topping

The members of the committee are to be thanked for their fine work in suggesting a variety of topics and speakers for the 2012-2013 luncheons. The members of the committee are also owed special thanks for volunteering to be a coordinator for one of the luncheons.

A total of 11 luncheons were scheduled at the MCL on the first Monday of the month. The following is a list of topics, speakers, and coordinators for the 2012-2013 PURA luncheon programs:

- |        |  |
|--------|--|
| Oct. 1 | Topic: New Recreational Sports Facility<br>Speaker: Mitch Nettesheim<br>Coordinator: Reuben Peterson         |
| Nov. 5 | Topic: Brain Injuries in High School Football Players<br>Speaker: Larry Leverenz<br>Coordinator: Ken Coleman |
| Dec. 3 | Topic: Global Women's Health Initiative<br>Speaker: Connie Weaver<br>Coordinator: Olivia Wood                |
| Jan. 7 | Topic: Oakland School<br>Speaker: Clare Lutgen<br>Coordinator: Ann Hunt                                      |
| Feb. 4 | Topic: Cancer Research<br>Speaker: Phil Low<br>Coordinator: Dale Margerum                                    |

- Mar. 4            Topic: Health and Human Sciences: New Endeavors  
                      Speaker: Christine Ladisch  
                      Coordinator: Doug Sprenkle
- Apr. 1            Topic: A View of the Indiana State House  
                      Speaker: Sue Scholer  
                      Coordinator: Betty Suddarth
- May 6            Topic: Food Finders  
                      Speaker: Cheryl Precious  
                      Coordinator: Eldon Ortman
- June 3            Topic: Identity Theft Protection  
                      Speaker: Bob Falk  
                      Coordinator: John Trott
- July 1            Topic: Energy Issues  
                      Speaker: Wally Tyner  
                      Coordinator: Don Jones
- Aug. 5            Topic: Juvenile Justice System  
                      Speaker: Judge Faith Graham  
                      Coordinator: Marilyn Ziemer

The committee wishes to thank Michele Salla for the many ways she serves PURA. The committee is especially grateful for her excellent work in preparing and distributing the printed programs for each of the luncheons.

Beginning with the luncheon on November 5, 2012, the starting time was changed from noon to 11:50 a.m. This was done in order to allow the speakers adequate time for their presentations and questions from the audience.

## **Annual Report for 2012-2013**

### **Purposeful Living in Retirement Committee**

Committee members: Sue Hiser, Mary Hood, Chris Johannsen, Lowell Landrum, Bryan Metzger, Stan Mithoefer, Doug Sprenkle, Betty Suddarth and Dr. Ken Ferraro served as an Ex Officio member.

Scott Rumble served as Chair and Lowell Landrum chaired the commercial exhibits.

Outstanding staff support provided by:

Human Resources: Michele Salla

Purdue Strategic Events Planning Staff: Kirk Milburn and Sarah Lewis with support from Catherine Adair Whitten. Purdue Students also helped with registration. The events staff was there to cover many details prior to, during, and after the event. A special thanks to them.

The PLIR Committee held its first meeting in September. Lowell Landrum provided an excellent start to the new year by providing an evaluation and review of the 2011 conference.

Arrangements were made with Four Points at the Sheraton to have the Conference on April 24, 2013. Planning meetings were continued throughout the year.

Special help with publicity from Jill May and Sam Conner was very helpful. Ted Luce helped with our pictures.

The program content was decided upon by the committee. Programs ranged from Balance and Mobility to Hearing, Medications, and Wills.

The after lunch kickoff speaker was author and communications manager John Norberg. John's presentation was enjoyed by all.

Excellent resource help was provided by the office of special events along with Michele Salla, Human Resources throughout the year. Sound, computer, and media help was provided by the Hall of Music.

Eight sponsors helped provide funds for the program. The Committee was very dedicated and participation was excellent! A special "Hats off to the hospitality committee" for their exceptional help with the program.

There were 275 attendees registered and 33 exhibitors. Over 320 people involved with the 2013 program. Numerous door prizes were awarded to the participants.

Roy Johnson led us in Hail to Purdue to cap off the conference.

A special thanks to all who attended and to the many who volunteered to make the program successful.

## **TRIPS AND TOURS COMMITTEE 2012-2013**

The committee met monthly at the Worklife office location on State Road 26 West during 2012 moving to Freehafer Hall in 2013.

Committee members:

Dan Collins, co-Chair  
Jim Marciniak, co-Chair  
Carol Barrett  
Linda Hawkins  
Wayne Hilt  
Nancy Yuochunas, Secretary

Carol Barrett, Dan Collins, Wayne Hilt, Jim Marciniak, and Nancy Yuochunas are leaving the committee. We appreciate their many years of contributions. Linda Hawkins will remain on the committee as chair joined by Carolyn Blue, Agnes Hawn, Tom Haworth, and Tarren Neth.

The Committee collaborated with Imperial Travel and Top Notch Travel Tours throughout the year and committee members will continue to work with these travel agencies to select and coordinate trips. The Trips and Tours Policies and Procedures were updated to include the most recent trips. Articles and photos of the trips were submitted for the PURA newsletter.

The first trip planned by the Committee was a two-day excursion to St. Louis on June 27-28, 2012. An Imperial Travel escort guided 20 PURA members and guests to the Gateway Arch, Union Station, Grant's Farm, the Missouri Botanical Gardens, and the Anheuser Busch Brewery for a tour and tasting. The Drury Inn in Fenton, MO welcomed the overnight tour guests with an evening reception.

On September 20, 2012, Purdue Retirees and guests nearly filled the Lafayette Civic Theater to enjoy "My Way, a Tribute to Frank Sinatra". Adelino's Old World Kitchen provided hors d'oeuvres and beverages before the performance. The evening was a huge success.

More music of the 40's, 50's, and 60's was enjoyed at the Second Annual Night at Pappy's on May 8, 2013. Twenty faithful PURA members and guests "grooved" to the music while enjoying burgers, fries, soda fountain drinks, and ice cream.

Other events planned for the year were cancelled for various reasons and will be revisited next year.