



ARAW Board Mini-Retreat September 23, 2021

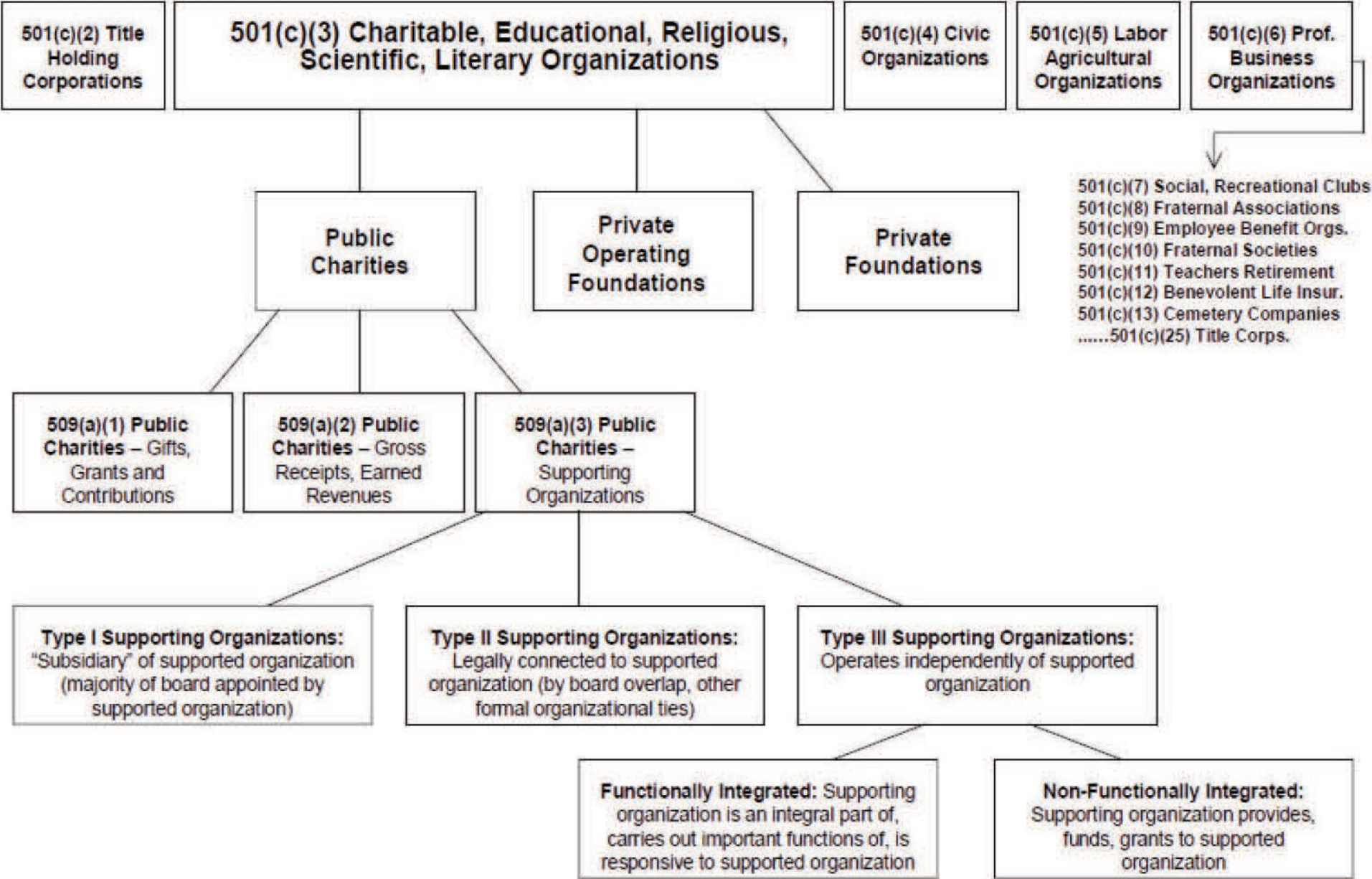
- 9:00 Social Time with coffee
- 9:30 Introduction
- Intention/goals for today
 - Role of Board
 - Open sharing/communication policy for today
 - *Get to know you* exercise
- 10:00 What is a Private Foundation? – interactive presentation/discussion
- 11:00 BREAK
- 11:30 State of the Association – interactive presentation/discussion
- 12:30 LUNCH
- 1:00 Recommitment to Mission & Vision and next steps – discussion
- 2:00 Dismissed!

PRIVATE FOUNDATIONS VS. PUBLIC CHARITIES

Private foundations and public charities are both classified as 501(c)(3) organizations by the IRS and are tax-exempt. Both exist to serve the public good. However, private foundations and public charities have different means of accomplishing and supporting their work, as well as governing themselves.

Tax-Exempt Organization Reference Chart

Internal Revenue Code Section:



	PUBLIC CHARITIES	PRIVATE FOUNDATIONS
Primarily make grants	<p>NO.</p> <p>Although some public charities can and do make grants, they more typically conduct charitable activities and provide services.</p>	<p>YES.</p> <p>Private foundations typically make grants (i.e., give funds) to public charities, although they sometimes conduct their own charitable activities.</p>
Receive most of their support from the general public	<p>YES.</p> <p>Public charities derive their financial support by raising funds from the public (i.e., individuals, government, corporations, and private foundations) by soliciting donations and/or grants.</p>	<p>NO.</p> <p>Private foundations typically derive all of their financial support from a single individual, family, or corporation.</p>

	PUBLIC CHARITIES	PRIVATE FOUNDATIONS
Required to prove that most funding comes from public support	<p>YES.</p> <p>To maintain their tax status, the IRS requires public charities to verify that they receive substantial support from the general public.</p>	<p>NO.</p> <p>Being self-funded is an advantage, enabling foundations to avoid the IRS tests that are required of public charities. Although not prohibited from doing so, private foundations do not typically engage in fundraising.</p>
Required to pick a diversified board of directors	<p>YES.</p> <p>A public charity must be governed by a BOD reflective of the constituency it serves. The majority of the board must be not be related by marriage or blood.</p>	<p>NO.</p> <p>A private foundation may be governed solely by its donor(s) or by a board consisting of family and/or other individuals chosen by the donor(s).</p>

DIFFERENT TYPES OF FOUNDATIONS

Many different types of nonprofit organizations call themselves a “foundation,” or use the word in their names. Here are some examples:

Public Foundation

A “public foundation” is just another term for a public charity. (Examples of public charities with the word “foundation” in their names include the Make-A-Wish Foundation and The Susan G. Komen Foundation.) These nonprofit organizations rely on donations from individuals, the government, corporations, and private foundations to fund their operations and programs.

Private Foundation

A private foundation, like a public charity or public foundation, is dedicated to carrying out a charitable mission. However, a private foundation is *not* a public charity because, instead of receiving public support, it is funded and controlled by an individual, family, or corporation. Examples of private foundations include The Bill and Melinda Gates Foundation, the Walton Family Foundation, and the Coca-Cola Foundation, Inc.

All private foundations share these commonalities:

- ✓ They are established for charitable purposes and to provide donors with a tax deduction for their contributions.
- ✓ They are managed by their own board of directors.
- ✓ They receive most of their financial support from and are normally controlled by their founders.
- ✓ They must make charitable distributions throughout their taxable year.
- ✓ They are tax-exempt organizations, but must pay a nominal excise tax on their net investment income.
- ✓ Although they typically make grants to public charities, they can also:
 - Run programs, provide services, and conduct direct charitable activities.
 - Provide aid to individuals and families for disaster relief and hardship assistance.

Private Endowed Foundation

- Most common type of private foundation
- Creates a principal- or endowment- for investment and pay out income from the endowment annually to charity

Pass-Through Foundation

- Distributes all of the contributions that it receives each year
- May make or revoke the pass-through option on a year-to-year basis

NON-OPERATING VS. OPERATING FOUNDATIONS

There are two distinct categories of private foundations:

- Operating Foundations
- Non-Operating Foundations

At the most basic level, the primary difference between non-operating foundations and operating foundations is the extent to which a foundation's resources and operations are dedicated directly to charitable activities and services, and whether such operations are carried on continuously or merely sporadically.

Operating Foundations:

- An operating foundation predominantly undertakes charitable activities and must be significantly involved in its own projects in a continuing and sustaining fashion. (Examples might include the operation of a museum, zoo, library or research facility.)
- To ensure that operating foundations are adequately engaged in directly carrying out their charitable activities, each year, they are required to spend the major portion of their investment income (85%) directly on the active conduct of their charitable operations (direct charitable expenditures).
- Essentially, an operating foundation makes direct charitable expenditures by conducting *its own* charitable projects rather than by making grants to other organizations. (For instance, rather than give a grant to a food bank, an operating foundation might purchase food directly and hire a driver to deliver it.)

Non-Operating Foundations:

- These foundations typically make grants to public charities, and they make up the vast majority of the private foundation community.
- They can conduct their own direct charitable activities (and make grants to individuals, award scholarships, make grants to international organizations that aren't recognized as 501(c)(3) charities, etc.), but running their own programs is not their primary focus.
- Generally, a non-operating foundation must make an annual distribution equal to roughly 5% of its prior year's average net investment assets.
- Distributions that count toward this requirement include grants to charities, certain related expenses, and, with the exception of investment expenses, necessary and reasonable administrative costs.

Advantages of Private Foundations over Public Charities

A private foundation provides both control and flexibility

Control: the final say on how foundation assets are invested and spent; which charities to support; whether others share in foundation governance; and if so, how. Private foundations enjoy full control over how the foundation's charitable assets are invested and granted (and pass this control to subsequent generations in perpetuity).

Flexibility: Moreover, because private foundations are given very broad latitude by the IRS to pursue their missions, they can effect change in many ways beyond granting to public charities. A private foundation is empowered to work through almost any entity, public or private, to accomplish its charitable objectives.

SO... WHAT ARE WE?

- Why?
- Is this what we want to?
- Is this how we operate?
- Is this how we think of ourselves?
- What would it mean to become something else?
- Who are our beneficiaries?
- What about the *Association* bit...???



Celebrating 155 years of women helping women



THE WORKING BOARD

2021 BOARD of DIRECTORS

President | Rosemary Saber
Vice-President | Jane Stankiewicz
Treasurer | Mary Ellis
Clerk | Gale Beaton

Jo-Ann Beaulieu
Gloria deSa
Jeannette Doyle

Grants Chair | Jane Stankiewicz
Beneficiary Chair | Diane Laflamme
Legacy Chair | Roseanne O'Connell
Visiting Chair | Shannon Bachman
Governance Chair | Deborah Brooke
Personnel Chair | Pamela McKnight

Cathy Mayall
Olivia Melo
Angela Natho

ARAW in the OFFICE

Executive Director

Clare Healy Foley

Office Administrator

Jenny Costa

ARAW Liaison & Beneficiary Advocate

Sharon O'Malley

Beneficiary Advocate

Patricia Midurski





WHAT HAVE WE BEEN UP TO RECENTLY, YOU ASK?

Establishment of Personnel & Legacy Committees

Establishment of Investment Advisory Committee

Establishment of Beneficiary Task Force

Review and revamp/development of Bylaws, policies, job descriptions and handbooks

Consistent communication with partners

Increased referrals and referral sources

Beneficiary Committee review of annual updates and all requests submitted each month

Visiting model analyzed and optimized

Migration and customization of new database

Communication and accountability

Distinction between operational and board roles



WHAT HAVE WE BEEN UP TO RECENTLY, YOU ASK?

Introduction of in-house Beneficiary Advocates

Socialization program established

Four new board members since 2019

Two new staff members

Operationalization of the Strategic Plan

COVID 19 restrictions and workarounds

RFP introduction and new community partners

Standardization of reporting, surveys, monthly communiques and quarterly reviews

Office optimization

Financial reporting overhaul



THE IMPACT

**\$5,071,700 direct support
to 820 beneficiaries**

since 2006

FY22 Giving

(YTD as of 9/22/21)

**\$156,308 in direct support
to 157 unique beneficiaries**

Gifts \$46,373 (\$5,790 EDDF)
vs. Reoccurring \$109,934



THE IMPACT

**72 unique women have engaged in
social engagement through FLO**

\$4,176

in FY22 through August 2021



FY22 Census Breakdown

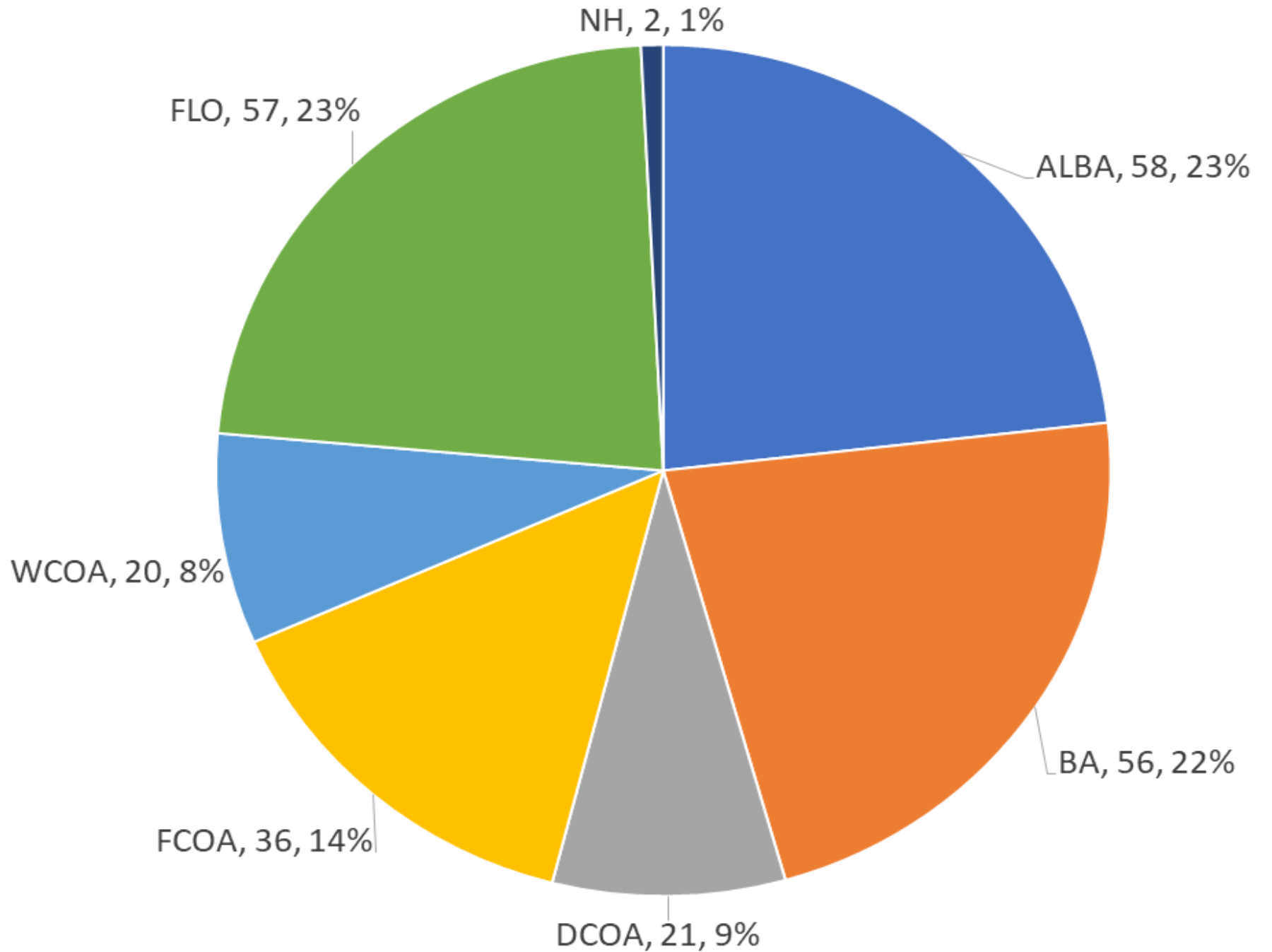
as 9/22/21

	Current	Pending	Total
ALBA	57	1	58
BA	47	9	56
DCOA	21	0	21
FCOA	34	2	36
WCOA	20	0	20
FLO	56	1	57
NH	2	0	2
Total	237	13	250



FY22 Census Breakdown

as 9/22/21





THE IMPACT

FY22 Requests

	April	May	June	July	Aug	Sept	Total
ALBA	3	3	5	3	5	5	24
BA	0	2	4	4	5	5	20
ACOA	1	1	1	0	0	0	3
DCOA	0	1	2	0	1	3	3
FCOA	1	3	2	0	7	0	13
WCOA	0	1	2	2	2	3	10
Total	5	11	16	9	20	16	73

FY22 Updates

	April	May	June	July	Aug	Sept	Total
ALBA	1	8	5	5	3	3	25
BA	0	1	3	3	5	1	13
ACOA	2	0	0	0	0	0	2
DCOA	1	2	1	2	0	0	6
FCOA	3	0	1	2	2	2	10
WCOA	2	0	0	0	0	1	3
Total	9	11	10	12	10	7	59

FY22 Giving | Reoccurring

(YTD as of 9/22/21)

	Apr 21	May 21	Jun 21	Jul 21	Aug 21	Sep 1 - 22, 21	TOTAL
HEALTH INSURANCE	4,155.28	3,479.69	8,773.67	10,135.86	5,992.65	9,419.18	41,956.33
SOCIAL DAY	0.00	0.00	564.00	940.00	940.00	0.00	2,444.00
PERSONAL CARE	1,248.29	1,321.43	1,521.58	1,535.73	1,037.79	135.00	6,799.82
NUTRITION	1,393.36	1,219.60	1,135.90	1,107.40	1,113.76	0.00	5,970.02
CABLE/PHONE/INTERNET	5,380.26	5,861.91	5,945.04	6,026.23	6,032.08	3,461.88	32,707.40
EPERS	1,476.45	1,452.45	1,452.45	1,492.40	1,474.45	1,443.50	8,791.70
RENT	1,210.00	1,210.00	1,210.00	1,210.00	1,210.00	900.00	6,950.00
TRANSPORTATION	153.80	113.20	114.20	337.96	244.16	120.00	1,083.32
GIFT CARDS	120.00	120.00	120.00	120.00	120.00	200.00	800.00
OTHER REOCCURING	267.27	712.59	448.50	748.58	142.44	113.00	2,432.38
Total REOCCURING	15,404.71	15,490.87	21,285.34	23,654.16	18,307.33	15,792.56	109,934.97

FY22 Giving | Gifts

(YTD as of 9/22/21)

	Apr 21	May 21	Jun 21	Jul 21	Aug 21	Sep 1 - 22, 21	TOTAL
HOLIDAY GIFTS	0.00	0.00	-600.00	305.00	150.00	0.00	-145.00
SOCIAL WORKER	200.00	725.00	200.00	575.00	0.00	0.00	1,700.00
DENTAL	455.00	0.00	2,142.00	0.00	863.00	0.00	3,460.00
HEARING AIDS	0.00	0.00	4,400.00	4,400.00	0.00	0.00	8,800.00
GLASSES	0.00	398.00	0.00	0.00	0.00	0.00	398.00
CAR BILLS	98.98	1,656.73	1,897.13	0.00	2,295.87	0.00	5,948.71
SANDRA FOGG	1,500.00	0.00	0.00	0.00	0.00	0.00	1,500.00
HOME PAYMENTS	0.00	0.00	1,674.13	0.00	5,095.74	0.00	6,769.87
CREDIT CARD	584.59	0.00	200.00	0.00	0.00	0.00	784.59
FURNITURE	0.00	688.99	599.00	0.00	-509.10	2,299.98	3,078.87
EDDF	31.10	234.87	2,023.61	1,384.76	1,938.76	177.00	5,790.10
OTHER GIFTS	784.37	386.44	1,217.94	1,859.99	2,163.95	1,875.00	8,287.69
Total GIFTS	3,654.04	4,090.03	13,753.81	8,524.75	11,998.22	4,351.98	46,372.83



Request for Proposal

Promote independence and enhance quality of life for elderly, low-income women in our community through financial support of qualified individuals and programs.

TARGETED FUNDING AREAS:

- Trusted sources of knowledgeable advocates in our community who will identify and connect us to women in need so we can provide direct support.
- Promotion of financial stability and life strategies.
- Access to social engagement opportunities to combat loneliness and isolation.
- Establishment of safety and stability to foster optimal health and well-being.

Targeted Funding Areas

Targeted Funding Areas	Success Indicators
<p>Trusted sources of knowledgeable advocates in our community who will identify and connect us to women in need so we can provide them with direct support.</p>	<ul style="list-style-type: none">▪ Increase the availability of trusted sources in the community for identification of potential beneficiaries, meetings with existing beneficiaries to determine ongoing needs/impact of support, submission of requests on behalf of beneficiaries and connecting beneficiaries to resources.▪ Increase in requests made on behalf of ARAW eligible women.

Targeted Funding Areas

Targeted Funding Areas	Success Indicators
<p data-bbox="377 791 1065 886">Promotion of financial stability and life strategies.</p>	<ul data-bbox="1294 536 2339 1146" style="list-style-type: none"><li data-bbox="1294 536 2339 632">▪ ARAW eligible women who access needed programs and/or resources.<li data-bbox="1294 651 2339 865">▪ ARAW eligible women who sign up for benefits to support income, such as SNAP, PACE or Supplemental Security Income.<li data-bbox="1294 883 2339 979">▪ Access to money management and financial counseling geared to ARAW eligible women.<li data-bbox="1294 998 2339 1146">▪ Innovative programming to address meaningful life strategies for ARAW eligible women.

Targeted Funding Areas

Targeted Funding Areas	Success Indicators
<p>Access to social engagement opportunities to combat loneliness and isolation.</p>	<ul style="list-style-type: none">▪ Creation of friendly visiting programs.▪ Creation of inter-generational programming.▪ Cultural events geared to ARAW eligible women.▪ Accessible and affordable transportation to promote social connectedness.▪ Opportunities for engagement, training and support for ARAW eligible women in using technology and social media.▪ Innovative initiatives which address loneliness and isolation among older women in our community.

Targeted Funding Areas

Targeted Funding Areas	Success Indicators
<p data-bbox="456 793 1279 886">Establishment of safety and stability to foster optimal health and well-being.</p>	<ul data-bbox="1332 368 2173 1315" style="list-style-type: none"><li data-bbox="1332 368 2173 511">▪ ARAW eligible women who access needed programs and/or resources for safety in-home and on the road.<li data-bbox="1332 525 2173 618">▪ Increased access to and consumption of healthy food.<li data-bbox="1332 632 2173 775">▪ Increased participation in physical activity, wellness and/or self-care programs for ARAW eligible women.<li data-bbox="1332 789 2173 882">▪ ARAW eligible women who receive preventative health care services.<li data-bbox="1332 896 2173 1039">▪ ARAW eligible women who receive necessary social work or behavioral health care services.<li data-bbox="1332 1053 2173 1196">▪ Opportunities for technological training and support for ARAW eligible women for telehealth purposes.<li data-bbox="1332 1210 2173 1315">▪ Innovative approaches to health and wellness for ARAW eligible women.

ARAW in the COMMUNITY

2021 Community Partner Grant
awarded over \$275,000 on April 1, 2021

2021 Outreach Partner Awards

Acushnet Council on Aging
Dartmouth Council on Aging
Fairhaven Council on Aging
Westport Council on Aging



ARAW in the COMMUNITY

2021 Program Partner Awards

AHA! (Arts, History, Architecture)

Cape Verdean Association in New Bedford

New Bedford Art Museum

YWCA

New Bedford Whaling Museum

South Coastal Counties Legal Services

Zeiterion Performing Arts Center



General ARAW Questions	Yes	No	n/a	Total
I am aware of the ARAW mission	94	1	1	96
I know how to apply for financial support if needed	76	18	2	96

FLO Program Questions	Yes	No	n/a	Total
I have participated in ARAW FLO program in person social activities	41	50	5	96
I have participated in ARAW FLO raffles or gift card distributions	64	30	2	96
I have received ARAW FLO home deliveries of holiday meals, soup or plants	44	50	2	96

If you have not participated in ARAW FLO activities or programs

The activities offered don't appeal to me	4
Not COVID vaccinated	3
I didn't know I was eligible	8
I didn't know the program pays meal/activity	14
No one I know is attending	13
Hesitant to go on my own	12
Didn't know transportation was available	17
I don't want to ride in a cab alone	9
Unsure if could attend with wheelchair/walker/cane	9
Special diet to be accommodated	4
PCA required when I go out	3
Other	15

Grant Fund Program Questions	Yes	No	n/a	Total
I participated in or signed up for NBAM art kit pick-up or delivery program	20	65	11	96
I participated in or signed up for Zeiterion Intergenerational Performing Arts Mentorship	6	75	15	96
I participated in or signed up for NBAM in person art classes	0	82	14	96
I am interested in New Bedford Whaling Museum's Lighting the Way: Lifelong Learning Program	21	57	18	96

I did not participate in programs because

Art/theater programs don't interest me	15
Local history does not interest me	10
Physical barriers prevent my participation	19
Program required the use of technology	11
Too long of a timeframe commitment	16
Didn't really understand the program	18
Wasn't aware of these programs	14
Other	22

Programs/Activities that interest me that I would like to see offered

Outdoor activities	25
Destinations (zoos, aquariums, museums, etc.)	37
Dining out with peers	37
Book club	17
At home visitor/companion	5
Raffles/gift cards	54
Delivered activities or special meals	28
Seasonal (ice cream, beach, holiday concerts, fall foliage, flower shows, etc.)	54
Creative activities: art	18
Creative activities: music	31
Creative activities: theater	27
Creative activities: movies	32
Educational activities: guest speakers	23
Educational activities: learn a foreign language	10
Educational activities: nutrition/cooking	20

Questions about YOU	Yes	No	n/a	Total
Do you have access to transportation for socialization?	49	32	15	96
Do you participate in programming at your local council on aging/senior center?	22	65	9	96

Thank you ARAW. You have made my life a much happier one, socializing FLO. I would have been so lonely and shut in. You came through wonderfully.

My life would be more limited for socializing. I would be home bound and lonely. Thank you from the bottom of my heart.

I really don't know how the whole organization works. I also have a little disability right now about going out.

I'm not sure of the protocol for financial support.

I wasn't aware of home delivery activities.

I'm so grateful for everything I have participated in. Thank you all so much. Having lots of fun!

Wonderful program and staff. Very happy with ARAW. You brighten up my day! Thank you so very much for what you have done for me. Very much appreciated.

Ellen Hull from senior center helped me. Also helped me with better health insurance. Sad to say she is no longer at center.

The newsletter is very informative.

I think this is a good group of people who care about people and am grateful for all the help you all give me. Thank you so much.

ARAW and the ladies that I have met or spoken to are sunshine on a cloudy day. You are gratefully appreciated.

As for your wonderful program it couldn't be better in my opinion. You certainly are great at making others feel good.

I'm so sorry I have anxiety. Hopefully I'll be getting better and looking forward to the activities.

I can't go to many activities. I have COPD. If it's hot and humid I stay home because I have a hard time breathing.

I liked very much going to the alpaca farm. I enjoyed the art, ice cream, gift cards. Thanks you all.

I'm recovering from surgery so I haven't been going out very much. I think what you offer is great.

Just continue your great work.

I have health issues and try not to participate in groups. Especially with Covid around.



Coming Attractions

Analysis of 2021 Community Partner Grantees

Recruitment/rollout of programs

Continued COVID uncertainty

2022 *Community Partner Grant*

Plan for Fairhaven/Dartmouth coverage

Beneficiary Advocate vs Outreach Worker model

Staffing considerations/capacity

Office space

Strategic plan goals

Bylaw finalization

Board recruitment

Archives

Financial considerations – spending policy

Sustainability

FY21 Referrals by source
as of 9/20/21

ARAW ID	Name	Community Partner	Outreach Name	Referral Organization	Referral Contact Name
INELIGIBLE-22/12	Lawrence, Maria	BA	Pat Midurski	ACOA	Jan Fortin
INELIGIBLE-22/13	Augustine, Lois	BA	Pat Midurski	ACOA	Heather Sylvia
22/09G	Benoit, Susan	BA	Pat Midurski	ACOA	
22/03G	Lawrence, Gail	ALBA	Sharon O'Malley	ARAW Beneficiary	June LaMontagne
PENDING FLO	Rose, Jean	FLO	Sharon O'Malley	ARAW Beneficiary	Barbara Grace
INELIGIBLE-22/14	Raymond, Roberta	FLO	Sharon O'Malley	ARAW Beneficiary	Sue Perry
FLO-22N	Polek, Andrea	FLO	Sharon O'Malley	ARAW Beneficiary	Regina Polek
FLO-22N	Delaney, Kathleen	FLO	Sharon O'Malley	ARAW Beneficiary	Marie Lorraine Silveira
PENDING	Raposa, Joyce	BA	Pat Midurski	ARAW Beneficiary	Bernice Rose
22/17G	Palazzo, Sharon	BA	Pat Midurski	ARAW Beneficiary	Dianna Sousa
22/05G	Bishop, Sarah	ALBA	Sharon O'Malley	ARAW Board Member	Gloria deSa
WITHDRAWN-22/06	Bischel, Gertrude	ALBA	Sharon O'Malley	Coastline Elderly Services	Caroline
21-22/11	Oliveira, Bebe	ALBA	Sharon O'Malley	Coastline Elderly Services	Natacha Salemme
PENDING	Eisley, Geraldine	BA	Pat Midurski	Coastline Elderly Services	
PENDING	Hernandez-Rolon, Francisca	BA	Pat Midurski	Coastline Elderly Services	Leslie Felizardo
PENDING	David Martinez, Nilda	BA	Pat Midurski	Coastline Elderly Services	Rachel
22/05EDDF	Dejesus, Eva	BA	Pat Midurski	Coastline Elderly Services	Leslie Felizardo
22/12G	Forte, Celeste	BA	Pat Midurski	Coastline Elderly Services	Elizabeth Ortiz
WITHDRAWN-22/03	Gibeau, Maria			Coastline Elderly Services	Brittany Botelho
PENDING	Ribeiro, Renay	BA	Pat Midurski	Community Nurse Home Care	Carol McAfee
FLO-22N	Almeida, Laura	FLO	Sharon O'Malley	DCOA	Ellen Hull
21-22/05	Furness, Betty	DCOA	Ann Raymond	DCOA	Ellen Hull
FLO-22N	Dean, Amy	FLO	Sharon O'Malley	DCOA/NBCOA/Coastline	
22/08G	Hennessy, Cheryl	BA	Pat Midurski	Department of Mental Health	Kelly
INELIGIBLE-22/01	C, Beverly	ALBA	Sharon O'Malley	Family/Friend	Carol Johnson, friend
WITHDRAWN-22/04	Loranger, S	ALBA	Sharon O'Malley	Family/Friend	Sarah Loranger, daughter
INELIGIBLE-22/07	Carreiro, Shirley	BA	Pat Midurski	Family/Friend	Gary Carreiro, son
PENDING	Gadomski, Marion	BA	Pat Midurski	FCOA	Carolyn D'Antoni
22/16G	Elgar, Marcia	BA	Pat Midurski	FCOA	
PENDING	LaFrance, Louise	FCOA	Carolyn D'Antoni	FCOA	Carolyn D'Antoni
21-22/09	Laber, Lynne	FCOA	Carolyn D'Antoni	FCOA	Carolyn D'Antoni
22/11G	Dann, Donna	FCOA	Lucille Dauteuil	FCOA	Lucille Dauteuil
22/04EDDF	Martinez, Victoria	ALBA	Sharon O'Malley	GNBCHC	Edie Gonsalves
22/01EDDF	Crovello, Mary	BA	Pat Midurski	Hathaway Manor/Coastline	Kellie Anne
DENIED-22/01	Batista, Urgelia	ALBA	Sharon O'Malley	Immigrants' Assistance Center	Lucy Oliveira
INELIGIBLE-22/04	Asonugha, Juanita	ALBA	Sharon O'Malley	Justice Bridge	

FY21 Referrals by source
as of 9/20/21

ARAW ID	Name	Community Partner	Outreach Name	Referral Organization	Referral Contact Name
INELIGIBLE-22/10	Aviles Roman, Juana	ALBA	Sharon O'Malley	NBCOA	Pat Foster
WITHDRAWN-22/01	Santos, Gail	ALBA	Sharon O'Malley	NBCOA	Pat Foster
22/07G	Miguel, Maria	ALBA	Sharon O'Malley	NBCOA	Pat Foster
PENDING	Rust, Alice	BA	Pat Midurski	NBCOA	Pat Foster
PENDING	Clark, Carolyn	BA	Pat Midurski	NBCOA	Pat Foster
DENIED-22/02	Walsh, Gail	BA	Pat Midurski	NBCOA	Pat Foster
INELIGIBLE-22/09	Patistea, Therese	BA	Pat Midurski	NBCOA	Pat Foster
INELIGIBLE-22/15	Pavao, Maria	BA	Pat Midurski	NBCOA	Pat Foster
22/04G	Carvalho, Patricia	BA	Pat Midurski	NBCOA	Pat Foster
INELIGIBLE-22/11	Almeida, Valentina			NBCOA	Pat Foster
WITHDRAWN-22/02	Ramos, Maria	BA	Pat Midurski	Olympia Towers	Christine Barboza
INELIGIBLE-22/05	Sylvia, Alice	BA	Pat Midurski	Sacred Heart	Beth Ouelette, SW
INELIGIBLE-22/06	Seney, Pauline	BA	Pat Midurski	Sacred Heart	Beth Ouelette, SW
WITHDRAWN-22/05	Monteiro, Phyllis	BA	Pat Midurski	SCCLS	Mary Ellen
PENDING	Alfonson, Dorothy	BA	Pat Midurski	SCVNA	Lori Cabral
21-22/01	DeMendonca, Theresa	ALBA	Sharon O'Malley	Senior Whole Health	Michelle Valente
21-22/04	Ramos, Anna	BA	Pat Midurski	Senior Whole Health	Kristine Demelo
INELIGIBLE-22/08	Martin, Joyce	ALBA	Sharon O'Malley	Southcoast	
22/02G	Myers, Mary	BA	Pat Midurski	SouthCoast ENT	
INELIGIBLE-22/02	New Bedford couple	ALBA	Sharon O'Malley	Southcoast VNA	Sarah Isabel
22/01G	Medeiros, Margaret	ALBA	Sharon O'Malley	Spark's Auto	
INELIGIBLE-22/03	Cordones, Angie	ALBA	Sharon O'Malley	WBSM	Self
22/15G	Rudnik, Martha	WCOA	Susan Routhier	WCOA	Susan Routhier
FLO-22N	Serdahl, Pauline	WCOA	Susan Routhier	WCOA	Susan Routhier
22/13G	Harrington, Diane	ALBA	Sharon O'Malley	Whaler's Cove	Amanda Costa
22/08G	Grace, Barbara	BA	Pat Midurski	Whaler's Cove	Amanda Costa

FY21 Referrals by CP OW/BA
as of 9/20/21

ARAW ID	Name	Community Partner	Outreach Name	Referral Organization	Referral Contact Name
WITHDRAWN-22/06	Bischel, Gertrude	ALBA	Sharon O'Malley	Coastline Elderly Services	Caroline
INELIGIBLE-22/01	C, Beverly	ALBA	Sharon O'Malley	Family/Friend	Carol Johnson, friend
WITHDRAWN-22/04	Loranger, S	ALBA	Sharon O'Malley	Family/Friend	Sarah Loranger, daughter
DENIED-22/01	Batista, Urgelia	ALBA	Sharon O'Malley	Immigrants' Assistance Center	Lucy Oliveira
INELIGIBLE-22/04	Asonugha, Juanita	ALBA	Sharon O'Malley	Justice Bridge	
INELIGIBLE-22/10	Aviles Roman, Juana	ALBA	Sharon O'Malley	NBCOA	Pat Foster
WITHDRAWN-22/01	Santos, Gail	ALBA	Sharon O'Malley	NBCOA	Pat Foster
INELIGIBLE-22/08	Martin, Joyce	ALBA	Sharon O'Malley	Southcoast	
INELIGIBLE-22/02	New Bedford couple	ALBA	Sharon O'Malley	Southcoast VNA	Sarah Isabel
INELIGIBLE-22/03	Cordones, Angie	ALBA	Sharon O'Malley	WBSM	Self
22/03G	Lawrence, Gail	ALBA	Sharon O'Malley	ARAW Beneficiary	June LaMontagne
22/05G	Bishop, Sarah	ALBA	Sharon O'Malley	ARAW Board Member	Gloria deSa
21-22/11	Oliveira, Bebe	ALBA	Sharon O'Malley	Coastline Elderly Services	Natacha Salemme
22/04EDDF	Martinez, Victoria	ALBA	Sharon O'Malley	GNBCHC	Edie Gonsalves
22/07G	Miguel, Maria	ALBA	Sharon O'Malley	NBCOA	Pat Foster
21-22/01	DeMendonca, Theresa	ALBA	Sharon O'Malley	Senior Whole Health	Michelle Valente
22/01G	Medeiros, Margaret	ALBA	Sharon O'Malley	Spark's Auto	
22/13G	Harrington, Diane	ALBA	Sharon O'Malley	Whaler's Cove	Amanda Costa
PENDING FLO	Rose, Jean	FLO	Sharon O'Malley	ARAW Beneficiary	Barbara Grace
INELIGIBLE-22/14	Raymond, Roberta	FLO	Sharon O'Malley	ARAW Beneficiary	Sue Perry
FLO-22N	Polek, Andrea	FLO	Sharon O'Malley	ARAW Beneficiary	Regina Polek
FLO-22N	Delaney, Kathleen	FLO	Sharon O'Malley	ARAW Beneficiary	Marie Lorraine Silveira
FLO-22N	Almeida, Laura	FLO	Sharon O'Malley	DCOA	Ellen Hull
FLO-22N	Dean, Amy	FLO	Sharon O'Malley	DCOA/NBCOA/Coastline	
PENDING	Raposa, Joyce	BA	Pat Midurski	ARAW Beneficiary	Bernice Rose
PENDING	Eisley, Geraldine	BA	Pat Midurski	Coastline Elderly Services	
PENDING	Hernandez-Rolon, Francisca	BA	Pat Midurski	Coastline Elderly Services	Leslie Felizardo
PENDING	David Martinez, Nilda	BA	Pat Midurski	Coastline Elderly Services	Rachel
PENDING	Ribeiro, Renay	BA	Pat Midurski	Community Nurse Home Care	Carol McAfee
PENDING	Gadomski, Marion	BA	Pat Midurski	FCOA	Carolyn D'Antoni
PENDING	Rust, Alice	BA	Pat Midurski	NBCOA	Pat Foster
PENDING	Clark, Carolyn	BA	Pat Midurski	NBCOA	Pat Foster
PENDING	Alfonson, Dorothy	BA	Pat Midurski	SCVNA	Lori Cabral
INELIGIBLE-22/12	Lawrence, Maria	BA	Pat Midurski	ACOA	Jan Fortin
INELIGIBLE-22/13	Augustine, Lois	BA	Pat Midurski	ACOA	Heather Sylvia
INELIGIBLE-22/07	Carreiro, Shirley	BA	Pat Midurski	Family/Friend	Gary Carreiro, son

FY21 Referrals by CP OW/BA
as of 9/20/21

ARAW ID	Name	Community Partner	Outreach Name	Referral Organization	Referral Contact Name
DENIED-22/02	Walsh, Gail	BA	Pat Midurski	NBCOA	Pat Foster
INELIGIBLE-22/09	Patistea, Therese	BA	Pat Midurski	NBCOA	Pat Foster
INELIGIBLE-22/15	Pavao, Maria	BA	Pat Midurski	NBCOA	Pat Foster
WITHDRAWN-22/02	Ramos, Maria	BA	Pat Midurski	Olympia Towers	Christine Barboza
INELIGIBLE-22/05	Sylvia, Alice	BA	Pat Midurski	Sacred Heart	Beth Ouelette, SW
INELIGIBLE-22/06	Seney, Pauline	BA	Pat Midurski	Sacred Heart	Beth Ouelette, SW
WITHDRAWN-22/05	Monteiro, Phyllis	BA	Pat Midurski	SCCLS	Mary Ellen
22/09G	Benoit, Susan	BA	Pat Midurski	ACOA	
22/17G	Palazzo, Sharon	BA	Pat Midurski	ARAW Beneficiary	Dianna Sousa
22/05EDDF	Dejesus, Eva	BA	Pat Midurski	Coastline Elderly Services	Leslie Felizardo
22/12G	Forte, Celeste	BA	Pat Midurski	Coastline Elderly Services	Elizabeth Ortiz
22/08G	Hennessy, Cheryl	BA	Pat Midurski	Department of Mental Health	Kelly
22/16G	Elgar, Marcia	BA	Pat Midurski	FCOA	
22/01EDDF	Crovello, Mary	BA	Pat Midurski	Hathaway Manor/Coastline	Kellie Anne
22/04G	Carvalho, Patricia	BA	Pat Midurski	NBCOA	Pat Foster
21-22/04	Ramos, Anna	BA	Pat Midurski	Senior Whole Health	Kristine Demelo
22/02G	Myers, Mary	BA	Pat Midurski	SouthCoast ENT	
22/08G	Grace, Barbara	BA	Pat Midurski	Whaler's Cove	Amanda Costa
22/14G	Carneiro, Maria	BA	Pat Midurski	Whaler's Cove	Amanda Costa
21-22/05	Furness, Betty	DCOA	Ann Raymond	DCOA	Ellen Hull
PENDING	LaFrance, Louise	FCOA	Carolyn D'Antoni	FCOA	Carolyn D'Antoni
21-22/09	Laber, Lynne	FCOA	Carolyn D'Antoni	FCOA	Carolyn D'Antoni
22/11G	Dann, Donna	FCOA	Lucille Dauteuil	FCOA	Lucille Dauteuil
22/15G	Rudnik, Martha	WCOA	Susan Routhier	WCOA	Susan Routhier
FLO-22N	Serdahl, Pauline	WCOA	Susan Routhier	WCOA	Susan Routhier
WITHDRAWN-22/03	Gibeau, Maria			Coastline Elderly Services	Brittany Botelho
INELIGIBLE-22/11	Almeida, Valentina			NBCOA	Pat Foster

FY21 Referrals by outcome
as of 9/20/21

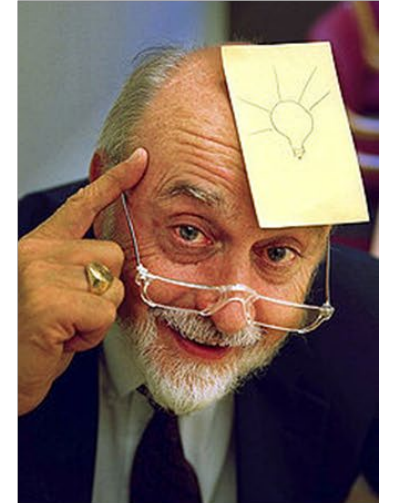
ARAW ID	Name	Community Partner	Outreach Name	Referral Organization	Referral Contact Name
21-22/01	DeMendonca, Theresa	ALBA	Sharon O'Malley	Senior Whole Health	Michelle Valente
21-22/04	Ramos, Anna	BA	Pat Midurski	Senior Whole Health	Kristine Demelo
21-22/05	Furness, Betty	DCOA	Ann Raymond	DCOA	Ellen Hull
21-22/09	Laber, Lynne	FCOA	Carolyn D'Antoni	FCOA	Carolyn D'Antoni
21-22/11	Oliveira, Bebe	ALBA	Sharon O'Malley	Coastline Elderly Services	Natacha Salemmé
22/01EDDF	Crovello, Mary	BA	Pat Midurski	Hathaway Manor/Coastline	Kellie Anne
22/01G	Medeiros, Margaret	ALBA	Sharon O'Malley	Spark's Auto	
22/02G	Myers, Mary	BA	Pat Midurski	SouthCoast ENT	
22/03G	Lawrence, Gail	ALBA	Sharon O'Malley	ARAW Beneficiary	June LaMontagne
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22/04G	Carvalho, Patricia	BA	Pat Midurski	NBCOA	Pat Foster
22/05EDDF	Dejesus, Eva	BA	Pat Midurski	Coastline Elderly Services	Leslie Felizardo
22/05G	Bishop, Sarah	ALBA	Sharon O'Malley	ARAW Board Member	Gloria deSa
22/07G	Miguel, Maria	ALBA	Sharon O'Malley	NBCOA	Pat Foster
22/08G	Hennessy, Cheryl	BA	Pat Midurski	Department of Mental Health	Kelly
22/08G	Grace, Barbara	BA	Pat Midurski	Whaler's Cove	Amanda Costa
22/09G	Benoit, Susan	BA	Pat Midurski	ACOA	
22/11G	Dann, Donna	FCOA	Lucille Dauteuil	FCOA	Lucille Dauteuil
22/12G	Forte, Celeste	BA	Pat Midurski	Coastline Elderly Services	Elizabeth Ortiz
22/13G	Harrington, Diane	ALBA	Sharon O'Malley	Whaler's Cove	Amanda Costa
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22/16G	Elgar, Marcia	BA	Pat Midurski	FCOA	
22/17G	Palazzo, Sharon	BA	Pat Midurski	ARAW Beneficiary	Dianna Sousa
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FLO-22N	Almeida, Laura	FLO	Sharon O'Malley	DCOA	Ellen Hull
FLO-22N	Dean, Amy	FLO	Sharon O'Malley	DCOA/NBCOA/Coastline	
FLO-22N	Serdahl, Pauline	WCOA	Susan Routhier	WCOA	Susan Routhier
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INELIGIBLE-22/02	New Bedford couple	ALBA	Sharon O'Malley	Southcoast VNA	Sarah Isabel
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INELIGIBLE-22/07	Carreiro, Shirley	BA	Pat Midurski	Family/Friend	Gary Carreiro, son
INELIGIBLE-22/08	Martin, Joyce	ALBA	Sharon O'Malley	Southcoast	
INELIGIBLE-22/09	Patistea, Therese	BA	Pat Midurski	NBCOA	Pat Foster
INELIGIBLE-22/10	Aviles Roman, Juana	ALBA	Sharon O'Malley	NBCOA	Pat Foster
INELIGIBLE-22/11	Almeida, Valentina			NBCOA	Pat Foster
INELIGIBLE-22/12	Lawrence, Maria	BA	Pat Midurski	ACOA	Jan Fortin
INELIGIBLE-22/13	Augustine, Lois	BA	Pat Midurski	ACOA	Heather Sylvia
INELIGIBLE-22/14	Raymond, Roberta	FLO	Sharon O'Malley	ARAW Beneficiary	Sue Perry
INELIGIBLE-22/15	Pavao, Maria	BA	Pat Midurski	NBCOA	Pat Foster
PENDING	Raposa, Joyce	BA	Pat Midurski	ARAW Beneficiary	Bernice Rose
PENDING	Eisley, Geraldine	BA	Pat Midurski	Coastline Elderly Services	
PENDING	Hernandez-Rolon, Francisca	BA	Pat Midurski	Coastline Elderly Services	Leslie Felizardo
PENDING	David Martinez, Nilda	BA	Pat Midurski	Coastline Elderly Services	Rachel
PENDING	Ribeiro, Renay	BA	Pat Midurski	Community Nurse Home Care	Carol McAfee
PENDING	Gadomski, Marion	BA	Pat Midurski	FCOA	Carolyn D'Antoni
PENDING	Rust, Alice	BA	Pat Midurski	NBCOA	Pat Foster
PENDING	Clark, Carolyn	BA	Pat Midurski	NBCOA	Pat Foster
PENDING	Alfonson, Dorothy	BA	Pat Midurski	SCVNA	Lori Cabral
PENDING	LaFrance, Louise	FCOA	Carolyn D'Antoni	FCOA	Carolyn D'Antoni
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WITHDRAWN-22/01	Santos, Gail	ALBA	Sharon O'Malley	NBCOA	Pat Foster
WITHDRAWN-22/02	Ramos, Maria	BA	Pat Midurski	Olympia Towers	Christine Barboza
WITHDRAWN-22/03	Gibeau, Maria			Coastline Elderly Services	Brittany Botelho
WITHDRAWN-22/04	Loranger, S	ALBA	Sharon O'Malley	Family/Friend	Sarah Loranger, daughter
WITHDRAWN-22/05	Monteiro, Phyllis	BA	Pat Midurski	SCCLS	Mary Ellen
WITHDRAWN-22/06	Bischel, Gertrude	ALBA	Sharon O'Malley	Coastline Elderly Services	Caroline



**What is your
sticky?**





Mission

to furnish financial assistance, provide friendship, and promote the welfare and relief of, elderly women

We do this by:

- Investing in and collaborating with our community partners to identify and address women's unmet needs.
- Meeting our beneficiaries' needs through one time, intermittent or ongoing financial support.
- Providing friendship to women through social visits.



Vision

Elderly women in our community will
live well and with dignity.



Values

Women helping women.

“Not alms alone, but a friend.”



Philosophy behind ARAW's support...

ARAW wants:

- elderly women in our community to live well and with dignity
- to promote independence - whatever that means for each woman
- to form a friendship with our beneficiaries
- to address the challenges low-income, elderly women face today
- to be there when a woman has nowhere else to turn

And ARAW doesn't want:

- to duplicate existing support
- women to feel indebted or entitled

Working Philosophy



**Let the board be
the board.**



**Let the staff be
the staff.**



**Let OWs/BAs be the
artisans they are.**



**Where do we go
from here?**

Do we understand our Mission, Vision, Values and philosophy?

Are they still relevant?

Are we currently fulfilling them?

Can we recommit to them or do we need to revise?

How do we translate them into the real world?



**Where do we go
from here?**

Are the goals of our current strategic plan still relevant?

Do we need to revise goals?

Do we need to add goals?

Do we need a new strategic plan?

Can we recommit to our current strategic plan?



**Where do we go
from here?**

What are the three top priorities for the future?

What are the three top concerns for the future?

What are the three top opportunities for the future?

What is the greatest unmet need?



**Where do we go
from here?**

Do we have what we need to move forward to achieve our goals?

If not, what do we need?

What role does the board play?

What role does each committee play?

What role does the staff play?

What role do our community partners play?