



ASSOCIATION FOR THE RELIEF OF AGED WOMEN
Board Meeting | February 13, 2020 | 9:30 am
Wamsutta Club at the James Arnold Mansion

Packet contents to be reviewed prior to the meeting:

January Minutes; January ED report & activity sheet; January Financial Reports; Proposed FY21 Budget; February Beneficiary Committee Recommendation Summary Sheet; New Year-End Report; Outreach meeting minutes

- Call to Order and Roll Call
- Clerk Report – see packet
 - ✓ **Recommendation to approve January 2020 Board meeting minutes – VOTE**
- Reflective Moment
 - Rosemary Saber
- President’s Report
- Executive Director’s report
 - Blackbaud Grant Making Database/CRM
 - ARAW Liaison & Beneficiary Advocate position/Friendship Lunches & Outings
 - Health insurance benefit for employees
 - HR & Insurance
 - Office Space

As always open to all feedback, questions, suggestions and TO DOs
- Finance Review – see packet
 - ✓ **Recommendation to accept January finance reports – VOTE**
 - ✓ **Presentation of proposed budget for FY21**
- Committee Reports
 - Visiting
 - Reminders...
 - If you run into any issues connecting with your beneficiary, please call office not the outreach worker
 - Do not commit to any beneficiary requests, say “I will bring this back and our outreach worker will be in touch to discuss.”
 - Please send all visit reports to admin@arawofnb.org
 - **January Visitor Reports:**
 - Gale, Olivia, Debbie, Jane, Jeannette (1 from December)
 - **Visiting in February, reporting in March:**
 - Diane, Rosemary, Jo-Ann

- Beneficiary – *see packet*
 - ✓ **Recommendation to accept recommendations of the beneficiary committee as distributed – VOTE**
 - Task force meeting 2/12/20
- Governance
 - Strategic Planning Presentation for Approval 3/26/20 - **RSVP**
- Grants
 - Grants committee meeting 2/10/20
 - New end of the year reporting
- Nominating
 - Presentation & recommendation of Angela Natho
 - Survey & next steps
- Outreach
 - Focus for the future
 - Valentine’s Day card

🌀 Other business to be brought before the board

Announcements/Meetings:

Monday, February 10th | Grants Committee | 1:30 pm
Tuesday, February 11th | Strategic Planning | 12:30 pm
Wednesday, February 12th | Beneficiary Task Force | 9:00 am
Thursday, February 13th | Board Meeting | 9:30 am
Thursday, February 20th | Community Partner Quarterly Review | 9:30 am
Monday, March 2nd | Strategic Planning | 1:00 pm
Thursday, March 26th | Strategic Plan Presentation for Approval | 9:30 am

**Association for the Relief of Aged Women
Minutes of the Regular Monthly Meeting, January 9, 2020**

President Susan Rothschild called the meeting to order at 9:30 AM.

Members in Attendance: Bachman, Beaton, Beaulieu, Brooke, Doyle, Ellis, Fox, LaFlamme, Melo, O'Connell, Pinarreta, Rothschild, Saber, Stankiewicz.
Executive Director Clare Healy Foley also present.

Members Absent: McKnight, Pearl, Whipple

January Reflection: Olivia read a passage by Caroline Kennedy on aging from her book She Walks in Beauty. Olivia also read the poem by Mary Dow Brine entitled "Somebody's Mother".

Report of Clerk: The minutes of the December 12, 2019 meeting were approved as written with edits. SO VOTED

Report of President: President Rothschild reported:
Discussion of consideration to move new annual, slate of officers to align with fiscal year. After much discussion, Board decided to leave as is with slate in May and Board vote in June.

Report of Executive Director: Executive Director Clare Healy Foley reported: ,:
1. Thank you to the hard work of board members, especially this week with so many meetings
2. Many thank you's from beneficiaries for Holiday gifts shared
3. Job description of in-house liaison/beneficiary advocate in draft form and being reviewed.
4. Follow up from Blackbaud for database with clarifications:
a. Contractually obligated for three years
b. Have asked their consultant for only one year of assistance
c. Annual costs laid out with total of \$34,212.50 for three years which includes data migration.
d. A motion was made to purchase Blackbaud database for contract length of three years. SO VOTED

- e. Recommendation made to align BBGM costs with fiscal year spending

Report of Finance Committee: Treasurer Doyle reported:

1. A motion was made to accept the December 2019 FINANCIALS as written.
SO VOTED
2. A motion was made to accept an amended by-law to read:
Finance Committee will annually present appropriate financial statements to the Board as a whole, prepared by an outside accounting firm. Such statements to meet the applicable government and general accounting standards; if so required. SO VOTED
3. Finance Committee will meet in February to start new budget. The new budget will be presented to Executive Committee and then to full Board in March with budget to begin in April. Based on feedback from strategic planners, a 3-year budget will be created.

Report of Beneficiary Committee: Chair Beaulieu reported:

1. A motion was made to accept recommendations of the Beneficiary Committee as distributed. SO VOTED
2. Beneficiary Task Force had its first meeting January 7th and began discussion clarifying guidelines, exceptions, defining “living alone”, gifts vs on-going, etc. with desire to promote independence and quality of life. Next meeting scheduled for February 12th.
3. Passage from *Elderhood* shared.

Report of Governance Committee: Chair Brooke reported:

Met with strategic planning consultants on January 8th. Worked on goals of financial sustainability and breadth (bringing in populations of new women). Have been adding measurable attainable goals with time frames to plan. Next meeting January 29th

Report of Grants Committee: Chair Stankiewicz reported:

Committee met on January 6th to discuss change to RFP process. Next Grants Committee meeting will be February 10th to review, to disburse Fiscal '21 checks and discuss RFP process. Clare to work on RFP application for Committee review at next meeting. Final reports from grantees to be reviewed in March.

Report of Nominating Committee: Chair Saber reported:

Nominating Committee will meet as soon as all Board member surveys have been returned to develop slate of officers for coming year.

Report of the Outreach Committee: Chair O'Connell reported:

1. Gretchen has taken on birthday-card list. At this point, we have 91 recipients.
2. Discussed possibility of sending Valentine's Day cards.
3. Committee will meet January 29th to:
 - a. Review Committee initiatives
 - b. Look at birthday program
 - c. Website review

Visitor Committee: Chair Bachman reported:

Annual visits are proceeding as scheduled. Will evaluate potential need for extra visits on a case-by-case basis.

Visitor Reports:

Reporting this month: Gretchen (read by Shannon), Diane, Jo-Ann, Jeannette

Visiting in January: Gale, Olivia, Debbie, Jane

There being no further business, the meeting was adjourned at 11:40am.

Respectfully Submitted,

Gale Beaton, Clerk

Next Regular Monthly Meeting: February 13, 2020 at 9:30am
Optional social time at 9:00 AM



Executive Director Notes | January 2020 Activity

BENEFICIARIES/DATABASE/FILES

Blackbaud contract submitted to attorneys for review; four concerns cited:

- Renewal process
- Arbitration location
- Indemnification – acceptable use policy
- Data security

Worked with BBGM for language revision

Opinion of insurance rep sought

ICC GRANT/WCAP/SHARON

Created position & program narrative, job agreement and terms and conditions for ARAW Liaison & Beneficiary Advocate (ALMA)

Determined compensation & benefits package for ALMA position

Met with & offered Sharon O'Malley ALMA position on 1/24

Sharon accepted ALMA position on 1/31 – start date 4/1/20

Conceptualized expectations of Friendship Lunches & Outing Program

Sharon met deadline 2/1/20 for eligibility documentation for current participants and beneficiaries

- 43 applications on file for beneficiaries | 13 Records of Eligibility | 5 pending unable to reach

FINANCE MATTERS

Worked w/Jeanette to create DRAFT budget for FY21-FY23

Created projected spending for remainder of FY20

1/16 met w/Jeanette & Rosemary DRAFT review in advance of Finance Committee meeting; made revisions

COMMITTEE ACTIVITIES

Visiting Committee – visiting assignments sent; issues addressed; follow up with OWs

Nominating Committee – Angela Natho meetings in office; CORI run; revised documentation for file completed

Beneficiary Committee – task force met 1/7

Outreach Committee – met on 1/29 to determine future focus; valentine cards & stamps ordered

Strategic Planning – met 1/8 & 1/29

GRANTS

Committee met 1/6

Ongoing clarification discussions with Community Partners

New year end reporting created and distributed

DRAFT RFP created

OUTREACH WORKERS

Follow up Fridays

Monthly email blast(s)

Quarterly Outreach Review scheduled for 2/20/20

OTHER

Work with \$M consultant

Office space – sink, storage, rug, files, rearrangement plan

ARAW | MONTHLY STATUS CHANGES & OTHER ACTIVITIES | JANUARY 2020

Date:	Beneficiary	Outreach Worker	Action Taken
Jan 2020			
1/2/20	Maria Cabral	Pat Foster NBCOA	f/u: SSI? Em to PF - pending
1/2/20	Gloria Mello	WCOA	Referral (Dartmouth Dental): Lives w/handicapped son pending
1/2/20	Anna Roman	Pat Foster GNBCHC	Referral : Lives w/brother, case manager Maria Miranda 508-646-9335, Pat to f/u pending
1/2/20	Lorraine Rioux	Andrea Lemos	f/u: Denied for MassHealth (again), request received to extend Westport Apothecary
1/3/20	Irene Moniz	Andrea Lemos	Inactive : Nursing home, cable bill switched to daughter's information
1/6/20	Pauline Martin	Pat Foster GNBCHC	Referral : self-referral; seems to meet all guidelines; asked PF to f/u, PF sent request – needs more info
1/6/20	Sylvia Morgan	Sharon O'Malley	Inactive : SWH meeting needs, unable to attend social or have visits
1/6/20	Dora Cloutier	Sharon O'Malley	Inactive : Moved out of area
1/6/20	Dianna Sousa	Pat Midurski	f/u: BCBS address changed but rep did not change in system, fixed now ✓
1/7/20	Judith Monteith	Pat Foster NBCOA	f/u: BCBS refund check to be signed by Judith to deposit – Pat picked up, had signed and returned 1/13✓
1/8/20	Isabel Alves	Carolyn D'Antoni	Isabel in the hospital New Year's day; as of 1/7 Oaks in New Bedford, CD to assist w/Frail Elder app for MH
1/8/20	Aurora Rollins	Ellen Hull	BM notified us that she went to hospital 1/7 with chest pains; f/u from EH expected to go to NH 1/14
1/8/20	Carolyn Clark	Pat Foster NBCOA	Referral : from Taber Mills; passed along to PF at NBCOA ✓
1/9/20	Janet Sampson	Sharon O'Malley	f/u board: Eversource assistance program
1/9/20	Janet Mello	Pat Midurski	f/u board: Judgment proof; \$M Consultation attempted
1/9/20	Mary Jane Parquette	Pat Foster NBCOA	f/u board: reinforce what judgment proof means
1/9/20	Maria Cabral	Pat Foster NBCOA	f/u board: need invoice from landlord – invoice received ✓
1/10/20	Kathleen Vincent	Andrea Lemos	Annual update received – no new request
1/10/20	Beatrice St. Ours	Andrea Lemos	f/u: BM visit ? re: use of EPEERS; confirmed by t/c with AL; f/u with JD ✓
1/10/20	Lorraine Rioux	Andrea Lemos	f/u: BM visit re: oppty for socialization; AL attempted LR refused; f/u with DL ✓
1/13/20	Dorothy Cunha	Susan Rothier	f/u: Em to SR re Bayada bill rec'd; ARAW support of these services DC'ed in May 2019 – bill sent to SR✓
1/13/20	Geraldine Banville	Pat Foster NBCOA	Referral : from CES Foster Grandparent Program; requested f/u pending
1/13/20	Anita Roderick	Lucille	f/u: BM visit; fall detector? GPS? Add to EPEERS? f/u 1/17 SWH pays, will f/u re: need for fall detector pending
1/13/20	Maria DaVeiga	Lucille	Wellness check: did not attend social day in Dec; easing back in to SD SWH covers partial ✓
1/13/20	Pauline Chase	Carolyn	t/c from SC ENT re: request to switch service & ARAW will pay; f/u CD waiting on bill for hearing exam
1/13/20	Barbara Costa	Pat Foster NBCOA	EDDF: Winter clothes \$46.58 (underwear purchase denied; awaiting boots)
1/13/20	Dorothy Carriero	Andrea Lemos	Annual update received – no new request
1/14/20	Maria Branco	Pat Midurski	f/u request for eligibility documentation; docs sent 1/15, f/u w/Sharon re: contacted for WCAP? No ✓
1/14/20	Maria Tavares	Pat Midurski	f/u on MMP approval from June – declined ✓
1/14/20	Betty Livramento	Pat Foster	Referral : SWH/Self-referral passed on to PF at NBCOA & GNBHC (recliner) – Request received, f/u ?s to PF ✓
1/14/20	Judy Monteith	Pat Foster	Received and deposited refund check from BCBS \$197.74 (Now has SWH)
1/14/20	Marjorie French	Ellen Hull	Received and deposited refund check from Standard Times \$140.94 (Deceased)
1/14/20	Laurinda Cardoza	Pat Midurski	t/c from Pat re: United Healthcare bill address changed back to Laurinda's, Pat to fix & forward bill for pymt
1/15/20	Polly Anna Nunes	Ellen Hull	Inactive : email from Amy D, not returning to community, BCBS to be forwarded, PERS cancelled by AD 1/17

* in next month's report | EDDF = Executive Director Discretionary Fund | BM = Board Member | cc = credit card | as of 2/6/20

ARAW | MONTHLY STATUS CHANGES & OTHER ACTIVITIES | JANUARY 2020

1/15/20	Dolores Borgess	Carolyn D'Antoni	Inactive: Sacred Heart Nursing Home, BCBS cancelled, Carolyn f/u with Next
1/15/20	Diane Edwards	Carolyn D'Antoni	Inactive: 1X gift only in '18, covered by Fallon Navicare
1/15/20	Jean Poitras	Pat Foster	Inactive: Nursing home
1/15/20	Maria Rodrigues	Pat Foster NBOCOA	Inactive: 1X gift only, Son to move in as live in aid
1/15/20	Doris Burda	Andrea Lemos	f/u email to Andrea: no record at ARAW; Inactive – from 2016 1x discretionary gift
1/15/20	Alzira Curado	Lucy Oliveira	t/c from Lucy asking if car loan payment sent, requested invoice
1/15/20	Cecilia Mattos	Ellen Hull	f/u email: request on monthly report but not received, discharged 1/9 as planned? Yes but returned to NH ✓
1/15/20	June DeAndrade	Andrea Lemos	EDDF: Internet set up & 1 month of internet service \$125.44 – request submitted for February for ongoing
1/16/20	Beverly Fields	Sharon O'Malley	EDDF: Shower chair, Dana at Westport Apothecary alerted \$75
1/16/20	Mary Wetherell	Cindy Kinnane	f/u to request: email to Cindy re: missing age, health insurance, monthly cc payments – Updated app sent ✓
1/16/20	Jacqueline Morin	Lucille Dauteuil	f/u email from Lucille, cell phone set up on CC, Jacqueline does not want to change at this time ✓
1/16/20	Gertrude Liberatore	Andrea Lemos	Annual update received – no new request
1/16/20	Alice Lourenco	Andrea Lemos	Annual update received – no new request at this time, request for new glasses to come at later date
1/16/20	Marcelina Lopes	Pat Foster	f/u email to Pat re: questions about family gift, grandson, ostomy supplies - pending
1/16/20	Shirley Rice	Pat Midurski	Inactive: son has moved in with her
1/17/20	Joan Shea	Lucille Dauteuil	TC from JS: rec'd insurance refund ck, signed fwd to ARAW; \$M consultation assess rec'd – no further need
1/17/20	Carolynne Rogerson	Pat Foster	Referral: Boston Neuro Behavioral Associates re-referred CR; fwded to PF for review - pending
1/21/20	Carol Simpkin	Pat Midurski	TC from PM: Jan BCBS bill not received, Pat to f/u with BCBS, 1/27 Pat spoke w/BCBS – should be resolved ✓
1/21/20	Muriel Godinet	Susan Rothier	f/u email to Susan: no record at ARAW – forwarded application, does not want assistance at this time ✓
1/23/20	Maria Cabral	Pat Foster NBOCOA	f/u email re: rent invoice, pursuit of SSI f/u Pat emailed copy of rent invoice 1/24 ✓
1/23/20	Sally Chace	Sharon O'Malley	f/u email re: rent invoice - pending
1/23/20	Joana Antunes	Pat Foster GNBCHC	f/u email re: rent invoice - pending
1/23/20	Atanazia Barbosa	Pat Foster GNBCHC	f/u email re: tv not working, Pat to return to ARAW, Jenny will return to Walmart & reorder – done ✓
1/23/20	Pauline Guay	Andrea Lemos	Inactive: Over income, f/u email re: reminder Jan last month for pymts to BCBS & Spectrum
1/24/20	Polly Anna Nunes	Ellen Hull	EM from Amy re: passed away sometime last week (previously in active)
1/24/20	Kathleen Jennings	Sharon O'Malley	EM from Sharon requesting letter stating that ARAW is not currently providing assistance for SS app, sent ✓
1/27/20	Susan Perry	Pat Midurski	EM from Beth Carroll w/recommendations from initial meeting
1/27/20	Alice Bissonette	Lucille Dauteuil	EM from Lucille, open to help with financial situation, referral to MM - pending
1/27/20	Eileen Hotte	Carolyn D'Antoni	TC from Eileen re: she was in an auto accident, asked to f/u with Carolyn – see below ✓
1/28/20	Dolores Borgess	Carolyn D'Antoni	Received and deposited refund check from BCBS \$319.81
1/28/20			Received and deposited refund check from Standard Times \$4.72
1/28/20	Sandra Spooner	Sharon O'Malley	f/u email to Sharon: new needs, daughter's health worsening – request received, f/u ?s to SO ✓
1/28/20	Susan Braley	Pat Foster GNBCHC	EDDF: Yellow cab trip to cash holiday check – awaiting invoice – declined by Bene
1/28/20	Eileen Hotte	Carolyn D'Antoni	EM from Carolyn: repair from accident \$3,500-3,800, turning in plates & cancelling ins, will use COA vans
1/28/20	Carole Reagan	Ann Raymond	f/u email: call from daughter about request, still waiting on documentation, Ann sent documents ✓
1/29/20	Atanazia Barbosa	Pat Foster GNBCHC	Returned defective TV and reordered to be delivered Saturday ✓

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ARAW | MONTHLY STATUS CHANGES & OTHER ACTIVITIES | JANUARY 2020

1/30/20	Cathrina DosSantos	Carolyn D'Antoni	f/u to request: SHINE - yes, dental insurance – would only cover future, cable bill? – accidentally sent ✓
1/30/20	Maria Macedo	Pat Foster GNBCHC	EDDF: Dental bill \$324.60 (Approval in Nov 18 add'l approval not needed)
1/30/20	Betty Ann Livramento	Pat Foster GNBCHC	f/u to request: On hold: CC use, O2 Models, physician consult, over income f/u answers sent 2/4 ✓
1/30/20	Sally Fletcher	Pat Foster GNBCHC	f/u to request: value of car, amount requested additional to loan from friend?
1/30/20	TBD	TBD	Referral: EM from Child & Family Services client who has old gas/electric bill, f/u replied w/ other guideline ?s
1/30/20	Wanda Couto	Sharon O'Malley	Inactive: in and out of hospital and rehab, unable to continue with socialization
1/30/20	Pauline Martin	Pat Foster GNBCHC	f/u to request: 2 blank sections, shared concern with family – funeral for existing bene – denied at this time ✓
1/30/20	Leslie Chytrus	Sharon O'Malley	f/u to request: how she uses transportation ✓
1/30/20	Frances Cory	Pat Midurski	EDDF: Oral surgeon consultation \$150 – awaiting invoice - pending
1/30/20	Joana Antunes	Pat Foster NBCOA	f/u to request: on hold, outdated app, typos in letter - pending
1/30/20	Louise Estrella	Pat Midurski	f/u to request: on hold, bankruptcy payments & balance, payments to dentist - pending
1/30/20	Vivian Pimental	Lucille Dauteuil	Annual update received – needs hearing aid but refuses, does not like change
1/30/20	Elizabeth Belanger	Pat Midurski	f/u to request: on hold , confusing letter (old-sent new 2/3), groceries, grooming, pet supplies (updated 2/3)
1/30/20	Sandy Spooner	Sharon O'Malley	f/u to request: updated app, CC, mortgage mod, dentures, other source of income, gorilla glue, trans ✓
1/31/20	Carolyn Clark	Pat Foster	EDDF: one yellow cab round trip – awaiting invoice
1/31/20	Alice Crowley	Carolyn D'Antoni	EM to CD re: help scheduling board visit - pending
1/31/20	Mary Jussaume	Sharon O'Malley	Approved WCAP – Over income \$64, daughter live in caregiver
1/31/20	Beatrice Levesque	Sharon O'Malley	Approved WCAP – Over income by \$9
1/31/20	June DeAndrade	Andrea Lemos	f/u to request: clarify reverse mortgage: taken at 62 yo, 60% at time, accrues interest monthly, life tenancy ✓
1/31/20	Maria DaCosta	Ellen Hull	f/u to request: EM to Amy: son living with her? Yes ✓

ASSOCIATION FOR THE RELIEF OF AGED WOMEN
04/1/19 - 3/31/20 BUDGET
January 2020

	Jan 20	Budget	\$ Over Budget	Apr '19 - Jan 20	YTD Budget	\$ Over Budget	Annual Budget
Income							
CONTRIBUTION	0.00			25.00	0.00	25.00	0.00
CURRENT UNREALIZED GAIN/LOSS	0.00			0.00	0.00	0.00	0.00
DUES				17.00			
INVESTMENT INCOME	70,000.00			685,000.00	0.00	685,000.00	0.00
MISCELLANEOUS	0.00			0.00	0.00	0.00	0.00
SALE OF INVESTMENTS	0.00			0.00	0.00	0.00	0.00
Total Income	70,000.00			685,042.00	0.00	685,042.00	0.00
Gross Profit	70,000.00			685,042.00	0.00	685,042.00	0.00
Expense							
01 HEALTH INSURANCE	9,392.40	9,166.67	225.73	92,327.11	91,666.67	660.44	110,000.00
02 STIPENDS	0.00	2,833.33	-2,833.33	29,800.00	28,333.33	1,466.67	34,000.00
03 INDIVIDUAL REQUESTS	17,243.19	14,791.67	2,451.52	169,593.89	147,916.67	21,677.22	177,500.00
03.01 IND REQ - SOCIAL WORKERS	1,400.00	500.00	900.00	5,100.00	5,000.00	100.00	6,000.00
04 COMMUNITY PROGRAMS	0.00	0.00	0.00	0.00	0.00	0.00	0.00
04.01 SOCIAL DAY	1,006.00	1,041.67	-35.67	10,092.00	10,416.67	-324.67	12,500.00
04.02 NUTRITION	544.69	1,041.66	-496.97	4,885.27	10,416.66	-5,531.39	12,500.00
05 GRANTS	64,306.05	383,850.00	-319,543.95	44,306.05	383,850.00	-339,543.95	383,850.00
07 AGENCY GIFTS	0.00			0.00	0.00	0.00	0.00
08 ADMINISTRATION	2,222.36	1,833.33	389.03	18,300.07	18,333.33	-33.26	22,000.00
09 ACCOUNTING	1,800.00	2,750.00	-950.00	35,020.00	27,500.00	7,520.00	33,000.00
10 STAFFING COSTS	14,493.91	10,000.00	4,493.91	145,757.65	100,000.00	45,757.65	120,000.00
11 RENT	1,185.00	1,300.00	-115.00	11,745.00	12,400.00	-655.00	15,000.00
12 UTILITIES	883.96	458.34	425.62	3,720.32	4,583.34	-863.02	5,500.00
13 OFFICE SETUP	0.00	0.00	0.00	5,899.53	0.00	5,899.53	0.00
14 US TRUST FEES	7,908.40	7,750.00	158.40	79,043.91	77,500.00	1,543.91	93,000.00
15 FEDERAL TAXES	0.00	0.00	0.00	16,634.00	26,250.00	-9,616.00	35,000.00
16 DISCRETIONARY FUND-EXEC DIR	247.02	1,333.34	-1,086.32	9,264.40	13,333.34	-4,068.94	16,000.00
17 OUTREACH COSTS	537.90	666.66	-128.76	948.81	6,666.66	-5,717.85	8,000.00
18 LEGAL FEES	0.00	83.34	-83.34	1,834.51	833.34	1,001.17	1,000.00
19 STRATEGIC PLANNING	0.00	1,666.67	-1,666.67	16,169.60	16,666.67	-497.07	20,000.00
20 S FOGG BENEFICIARY FUND	0.00			1,500.00	1,500.00	0.00	1,500.00
Total Expense	123,170.88	441,066.68	-317,895.80	701,942.12	983,166.68	-281,224.56	1,106,350.00
						Under Budget	

**ASSOCIATION FOR THE RELIEF OF AGED WOMEN
MONTHLY ACTIVITY**

02/04/20

January 2020

Accrual Basis

	Jan 20
Income	
INVESTMENT INCOME	70,000.00
Total Income	70,000.00
Gross Profit	70,000.00
Expense	
01 HEALTH INSURANCE	
ALVES, ISABEL	625.68
AUGER, SUSANNE	129.00
BIZARRO, LUCILLE	49.60
BLAIS, LINDA	209.21
BORGESS, DOLORES	-319.81
CARDOZA, LAURINDA	94.00
CARRIERO, DOROTHY	209.21
CORY, FRANCES	211.66
DAYS, VIOLA	625.68
DYKES, LOLITA	633.03
ELEUTERIO, SOFIA	209.21
FRAGATA, MARIA	209.21
GAGNON, ALYCE	209.21
GALLEY, MARGARET	625.68
GREENWOOD, DOROTHY	625.68
GUAY, PAULINE	211.66
LEMERE, ROCHELLE	211.66
LOURENCO, ALICE	209.21
MEDEIROS, EILEEN	133.20
MONTEITH, JUDITH	-197.74
MOORE, CAROLYN	209.21
OLIVEIRA, ALICE	209.21
POLEK, REGINA	633.03
REZENDES, DORIS	209.21
RIOUX, LORRAINE	209.21
ROLLINS, AURORA	85.20
SHARPLES, MARY	625.68
SIMARD, AGNES	625.68
SIMPKIN, CAROL	418.42
SOUSA, DIANNA	209.21
ST OURS, BEATRICE	209.21
TUIE, JANICE	625.68
VINCENT, KATHLEEN	209.21
Total 01 HEALTH INSURANCE	9,392.40
03 INDIVIDUAL REQUESTS	
ALEXANDER, CLAUDETTE - GPS	51.95
ALEXANDER, CLAUDETTE - PRESCRIP	92.02
ALMEIDA, MILDRED - CABLE	135.74
ALMEIDA, MILDRED - TRANSPORTATI	50.00
ALVES, F. - GPS	39.95
ANTUNES, JOANA - TRANSPORTATION	20.00
BARBOSA, ATANAZIA - TRANS	150.00
BARBOSA, ATANAZIA - TV	86.00
BEAUBIAN, JOAN - CABLE	148.67
BEGNOCHE, CECILE - GPS	51.95
BELANGER, ELIZABETH - TRANS	25.00
BENOIT, PAULINE JEANNE - CABLE	392.83
BIZARRO. LUCILLE-CAR REPAIRS	0.00
BIZARRO. LUCILLE-OTC	21.49
BIZZARO. LUCILLE-CABLE	28.07
BIZZARO. LUCILLE-DENTAL	0.00
BIZZARO. LUCILLE-GPS	51.95
BIZZARO. LUCILLE-PHONE	64.31
BLAIS, LINDA - OTC	31.66
BLAIS, LINDA - PERS CARE	61.56
BORGES, JEANNE - TRANS	25.00

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Accrual Basis

ASSOCIATION FOR THE RELIEF OF AGED WOMEN
MONTHLY ACTIVITY
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	Jan 20
BORGESS, DOLORES-GPS	51.95
BRIGHTMAN, PAULINE - CABLE	248.32
CABRAL, MARIA-RENT	200.00
CARDOZA, LAURINDA-PERS CARE PROD	115.92
CARRIERO, DOROTHY - GPS	51.95
CHACE, SALLY-GPS	51.95
CHACE, SALLY - RENT	260.00
CORREIA, JULIA-STOCKINGS	109.00
CORREIA, MARIA-RENT	250.00
COSTA, MARIA - CABLE	227.74
COSTA, PEGGY - CELL PHONE	37.39
CROWLEY, ALICE - CABLE	127.84
CUNHA, DOROTHY - PERS EM SYS	29.95
DAROSA, PRISCILLA - GPS	51.95
DAYS, VIOLA - PERS EM SYS	61.90
DEANDRADE, JUNE-CABLE	130.72
DECOSTA, CYNTHIA - CABLE	264.42
DRAYTON, GAIL- CABLE	490.10
DUCHESNEAU, JOANNE - CABLE	28.07
DUCHESNEAU, JOANNE - PHONE	31.97
FAHEY, DORIS - CABLE	30.50
FERREIRA, RUTH-GPS	51.95
FIELDS, BEVERLY-PERS CARE PRODU	167.88
FLAHERTY, EILEEN - CABLE	127.38
FREITAS, LILLIAN - GIFT CARD	80.00
FRENCH, MARJORIE - NEWSPAPER	-140.94
GALLEY, MARGARET-GPS	207.80
GASSAR, VERA - ACUPUNCTURE	140.00
GASSAR, VERA - CABLE TV	155.01
GOMES, AMELIA - CABLE	71.03
GREENWOOD, DOROTHY - LAUNDRY	52.00
GREENWOOD, DOROTHY - PERS	51.95
GUAY, PAULINE-CABLE	182.99
GUBA, ELEANA - GPS	51.95
HARNOIS, IRENE - VERIZON	87.68
HUEZO, SONIA-GIFT CARD	40.00
HUEZO, SONIA-TRANSPORTATION	28.00
HULTGREN, MARY-GPS	155.85
INGHAM, LINDA - CABLE	70.18
INGHAM, LINDA - MONEY MGT	87.00
INGHAM, LINDA -ADULT DAY CARE	70.00
LADA, ROSALIE -CABLE	109.41
LAMBERT, HILDA - PERS EM SYS	40.00
LIBERATORE, GERTRUDE - CABLE	190.54
LIBERATORE, GERTRUDE - GPS	51.95
LIMA, MARY - CABLE	151.84
LIVESLY, VIRGINIA - CABLE	228.19
LIVESLY, VIRGINIA - GPS	51.95
LOPES, CRISPINA- CABLE	28.07
LOPES, CRISPINA - PHONE BILL	64.44
LOPES, CRISPINA - TRANSPORTATIO	28.00
LOPES, MARCELINA - CABLE	257.36
LOPES, MARCELINA - PERS CARE PR	71.00
LYONNAIS, JEAN - TRANSPORTATION	108.15
MATTOS, CECILIA - GAS	199.00
MATTOS, CECILIA - VERIZON	64.01
MATTOS, CECILIA -CABLE BILL	148.11
MCNAMARA, THERESA - TRANSPORTAT	25.00
MEDEIROS, EILEEN - ALERT SYSTEM	39.95
MELLO, JANET- AUTO REPAIR	301.68
MELLO, JANET - EYE	250.00
MENDONCA, SHIRLEY -CABLE	221.93
MINDLE, MURIEL - GPS	51.95
MINDLE, MURIEL - HOME INS	937.00
MONTEITH, JUDITH - CABLE	137.03
MONTEITH, JUDITH - MONITORING	41.95

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Accrual Basis

ASSOCIATION FOR THE RELIEF OF AGED WOMEN
MONTHLY ACTIVITY
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	Jan 20
MORIN, JACKIE - GPS	51.95
MORIN, JACKIE - HEARING AID	2,400.00
MORIN, JACQUELINE- CABLE	229.77
MORRISON, HELEN B - TRANSPORTAT	0.00
MOTA, LINA - CABLE	166.61
NUNES,POLLY-ANNA - PERS EM SYS	29.95
O'CONNOR, SHIRLEY - CABLE	251.08
OCANO, PROVIDENCIA - ELECTRIC	185.81
OKPAPA, PRISCILLA - TRANSPORTAT	28.00
OLIVEIRA, ALICE - PERS	29.95
OLIVEIRA, ALICE - PERSONAL CARE	115.92
PACHECO, LILLIAN-PERS EM SYS	29.95
PARQUETTE, MARY JANE - CC	471.16
PEREIRA, BARBARA - GPS	39.95
PERRY, SUSAN- MONEY MANAGEMENT	50.00
PINARD, IRENDE -GPS	51.95
PINE, HILDA -CABLE	175.28
PINE, HILDA -GPS	51.95
POPE, DOROTHY - GPS	51.95
RAPOZA ,EVELYN- PERS CARE PRO	65.75
RAPOZA, MARY-LOU- PHONE	28.96
RAPOZA, MARY-LOU-CABLE	102.45
REZENDES, DORIS - GPS	51.95
RIoux, LORRAINE-GPS	51.95
RIoux, LORRAINE-PERS CARE PRODU	407.55
ROBILLARD, RITA-PERS CARE PROD	87.54
ROCHA, MARGARET -CABLE	97.04
RODERICK, ANITA - CABLE BILL	215.81
RODERIQUES, BERNADETTE-CABLE	212.43
SAMPSON, JANET- AUTO INS	413.00
SAMPSON, JANET- CABLE	177.30
SAMPSON, JANET - FOOD CARD	50.00
SHARPLES,MARY - VERIZON	75.39
SHEA, JOAN- AUTO INSURANCE	-136.00
SHEA, JOAN- GPS ALERT	51.95
SHEA, JOAN- MONEY MANAGEMENT	50.00
SHEA, JOAN- VET BILL	98.42
SNOW,LUCINDA - GPS	51.95
SOUSA, RAE-PERS CARE PRODUCTS	72.95
SOUSA, RAE-PHONE BILL	80.85
SOUSA, RAE-TRANSPORTATION	25.00
SOUZA, AURACELIA. - PERS EM SYS	51.95
ST. OURS, BEATRICE-GPS	29.95
TUITE, JANICE - TRANSPORTATION	0.00
VENTURA, NATALINA - CABLE	175.20
VIEIRA, GERMAINE - CABLE	97.25
VIEIRA,GERMAINE -PERS EM SYS	29.95
VINCENT, PATRICIA - CABLE	147.46
WHEELock, THELMA - GPS	51.95
Total 03 INDIVIDUAL REQUESTS	17,243.19
03.01 IND REQ - SOCIAL WORKERS	
ADESSO, DOLORES	200.00
CHACE, SALLY	200.00
FREITAS, LILLIAN	400.00
MORRISON, HELEN	600.00
Total 03.01 IND REQ - SOCIAL WORKERS	1,400.00
04.01 SOCIAL DAY	
ALBANESE, JANICE	470.00
DESROCHERS, MURIEL	252.00
FONTES, LORRAINE	284.00
Total 04.01 SOCIAL DAY	1,006.00

ASSOCIATION FOR THE RELIEF OF AGED WOMEN
MONTHLY ACTIVITY
 January 2020

	Jan 20
04.02 NUTRITION	
BRALEY, SUSAN	108.60
CABRAL, MARIA	72.40
CHACE, SALLY	111.81
DACOSTA, MARIA	143.28
ROBILLARD, RITA	108.60
Total 04.02 NUTRITION	544.69
05 GRANTS	
ACUSHNET COUNCIL ON AGING-CHAIR	250.00
ACUSHNET COUNCIL ON AGING-OUTRE	1,793.00
ACUSHNET COUNCIL ON AGING-SINGL	500.00
COMM. NURSE ASSOC. OF FAIRHAVEN	-1,391.95
DART. COUNCIL ON AGING- DAY AID	6,864.00
DART. COUNCIL ON AGING- OUTREAC	3,861.00
DART. COUNCIL ON AGING-DISCRETI	-6,577.00
DART. COUNCIL ON AGING-DRIVER	4,000.00
FRHVN COUNCIL ON AGING-ACTIVITI	750.00
FRHVN COUNCIL ON AGING-DISCRETI	-434.00
FRHVN COUNCIL ON AGING-OUTREACH	10,750.00
FRHVN COUNCIL ON AGING-SOCIAL D	4,500.00
FRHVN COUNCIL ON AGING-TRANSPOR	1,250.00
GREATER NB COMM-HEALTH-DISCRETI	-7,187.00
GREATER NB COMM-HEALTH-OUTREACH	5,000.00
GREATER NB COMM-HEALTH-RN	1,447.00
IMMIGRANT'S ASSIST-COMM. HEALTH	1,875.00
IMMIGRANT'S ASSIST-SENIOR COORD	1,563.00
IMMIGRANT'S ASSIST-TRANSPORTATI	1,000.00
INTER- CHURCH COUNCIL-ADMIN FEE	1,903.75
INTER- CHURCH COUNCIL-COORDINAT	15,750.00
INTER- CHURCH COUNCIL-DISCRETIO	-2,273.75
INTER- CHURCH COUNCIL-PROGRAM	6,000.00
INTER- CHURCH COUNCIL-VISITOR	3,750.00
NBCOUNCIL ON AGING-DIS FUND	-7,500.00
NBCOUNCIL ON AGING-OUTREACH	7,500.00
WEST. COUNCIL ON AGING- DAY AID	1,000.00
WEST. COUNCIL ON AGING- DISRCET	-2,137.00
WEST. COUNCIL ON AGING- OUTREAC	8,750.00
WEST. COUNCIL ON AGING- TRANS/D	1,750.00
Total 05 GRANTS	64,306.05
08 ADMINISTRATION	
COPIER	301.83
COPIER MTHLY SERVICE AGREEMENT	108.00
DEMAND RESPONSE	0.00
LUNCH	56.47
MILEAGE	11.94
NEWSPAPER	-4.72
OFFICE CLEANING	250.00
OFFICE SUPPLIES	175.87
PARKING SPACE	1.00
PAYROLL SERVICE FEES	305.61
POSTAGE METER	499.96
RECORDS DESTRUCTION	65.00
WAMSUTTA CLUB	54.40
WORKERS COMP INS	397.00
Total 08 ADMINISTRATION	2,222.36
09 ACCOUNTING	
ACCOUNTING	1,800.00
Total 09 ACCOUNTING	1,800.00
10 STAFFING COSTS	
HEALTH INSURANCE	569.80

ASSOCIATION FOR THE RELIEF OF AGED WOMEN
MONTHLY ACTIVITY
January 2020

	<u>Jan 20</u>
OFFICE ASSISTANT POSITION	
PAYROLL TAXES	317.38
WAGES	<u>3,520.00</u>
Total OFFICE ASSISTANT POSITION	3,837.38
PAYROLL TAXES	855.95
SALARY	<u>9,230.78</u>
Total 10 STAFFING COSTS	14,493.91
11 RENT	1,185.00
12 UTILITIES	
ELECTRIC	149.85
GAS	305.83
TELEPHONE	<u>428.28</u>
Total 12 UTILITIES	883.96
14 US TRUST FEES	7,908.40
16 DISCRETIONARY FUND-EXEC DIR	
COSTA, BARBARA - CLOTHING	46.58
DEANDRADE, JUNE-INTERNET	125.44
ESTRELLA , L -GLASSES	0.00
POPE, DOROTHY-PERS	<u>75.00</u>
Total 16 DISCRETIONARY FUND-EXEC DIR	247.02
17 OUTREACH COSTS	
GIFTS	200.00
HOLIDAY GIFTS	248.00
POSTAGE	<u>89.90</u>
Total 17 OUTREACH COSTS	537.90
Total Expense	<u>123,170.88</u>
Net Income	<u><u>-53,170.88</u></u>

ASSOCIATION FOR THE RELIEF OF AGED WOMEN
STATEMENT OF INCOME AND EXPENDITURES
FOR THE TEN MONTHS ENDED JANUARY 31, 2020

	Jan 20	Apr '19 - Jan 20
ARAW INCOME		
CONTRIBUTIONS	0.00	25.00
DUES	0.00	17.00
INVESTMENT INCOME	70,000.00	685,000.00
Total ARAW INCOME	70,000.00	685,042.00
EXPENSES		
ACCOUNTING & LEGAL	1,800.00	36,854.51
ADMINISTRATIVE EXPENSE	2,222.36	18,300.07
CONSULTING FEES	0.00	16,169.60
FEDERAL TAXES	0.00	16,634.00
GRANTS	64,306.05	44,306.05
OFFICE SETUP	0.00	5,899.53
OUTREACH COSTS	537.90	948.81
RENT	1,185.00	11,745.00
STAFFING COSTS	14,493.91	145,757.65
US TRUST FEES	7,908.40	79,043.91
UTILITIES & TELEPHONE	883.96	3,720.32
Total EXPENSES	93,337.58	379,379.45
PAYMENTS FOR BENEFICIARIES		
ADESSO, DOLORES	200.00	2,060.64
ALBANESE, JANICE	470.00	2,990.00
ALEXANDER, CLAUDETTE	143.97	1,010.78
ALMEIDA, MILDRED	185.74	1,968.55
ALVES, ISABEL	665.63	5,505.37
AMARAL, CLAIRE	0.00	666.50
ANDERSON, HELEN	0.00	306.00
ANDRADE, JOSHEPINE	0.00	2,112.63
ANTUNES, JOANA	20.00	48.00
AUGER, SUSANNE	129.00	1,408.00
BARBOSA, ATANAZIA	236.00	236.00
BEAUBIAN, JOAN	148.67	2,646.77
BEGNOCHE, CECILE	51.95	697.45
BELANGER, ELIZABETH	25.00	654.08
BELLINO, PATRICIA	0.00	95.57
BENOIT, JEANNE PAULINE	392.83	2,159.22
BISSONNETTE, ALICE	0.00	2,223.94
BIZARRO, LUCILLE	215.42	4,953.36
BLAIS, LINDA	302.43	1,849.15
BORGES, JEANNE	25.00	100.00
BORCESS, DOLORES	-267.86	2,565.23
BOUDREAU, JEANNE	0.00	2,522.53
BRALEY, SUSAN	108.60	1,127.40
BRIGHTMAN, PAULINE	248.32	514.90
CABRAL, MARIA	272.40	3,641.21

ASSOCIATION FOR THE RELIEF OF AGED WOMEN
STATEMENT OF INCOME AND EXPENDITURES
FOR THE TEN MONTHS ENDED JANUARY 31, 2020

	Jan 20	Apr '19 - Jan 20
CARDOZA, LAURINDA	209.92	1,338.98
CARRIERO, DOROTHY	261.16	2,721.79
CARVALHO,MIQUELINA	0.00	2,050.32
CASTELLO, JANICE	0.00	1,546.48
CHACE, SALLY	623.76	3,653.26
CHARBONNEAU, LEILA	0.00	2,302.34
CHASE, PAULINE	0.00	2,692.34
CHAVES, ROBERTA	0.00	593.22
CORREIA, JULIA	109.00	109.00
CORREIA, MARIA	250.00	2,650.00
CORY, FRANCES	211.66	2,221.73
COSTA, BARBARA	46.58	472.88
COSTA, MARIA	227.74	440.34
COSTA, PEGGY	37.39	703.37
CROWLEY, ALICE	127.84	869.59
CUNHA, DOROTHY	29.95	627.33
DACOSTA, CYNTHIA	0.00	89.00
DACOSTA, MARIA	143.28	2,967.52
DAROSA, PRISCILLA	51.95	4,256.14
DAVEIGA, MARIA	0.00	2,793.00
DAVID, LIZZETTE	0.00	275.00
DAYS, VIOLA	687.58	2,896.29
DEANDRADE, JUNE	256.16	1,857.34
DECOSTA, CYNTHIA	264.42	2,715.26
DEROSA, PRISCILLA	0.00	51.95
DESROCHES, MURIEL	252.00	2,856.00
DRAYTON, GAIL	490.10	3,389.88
DUCHESNEAU, JOANNE	60.04	575.50
DUQUETTE, LUCILLE	0.00	1,947.59
DYKES, LOLITA	633.03	2,596.04
ELEUTERIO, SOFIA	209.21	1,976.81
ESTRELLA, L	0.00	1,022.70
FAHEY, DORIS	30.50	224.45
FELIX, JOAN	0.00	0.00
FERNANDES, MARIA	0.00	769.67
FERREIRA, RUTH	51.95	2,519.04
FIELDS, BEVERLY	167.88	1,778.52
FLAHERTY, EILEEN	127.38	506.92
FONTES, LORRAINE	284.00	444.00
FRAGATA, MARIA	209.21	3,350.10
FRANCO, RAQUEL	0.00	600.00
FREDETTE, LUCILLE	0.00	1,952.86
FREITAS, LILLIAN	480.00	3,212.75
FRENCH, MARJORIE	-140.94	1,852.83

ASSOCIATION FOR THE RELIEF OF AGED WOMEN
STATEMENT OF INCOME AND EXPENDITURES
FOR THE TEN MONTHS ENDED JANUARY 31, 2020

	Jan 20	Apr '19 - Jan 20
FURTADO, JOANA	0.00	25.00
GAGNON, ALYCE	209.21	2,277.34
GALIPEAU, BEVERLY	0.00	2,618.94
GALLEY, MARGARET	833.48	3,019.72
GASSAR, VERA	295.01	2,922.70
GOMES, AMELIA	71.03	135.43
GOMES, ROSA	0.00	147.67
GOMES, VIRGINIA	0.00	434.40
GREENWOOD, DOROTHY	707.63	3,111.84
GUAY, PAULINE	394.65	3,851.22
GUBA, ELEANA	51.95	721.45
HARNOIS, IRENE	87.68	535.29
HARRISON, DELPHINA	0.00	3,526.80
HOPKINS, EDNA	0.00	1,063.73
HOTTE, EILEEN	0.00	2,360.89
HUEZO, SONIA	68.00	164.00
HULTGREN, MARY	155.85	5,555.85
INGHAM, LINDA	227.18	1,880.11
JENNINGS, KATHLEEN	0.00	4,500.00
JOHNSON, SHIRLEY	0.00	118.30
LADA, ROSALIE	109.41	1,138.92
LAMBERT, HILDA	40.00	510.00
LEMERE, ROCHELLE	211.66	1,169.83
LEONARDO, BESSIE	0.00	749.00
LIBERATORE, GERTRUDE	242.49	2,554.75
LIMA, MARY	151.84	2,188.96
LISBOA, MARIA	0.00	25.00
LIVESLEY, VIRGINIA	280.14	4,136.64
LOPES, CRISPINA	120.51	759.67
LOPES, MARCELINA	328.36	3,171.18
LOURENCO, ALICE	209.21	2,150.34
LYONNAIS, JEAN	108.15	1,080.95
LYONS, CAROL	0.00	3,157.10
MATTOS, CECILIA	411.12	5,752.71
MAYER, CONSTANCE	0.00	2,304.00
MCNAMARA, THERESA	25.00	375.00
MEDEIROS, EILEEN	173.15	1,229.85
MELLO, JANET	551.68	1,637.41
MENDONCA, SHIRLEY	221.93	5,198.36
MILNER, JEANNETTE	0.00	591.63
MINDLE, MURIEL	988.95	3,467.39
MONIZ, IRENE	0.00	1,999.76
MONTEITH, JUDITH	-18.76	2,162.77
MOORE, CAROLYN	209.21	2,150.34

ASSOCIATION FOR THE RELIEF OF AGED WOMEN
STATEMENT OF INCOME AND EXPENDITURES
FOR THE TEN MONTHS ENDED JANUARY 31, 2020

	Jan 20	Apr '19 - Jan 20
MORGAN, SYLVIA	0.00	150.00
MORIN, JACQUELINE	2,681.72	6,807.20
MORRISON, B. HELEN	600.00	2,200.00
MOTA, LINA	166.61	166.61
MUTHONI, MWANGI	0.00	0.00
NUNES,POLLY-ANNA	29.95	2,270.96
O'CONNOR, SHIRLEY	251.08	502.18
OCANO, PROVIDENCIA	185.81	1,759.80
OKPAPA, PRISCILLA	28.00	28.00
OLIVEIRA, ALICE	355.08	3,977.27
ORTIZ, MARIA	0.00	611.35
PACHECO, LILLIAN	29.95	2,277.04
PARQUETTE, MARY JANE	471.16	471.16
PEREIRA, BARBARA	39.95	709.45
PERRY, SUSAN	50.00	155.00
PETRIN, JOAN	0.00	614.33
PIMENTAL, VIVIAN	0.00	1,958.94
PIMENTAL, ZELIA	0.00	34.28
PINARD, IRENE	51.95	721.45
PINE, HILDA	227.23	4,795.88
POLEK, REGINA	633.03	4,581.15
POPE, DOROTHY	126.95	796.45
PRATA, ADELIA	0.00	1,385.85
QUINTIN, JEANNE	0.00	819.47
RACINE, HARRIET	0.00	1,198.35
RAPOZA, EVELYN	65.75	533.72
RAPOZA, MARY-LOU	131.41	1,403.36
REBELLO, ALICE	0.00	200.00
REBELLO, ANTOINETTE	0.00	180.00
REZENDES, DORIS	261.16	2,721.79
RIOUX, LORRAINE	668.71	5,299.76
ROBILLARD, KATHERINE	0.00	108.60
ROBILLARD, RITA	196.14	2,112.10
ROCHA, MARGARET	97.04	459.36
ROCHELEAU, ALICE	0.00	591.63
RODERICK, ANITA	215.81	2,382.25
RODERIQUES, BERNADETTE	212.43	625.01
ROGERSON, CHRISTINE	0.00	1,828.00
ROLLINS, AURORA	85.20	971.60
ROSA, ZULMIRA	0.00	1,226.20
ROUSSEU, MARY	0.00	461.47
SAMPSON, JANET	640.30	2,385.75
SANTOS, JUDITH	0.00	150.00
SHARPLES, MARY	701.07	6,891.99

ASSOCIATION FOR THE RELIEF OF AGED WOMEN
STATEMENT OF INCOME AND EXPENDITURES
FOR THE TEN MONTHS ENDED JANUARY 31, 2020

	Jan 20	Apr '19 - Jan 20
SHEA, JOAN	64.37	8,548.31
SILVA, MARY	22.00	172.00
SILVEIRA, MARIE	0.00	1,830.43
SIMARD, AGNES	625.68	3,321.59
SIMPKIN, CAROL	418.42	1,016.96
SNOW, LUCINDA	51.95	2,530.39
SOUSA, DIANNA	209.21	412.27
SOUSA, RAE	178.80	1,614.31
SOUZA, AURACELIA	51.95	721.45
SOUZA, ETHEL	0.00	280.00
SOUZA, ISABEL	0.00	185.94
ST OURS, BEATRICE	239.16	3,249.84
STONE, LOUANNE	0.00	395.48
SYKES, JANE	0.00	0.00
SYLVIA, DOROTHY	0.00	348.91
TAVARES, MARIA	0.00	470.00
TAVARES, MARILYN	0.00	0.00
TAYLOR, PRISCILLA	0.00	1,637.25
TUITE, JANICE	625.68	2,730.84
VENTOR, ROSALIE	0.00	5,552.86
VENTURA, NATALINA	175.20	3,747.03
VIA,NORBERTA	0.00	0.00
VIEIRA GERMAINE	127.20	2,072.27
VINCENT, KATHLEEN	209.21	2,150.34
VINCENT, PATRICIA	147.46	2,162.34
WHEELock, THELMA	51.95	721.45
Total PAYMENTS FOR BENEFICIARIES	29,833.30	322,562.67
TOTAL	<u>-53,170.88</u>	<u>-16,900.12</u>

FY21 to FY 23 DRAFT Budget

DRAFT Budget	FY21	FY22	FY23	Notes
Grants	\$0	\$300,000	\$300,000	FY20 pd in FY1; \$140 OR
Direct Support*	\$500,000	\$500,000	\$500,000	\$23K holiday included
Friendship Program	\$20,000			RFP to alleviate?
Administration	\$26,133	\$25,188	\$25,462	BBGM
Accounting	\$25,000	\$25,000	\$25,000	does not include audit
Rent	\$17,500	\$18,000	\$18,500	based on staying at 432
Utilities	\$5,500	\$5,500	\$5,500	based on 432
Legal/Professional Fees	\$5,000	\$5,000	\$5,000	might need to increase
Outreach/Comm Engage	\$2,000	\$2,000	\$2,000	engagement programs
US Trust Fees	\$93,000	\$93,000	\$93,000	estimate
Federal Taxes	\$25,000	\$25,000	\$25,000	estimate
Staffing Costs	\$248,966	\$251,000	\$265,000	3 staff
TOTAL	\$953,599	\$1,249,688	\$1,264,462	

FY 20 Direct Support Elements	FY20 Budget
Health Insurance	\$110,000
Stipends	\$34,000
Individual Requests	\$177,500
Social Workers	\$6,000
Social Day	\$12,500
Nutrition	\$12,500
EDDF	\$16,000
S Fogg Bene Fund	\$1,500
Total	\$370,000

*FY21 - FY 23 Direct Support Elements		
Reoccurring	Gifts	
Health Insurance		Holiday Gifts
Social Day		Social Worker
Personal Care		Dentures
Nutrition		Hearing Aids
Cable/Phone/Internet		Car Bills
EPERS		Sandra Fogg
Rent		Home Payments
Transportation		Health Bills
Gift Cards		Credit Card
Other reoccurring		Other gifts

ADMIN	FY21	FY22	FY23
Copier costs	\$2,496	\$2,750	\$2,800
BBGM	\$8,986	\$7,238	\$7,237
Office cleaning	\$1,500	\$2,000	\$2,225
IT Support	\$500	\$500	\$500
Software	\$356	\$400	\$400
Insurance	\$4,000	\$4,000	\$4,000
WBMason	\$3,500	\$3,500	\$3,500
Postage	\$2,000	\$2,000	\$2,000
Wamsutta	\$2,000	\$2,000	\$2,000
Other	\$795	\$800	\$800
TOTAL	\$26,133	\$25,188	\$25,462

Outreach	FY21	FY22	FY23
Holiday gift	\$400		
Bday	\$300		
Sunshine Fund	\$500		
OW Reviews	\$100		
Other	\$700		
	\$2,000		

Friendship	FY21	FY22	FY23
Meals	\$18,000		
Transportation	\$1,000		
Admission	\$1,000		
	\$20,000		

Staffing Costs	FY21	FY22	FY23
Wages	\$211,520		
Payroll taxes	\$16,181		
Health Ins	\$14,419		
401K	\$6,346		
Mileage	\$500		
TOTAL	\$248,966		

ARAW BENEFICIARY REQUEST REVIEW

FEBRUARY 2020 | VER 2/7/20

Beneficiary	Outreach	Biggest Concern	Notes	Specific Request	Recommendations
<p>BENE# 11-12/17 Rioux, Lorraine 83 y/o; 2/23/36 Income: \$940 H ARAW support \$45,479.39: Ongoing: BCBS \$209.21 '12, EPERS \$51.95 '16, Pers Care \$50-415 '14 Gifts: Lift chairs \$739.45 '12 & \$1,595 '16; Space heater \$1,000 '13, Dryer \$334.95 '14, Washer \$434 '17</p>	<p>WCOA Andrea Lemos (508) 636-1026</p>	<p>"Not having enough money for my bills. I also worry about not having enough hours for my personal care."</p>	<p>Approved in November for 2 months or until MassHealth in place Unable to get MassHealth because of death benefits – spending down money – MassHealth pending</p>	<p>Ongoing:</p> <ul style="list-style-type: none"> Personal care products from Westport Apothecary \$414.58 per month (Another extension) 	<p>2 months:</p> <ul style="list-style-type: none"> Personal care products from Westport Apothecary \$414.58 per month
<p>BENE# 18-19/09 DeAndrade, June 72 y/o; 8/24/1947 Income: \$1,275 H ARAW support \$3,024.74: Ongoing: Cable \$130.72 '18, Propane \$70-150 '18 Gifts: Internet set up \$125.44 '20, Electric bill \$239.84 '15</p>	<p>WCOA Andrea Lemos (508) 636-1026</p>	<p>"I worry about my house falling apart around me and my car which is 15 years old and needs a lot of work. Another worry is my children having to pick up the cost of my funeral expenses..."</p>	<p>Internet needed to use iPad bought as a gift for her for Christmas to keep in touch with children and grandchildren EDF set up costs \$125.44 Clarification on reverse mortgage</p>	<p>Ongoing:</p> <ul style="list-style-type: none"> Increase in cable bill to include internet \$49.99 per month 	<p>Ongoing:</p> <ul style="list-style-type: none"> Increase in cable bill to include internet \$49.99 per month <p>Gift:</p> <ul style="list-style-type: none"> Money Management consultations when consultant available.

ARAW BENEFICIARY REQUEST REVIEW

FEBRUARY 2020 | VER 2/7/20

Beneficiary	Outreach	Biggest Concern	Notes	Specific Request	Recommendations
<p>BENE# 16-17/09</p> <p>DaRosa, Priscilla 81 y/o; 6/3/1938 Income: \$1,394 H</p> <p>ARAW support \$20,391.55: Ongoing: BCBS \$619.60 qrtly '16, PERS \$51.95 '16 Gifts: CC payment \$2,459.90 '10, Hearing aids \$2,500 '16, Hearing aids \$3,000 '18, Hearing aid adj \$40 '18, Glasses \$610.20 '19, Hearing aid adj \$50 '19, CC payment \$900 '19, Functional solution items \$112.74 '19</p>	<p>FCOA Lucille Dauteuil (508) 979-4081</p>	<p>"I can't change the batteries in my hearing aids because I'm not able to use my left hand since my stroke. So they last only three days because I can't open the battery doors every night which would make them last seven or eight days."</p>	<p>Request held in January – now resubmitting with recommendation from Heather Pianfetti, Audiologist</p> <p>New hearing aids need to be rechargeable</p>	<p>Gift:</p> <ul style="list-style-type: none"> Hearing aids \$3,800 (Estimate) <p>Gift:</p> <ul style="list-style-type: none"> Hearing aids \$3,800 (Estimate) 	<p>Gift:</p> <ul style="list-style-type: none"> Hearing aids \$3,800 (Estimate)
<p>BENE# 06-07/08</p> <p>DaCosta, Maria 95 y/o; 10/12/1924 Income: \$867 H</p> <p>ARAW support \$27,778.46: Ongoing: Nutrition \$143.28 '11, Car & HOI Insurance \$1,528 per year</p>	<p>DCOA Amy DiPietro (508) 999-4717</p>	<p>She worries she will not be able to remain in her home without the continued support of ARAW and her family.</p>	<p>Enjoys doing laundry on her own. Dryer has not been working for some time and it has become increasingly difficult to hang laundry to dry.</p> <p>Son living there</p> <p>Laundry service?</p>	<p>Exception:</p> <ul style="list-style-type: none"> Living alone guideline <p>Gift:</p> <ul style="list-style-type: none"> Dryer \$721.95 (Quote) 	<p>Exception Approved:</p> <ul style="list-style-type: none"> Living alone guideline, due to advanced age <p>Ongoing:</p> <ul style="list-style-type: none"> In lieu of purchasing a dryer, due to safety concerns, we offer to fund laundry service (estimate needed)

ARAW BENEFICIARY REQUEST REVIEW

FEBRUARY 2020 | VER 2/7/20

Beneficiary	Outreach	Biggest Concern	Notes	Specific Request	Recommendations
<p>BENE# 06-07/03 Bissonnette, Alice 78 y/o; 10/9/1941 Income: \$1,394 sub ARAW support \$42,646.04: Ongoing: BCBS \$625.68 quarterly '06 Gifts: Dentures \$1,505 '16, 1,600 '11, \$1,760 '11, \$1,700 '09, Hearing aid \$3,000 '17, Adj \$330 '18-19, Car repairs \$225 '19, \$725 '18, CC \$725.70 '12</p>	<p>FCOA Lucille Dauteuil (508) 979-4081</p>	<p>Car was leaking anti-freeze because it needed a new water pump...already has a monthly deficit</p>	<p>Needs car for errands, grocery shopping and doctor's appointments – would be very depressed if this freedom was taken away from her due to her extremely nervous condition</p>	<p>Ongoing:</p> <ul style="list-style-type: none"> Invoice Auto Insurance \$952 per year <p>Gift:</p> <ul style="list-style-type: none"> Invoice Car repair \$661.13 	<p>Gift:</p> <ul style="list-style-type: none"> Invoice Car repair \$661.13 Auto loan monthly payment counted 2x <p>We welcome requests for any future needs as they arise</p>
<p>BENE# 14-15/06 Charbonneau, Leila 75 y/o; 4/13/1944 Income: \$920 H ARAW support \$23,965.24: Disc: Stpd \$100 '19, Gifts: Auto Ins \$303.34 '19, HOI \$879 '19 RE Tax \$600-700 '14-'16, Cable \$100 '14-'17; HOI \$600-700 '14-16, Auto Ins \$268 '16, glasses \$269 '18, TV \$379 '18, SW \$125 '17, Stove \$661 '16, CC \$401 '15, Gas \$90 & Car repair \$650 & Dental \$600 '14</p>	<p>FCOA Lucille Dauteuil (508) 979-4081</p>	<p>"Because the ARAW no longer helps me with a \$100 check every month will they be paying my auto insurance and homeowners insurance every year from now on?"</p>	<p>Discontinued stipend and paid one year of auto insurance and homeowner's insurance October 2019 Looking for multiple year guarantee</p>	<p>Ongoing:</p> <ul style="list-style-type: none"> Invoice Auto Insurance \$877 per year (Based on policy 3/19-3/20) Invoice Homeowner's insurance \$879 per year (Based on policy 11/19-11/20) 	<p>Gift, to be reevaluated each year (per policy):</p> <ul style="list-style-type: none"> Invoice Auto Insurance \$877 per year (Based on policy 3/19-3/20) Invoice Homeowner's insurance \$879 per year (Based on policy 11/19-11/20) Social Worker support to explore options for the future

ARAW BENEFICIARY REQUEST REVIEW

FEBRUARY 2020 | VER 2/7/20

Beneficiary	Outreach	Biggest Concern	Notes	Specific Request	Recommendations
<p>BENE# 16/3G Fletcher, Sally 74 y/o; 3/26/1945 Income: \$1,297 sub ARAW support \$3,000: Gift: Hearing aides \$3,000</p>	<p>GNBCHC Pat Foster (508) 992-6553</p>	<p>"I find it terrible that I will at some point lose my independence when I can no longer afford to get my car repaired. I am concerned about what will happen if I should have a fall."</p>	<p>Daughter telling her she should give up her car Extremely upset over the thought of losing her independence</p>	<p>Ongoing: EPERS GPS/Fall \$51.95 per month Gift: Invoice All 2019 Car repairs \$2,270.27 (reimbursement and payment of loan)</p>	<p>Ongoing: EPERS GPS/Fall \$51.95 per month She seems to be doing ok and has a healthy monthly cushion and has already paid off much of the loan. We welcome requests for future needs as they arise</p>
<p>New BENE# DosSantos, Cathrina 70 y/o; 12/9/1949 Income: \$1,390 sub ARAW support: New</p>	<p>FCOA Carolyn D'Antoni (508) 979-4081</p>	<p>At this time, Ms. DosSantos is worried about the upcoming dental work that needs to be done.</p>	<p>First estimate \$10,000, decided to get second opinion SHINE?</p>	<p>Ongoing: BCBS Bronze \$209.21 Due to higher than normal estimate, request for additional estimate from Dartmouth Dental Gift: ARAW will pay any expenses associated with obtaining this</p>	<p>Ongoing: BCBS Bronze \$209.21 Due to higher than normal estimate, request for additional estimate from Dartmouth Dental Gift: ARAW will pay any expenses associated with obtaining this</p>
<p>BENE# 18/6G Chytrus, Leslie 73 y/o; 5/19/1946 Income: \$852 sub ARAW support \$1,389: Gift: Lift chair \$1,389 '18</p>	<p>WCAP Sharon O'Malley (508) 993-0015</p>	<p>"Other than continuing with SRТА, I'm good."</p>	<p>Lost weight and has been able to get out more to go to zoo, counselor and medical appointments</p>	<p>Ongoing: SRТА Demand Response 1-2 books per month \$25 each</p>	<p>Ongoing: SRТА Demand Response 1-2 books per month \$25 each</p>

ARAW BENEFICIARY REQUEST REVIEW

FEBRUARY 2020 | VER 2/7/20

Beneficiary	Outreach	Biggest Concern	Notes	Specific Request	Recommendations
<p>New BENE# Rose, Bernice 76 y/o; 3/1/1943 Income: \$1,641 H ARAW support: New</p>	<p>DCOA Ann Raymond (508) 999-4717</p>	<p>"I would like to stay in my home with my dog. I need my dog because I wouldn't have made it without him...I only know this house."</p>	<p>Oven? Total gift ask: \$5,778 No family Never married</p>	<p>Ongoing:</p> <ul style="list-style-type: none"> Comcast \$160.95 per month <p>Gift:</p> <ul style="list-style-type: none"> Invoice Homeowner's insurance \$1,481 per year Invoice Car insurance \$1,047 per year Invoice Real estate taxes \$3,250 per year 	<p>Ongoing:</p> <ul style="list-style-type: none"> EPERS with GPS/Fall Detector through NEXT <p><i>She seems to be doing ok and has a monthly cushion plus funds in the bank. We welcome requests for any future needs as they arise</i></p>
<p>New BENE# Cournoyer, Marilyn 75 y/o; 1/11/1944 Income: \$861.58 sub ARAW support: New</p>	<p>DCOA Ann Raymond (508) 999-4717</p>	<p>Not being able to live in the apartment and becoming homeless. Marilyn lived in an orphanage and was in foster care for 4 years.</p>	<p>Denied in January asking for reconsideration Sale of house funds: 20K to daughter for divorce, \$ to sister, bought car Receives husband's SS No docs of funds from house sale spending</p>	<p>Ongoing:</p> <ul style="list-style-type: none"> Harvard Pilgrim \$116.94 per quarter Cable/internet/phone \$91 per month 	<p>Ongoing:</p> <ul style="list-style-type: none"> Harvard Pilgrim \$116.94 per quarter <p>What is the available balance on the home Equity loan?</p>

ARAW BENEFICIARY REQUEST REVIEW

FEBRUARY 2020 | VER 2/7/20

Beneficiary	Outreach	Biggest Concern	Notes	Specific Request	Recommendations
<p>BENE# WCAP Spooner, Sandra 77 y/o; 2/12/1942 Income: \$1,439 H ARAW support: WCAP</p>	<p>WCAP Sharon O'Malley (508) 993-0015</p>	<p>Urgency due to the desire to have it complete for daughter's return from surgery</p>	<p>Marked urgent EDDF approved for assessment See email Awaiting written estimates 30 gallon? 50 gallon?</p>	<p>Gift:</p> <ul style="list-style-type: none"> Hot water heater \$1,450 (Estimate) 	<p>Immediate Gift:</p> <ul style="list-style-type: none"> Hot water heater \$1,450 (Estimate)
<p>BENE# WCAP Jussaume, Mary 86 y/o; 2/1/1934 Income: \$1,464 sub ARAW support: WCAP</p>	<p>WCAP Sharon O'Malley (508) 993-0015</p>	<p>Responded "no, I don't think so" when asked about worries.</p>		<p>Exception:</p> <ul style="list-style-type: none"> Income guideline (Over \$64) Living alone guideline <p>Ongoing:</p> <ul style="list-style-type: none"> WCAP participation 	<p>APPROVED</p>
<p>BENE# WCAP Levesque, Beatrice 75 y/o; 1/9/1945 Income: \$1,409 sub ARAW support: WCAP</p>	<p>WCAP Sharon O'Malley (508) 993-0015</p>	<p>"I don't have any needs...enjoy the lunches and socials and would like to continue to go"</p>		<p>Exception:</p> <ul style="list-style-type: none"> Income guideline (Over \$9) <p>Ongoing:</p> <ul style="list-style-type: none"> WCAP participation 	<p>APPROVED</p>

ARAW BENEFICIARY REQUEST REVIEW

FEBRUARY 2020 | VER 2/7/20

Beneficiary	Outreach	Biggest Concern	Notes	Specific Request	Recommendations
<p>New</p> <p>Wetherell, Mary 82 y/o; 5/31/1937 Income: \$1,369 sub ARAW support: New</p>	<p>WCOA Cindy Kinnane (508) 636-1026</p>	<p>Being a burden to her children and her health changing.</p>	<p>Mary willing to give \$50 monthly to premium Currently has Medicare (HSN) \$100 clothes? Dining? Social outings? SHINE? MMP?</p>	<p>Ongoing:</p> <ul style="list-style-type: none"> Medigap insurance plan 209.21 per month (Estimate) 	<p>HOLD</p> <p>Revisit after SHINE consultation – no tin crisis currently</p> <p>Add'l info request: please tell us about the bus trips and social needs with cost</p> <p>Kohl's for clothes in addition to the \$100?</p>
<p>BENE# 15/3G</p> <p>Reagan, Carole 77 y/o; 4/18/1942 Income: \$1,277 sub ARAW support \$3,325: Gifts: Hearing aid repair \$175 '18, Dental \$150 '15, Hearing aides \$3,000 '15</p>	<p>DCOA Ann Raymond (508) 999-4717</p>	<p>"I'm scared my hearing has gotten worse and I won't be able to hear."</p>	<p>Originally submitted December Hearing aides would be preferred SouthCoast ENT?</p>	<p>Ongoing:</p> <ul style="list-style-type: none"> Harvard Pilgrim Health Insurance \$94.33 per month -OR- <p>Gift:</p> <ul style="list-style-type: none"> Hearing aides \$5,500 (Estimate) 	<p>HOLD</p> <p>Due to higher than normal estimate, request for additional estimate from Southcoast ENT</p> <p>Gift:</p> <ul style="list-style-type: none"> ARAW will pay any expenses associated with obtaining this
<p>New BENE#</p> <p>Martin, Pauline 67 y/o; 3/15/1952 Income: \$851 sub ARAW support: New</p>	<p>GNBCHC Pat Foster (508) 992-6553</p>	<p>"I am most concerned about paying for my funeral."</p>	<p>Funeral cost includes visitation and cremation</p>	<p>Gift:</p> <ul style="list-style-type: none"> Funeral costs \$6,865 	<p>DENIED</p> <p>Must be existing beneficiary to be considered for funeral support</p>

ARAW | CY19 FY20 Year End Report | DCOA

GRANTEE:

COMPLETED BY:

DATE:

DCOA by the Numbers 1/1/19 - 3/15/20	Men	Women	ARAW Eligible Women	Women Assessed but not ARAW Eligible	Comments	Other Reporting Requirements
Discretionary Fund						Please provide discretionary fund accounting - names, gifts & type of support
Outreach Specialist						Please ensure eligibility documentation is on file for all ARAW beneficiaries
Social Day Aide						Please ensure eligibility documentation is on file for all ARAW beneficiaries
Van Driver						Please ensure eligibility documentation is on file for all ARAW beneficiaries
Total:	0	0	0	0		

DCOA Spending for 1/1/19 - 3/15/20	2019 Grant Award (1/1/19)	Unspent Funds as of 1/1/19	Beginning 2019 Balance	Spending from 1/1/2019 - 6/30/19	Balance 6/30/19	Alignment Grant Award (1/1/20)	Spending from 7/1/19 - 3/15/20	Unspent Balance as of 3/15/20
Discretionary Fund	\$0	\$8,851	\$8,851	\$1,775	\$7,076	-\$6,577		\$500
Outreach Specialist	\$15,444	\$690	\$16,134	\$7,029	\$9,105	\$3,861		\$12,966
Social Day Aide	\$27,456	\$0	\$27,456	\$13,641	\$13,815	\$6,864		\$20,679
Van Driver	\$16,000	\$1,558	\$17,558	\$10,235	\$7,323	\$4,000		\$11,323
TOTAL	\$58,900	\$11,098	\$69,998	\$32,680	\$37,319	\$8,148	\$0	\$45,467

ARAW | CY19 FY20 Year End Report | DCOA

GRANTEE:		DATE:	
COMPLETED BY:			

DCOA ARAW hours 1/1/19 - 3/15/20	ARAW hours from 1/1/2019 - 6/30/19	ARAW hours from 7/1/19 - 3/15/20	Comments	Other Reporting Requirements
Outreach Specialist				<i>Please provide brief narrative</i>
Social Day Aide				<i>Please provide brief narrative</i>
Van Driver				<i>Please provide brief narrative</i>
Total	\$0	\$0		

02/03/20

Dear Committee members,

Thank you very much for attending and contributing so much to the Committee's discussions on multiple agenda items!

Clare kindly took notes and synthesized our multiple discussions on multiple topics (as delineated in the agenda) into a succinct and meaningful way forward for the committee. Please review these and let me know of missed or additional thoughts and/or edits. See Attached.

I believe some specific action items included:

Website updates- any current clarifications

Brochure update - following any strategic plan recommendation/changes

Birthday cards - bring back into more of our branding mode - card stock, photo and ARAW identification

Archives - move discussions forward with NBWM on the research and digitizing of ARAW archives

As always, thanks!

Roseanne

Outreach January 29, 2020 Meeting Minutes

Clare Healy Foley – Brief synopsis – Forward Thinking – Take away

Outreach Committee meeting - January 29, 2020

Present: Roseanne O'Connell, Gail Beaton, Debbie Brooke, Jane Stankiewicz, Gretchen Whipple, ED Clare Foley

Absent: Barbara Pearl

Mission of Committee

To provide consistent messaging of ARAW's mission to the community so we maximize our ability to engage and reach new populations of women in need.

- We do this through the promotion of ARAW in the community as a key resource, program and support available to elderly women
- We do this by targeting communities which include *current and prospective* organizations, partners, beneficiaries and volunteers in New Bedford, Dartmouth, Acushnet, Westport and Fairhaven

Focus areas/Methods/Projects

- Development of community engagement/marketing plan
- Curator of website development and enhancement
- Oversight of marketing collateral – brochures, annual report, branding
- Creation of Ambassador cheat sheet for board members
- Stewardship of archives and history
- Authority on challenges faced by aging women
- Guardian of beneficiary friendship programs: Birthday, Valentine, Holiday

Waiting until after strategic plan *reveal* to determine our role in those initiatives.

Outreach Meeting January 29, 2020

Review Refine Envision

Outreach Committee Tasks

- **As written**
- **As functioning**
- **As envisioned**

Members present, Roseanne O'Connell-Chair, Olivia Melo, Debbie Brooke, Gail Beaton, Jane Stankiewicz
Gretchen Whipple, Barbara Pearl
Also, Executive Director, Clare Foley

For Review:

As written

January 2015 Outreach Committee established as ARAW standing committee - per Constitution, By-Laws and Rules (meets on an "as needed" basis)

Tasks:

- Research new outreach/referral sources
- Make recommendations for new sources to the Grants Committee or full Board as appropriate
- *Monitor outreach sources for efficacy and compliance/Grantee visits*
- Act as a sounding board for all new initiatives that involve outreach in the community
- Members: Chair, at least 4 other board members

The above was written with the intention of allowing for flexibility and a breadth of activity as the committee and association's needs/goals changed.

- Does the above successfully reflect/define the scope and relative tasks of Outreach Committee presently? _____
- Does it reflect a framework that speaks to the future?

- What tasks? _____

Will Strategic Planning suggest changes? _____

Community - Outreach Committee – what role in community/discussions/events if any?

Does additional staffing and roles require re-thinking the Committee's role to engage in community/activity

ED Clare possesses the talent, experience and energy for generating and maintaining community engagement.

How does Clare envision her role? _____

Will/should the Outreach Committee play a role (as in by-laws – as a sounding board) in furthering the mission in the community as sounding board? _____

Why? _____

In other ways? _____

Should we take on other "socials", coffee catch-up, listening lunches, guest speakers/?

coffee catch-up

Over the years 2015-2019 – Committee hands on work/tasks included:

Outreach/Grantee Appreciation Luncheon; MEMBER/Grantee visits; Special Lady program; Birthday Card program; facilitation of Holiday and Annual Meeting luncheons; ARAW archives: retrieval, research, review, assessment; collaboration with New Bedford Public Library and NBWM staff; Participation in Historic Women of the South Coast project (NBWM); Development of color logos; Branding ARAW materials; Initial development of oral history/interviews with former members by former member; Development of ARAW web site arawofnb.org (Medium Studios); Development (over two years) and execution of 150th ARAW Anniversary Celebration (October 18, 2018); Sought and received BofA/USTRUST financial contribution/sponsorship for the event; Collaboration with NBWM staff which resulted in donation of certain ARAW archives to NBWM/ODHS. (August 2018)

Note: Above does not necessarily represent an accurate timeline. As well, there may be omissions.

In reviewing the above activities, which ones align most closely to stated Outreach Committee responsibilities? _____

Of the above, which would/should remain responsibilities/tasks of the committee? _____

Which would you personally like to retain _____

What tasks/opportunities would you like the committee to take on? _____

What tasks seem most appropriate/a priority to pursue? _____

ARAW.ORG Website

Review: Developed over two years; launched August 2018; Updated in 2019(ED Clare Foley) to include: Member Portal with access to all monthly meeting agendas, associated documents, beneficiary requests, forms, visiting and committee meeting schedules, ARAW calendar...ARAW photo!

Refine:

New content/editing i.e. change in mission statement

Suggestions:

Downloads:

Beneficiary request forms

Link: to community partners, other

Envision:

Protocol for managing site:

Manager – Editing and Content approval – ED and Executive Committee ?

Board? _____

New content - new ideas/suggestions – pathway for submissions?

Envision: _____

Archives

Should we continue oral history project? _____ If so, how _____

Should we pursue a collaboration with the NBWM and seek funds to digitize ARAW archives? _____

How would we proceed? _____

Due to constrictions in office space, we need to purge some ARAW documents. Do we have a criterion on which to base which documents should be preserved for historical relevance to the Association over time?

_____ If not, who will develop _____?

Then who will physically handle such a task? _____

Outreach to Beneficiaries - Programs

Birthday Card Program – Ongoing 85 +

Various cards... various members have taken responsibility for this and chosen cards.

What variety do we send?

Are we interested in something more consistent?

Personal message is key!

Number of women - 91

Cost- postage and cards _____

From Outreach Budget _____

Holiday Card/Gift Program

Clare and Jenny handled much of this: card purchase, stamps, checks.

Gift \$ budgeted in beneficiary category _____?

Cards budgeted in Outreach _____

Valentine Cards – New 2020 Clare suggested this new outreach.... hellowe're thinking of you !

To each beneficiary - 150 + women

Card Cost _____

Postage cost _____

From Outreach budget _____

Most importantly, each committee member has contributed talent, ideas for present and forward thinking, as well as enthusiasm and joyful dedication to completion of so many diverse tasks. I am very thankful for each one you! My hope is that your experience proved rewarding on many levels and was such that you may desire a leadership role on this committee. Xxoo

Roseanne