

PURDUE UNIVERSITY RETIREE'S ASSOCIATION

Benefits Committee

Annual Report 2023-2024

A. Committee Members:

- * Charles Brown
- * Betty Nelson
- * Don Gentry
- * Larry Pherson, Chair
- * Sue Hiser (Ended Committee service during 2023-24)
- * Harry Morrison
- * Leon Thacker
- * Marta Read(Ended committee Service during 2023-24)
- * Emily Bramson
- * Julie Kercher-Updike
- * Larry DeBoer
- * Carolyn Roper
- * Peter Goldsbrough
- * Rick Cosier
- * Cindy Oneal
- * Jane Walker
- * Scott Ksander
- * Marshall Martin
- * Jesse Moore
- * Tom Turpin
- * Norm Long
- * William Bennett
- * Jerry Day

*Tom Robertson

* Charlene Sullivan

*Kate LaMar, ex-officio

*Candace Shaffer, ex-officio

B. Mission/Purpose:

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. It is the purpose of the Benefits Committee to expand upon and add to the specific University policies which contribute to the wellbeing of retirees. The primary responsibilities of the Benefits Committee are to assure the provision of comprehensive, affordable medical plans for retirees, negotiate with insurance providers, evaluate changes, monitor services and investigate alternatives where advantages may be gained. The committee strives to keep retirees aware of additional University benefits and privileges and promotes program improvements where possible. The Benefits Committee is also responsible for assuring representation on the Purdue Faculty Compensation and Benefits Committee, Parking and Traffic Committee and the Retirement Plan Committee.

C. Committee Goals 2022-2023`:

- 1) Finalize with UHC by August 31, 2023, the PURCare and PURA Medicare Advantage Plans for 2024.
- 2 Announce PURCare and Medicare Advantage Plans for 2024 to PURA membership via the PURA Newsletter and letter by September 2023.
- 3) Evaluate the renewal process for the 2024 plan and identify potential improvements by October 31, 2024.
- 4) Set Schedule for negotiating 2025 PURA plans by March 31, 2024.
- 5) Enhance the diversity of the Committee so that the Committee may better serve all current and future Purdue retirees.
- 6) Continue participation in the activities of the Parking and Traffic Committee, the Retirement Plan Committee and the Faculty Compensation Committee.
- 7) Actively engage in the Annual Spring Conference and the Road to Retirement Programs.
- 8) Obtain adequate clerical support for the activities of the Benefits Committee
- 9)Continue to monitor actions of external organizations (state and federal governments and organizations involved in the delivery of healthcare services and products) to assess the possible impact of these actions for PURA's members.

10) Develop a succession plan for the leadership of the Benefits Committee.

11) Review and update as necessary the Benefits Committee portion of the PURA website.

12) Coordinate with the University Parking Office the continuation of free on-campus parking for University retirees.

D) Accomplishments 2023-2024

1) Working with University staff and healthcare consultants, PURcare and the Medicare Advantage Plans were extended for 2024. Both plans remained unchanged. The premium for Medicare Advantage, which is \$172.91 per month, was unchanged. The monthly premium for PURcare increased to \$298.39, an increase of 2.5%.

2) An evaluation of the negotiation of the 2024 insurance package was conducted during the Fall of 2023. Recommendations resulting from that evaluation will be utilized during the negotiation of the 2025 insurance package.

3) During 2023-24, Rick Cosier was the PURA representative to the Purdue Retirement Plan Committee; Carolyn Roper was the representative to the University Compensation and Benefits Committee and Larry Pherson was the representative to the University Parking and Traffic Committee.

4) The following are examples of the Committee's communication and marketing efforts:

a) Prepared articles for the PURA Newsletter, including the announcement of United Healthcare's new drug plan's ID cards that were effective January 1, 2024.

b) PURA Spring Conference.

5) The Benefits Committee portion of the PURA website was continually monitored and updated.

6) The document listing the benefits that are available to Purdue University retirees was continuously monitored, updated and posted to the PURA website.

7) The schedule for negotiating the 2025 plans has been proposed to and accepted by UnitedHealthcare.

8) Assisted in staffing the PURA table at the Purdue Employees Benefits Fair.

9) The Committee with assistance from its consultant, Aon, began research to better the implications of the Inflation Reduction Act of 2022 for the upcoming renewal of PURA medical plans.

10) Three new members were added to the Committee during 2023-24.

11) Coordinated with the University Parking Office, the transition to a License Plate Recognition system which will be utilized for retiree parking effective August, 2024.

12) Continued monitoring governmental activity relating to Affordable Healthcare, Tax Code revisions and the Inflation Reduction Act.

13) The Committee considered adding an additional zero premium Medicare Advantage plan. After much review and discussion, it was determined that a significant advantage beyond that available in the open market could not be provided.

All in all, the Benefits Committee had a successful 2023-2024 and was quite busy.

Campus and Community Activities Committee
Annual Report
2023-2024

The goal of the Campus and Community Activities (CCA) Committee is to offer educational, informative, and entertaining activities of interest to members of the Purdue University Retirees Association and their guests. Generally, committee activities do not require chartered transportation or collection of registration fees. Reservations are accepted to assure that adequate space and/or seating is available. Limitations on the number of reservations accepted are determined by the activity and venue.

Announcements of events are placed in the PURA newsletter, through e-mail, and/or announced at the monthly PURA meetings.

Four campus and community tours were offered during the 2023-2024 academic year. The year's activities were as follows.

Summer 2023

On June 16th, Elizabeth Whittaker gave a tour of the Whittaker Inn to 19 PURA members. The tour presented the history of the facility as well as plans for future expansion. Attendees were able to see most of the 13 guest rooms in the facility, with each room featuring a different theme from locations special to the Whittakers. The tour was capped off with delicious lunch from the inn's own kitchen.

Fall 2023

On October 16th, Al Capitos, Associate Athletics Director for Facilities and Event Management, led 20 Purdue retirees on a tour of Mackey Arena, the Holloway Gymnasium, and Ross Ade Stadium. Al provided insights into past, current, and future projects for athletic facilities. The tour was a big hit with those who were able to attend, and we hope to have a similar tour in the future for those who wanted to see the facilities but were unable to join this tour.

On October 30th, Jen Van Schuyver, Deputy Director of Development for the City of West Lafayette, led a group of 24 retirees on a tour of Sonya L. Margerum City Hall. Jen described how the former Morton School building was renovated in 2019 and 2020 to become the new home of West Lafayette's city offices. Attendees were able to tour throughout the building including city council chambers, conference and meeting rooms, employee workspaces, community use spaces, and even the mayor's office. Everyone was impressed with the building which provides an excellent space for city offices with room to grow in the future!

Spring 2024

On May 2, Ernie Avellana - Chief Development Officer for the Purdue Polytechnic, Tim Updike - Operations Manager, and others hosted 15 PURA members on a tour of Dudley and Lambertus Halls, the new engineering and technology Gateway Complex near Knoy Hall on campus. Attendees were able to see cutting-edge laboratories and maker spaces for smart manufacturing, electronics, construction, and

more. Those who were able to attend were impressed by the quality of these new facilities, which are the only ones of their kind anywhere in the country. The new building supports classes from engineering and technology and will help to anchor a new manufacturing major being offered by the Polytechnic.

The members of the committee are pleased to have been able to offer these activities for PURA members during this year.

Committee Members:

Sharon Kraebber

Jim Lehman, co-chair

Debby Sherman, co-chair

Tom Templin

2023-24 Annual Financial Report

PURA continues to receive an allocation of \$17,000 from the Purdue University general fund to be used for organizational expenses such as publication of the newsletter, supplies, travel, committee and program activities as well as the kickoff luncheon. There was a carry forward in this account from the 2022-23 fiscal year of \$522.23.

Expenses totaled \$15,522.67 for the year. The largest categories were the transition luncheon (\$2,376.57), the Big 10 Conference travel (\$2052.17) and increases in printing and postage costs (3,806.87). A projected carry forward of \$2,429.40, leaves the Purdue Retiree Association in good financial shape for the start of the coming fiscal year.

Other account balances are all positive.

Other accounts holding funds for PURA are the Activities and Opportunities Endowment Account, Retirement Activities – Outside Agency Fund and the Jischke scholarship endowment.

1. The Activities and Opportunities Endowment Account supports unique miscellaneous expenses not considered operational in nature. This account receives endowment income twice a year. The endowment income for 2023-2024 was \$6,966.27. Expenses charged to this account were \$8,517.74, the bulk of these expenses was \$6595.32 for the catering costs associated with the Annual Spring Conference. The balance in this account is \$63,701.40.
2. The Retirement – Outside Agency Activities is used to support awards and the committee members retiree gift to the University Scholarship account. Expenses charged to this account were for retiring committee members of \$625 and \$250 for a conference honorarium. Income from sponsors for the Annual Spring Conference totaling \$8,425 was deposited into this account to offset expenses not charged to the University Conference Division account. The balance in this account is \$54,832.29.
3. Purdue Opportunity Award – Martin and Patty Jischke account receives endowment income twice a year to support scholarships for Purdue students. The endowment income was \$2,516.92. The scholarships payments totaled \$3,500. The balance in this account is \$445.74.

Attached is the year end financial report for 2023-2024.

Purdue University Retiree Association Financial Report
July 2023-June 2024

Jun-24

Account: General Fund Operations
3200002308

Income	\$ 17,000.00	Annual Allocation
Carry Forward	\$ 522.33	
Other Income	\$ 429.74	Kickoff luncheon
Expenses	\$ 15,522.67	

Commitments

Balance	<u>\$ 2,429.40</u>
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Activities and Opportunities Fund:

7600000101 Endowment Account

Carry Forward	\$ 65,252.87
Income Distributions	\$ 6,966.27
Expenses	\$ 8,517.74
Commitment	

Balance:	<u>\$ 63,701.40</u>
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Retirement Activities - Outside Agencies Fund

15010000

Carry Forward	\$ 48,032.29
Expenses	\$ 1,625.00
PURA conference sponsors	\$ 8,425.00
	\$ 750.00

Balance	<u>\$ 54,082.29</u>
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Purdue Opportunity Award - Martin and Patty Jischke

360005530

Carry Forward	
Income Distribution	\$ 2,516.92
Expenses	\$ 1,428.82
	\$ 3,500.00

Balance	<u>\$ 445.74</u>
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Note: Distributions from Endowments to support accounts are made in May and November of the fiscal year.

Purdue University Retirees Association

Hospitality Committee

Annual Report 2023-2024

Committee Members:

Linda Hawkins – Chair

Bill Bennett

Marjorie Boeckman

Donna Cackley

Betty Hatfield

Michele Salla

Terry Wade

Judy Ware

Barb Welch

Jerry Day – ex-officio

Marshall Martin – ex-officio

Tom Robertson – ex-officio

Mission/Purpose

The Hospitality Committee encourages retirees from all sectors of the University to take part in PURA's ongoing activities such as the fall Kick-off Luncheon, the monthly gatherings at the VFW, and other special events.

The Committee may serve in a liaison capacity for special events, such as the flu shot administration, health fairs, retirement receptions, etc. The Committee also strives to improve communications to retirees and pre-retirees and gather ideas that might result in interesting new programming for PURA.

The year in review:

In September, 2023, the Hospitality Committee welcomed retirees to the Courtyard by Marriott for the annual Kick-off Luncheon. We were also tasked with distribution of door prizes at this event.

Also in September and October, 2023, the Hospitality Committee assisted the Center for Healthy Living as they offered flu shots and wellness checks for retirees over a three day period at the William H. Daniel Turfgrass Center. On those three days, a total of 719 retirees took advantage of the event.

In April, 2024, the Hospitality Committee greeted and guided retirees and vendors at the Beck Agricultural Center for the annual PURA Spring Conference. Again, the Committee was responsible for distributing the many door prizes supplied by the vendors.

Throughout the year, the Committee decorated tables and greeted retirees as they came to the VFW for a monthly gathering.

And before this year is over, PURA will be on campus to meet and greet retirees and those nearing retirement at the annual Spring Fling.

We look forward to a fun-filled and busy upcoming year.

Media Communications Committee

2023-2024 Annual Report

Committee Chair: Scott Ksander

Committee Members: Julie Kercher-Updike, Ken Scheeringa

The major effort of the committee this year was to assist in the transition from a monthly Newsletter to specific purpose emails. The retiree email database is maintained by Purdue for Life but keeping the database current with accurate retiree contact information continued to be challenging. Additionally, the database does not contain complete information of retiree spouses who are also full members of PURA. An effort to address this with Purdue HR will be a priority for 2024-2025.

The committee continued maintenance of the PURA website. The website was also restructured to focus on current information on the landing page. PURA archives and historical information continues to be available on the website.

The Committee supported many Zoom meetings for monthly meetings, and Benefits Committee meetings. Executive Board meetings moved to Microsoft Teams because of facilities available at the 2550 building.

The Committee also manages email sent to PURA@purdue.edu and gets it routed for responses.

Submitted by Scott Ksander, Chair, May 14,2024

PURA Program Committee 2023-24 Annual Report

Program Committee Mission: The Program Committee provides a program for PURA members during the monthly meetings. The committee sets the meeting schedule for the coming program year, beginning in October and running through August of the following year. If the first Monday of the month falls on a national holiday, PURA, generally, does not meet that month. The annual kickoff luncheon serves as the program for September. For the Program year 2023-24, the committee asked to change the meeting time from a lunch to 10:00. The Executive Committee approved this AND agreed to pay for the refreshments. Attendance has picked up a bit.

The program committee chair and members are responsible for recruiting members to serve on the committee. Committee members are asked to coordinate and host 1-2 program speakers each year. Programs were planned out for the entire program year and assigned members were encouraged to book a presenter as soon as possible to speak to the title given. Some title edits do occur. The program committee hosts are responsible for facilitating the program and introducing the speaker. Emceeding the meetings is the responsibility of the PURA president.

With the pandemic now in the rearview mirror, we ARE back to in-person meetings at the VFW, but we have retained zoom for those in the outer regions. In general, it appears that the attendance of in-person plus zoom is about the same as the attendance was on zoom alone. However, we are not back to pre-pandemic in-person attendance days, BUT progress is being made with the new time. Our program recordings are archived and available to be viewed at later dates.

Recruitment of new committee members for 23-24 remained a challenge leading to a small, but robust committee roster. Thank you to the committee members for their efforts and flexibility in solidifying programs and speakers for this year and for covering for each other as conflicts arose. Planning for the 2024-25 year will be a part of the annual Transition Meeting to take place on June 5, 2024. To this point, no new members for 2024-25. Continuing will be Dan Collins, John Schneider, Chris Rohler, Jim Beatty, Tom Turpin, Norm Long, and Bob Ritchie (Chair). Leaving the committee will be Becky Moyer.

PURA Program Committee Members and the 2023-24 Programs are included as attachments.

Bob Ritchie. Program Committee Chair
PURA 2023-24

PURA Annual Spring Conference -2024

The Purdue University Retiree Association's Annual Spring Conference was held at the Beck Agricultural Center on April 17, 2024, with more than two hundred attendees and twenty-nine vendors.

The purpose and goal of the Annual Spring Conference is to offer an educational program and social event focused on topics of interest to retirees and their spouses.

The event began with Coffee & Snacks with time for Fellowship and time to visit with Vendors. The morning program began with Lisa Duncan, Purdue's Nonprofit Engagement Director outlining a printed document listing Volunteer Options for Seniors in the Lafayette Area.

Understanding Dementia/Stroke/ALS/Disorders and Rehabilitation was presented by Garry Gumasing, Director of Therapy at Saint Anthony Rehabilitation Center. His presentation was followed by Day Trips for Seniors presented by Tommy Kleckner, Western Indiana Regional Director for Indiana Landmarks.

Attendees were then treated to a hot noon meal catered by Christo's. During the noon break, attendees had more time for fellowship, time to visit the vendors and to learn more about their United Health Care Program with Kate LaMar.

As the afternoon session began, attendees were treated to the awarding of many nice door prizes provided by the vendors.

The program then featured, Amy Boyle, PURA Liaison and Purdue Vice President for Human Resources who shared an update and warm welcome.

Campus/Area Improvements and Future Plans for New Facilities were jointly presented by Paul Bercot Sr. Project Mgr. Purdue Research Foundation and Amber Chellis-Omedo Sr. Director Purdue Campus Planning & Architecture. The ever-popular Armchair Exercises were again introduced and led by David Caldwell.

The afternoon event was highlighted by Dr. James Mohler, Executive VP for Research, Partnerships and Scientific Integrity addressing the topic of Artificial Intelligence and its Potential Impact on Seniors.

The session was spiced up with the balance of door prizes and table decorations.

Closing the event was the ever-popular protocol of singing “Hail Purdue” led by Roy Johnson.

A review of the speakers slide decks may be found on the PURA website at www.purdue.edu/retirees

If you missed this unique event, plan now to attend with us next year. Planning is already underway for yet another powerful and different agenda.

Prepared & submitted by:
Dr. Norman D. Long, Chr.

Committee Members: Melinda Bain, David & Betty Caldwell, Berdine Martin, Carol Shelby, Chris Rohler, Gail Ruhl, Mary Gardner, Jerry Day, Linda Hawkins, Martha Fletcher, Olivia Wood, Debra Pontecorvo, Scott Rumble, Sue Scholer, Tom Turpin, Charlene Sullivan, Marshall Martin, and Tom Robertson.

Departing committee Members: Martha Fletcher and Mary Gardner
New Member: James Schweitzer.

In addition to attendee and vendor fees, four major sponsors underwrote the program, namely: United Health Care, TIAA Financial, Fidelity Investments and Purdue Federal Credit Union.

Six local donors also helped support the event, namely: University Place, West Minster, Cumberland Pointe, Saint Anthony Rehabilitation and Nursing Center, Aster Place and O’Drobinack & Nowaczyk & Co. elder attorneys.

Purdue University Retirees Association
PURA Scholarship Committee
Annual Report
2023-2024

Committee Members:

Melinda Bain, Chair
Jerry Day, Past President
Sue Hume Graham
Betty Nelson
John Norberg
John Trott
Tom Turpin

Primary Goal: The primary goal of this committee is to continue growing the PURA scholarship endowments to provide funds to assist as many Indiana students with significant financial need as possible. Committee members will fundraise for and mentor students for the two endowments: PURA Student Scholarship Endowment and the PURA Purdue Opportunity Award (POA) in Honor of Martin C. and Patty Jischke.

Scholarships Awarded: Awards in excess of \$16,000 were distributed from PURA scholarship endowments for the 2023-2024 academic year. \$12,910 was awarded to the 5 PURA Student Scholarship Endowment recipients and \$4,000 was awarded to the 3 PURA POA Jischke recipients. These funds are a portion of a complete financial aid package offered to Indiana students. Student selection and award amounts are administered by the Division of Financial Aid.

The PURA Student Scholarship Endowment made awards to five students:

Isabelle Ahlenius, College of Liberal Arts, Knox, Indiana
Steven Elder, School of Aviation and Transportation Technology, West Lafayette, Indiana
Nathan Ellis, College of Engineering, Crown Point, Indiana
Dakota Richards, College of Agricultural, Vevay, Indiana
Lilly Sterk, College of Agriculture, Remington, Indiana

The PURA POA Endowment in Honor of Martin C. and Patty Jischke made awards to three students:

Suingun Par, College of Health and Human Sciences
Abdulrahman Saleh, College of Science, Topeka, Indiana
Camille Smith, College of Education, Waynetown, Indiana

Communication with Students: The Scholarship Committee Chair requests the following information from the University Development Office: student name, degree area, hometown in Indiana, address, email address and cell phone number (sometimes these are not available) and photograph of the student. The University Development Office routinely asks the students for letters of appreciation or thank you letters. Those are forwarded to the Scholarship Committee Chair. A welcoming email is sent to all of the students inviting them to participate in the monthly educational activity.

Scholarship Balance: The Book Value of the PURA Student Scholarship Endowment as of April 30, 2024 is \$259,164, an increase of \$12,302 from the same time last year. The Book Value of the PURA POA in Honor of Martin C. and Patty Jischke is \$61,074, an increase of \$2,625 from the same time last year. The Market Value of the PURA Student Scholarship Endowment is \$302,803 and the Market Value of the PURA POA in Honor of Martin C. and Patty Jischke is \$72,932.

The current Book Value totals do not reflect the Purdue Day of Giving April 24, 2024, donations as they will not be communicated from University Development until July 2024.

Donors and Gifts: Thirty-six donors made contributions to the PURA Student Scholarship Endowment. Seven of those were new donors. Seven individuals contributed to the PURA POA in Honor of Martin C. and Patty Jischke Endowment.

The April 24, 2024, Purdue Day of Giving leaderboard showed an increase to the PURA scholarship endowment of \$6,180 -- \$5,580 for the PURA Student Scholarship Endowment and \$600 for the PURA POA in Honor of Martin C. and Patty Jischke Endowment.

Communication: The PURA Student Scholarship Endowment was kept before the PURA members in a variety of ways:

PURANews articles:

August 2023: Purdue Day of Giving Update and Thank You

Emails to PURA members:

December 2023: Year-End-Giving from PURA President and Scholarship Committee

February 2024: PURA Endowments Assisting Eight Students in 2023-2024

February 2024: Email March Newsletter: Save the Date, April 24, 2024 for Purdue Day of Giving

April 2024: Purdue Day of Giving Request with direct link to Purdue for Life Foundation website for making donations

Thank You Notes and Letters: To each donor from Scholarship Committee chair for End-of Year and Purdue Day of Giving contributions.

Ornaments Continue: The Purdue themed ornaments, as well as special orders, continue to be popular. From September 2023 to the Spring Annual Conference in April, and this year through to the June Transition Meeting, 40 ornaments were sold putting \$405395 in the PURA Student Scholarship Endowment. PURA members, Purdue Women's Club members and friends continue to request special orders for these ornaments.

Committee Membership: All members will continue with the following exceptions:

Retiring Member: Jerry Day, Past President

New Member: Tom Robertson, Past President

Respectively Submitted
Melinda Bain
Committee Chair

May 17, 2024