



ASSOCIATION FOR THE RELIEF OF AGED WOMEN

Board Meeting | June 9, 2022 | 9:30 am

Wamsutta Club | County Street | New Bedford | Zoom option

Packet contents to be reviewed prior to the meeting:

*May Minutes; June FLO Newsletter & BA Report; May activity sheet; May Financials;
June Beneficiary Recommendations; Committee Materials: Executive, Finance, Governance*

🕒 Moment of Silence

♥ Irene Almas

🕒 Reflective Moment – Angela Natho

🕒 Call to Order – President Jane Stankiewicz

- ✓ **Recommendation to authorize the Office Administrator to take meeting minutes for review, approval and distribution by the President. – VOTE**

🕒 Roll Call – Clerk Gale Beaton

🕒 President's Report – *see packet*

- ✓ **Recommendation to approve May 2022 Board meeting minutes, as distributed – VOTE**
- ✓ **Recommendation to approve May 2022 Special Board meeting minutes, as distributed – VOTE**
- Update: Consultants' engagement

🕒 Executive Director's Update – *see packet*

- FLO Newsletter & BA reports
- Questions: activity sheet
- Move to 174 Union update
- Past Board Members
- Community Engagement
- CPG updates
- Beneficiary highlight

🕒 Finance Review – Treasurer Mary Ellis – *see packet*

- Finance Committee meeting update 5/17/22
- Investment Advisory Committee meeting update 5/31/22
- ✓ **Recommendation to accept May finance report, as distributed – VOTE**
- ✓ **Recommendation to accept FY22 Financial Review/Statements, as distributed – VOTE**

🕒 Committee Reports

- Visiting – Committee Chair Jeannette Doyle – *see packet for upcoming birthdays*
 - June Visiting reports – 3 minutes each
 - * Roseanne O'Connell
 - Reporting in July: Angela Natho

- Beneficiary – Committee Chair Pam McKnight – *see packet*
 - ✓ **Recommendation to accept decisions of beneficiary committee, as distributed – VOTE**
 - Highlight a new beneficiary
 - Upcoming Beneficiary Task Force meeting
- Governance – Committee Chair Debbie Brooke – *see packet*
 - Governance Committee meeting update 5/24/22
 - Board survey
 - ✓ **Recommendation to invite Leah Macomber to join the board – VOTE**
- Grants
 - Nothing to report
- Legacy
 - Nothing to report
- Personnel
 - Nothing to report
- 🌐 Other business to be brought before the Board
- 🌐 Executive Session, if needed

ANNOUNCEMENTS/MEETINGS – ALL INVITED TO ATTEND AND AUDIT WHENEVER INTERESTED:

- Thursday, June 9th | Board Meeting | Wamsutta/Zoom | 9:30 am**
- Tuesday, June 14th | Grants Committee | 11:30 am**
- Tuesday, June 14th | Visit to NBFHC | 1 pm**
- Monday, June 20th | Beneficiary Task Force Meeting | 9:30 am**
- Tuesday, June 21st | Finance Committee | 9:30 am**
- Friday, June 24th | Personnel Committee | 9:30 am**
- Tuesday, June 28th | Governance Committee | 9:30 am**
- Thursday, June 30th to Friday, July 1st | Office Move | to 174 Union Street**
- Monday, July 4th | Office Closed | Independence Day**
- Wednesday, July 6th | Beneficiary Committee | 9:30 am**
- Thursday, July 14th | Regular Board Meeting | 9:30 am**



Happy Birthday, America!! 7/4/22
No board or staff birthdays before next meeting

Association for the Relief of Aged Women
Minutes of the Regular Monthly Meeting, May 12, 2022

Moment of Silence: All present had a moment of silence for the beneficiaries who we lost since our last meeting: Lorraine Perry and Joanne Methia (inactive). Also, past board member Jean Bennett. Some information was shared about each as well.

Reflective Moment: Debbie Brooke read the poem *Will I Lose Myself* by Patricia Fleming:

Will I slowly wither like a leaf That falls upon the earth? Once void of all its Autumn hues, It loses all its worth.	And will I drift so far away I never make it back?
Will my strength and vigor for this life Just one day start to wane? Will all these lines and wrinkles guise My once familiar face?	Will I be that old forgotten soul That no one comes to see? Kept in the hands of strangers, A shell of who I used to be.
Will I feel no longer needed By my family and my friends? Will that thrill of feeling deep in love, In time come to an end?	I pray I'm spared such cruelty, For if I am to live. I don't want to be a burden When I still have much to give.
Will I lose my sense of purpose, My reason for each day? Will my mind grow dull and cluttered Till I somehow lose my way?	I want to treasure every moment, Every love my heart embraced. I need to know each pain I felt, Each tragedy I faced.
Will I outlive all my loved ones And find myself alone? Will I lose my independence, My possessions and my home?	So if someday I disappear Before I leave this life, I beg you to reach out to me And hold on with all your might.
Will all my fondest memories Escape my aging grasp?	For despite how far away I go, I need the world to care. For somewhere in that bewilderment, I still linger there.

President Jane Stankiewicz called the meeting to order at 9:44 AM.

A motion was made to authorize the Office Administrator to take meeting minutes for review, approval and distribution by the clerk. **SO VOTED**

Members in Attendance: Beaton, Beaulieu (Via Zoom), Brooke, deSa, Doyle, Ellis, LaFlamme (Via Zoom), Mayall (Via Zoom), McKnight (Via Zoom), Natho, O'Connell, Saber, Stankiewicz.

Executive Director Clare Healy Foley and Office Administrator Jenny Costa also present.

Members excused: Bachman.

The minutes of the April 14, 2022 board meeting were approved as distributed with post-President approval amendments. **SO VOTED**

Report of President: President Jane Stankiewicz reported:

1. Honored to be serving as President
 - a. ARAW has rich history and important mission
 - b. In awe of accomplishments of fellow board members and staff
2. Theme for coming year – Leading Together
 - a. Many changes over the past few years – all coming together now
 - b. Over past few weeks - met with committee chairs in small groups to discuss committee make ups and goals for the coming year
3. Goals for upcoming tenure
 - a. Finalize current strategic plan and work towards next steps
 - b. Continue to define board vs staff functions
 - c. Board education
 - d. Board culture conversations (Covid interrupted coming together)
4. Annual Meeting
 - a. Everyone enjoyed format of having community partners attend
 - b. Great to see interaction afterwards at reception
 - c. Opportunity to tighten some things up
 - d. Remarks from board members – impressed by community partners, glad to be funding
 - e. Potential to invite community partners unable to join to a future board meeting
 - f. Community partners learned from each other as well

Report of Executive Director: Executive Director Clare Healy Foley reported:

1. Thank you for Annual Meeting
 - a. Effort put into committee reports
 - b. Taking a chance on new format
 - c. To Jenny for data/reports from database
2. FLO Newsletter: reminder to use as tool when speaking with beneficiary buddies
3. BA Report: Clare added Pat spending time mentoring/training Leonora
4. Activity Sheet: next month will list staff responsible for task rather than outreach person
5. Volunteer Opportunities
 - a. Thank you to Rosemary, Jo-Ann and Cathy for making deliveries of raffle items – still a few left to deliver
 - b. Hostesses needed for Wamsutta luncheon featuring NBSO on May 26th
6. Referral process: Streamlining – referral form to be sent to admin email (able to vet in advance and not bog down beneficiary advocates)
7. Community Engagement
 - a. Always intentional
 - b. Coastal Neighbors Network presentation led to potential new board member
8. CPG updates

- a. LGBTQ+ Network
 - i. Will have area geared for elderly during Pride Day in June at Buttonwood Park – asked ARAW for suggestions for activities
 - ii. Have free Zeiterion tickets available for recruitment purposes
- b. New Bedford Police Department
 - i. Received outstanding elements of grant agreement – check sent
 - ii. New to grants – going to take work but will be worth it
 - iii. Training session with ARAW on June 1st (tentatively)
 - iv. Will start with ARAW Beneficiaries
- c. Closing up FY22
 - i. Missing a few YE reports: NBAM, Zeiterion, AHA!, DCOA
 - ii. Survey sent out to all for feedback on process/experience
- d. Beneficiary Highlights
 - i. Isidora Conway sent email with positive feedback on New Bedford Art Museum field trip
 - ii. Patricia Rose called to thank for hearing aids – shared the radio in her car was too loud and can now hear dog’s nails on the floor
 - iii. Group of beneficiaries at Presidential Terrace who get together every month to read the ARAW newsletter

Report of Finance Committee: Chair Mary Ellis reported:

- 1. April 12th meeting with Investment Advisory Committee and Bank of America
 - a. Standard investment banking presentation – difficult to understand
 - b. Kathleen McQuiggan offered to meet with committee to “translate” – meeting tomorrow May 13th via Zoom (all board members invited)
- 2. Motion made to accept April finance report as distributed. SO VOTED

Report of Visiting Committee: Chair Jeannette Doyle reported:

- 1. Visiting reports: Jane Stankiewicz
 - a. Cecile Begnoche
 - i. Always upbeat and happy
 - ii. Has friends where she lives and is connecting with family
 - iii. Four upcoming doctor’s appointments – was able to set up transportation
 - iv. Had granddaughter up from Virginia over the holidays
 - b. Jacqueline “Jackie” Morin
 - i. Worked at St. Joe’s preschool
 - ii. Daughter is a nurse
 - iii. Needs heart valve replacement – will need to have dental work done first, also exposed to Covid which has caused delays
 - c. Next month – Roseanne O’Connell
- 2. Will be scheduling a committee meeting in June to discuss format and next steps

3. Updated visiting reports to be handed out – contact office if able to take new friends or need to drop any current friends

Report of Beneficiary Committee: Chair Pam McKnight reported:

1. A motion was made to accept recommendations from the Beneficiary Committee.
SO VOTED
 - a. 8 requests, 7 updates
2. Task Force meeting coming up to discuss:
 - a. EPERS – safety, available monthly balance
 - b. FLO exceptions
 - c. Declination letters
3. New Beneficiary Highlights
 - a. Holly Graybill
 - i. Artist all her life (low Social Security)
 - ii. Diagnosed with ovarian cancer in 2013
 - iii. Went through divorce – left financially unstable
 - iv. ARAW approving car repair – connect to SCCLS and ACCS
 - b. Teresa Tripp
 - i. Hairdresser – business affected heavily by Covid
 - ii. Declining health and rent increase – probably going to have to give up business
 - iii. Major credit card debt, low Social Security
 - iv. ARAW approving six months of car payments with stipulation of SCCLS referral

Report of Governance Committee: Chair Debbie Brooke reported:

1. Potential board member – Helen Montague
 - a. Recently widowed
 - b. Mainly involved in education – retired 2018
 - c. Mentors at NB Whaling Museum
 - d. Passion to be engaged with people
 - e. One week to bring concerns or questions to committee or office – then will set up initial meet and greet
2. Leah Macomber initial meet and greet completed – will be bringing information back to Governance committee, then make recommendation to board in June

Report of Personnel Committee: Chair Angela Natho reported:

1. Committee has one year under their belt – amazing amount of work done
2. Still have more work – have goals for upcoming year
3. Small staff but still important to have policies and consistency
4. Thank you from Clare for committee's work and support

Other Business:

1. Rosemary Saber expressed gratitude for flowers and diary
 - a. Board members to sign letter for Rosemary regarding her tenure as president
2. Shared Sharon's thank you card to the board
3. Round of applause for getting through the first month of meetings of the new FY – including three board meetings

The meeting was adjourned at 11:15 am.

Recorded by Jenny Costa, Office Administrator

Members in Attendance: Beaton, Beaulieu, Brooke, deSa, Doyle, Ellis, Laflamme, Mayall, McKnight, O’Connell, Saber, Stankiewicz

Staff in Attendance: Foley, ED

Members Absent: Bachman, Natho

President Jane Stankiewicz thanked the board for coming together on short notice to discuss a move to 174 Union Street, Unit 4W which she and the executive board, upon thorough consideration, recommend as an extraordinary opportunity. With thanks for work done thus far, especially to Cathy Mayall, she shared details of the search and determination process:

- Operational determination of needs for office space
- Monitoring of New Bedford real estate opportunities
- Vetting of spaces to determine best space
- Receive terms and conditions to create cost analysis (include comparison to current situation)
- Present recommendation to Exec Comm
- If Exec Comm approves, recommendation goes to the finance committee for financial approval
- With Exec and Fin Comm approval, the recommendation goes to the full board
- LOI & lease process, including legal review
- Move in

Jane handed over discussion to Cathy Mayall who, as a member of the Finance Committee and as a Real Estate Professional, has guided and advised throughout the process. She shared details of the current Greater New Bedford real estate landscape and how this space compared to other options. She also discussed the clear virtues of this space which includes utilities as part the rent, a newly renovated building, a good value, the merits of being first in, the owners’ evident desire to work with us and how it met ARAW’s established needs to a tee. As a professional in the field, she recommends this site on its own merits not as something “just to settle for”.

Jane then handed over the discussion to Clare Healy Foley, Executive Director, to speak about the space in relation to our operational needs and to field any questions about the cost analysis. Clare walked the group through the space and how it addressed the established needs for both the staff and the board. Several questions about location, length of lease, lease review process, safety, move in date and need for Wamsutta membership moving forward were addressed. Clare also thanked Cathy for her time, patience, guidance, consultation and advice throughout the process up until this point.

Jane then handed over the discussion to Mary Ellis, Treasurer and Chair of Finance, who shared the enthusiastic recommendation of the Finance Committee. She shared details of their meeting and review of the cost analysis. The overall feeling was that the for a \$500 increase in monthly costs we were not only doubling our space but meeting ongoing needs, as we look to the future. She too thanked Cathy for her dedication, commitment and hard work on this important project.

After a request for any additional questions, Jane asked for a recommendation *to move ahead with lease negotiations for ARAW to move their office space to 174 Union Street, Unit 4W*. A motion was made, seconded and passed unanimously.

Many thanks were voiced, and the board as a whole was recognized for their willingness and trust to work within this streamlined committee driven process.

Meeting was adjourned.

Recorded by Clare Healy Foley, Executive Director

Approved by Gale Beaton, Clerk

ARAW Executive Board Meeting
May 12, 2022

A meeting of the executive committee was held at the NBIS building at 174 Union Street. Present were Mary Ellis, Diane Laflamme, and Jane Stankiewicz. Also present were Cathy Mayall and Clare Foley.

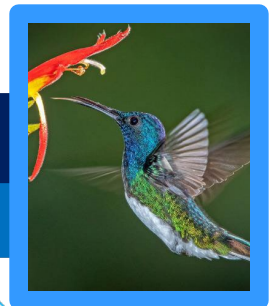
Cathy and Clare have searched everywhere for suitable office space and have finally found something that fits the needs of the ARAW office. The committee toured the office and met with the 2 owners of the building.

They are very accommodating and are willing to adapt the space for it to work for us. A full wall needs to be constructed where there is now a half wall in order to create a private meeting space for board and committee meetings. Other than that the space is in good shape and is large enough to allow for some growth of our staff should we need that.

The committee reviewed the cost analysis and recommended that it be sent to finance for review/approval and then on to the board for approval.

Jane Stankiewicz, President

June 2022



GOING WITH THE FLO

Friendship Lunches & Outings (FLO)
Newsletter

Rave Reviews

Such a change in my life to be out *socializing*. Thank you!

...the music was as excellent as the company and atmosphere.

On May 26th ARAW welcomed our new Community Partner, the New Bedford Symphony Orchestra, at our monthly FLO lunch. This private concert was met with rave reviews!

Everything was excellent: the food, the music and of course the people. I felt so CHIC!!

It was lots of fun and everything was beautiful!

OMG! The band was so nice! Four violinists and a cellist. The room was spacious. The food was excellent. A perfect time! Thank you!



MORE MUSIC



FREE TICKETS

New Bedford Symphony Orchestra performs *Irresistible*
Saturday, June 18th | 7:30 PM | at the Zeiterion
Call NBSO (508) 999-6276 or ARAW (508) 717-0400
for tickets or more details!

Days to Celebrate in June

				1. World Milk Day 	2. National Rocky Road Day 	3. National Egg Day 
4. Hug Your Cat Day 	5. National Donut Day 	6. National Gardening as Exercise Day 	7. National Chocolate Ice Cream Day 	8. Best Friends Day 	9. National Strawberry Rhubarb Pie Day 	10. National Iced Tea Day 
11. Corn on the Cob Day 	12. National Jerky Day 	13. Weed Your Garden Day 	14. Flag Day 	15. National Lobster Day 	16. Fresh Veggies Day 	17. National Apple Strudel Day 
18. National Splurge Day 	19. National Dry Martini Day 	20. First Day of SUMMER 	21. National Smoothie Day 	22. National Onion Rings Day 	23. National Pink Day 	24. National Pralines Day 
25. National Strawberry Parfait Day 	26. Tropical Cocktail Day 	27. Great American Picnic Day 	28. National Tapioca Day 	29. National Camera Day 	30. National Meteor Watch Day 	



Get ready for Flag Day this month and Independence Day next month with a stars and stripes lapel pin ...

Call the ARAW office at (508) 717-0400 and we will send you a way to show your patriotism.

We have some **FREE** tickets available to a performance at the Zeiterion. However, they are limited...

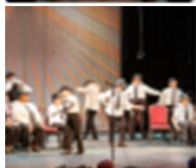
CALL (508) 717-0400 IF INTERESTED!

Up to two tickets per person, while supplies last...



Sunday
JUN 04
7:00 pm

MEL BROOKS' SILENT MOVIE



Sunday
JUN 05
2:00 pm

YOUNG@HEART CHORUS



Friday, June 24th | 12:30 pm | Wamsutta
CALL ARAW (508) 717-0400 TO REGISTER

Attendees by lottery
Transportation available

PRIDE

SOUTH COAST
2022

Special Pride Activities for Our Older LGBTQ+ Friends!

We're creating a space at the New Bedford Pride Festival with food, music, games, and social activities for older LGBTQ+ people to enjoy!

Join us!

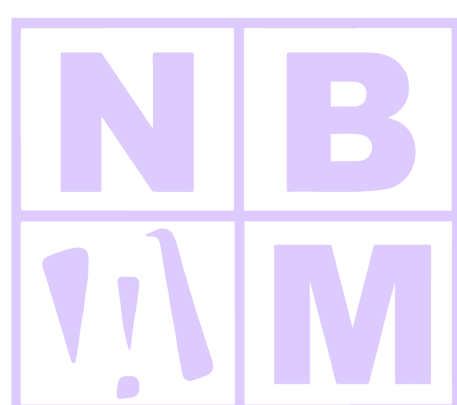
June 4, 2022
11 am-3 pm

Buttonwood Park
New Bedford



Made possible with support
from the Association for the
Relief of Aged Women of
New Bedford





Painting Class



with Devin McLaughlin

Designed for beginners and advanced creatives, follow along with Devin for step-by-step instruction in NBAM's studio space. Topics include: color theory and mixing, brush techniques, creating a successful composition...and more!

Classes are FREE and all materials are included!

Registration required.

Contact the ARAW office at 508-717-0400

10 am to 12 pm
Sundays, June 12 - July 10

New Bedford Art Museum
608 Pleasant Street
New Bedford, MA
02740

Creative Care is an art program for seniors presented by the New Bedford Art Museum/ArtWorks!.

This class is made possible through a grant from the Association for the Relief of Aged Women.

A Bristol Plymouth Celebration of Seniors

Presented By:



Friday, June 17, 2022 from 9 a.m. to 12 p.m.

White's of Westport, 66 State Rd. Westport, MA 02790

Join us for a FREE breakfast, a resource fair, and engaging speakers on topics important to seniors in our communities.

For breakfast reservation/RSVP: 508-961-1980 or EPoulin@townofrochester.com

For vendor information/RSVP: 508-742-9160 or Amccrillis@CoastlineNB.org

Platinum Sponsor



Gold Sponsors



Silver Sponsors



Bronze Sponsor



Surprenant & Beneski, P.C.
Strategic Planning for Your Peace of Mind

Supporting Older Residents of Dartmouth & Westport

HELP THAT COMES TO YOU

(Free for ARAW
members)



Transportation
Friendly Visits | Household
Chores | Social Opportunities



A nonprofit, membership-based organization helping seniors stay safe, independent and connected in the communities they love

Want to Join? Volunteer? Call 508-556-4004
www.coastalneighborsnetwork.org



ALL ABOARD!

Join New Bedford
Fishing Heritage Center
as we launch *Herstory*



Herstory is a year-long project that will include FREE performances, films, walking tours, cooking classes, museum visits, and more!

In addition, we are looking for women with ties to the fishing industry to share stories as part of an intergenerational oral history project led by local high school and college aged women. The resulting oral histories will become part of the Fishing Heritage Center's archive and will be shared through a digital exhibit and culminating reception.

- 🐟 Do you come from a fishing family?
- 🐟 Did you ever work in the fishing industry (in a settlement house, seafood processing plant or other business)?

→ **We'd love to hear *your* story!**

- 🐟 Are you interested in learning about the history of New Bedford's fishing community and the local seafood industry?

→ **We would love to share *our* story!**

We are excited to engage the ARAW community in all of these ways!

**If you might be interested in participating,
please contact the Center at 508-993-8894
or by emailing herstory@fishingheritagecenter.org.**

New Bedford Fishing Heritage Center invites you to experience the history and culture of the fishing community!

Join us for one or more of these upcoming programs:

June 9, 2022 - 5-8 PM

AHA! Night (NB Cultural Night)

See our exhibit "Women's Work" and meet fiber artist Alex Buchanan!



June 10, 2022 - 12 PM - Zoom (link below)

Virtual Author Talk with Alison Neilson

A Sea Full of Life: Visions from the Azores

<https://us02web.zoom.us/j/86500170531>

June 15, 2022 - 7 PM

Music from the Chesapeake Bay

Featuring Janie Meneely & Rob van Sante

Tickets \$12-\$15. Limited free tickets available on a first come, first served basis



June 17, 2022 - 7 PM

Film Screening: Vanishing Pearls

Exploring the changes in a Black fishing community on the Gulf coast after the 2010 Deepwater Horizon oil spill.

NPS Theater, 33 William Street, NB

Unless otherwise noted, all programs will be at the Center
38 Bethel Street, New Bedford MA

Questions? Call (508) 993-8894 or
email programs@fishingheritagecenter.org



ARAW May 2022 Activity Sheet

Due Date	With	Staff	Type	Notes
5/2/2022	Perry, Lorraine	PMIDURSKI	Phone Call	From friend asking if ARAW wants books and walkers - to donate to COA
5/2/2022	Medeiros, Ann	PMIDURSKI	Email	From CES CM: AM remains in SNF Carvahlo Grove: No updates
5/2/2022	Bachand, Frances	PMIDURSKI	Email	To ACOA SHINE: VMM to FB re: SHINE counselor and need to sched appt
5/2/2022	Burke, Shauneen	PMIDURSKI	Phone Call	Tufts Dental work "covered by insurance." SB reports ARAW to receive refund from Tufts Dental
5/2/2022	Ponte, Karyn	PMIDURSKI	Phone Call	Req. ARAW assist w/payment for out of network counselor: "Not working well w/SWH counselor"
5/2/2022	Ponte, Karyn	LROBINS	Phone Call	From beneficiary looking for Pat with questions. Pat given info to call her
5/2/2022	Benoit, Ruth	PMIDURSKI	Phone Call	Invoice for auto repair: PGM to p/u Tues morning
5/2/2022	Benevides, Maria	PMIDURSKI	Phone Call	From Dgt: Comcast invoice rcvd: SHINE appt 4/28: Mass Health app begun: Req assist w/COMCAST
5/2/2022	Verissimo, Dalia	PMIDURSKI	Phone Call	NEW referral from BB @ PIADH: FLO: TC to sched HV for Tues 5/3
5/2/2022	Antunes, Joana	LROBINS	Phone Call	Left VM to schedule annual visit
5/2/2022	Monteith, Judith	PMIDURSKI	Phone Call	To confirm HV for Tues 5/3: confirmed
5/2/2022	DaRosa, Priscilla	LROBINS	Phone Call	To set up an annual visit, scheduled for 05/09/2022 at 10:30
5/3/2022	Chor, Patricia	PMIDURSKI	Phone Call	To confirm HV for 5/4: PC has cough/sneezing: "Allergies?" HV postponed: BA to call next week to resch
5/3/2022	Correia, Patricia	LROBINS	Phone Call	To Patricia re: list she's on for South Pacific in May 2022, she will call the Zeiterion for tickets
5/3/2022	Bonneau, Maria	LROBINS	Phone Call	Ms. Bonneau will call Zeiterion for tickets to South Pacific and she is aware to identify as ARAW affiliated
5/3/2022	Monteith, Judith	PMIDURSKI	In Home Visit	For annual update & review
5/3/2022	Antunes, Joana	LROBINS	Phone Call	VM for Stephanie Gibson, which came up when dialing by name at CESI. Ext. 309
5/3/2022	Antunes, Joana	LROBINS	Phone Call	From Stephanie Gibson/CESI, Stephanie Silva/CESI withdrew referral due to lack of ability to contact JA
5/3/2022	Antunes, Joana	LROBINS	Phone Call	Per CHF & file, called Cindy Marcial previous point of contact, VM left
5/3/2022	Polek, Regina	PMIDURSKI	Phone Call	Z tix for South Pacific: RP to call Z box office: TY ARAW
5/3/2022	Souza, Ethel	PMIDURSKI	Phone Call	To confirm HV for 5/4: Confirmed
5/3/2022	Ortiz, Maria	PMIDURSKI	Phone Call	Re: Z tix for South Pacific: MO to call Z box office
5/3/2022	Verissimo, Dalia	PMIDURSKI	In Home Visit	Completed and app done: No financial needs at present: Interested in FLO activities
5/3/2022	Vieira, Nancy	LROBINS	Phone Call	LM to call Zeiterion for South Pacific tickets and identify as ARAW affiliated
5/3/2022	Pacheco, Lillian	CFOLEY	Phone Call	To Debra dghtr re: return of EPERS equip; 1 month grace then bill to family
5/3/2022	Pacheco, Lillian	CFOLEY	Phone Call	From Dghtr, mailed EPERS this week; Lillian's son died this am; not happy at WC; explore ARAW oppty's
5/3/2022	Morin, Jacqueline	PMIDURSKI	Phone Call	CC Invoice: will send remaining pages of invoice; In contact w/COVID +: To call PCP for guidance
5/3/2022	Benoit, Ruth	PMIDURSKI	In Home Visit	To pick up invoice for auto repair
5/3/2022	Collins, Donna	LROBINS	Phone Call	Spoke to Donna re: her needing to call Zeiterion for tickets to South Pacific
5/3/2022	Collins, Donna	CFOLEY	Phone Call	To register for NBAM class – Devin shared flyer
5/3/2022	Collins, Donna	PMIDURSKI	Phone Call	Re: Z tix for South Pacific: DC to call Z box office: TY ARAW
5/3/2022	Letourneau, Diane	PMIDURSKI	Phone Call	Re: Z tix for South Pacific: DL to call Z box office: TY ARAW
5/3/2022	Walker, Bonnie	PMIDURSKI	Phone Call	Re: past due amount COMCAST: HV to drop off invoice
5/3/2022	Mello, Linda	LROBINS	Phone Call	Linda stated she has already called Zeiterion for tickets to South Pacific
5/3/2022	Bachand, Frances	PMIDURSKI	Phone Call	To refer to ACOA SHINE for supplemental Ins& eval part D: Over asset for ARAW: TO CB when changes
5/3/2022	Miranda, Barbara	PMIDURSKI	Phone Call	VM left re: Z tix for South Pacific
5/4/2022	Gadomski, Marion	PMIDURSKI	Phone Call	VM left re: need for MAY invoice for HP insurance: Req made to speak w/family member

5/4/2022	Brazil, Eleanor	PMIDURSKI	Phone Call	NEW ref from FCOA re: EPERS
5/4/2022	Verissimo, Dalia	PMIDURSKI	Email	From GSSC re: POC: TC from PIADH notified of HV w/DV
5/4/2022	Souza, Ethel	PMIDURSKI	In Home Visit	Completed for annual update: "Thanks to the ARAW for all they do for me."
5/4/2022	Costa, Barbara	JCOSTA	Phone Call	To wish all a Happy Mother's Day, cousin is doing well, almost cleaned out aunt's room completely
5/4/2022	Almeida, Mildred	PMIDURSKI	Phone Call	Inquiring about Fishing Heritage Center: Encouraged MA to contact Center to share RAE family story
5/4/2022	Gassar, Vera	JCOSTA	Phone Call	From chiropractic, Daniel Schwartz retired, practice taken over by other chiropractor
5/4/2022	Mello, Eleanor	PMIDURSKI	Phone Call	To reg for Wamsutta, she will sched Dem Resp: 5/22 NBSO/will need trans: Whites w/friend: PenPal
5/4/2022	Conway, Isidora	PMIDURSKI	Phone Call	To reg for Wamsutta: NBAM art classes: Young @ Heart Lunch: "Loved NBAM field trip"
5/4/2022	Desautels, Louise	PMIDURSKI	Phone Call	WA delivery: Sched del for Fri 5/6: Grieving death of her 17yo dog Sadie: Condolences offered
5/4/2022	Somers, Linda	PMIDURSKI	Phone Call	To clarify award letter: NO charge for BA visit: MSW consult pending & LS agreeable to MSW
5/4/2022	Chytrus, Leslie	PMIDURSKI	Phone Call	To reg for Wamsutta & Whites of Westport: Will sched own trans w/Demand Response
5/5/2022	Roderiques, Bernadette	JCOSTA	Phone Call	Reg for Wamsutta & Young at Heart luncheon
5/5/2022	Ventura, Natalina	PMIDURSKI	Phone Call	White's for Westport Senior Expo and need for Vax: Enc. To call CES
5/5/2022	Somers, Linda	JCOSTA	Phone Call	No longer needs in home MSW, going to therapist once a week & COA activities, not home depressed
5/5/2022	Lamontagne, June	PMIDURSKI	Phone Call	To reg for Wamsutta Luncheon
5/5/2022	Cordeiro, Cezaltina	JCOSTA	Email	BM f/u update on situation? Still at Brandon Woods? EM to AR to f/u
5/5/2022	Desautels, Louise	PMIDURSKI	Phone Call	From Duncan: Inq. Re: payment: Invoice EM to ARAW: Mrs. D to receive her hearing aids today
5/5/2022	Desautels, Louise	JCOSTA	Phone Call	Reg for Wamsutta & Chair Yoga – question about frequency of yoga, will investigate & CB
5/5/2022	Waite, Cynthia	PMIDURSKI	Phone Call	Status of chair: CW has not heard from SWH: VMM to GSSC & SWH RN:PCP appt 5/6 for script
5/5/2022	Francis, Eileen	PMIDURSKI	Phone Call	To reg for Wamsutta Luncheon: To call NBSO for 5/14 concert and Z for 5/24 Young @ Heart Lunch
5/5/2022	Charbonneau, Leila	LROBINS	Phone Call	Asking to register in the following: Wamsutta Luncheon, art classes June 12 and July 10
5/5/2022	Almeida, Mildred	JCOSTA	Phone Call	Received OSJL gift card today
5/5/2022	Belanger, Elizabeth	PMIDURSKI	Phone Call	To reg for Wamsutta Luncheon and Sangha Chair Yoga
5/5/2022	Correia, Maria Luisa	LROBINS	Phone Call	Spoke to M. Couto/dtr. HV scheduled for Friday, 05/13/2022, She'll be at visit as well
5/5/2022	Antunes, Joana	LROBINS	Phone Call	To Cindy M to schedule Annual HV for Tuesday, 5/10/2022 at 12
5/5/2022	Antunes, Joana	PMIDURSKI	Phone Call	From CES CM SS: Numerous attempts to connect w/JA via Creole interpreter: CES ref w/drawn
5/5/2022	Antunes, Joana	LROBINS	Phone Call	To CM re: A/V needed. Cindy stated to call her back with time and date of visit to relay to JA
5/5/2022	Ortiz, Maria	PMIDURSKI	Phone Call	To inquire NBSO: MO to call NBSO re Tix for 5/14
5/5/2022	Quirini, Sandy	JCOSTA	Phone Call	Requesting assistance w/SRTA Demand tickets, adv will rec'v CB tomorrow to set up HV, CHF to assign
5/5/2022	Pratt, Julie	PMIDURSKI	Phone Call	To reg for Wamsutta Luncheon: To call NBSO for 5/14 concert and Z for 5/27 Young @ Heart lunch
5/5/2022	Letourneau, Diane	LROBINS	Phone Call	Asking to register for Wamsutta Luncheon
5/5/2022	Ponte, Karyn	PMIDURSKI	Phone Call	To reg for NBAM art classes: W/drew req for ARAW assist/counselor: will use SWH counselor
5/5/2022	DeMendonca, Theresa	LROBINS	Phone Call	Message given to Pat this day to call Theresa D
5/5/2022	DeMendonca, Theresa	PMIDURSKI	Phone Call	To reg for Wamsutta, NBAM classes, TD to call Z for Young Lunch, To call DCOA re: trans to Whites 6/17
5/5/2022	Bishop, Sarah	PMIDURSKI	In Home Visit	For Annual Review: Extremely grateful for ARAW assistance w/moving costs
5/5/2022	Gadomski, Marion	PMIDURSKI	Phone Call	HP insurance: Consent provided by MG to call dgt Janet: Janet will f/u to get HP invoice to ARAW
5/5/2022	Gadomski, Marion	JCOSTA	Phone Call	Reg for Wamsutta, Young at Heart luncheon, Chair Yoga, Celebration of Seniors
5/5/2022	Guy, Nancy	JCOSTA	Phone Call	Reg for Wamsutta luncheon & Celebration of Seniors with Sandy Quirini
5/5/2022	Shea, Joan	LROBINS	Phone Call	VM for Ms. Shea re: approval of work for sump pump
5/6/2022	Miguel, Maria	LROBINS	Phone Call	VM with dtr Michelle Miguel this date

5/6/2022	Miguel, Maria	PMIDURSKI	Phone Call	From Dgt Michelle re: Social Day coverage: Dgt to CB Mon & PGM will set up HV for review
5/6/2022	Gadomski, Marion	JCOSTA	Phone Call	From daughter, EM Harvard Pilgrim invoice to admin
5/6/2022	DeMendonca, Theresa	PMIDURSKI	Phone Call	W/RSVP info for Senior Celebration @ White's
5/6/2022	Burke, Shauneen	LROBINS	Phone Call	To sign up: Art Class, Wamsutta, Accessible Chair Yoga, White's of Westport
5/6/2022	Burke, Shauneen	PMIDURSKI	Phone Call	VM left re: RSVP for Senior Celebration @ White's
5/6/2022	Quirini, Sandy	LROBINS	Phone Call	HV scheduled for Friday, 5/13/2022 at 12:00
5/6/2022	Edwards, Diane	LROBINS	Phone Call	Initial HV confirmed for today with PGM
5/6/2022	Brazil, Eleanor	PMIDURSKI	Phone Call	To sched HV: appt sched for 5/9 @ 2pm
5/6/2022	Desautels, Louise	LROBINS	Phone Call	From Louise stating she needs to cancel Wamsutta, Having hearing aid checkup
5/6/2022	Chytrus, Leslie	PMIDURSKI	Phone Call	W/RSVP info for Senior Celebration @ White's
5/9/2022	Perry, Susan	PMIDURSKI	Phone Call	To report she "will receive the keys to her new apartment on 5/13. Will sched Tavares movers. TY ARAW"
5/9/2022	Costa, Barbara	PMIDURSKI	Phone Call	BB vouchers: Used one for store and returned home w/friend
5/9/2022	Antunes, Joana	LROBINS	Phone Call	From Cindy, Requested Annual HV to be done at 1:00 instead of 12:00
5/9/2022	Thibault, Cecile	PMIDURSKI	Phone Call	Spectrum TV/Internet services: CHF spoke w/CT
5/9/2022	Belanger, Elizabeth	PMIDURSKI	Phone Call	To w/draw from Yoga Class: "I am doing 2 other classes already." Will need trans for Wamsutta if chosen
5/9/2022	Moore, Carolyn	PMIDURSKI	Phone Call	To sign up for NBAM art classes: Surgery BMC 6/28: Numerous health issues
5/9/2022	DaRosa, Priscilla	LROBINS	Phone Call	To Priscilla this am to confirm HV for this morning
5/9/2022	DaRosa, Priscilla	PMIDURSKI	Phone Call	To reg for Wamsutta Lunch
5/9/2022	Cole, Carol	PMIDURSKI	Phone Call	To reg for Wamsutta Lunch: NBAM art program: Celebration of Seniors: Nd Trans
5/9/2022	Chor, Patricia	PMIDURSKI	Phone Call	VM left re: rescheduling Annual Update/Home visit
5/9/2022	Somers, Linda	PMIDURSKI	Phone Call	Top request resumption of request for MSW visit: "My cardiologist recommends I see someone."
5/9/2022	Brazil, Eleanor	PMIDURSKI	In Home Visit	For new request: Over asset
5/9/2022	Morin, Jacqueline	PMIDURSKI	Phone Call	Standard Times: Has not received newspaper for many months! ARAW will pay bill
5/9/2022	Pratt, Julie	PMIDURSKI	Phone Call	To get info re: Mailing card to SOM
5/9/2022	Bishop, Sarah	PMIDURSKI	Phone Call	SCOs: SB interested in learning more: "TY. I don't feel so alone." EMM to SCO dept @ CES for >info
5/9/2022	Grace, Barbara	PMIDURSKI	Phone Call	VM left re: scheduling Annual update/Home visit
5/9/2022	Miguel, Maria	PMIDURSKI	Phone Call	W/SWH GSSC: EM to NBCOA Deb Lee: TC to PCA manager @ CES
5/9/2022	Horne, Donna	PMIDURSKI	Phone Call	To register for Wamsutta Luncheon Lottery
5/10/2022	Gadomski, Marion	PMIDURSKI	Phone Call	Yoga drop in: Info re: RSVP to RCOA 4 Celebration of Seniors 6/17
5/10/2022	Miguel, Maria	PMIDURSKI	Phone Call	From dgt: HV sched for update 5/20 @ 8am: To meet MM, dgt and private caregiver
5/10/2022	Ramos, Anna	PMIDURSKI	In Home Visit	For Annual Update: Req cont assist w/briefs: "I love my chair and the briefs are THE Best. TY"
5/10/2022	Burke, Shauneen	PMIDURSKI	Phone Call	Request for TUFTs reimbursement: Need pd Tufts invoice: SB to call Tufts billing & RCOA re: 6/17 RSVP
5/10/2022	Rose, Patricia	PMIDURSKI	Phone Call	"THANK Board of purchase of hearing aids: I heard my dog's nails on the tile & I can turn down my TV."
5/10/2022	Mello, Linda	JCOSTA	Phone Call	Ms. Mello will not need trans. for Zeiterion on 05/22/2022
5/10/2022	Vieira, Nancy	LROBINS	Phone Call	VM to inquire if trans. needed to Zeiterion 5/22/2022
5/10/2022	Michel, Loretta	PMIDURSKI	Phone Call	NEW referral w/request for COMCAST assistance: Resident @ Sacred Heart NH
5/10/2022	Edwards, Diane	LROBINS	Phone Call	To Ana Tinoco/GSSC/CES, to introduce myself and gather info. Diane is very new to her. No visit yet.
5/10/2022	Desautels, Louise	PMIDURSKI	Phone Call	Yoga drop in: Rcvd WA supplies: "1st time I heard my great grandkids w/HA. Best Mothers Day gift. TY"
5/10/2022	Correia, Patricia	LROBINS	Phone Call	VM to inquire if trans. needed to Zeiterion 5/22/2022
5/10/2022	Bonneau, Maria	LROBINS	Phone Call	Ms. Bonneau will require trans. for Zeiterion 05/22/2022

5/10/2022	Chytrus, Leslie	PMIDURSKI	In Home Visit	Completed for Annual Update: Denies needs: Req cont w/FLO: "THANKS ARAW for all you do!"
5/10/2022	Mello, Eleanor	PMIDURSKI	Phone Call	RSVP to RCOA 4 Celebration of Seniors 6/17: EM to call DCOA re: trans to Whites
5/10/2022	Souza, Ethel	PMIDURSKI	Phone Call	Request for assist with oral surgery: Will obtain estimate and forward to ARAW
5/10/2022	Shea, Joan	LROBINS	Phone Call	Ms. Shea called re: land line not working to use her cell phone. She recvd. message to call Rock Plumbing.
5/10/2022	Shea, Joan	LROBINS	Phone Call	To Ms. Shea to remind her to call Rock Plumbing and that there was a deadline of quote, May 20,2022
5/11/2022	Moore, Carolyn	JCOSTA	Phone Call	To reg for Celebration of Seniors, question about vaccination, given number to RSVP
5/11/2022	Parker, Delia	PMIDURSKI	Phone Call	From Dart ENT: Req to speak w/MSW Sandy: EMM to Sandy Cambra as DP inactive w/ARAW
5/11/2022	Benoit, Ruth	PMIDURSKI	Phone Call	To report date of move is June 6th: To be notified of result of Board meeting 5/12
5/11/2022	Spearin, Gail	PMIDURSKI	Phone Call	VM re: late payment notice from COMCAST: Bill paid 5/3: EM to GS to contact COMCAST to confirm receipt
5/11/2022	Grace, Barbara	PMIDURSKI	Phone Call	To report Oxygen therapy begun: Increased anxiety: Annual update to be postponed until June
5/11/2022	Carneiro, Maria	PMIDURSKI	Phone Call	VM left for dgt Sylvie requesting call back for update re: MC living situation
5/12/2022	Bramwell, Nancy	PMIDURSKI	In Home Visit	For NEW request
5/12/2022	Adesso, Dolores	PMIDURSKI	Phone Call	From CR MSW: DA ?d/c home in 2 wks: Declined MSW visit @ BW d/t COVID in SNF:BM RS to be notified
5/12/2022	Benoit, Ruth	PMIDURSKI	Phone Call	To notify of Award: "I cannot THANK the ARAW enough. I am beyond thrilled and I am in tears!"
5/12/2022	Silveira, Marie Lorraine	JCOSTA	Phone Call	To reg for NBAM classes
5/13/2022	Burke, Shauneen	LROBINS	Phone Call	Stating Tufts check was mailed to ARAW on 5/10/2022 per TUFTS
5/13/2022	Benoit, Ruth	LROBINS	Phone Call	Stating:" I'm going to give Pat a big hug when she visits my new apartment."
5/13/2022	Bramwell, Nancy	JCOSTA	Phone Call	Requesting ACOA phone number – given to her
5/13/2022	Adesso, Dolores	JCOSTA	Email	PM's update to Rosemary, will keep updated
5/16/2022	Waite, Cynthia	JCOSTA	Phone Call	CW received call from Enos – no longer working w/SWH, PM to f/u with next steps
5/16/2022	Somers, Linda	CFOLEY	Phone Call	F/u on MSW referral, EM sent to Sandra Cambra last week
5/16/2022		LROBINS	Phone Call	From Mary Ann/Fhvn housing re: Jeannette Milner Medicare, adv no longer ARAW beneficiary
5/16/2022		LROBINS	Phone Call	From Cindy Kinnane from WCOA for CHF
5/16/2022	DaRosa, Priscilla	LROBINS	Phone Call	To visit 05/17/2022 for ARAW IN- Person Visit Checklist to be signed. To call 05/17/2022 before visit
5/16/2022	Polek, Regina	JCOSTA	Phone Call	Called for South Pacific tickets & got them, looking forward to the show, Thank you!
5/16/2022	Boudreau, Jeanne	CFOLEY	Phone Call	BM f/u – had fall, now @Brandon Woods, does not like it there, adv to call doctor or CESI
5/16/2022	Antunes, Joana	JCOSTA	Phone Call	From Cindy Marcial looking for LR, EM sent to f/u
5/16/2022	Morin, Jacqueline	JCOSTA	Phone Call	Not receiving Standard Times yet, adv 1-2 week turn around usually
5/16/2022	Tripp, Teresa	CFOLEY	Phone Call	Re: award letter & SCCLS
5/16/2022	Lawrence, Gail	JCOSTA	Phone Call	Thank you to ARAW for paying BCBS! Adv to change billing address to ARAW, EM to PM
5/17/2022	Burke, Shauneen	PMIDURSKI	In Home Visit	To pick up billing statement from TUFTS dental
5/17/2022	Almas, Irene	PMIDURSKI	Email	To niece re: approval and need for updated invoice: VM box full
5/17/2022	Burke, Shauneen	PMIDURSKI	Phone Call	Re: TUFTs return of funds: Numerous concerns: Offered MSW: PGM to p/u pd invoice for dental wk
5/17/2022	Benoit, Ruth	PMIDURSKI	Phone Call	From Coles car repair: JC spoke w/Coles: RB THANKS TO ARAW: Tavares notified of approval
5/17/2022	Kirklewski, Beatrice	PMIDURSKI	Phone Call	To FCOA OW CD: BK has trans to SCENT on June 16 for hearing aid eval/estimate
5/17/2022	O'Brien, Joan	CFOLEY	Phone Call	Explained bd decision/reasoning, intention of FLO; would consider future fin support request if needed
5/17/2022	O'Brien, Joan	PMIDURSKI	Phone Call	VM left re: Board decision
5/17/2022	McNamara, Theresa	JCOSTA	Phone Call	To reg for NBAM class
5/17/2022	Morin, Jacqueline	PMIDURSKI	Phone Call	VM left re: Standard Times: Check mailed 5/10: Req JM to CB ARAW 5/27
5/17/2022	Medeiros, Cathleen	PMIDURSKI	Phone Call	From MSW re: NEW referral: To CHF as Westport resident

5/17/2022	Ortiz, Maria	JCOSTA	Phone Call	Asking how many tickets she can get to a show, adv 2 per person if chosen
5/17/2022	Souza, Ethel	PMIDURSKI	Phone Call	Oral surgeon consultation sched for May 2022 not July 2022: Will get estimate
5/17/2022	DaRosa, Priscilla	LROBINS	Phone Call	To verify some info and ARAW CHECK-LIST mailed to Ms. DaRosa. She is aware to sign & return.
5/17/2022		PMIDURSKI	Email	Sarah Isabel SCVNA MSW: EMM sent w/ARAW brochure and referral
5/17/2022	DeSouza, Joanne	JCOSTA	Phone Call	From Dana at WA, increase in price of incontinence products, \$ will be more but same quantity so OK
5/17/2022	Mendes, Darlene	LROBINS	Phone Call	Spoke to Ms. Mendes to acquire information
5/17/2022	Waite, Cynthia	LROBINS	Phone Call	Message given to PGM to return Ms. Waite's call
5/17/2022	Waite, Cynthia	PMIDURSKI	Phone Call	Re: chair: Enos no longer DME provider: EMM & VMM left for SWH CM
5/17/2022	Rocha, Margaret	CFOLEY	Email	To AR re: tech visit charge on Comcast bill, monthly report stated no charge, AR to f/u
5/18/2022	Okpara, Priscilia	PMIDURSKI	Phone Call	To son Felix re: Charlie Card check: "Void March check and issue new check please"
5/18/2022	Openshaw, Pauline	PMIDURSKI	Phone Call	For FLO update: "Very happy @ WCALF. Referred to ex-spouse for financial update: His wife is rep payee
5/18/2022	Chytrus, Leslie	PMIDURSKI	Phone Call	Wamsutta Luncheon: LC to sched Dem Resp: Req gift of fax machine: to get estimate
5/18/2022	Alves, Janice	PMIDURSKI	Phone Call	For FLO update: Referred to SCCLS Raquel due to her concerns at housing
5/18/2022	Jennings, Kathleen	PMIDURSKI	Phone Call	New landlord phone #: KJ reports CT scan "Shows no CA!!" KJ extremely happy and "TY to ARAW"
5/18/2022	Waite, Cynthia	PMIDURSKI	Phone Call	From Diane @ ENOS: Diane to check re: ENOS & SWH contract re: chair coverage
5/18/2022	Conway, Isidora	PMIDURSKI	Phone Call	VM left re: Wamsutta Luncheon
5/18/2022	Lamontagne, June	PMIDURSKI	Phone Call	Wamsutta Luncheon: "YAY: I need a day for myself! Thank you ARAW."
5/18/2022	Charbonneau, Leila	PMIDURSKI	Phone Call	Wamsutta Luncheon: Will not need trans: TY ARAW
5/18/2022	Monteith, Judith	JCOSTA	Phone Call	TY for plant, needs to find a new place to live, doesn't know where to start, PM to connect
5/18/2022	Monteith, Judith	PMIDURSKI	Phone Call	Housing: No immediate need but planning: To complete CHAMP app and call Manomet Place
5/18/2022	Simard, Agnes	PMIDURSKI	Phone Call	To report no need for Inj as taking oral med: Missed BM delivery yesterday: TY to ARAW
5/18/2022	Francis, Eileen	PMIDURSKI	Phone Call	Wamsutta Luncheon: Will drive and bring JP" "Thanks ARAW"
5/18/2022	Mello, Eleanor	PMIDURSKI	Phone Call	Wamsutta Luncheon: EM to sched Dem Response: TY This made my day!"
5/18/2022	Belanger, Elizabeth	PMIDURSKI	Phone Call	Wamsutta Luncheon: Will need BB Taxi: "Thanks so much."
5/18/2022	Pratt, Julie	PMIDURSKI	Phone Call	Wamsutta Luncheon: has transportation: will ride with EF
5/18/2022	Tripp, Teresa	CFOLEY	Phone Call	From Teresa, given direct line to Raquel @SCCLS
5/18/2022	Tripp, Teresa	JCOSTA	Phone Call	From AR, adv TT connecting w/SCCLS, send car payment invoice to office
5/18/2022	Comeau, June	JCOSTA	Phone Call	From friend, delivery from CFC, concerned cost involved, PM to f/u
5/18/2022	Walker, Bonnie	PMIDURSKI	Phone Call	To THANK ARAW for paying comcast : "I watch TV when I cannot sleep and so I appreciate the ARAW."
5/18/2022	Letourneau, Diane	PMIDURSKI	Phone Call	For FLO update: No changes: "Enjoys newsletter and activities. TY ARAW!"
5/18/2022	Machado, Delfina	PMIDURSKI	Phone Call	VM left re: FLO update
5/19/2022	Guy, Nancy	PMIDURSKI	Phone Call	Wamsutta Luncheon: She will not attend due to work in apartment: "TY though."
5/19/2022	DeMendonca, Theresa	PMIDURSKI	Phone Call	Wamsutta Luncheon: Will need BB taxi: "I am so happy to be attending with the music."
5/19/2022	Furness, Betty	PMIDURSKI	Phone Call	Z show South Pacific: Friend has COVID: BF will attend alone: Notifying Z re: ticket pick up
5/19/2022	Carvalho, Patricia	PMIDURSKI	Phone Call	From CESI Alicia: Vendor unable to enter apt: NO answer/locked door: Check phone #: CES to call NBCOA
5/19/2022	Gadomski, Marion	PMIDURSKI	Phone Call	VM left re: Wamsutta Luncheon
5/19/2022	Booth, Sharon	CFOLEY	Email	To AL re: health insurance and car insurance bills
5/19/2022	Benoit, Ruth	PMIDURSKI	Phone Call	To report Tavares Movers will move her 6/8 as they are booked 6/6
5/19/2022	Tripp, Teresa	JCOSTA	Phone Call	To TT, adv received car payment remit slips
5/19/2022	Edwards, Diane	LROBINS	Phone Call	To beneficiary to clarify some information

5/19/2022	Dillon, Sherry	JCOSTA	Phone Call	From SD received paperwork from doc, PM to set up HV
5/19/2022	Quirini, Sandy	PMIDURSKI	Phone Call	Wamsutta Luncheon: She will call Dem Resp: "TY ARAW"
5/19/2022	DaRosa, Priscilla	PMIDURSKI	Phone Call	Wamsutta Luncheon: "This is wonderful news. My dgt will provide my transportation. TY"
5/19/2022		JCOSTA	Phone Call	From CK @WCOA, questions related to several requests being submitted
5/19/2022	Waite, Cynthia	PMIDURSKI	Phone Call	DME vendor: EMM to CESI SCO Director
5/19/2022	Conway, Isidora	PMIDURSKI	Phone Call	Wamsutta Luncheon: "I am so happy. TY ARAW."
5/19/2022	Cole, Carol	PMIDURSKI	Phone Call	Wamsutta Luncheon: Will need BB taxi: "I am thrilled to be attending especially w/music."
5/19/2022	Jennings, Kathleen	PMIDURSKI	Phone Call	To landlord Herbeth Aguilar who will send his contact info
5/19/2022	Chor, Patricia	PMIDURSKI	Phone Call	To resched Annual HV due to family member emergency: Resched to Mon 5/23 @ 3pm
5/19/2022	Roderiques, Bernadette	PMIDURSKI	Phone Call	VM left re: Wamsutta Luncheon
5/19/2022	Chytrus, Leslie	PMIDURSKI	Phone Call	Fax machine estimate
5/19/2022	Chytrus, Leslie	JCOSTA	Phone Call	From LC, PM not received fax estimate, PM to p/u tomorrow instead – came thru, found on website
5/20/2022	Bonneau, Maria	PMIDURSKI	Phone Call	VM left re: trans to Z on Sunday
5/20/2022	Mendes, Darlene	LROBINS	Phone Call	L/M for Ms. Mendes re: question for finances
5/20/2022	Tuite, Janice	PMIDURSKI	In Home Visit	Completed for Annual Update: Increased medical issues: Undergoing testing and RX: TY to ARAW for all."
5/20/2022	Sousa, Rae	PMIDURSKI	Phone Call	Trans to Z on Sunday: Prefers not to use BB taxi: "I don't like anyone unfamiliar helping me."
5/20/2022	Edwards, Diane	LROBINS	Phone Call	To state that an emergency contact is needed. To call Monday with her decision.
5/20/2022	Comeau, June	PMIDURSKI	Phone Call	From cousin (HCP) req HV to discuss request for clothes dryer. Appt sched for 5/26 @ 10am
5/20/2022	Freitas, Sandra	PMIDURSKI	Phone Call	To sched HV to complete application: Appt sched for Tues 5/24 @ 1pm
5/20/2022	McNamara, Theresa	PMIDURSKI	Phone Call	BB trans to Z on Sunday: Aware of pick up time
5/20/2022	Kelly, Louise	PMIDURSKI	Phone Call	NEW ref from Grace Episc. Church NB: Intake completed: Will CB Tues after discussion w/CHF
5/20/2022	Miguel, Maria	PMIDURSKI	In Home Visit	Completed to update application: Dgt, PCA, MIL w/her 2 PCAs & 2 children present
5/23/2022	Lammers, Edith	PMIDURSKI	Phone Call	NEW ref: Learned of ARAW via neighbor (an ARAW bene) HV sched for 6/15
5/23/2022	Carreiro, Andriana	PMIDURSKI	Phone Call	NEW Ref from IAC: Lived in Fall River x 17yr: Homeless: Req assist: CHAMPS app being completed
5/23/2022	Quirini, Sandy	LROBINS	Phone Call	VM left for SQ re: AC, CB from SQ: size?, EM sent to Stan & Paul's to inquire
5/23/2022	Waite, Cynthia	PMIDURSKI	Phone Call	To ENOS: Diane submitting docs to SWH & PCP: CW to go to ENOS to select chair: Await estimate
5/23/2022	Bonneau, Maria	PMIDURSKI	Phone Call	VM left Sunday 5/22: "Too sick to attend South Pacific. Thank you."
5/24/2022	Almeida, Mildred	LROBINS	Phone Call	Needs to speak to PM, LM with PM to call her
5/24/2022	Almeida, Mildred	PMIDURSKI	Phone Call	VM left for MA
5/24/2022	Almeida, Mildred	PMIDURSKI	Phone Call	To share numerous concerns re: FLO luncheon at Wamsutta club: Discussed with ED
5/24/2022	Silva, Mary Theresa	LROBINS	Phone Call	In hospital 05/17/2022, no heart concerns, released the next day, PM aware
5/24/2022	Chytrus, Leslie	LROBINS	Phone Call	To cancel for Wamsutta luncheon: very bad cold
5/24/2022	Somers, Linda	PMIDURSKI	Phone Call	Req call from Sandra MSW: EMM sent to MSW req call to LS
5/24/2022	Pine, Hilda	LROBINS	Phone Call	To Ms. Pine re: Medical Bill invoice, LM to CB
5/24/2022	Conway, Isidora	PMIDURSKI	Phone Call	To report car vandalism: May need trans to Wamsutta on Thurs: cancel Z for Fri due to funeral
5/24/2022	Waite, Cynthia	PMIDURSKI	Email	From Enos DME: invoice info to be sent Wed
5/24/2022	Almas, Irene	PMIDURSKI	Phone Call	From niece Victoria: IA passed from major stroke: "Thanks to ARAW for all you do."
5/24/2022	Ponte, Karyn	PMIDURSKI	Phone Call	To req info r/t ARAW payments for auto Ins & COMCAST: Info sent to KP: ACCS info provided
5/24/2022	Ponte, Karyn	LROBINS	Phone Call	From KP asking to speak to PM re: an important question, PM made aware
5/24/2022	Gadomski, Marion	PMIDURSKI	Phone Call	To report recent hosp stay w/SZ. TO CB re: Wamsutta Luncheon on Thurs: No longer driving

5/24/2022	Freitas, Sandra	PMIDURSKI	In Home Visit	TC w/CES CM re: POC: Hmk/groc cancelled by SF: Awaiting CB from POA w/financial info
5/24/2022	Carreiro, Andriana	PMIDURSKI	Phone Call	To IAC Lucy to relay ED discussion re: 17 year resident of Fall River excludes from ARAW criteria
5/24/2022	Kelly, Louise	PMIDURSKI	Phone Call	VM left after discussion w/ED: OI OA: Referral info for SCCLS provided
5/24/2022	Vieira, Rose Marie	LROBINS	Phone Call	Expressing a "wonderful time at SOUTH PACIFIC at Zeiterion." She thanked ARAW for "a good time."
5/25/2022	Morin, Jacqueline	PMIDURSKI	Phone Call	Report w/o Standard Times: Sched for >dental extractions 6/2: Heart surgery pending
5/25/2022	Adesso, Dolores	PMIDURSKI	Phone Call	From Chris Rider MSW: DA remains at BW: Declining MSW visit: MSW to CB in 2 weeks
5/25/2022	Freitas, Sandra	CFOLEY	Phone Call	From Ken – all missing info ready for application; on table at house
5/25/2022	Comeau, June	PMIDURSKI	Phone Call	From cousin asking to resched HV due to illness: Resched to Fri 6/27
5/25/2022	Edwards, Diane	PMIDURSKI	Phone Call	To inform of new land line #: Req CB from LR: EM to LR for follow up upon return
5/25/2022	Hennessy, Cheryl	PMIDURSKI	Phone Call	VM left re: sched annual home visit for update
5/25/2022	Hennessy, Cheryl	JCOSTA	Phone Call	Returning call from PM, will CB tomorrow, EM to PM
5/25/2022	Grace, Barbara	PMIDURSKI	Phone Call	To sched annual HV 6/15 @ 1:30pm: Feeling better however has new health issues
5/25/2022	Ponte, Karyn	PMIDURSKI	Email	Sent with req info re: ARAW financial assistance: KP declined ref to ACCS: working with BOA
5/25/2022	Smith, Debra	CFOLEY	Phone Call	Concerned about ATT bill, phone shut off, extra \$, not mailed – to stop by office; f/u call: bill rec'ed in mail
5/25/2022	Lajoie, Elizabeth	PMIDURSKI	Email	From dgt re: Verizon invoice: confirmed invoice was rcvd at ARAW & paid
5/25/2022	Conway, Isidora	PMIDURSKI	Phone Call	To report Ins co has totaled car d/t theft of catalytic converter: BB taxi sched for Wamsutta Luncheon
5/25/2022	Whitehead, Marguerite	CFOLEY	Phone Call	With Ann R DCOA re: 3rd party credit card reimbursement & transactions
5/25/2022	Okpara, Priscilia	PMIDURSKI	Phone Call	From RSC to sign up PO for NBAM art classes beg /12: will need trans
5/25/2022	Okpara, Priscilia	JCOSTA	Phone Call	Checks for SRTA, adv March one is void, May one to be brought to SRTA office
5/25/2022	Blais, Linda	PMIDURSKI	Phone Call	Attempt to reach LB to sched annual HV: Voice mail box full
5/25/2022	Fredette, Lucille	PMIDURSKI	Phone Call	To sched annual update: HV sched for 5/26 @ 10am 5/25/2022
5/25/2022	Auger, Susanne	PMIDURSKI	Phone Call	VM left re: sched annual home visit for update
5/25/2022	Begnoche, Cecile	PMIDURSKI	Phone Call	VM left re: Sched annual home visit for update
5/25/2022		CFOLEY	Phone Call	With AR DCOA re: potential been looking for clothes – not eligible @ 62
5/25/2022		CFOLEY	Phone Call	From AR @DCAO notifying us of her resignation from DCOA effective 6/9/22
5/26/2022	Moore, Carolyn	CFOLEY	Phone Call	Liz @ CES seeking move of hospital bed to CM – Queried: Safety? Cost? Acceptance? Space? Set up?
5/26/2022	Moore, Carolyn	PMIDURSKI	Phone Call	From Liz ENP @ CES: CM bought lift chair: Awaiting delivery: Cont w/pain in arm: Thyroid OR 6/28
5/26/2022	Fredette, Lucille	PMIDURSKI	In Home Visit	For Annual update & review: "Thanks to ARAW I have peace of mind re: my health insurance
5/26/2022	Pine, Hilda	LROBINS	Phone Call	Ms. Pine stated "I don't have any medical bills." This writer to F/U on this
5/26/2022	Mendes, Darlene	LROBINS	Phone Call	LM re: needing some information
5/26/2022	Mendes, Darlene	LROBINS	Phone Call	LM for Darlene re: needing info. for request
5/26/2022	Conway, Isidora	PMIDURSKI	Phone Call	Re: med copay: Has met deductible: Cost decreasing: Hardship form completed w/J&J:Car issue
5/26/2022	Hennessy, Cheryl	JCOSTA	Phone Call	Looking for PM, will CB tomorrow
5/26/2022	DeMendonca, Theresa	CFOLEY	Phone Call	TY for Wamsutta lunch & music - made friends! Concerns re: transportation; called BB re: Z lunch
5/26/2022	Quirini, Sandy	PMIDURSKI	Phone Call	Ms. Quirini aware of A/C from Stan & Paul's. She will look online. She feels 35" won't fit window.
5/26/2022	Edwards, Diane	LROBINS	Phone Call	LM for Ms. Edwards re: needing info. for request
5/26/2022	Edwards, Diane	LROBINS	Phone Call	From DE - explained she has a landline now, new phone number updated
5/26/2022	Edwards, Diane	LROBINS	Phone Call	LM for Ms. Edwards re: needing copy of May 2022 COMCAST bill
5/26/2022	Comeau, June	CFOLEY	Phone Call	Cousin returned Pat's call re: reschedule; will call back in am; encouraged waiting until support in place
5/26/2022	Benoit, Sandra	CFOLEY	Phone Call	From Pat Foster re: referral – over income and over asset

5/26/2022	Benoit, Sandra	CFOLEY	Phone Call	PF didn't communicate ineligibility; explained & welcomed back if/when circumstances change
5/27/2022	Freitas, Sandra	PMIDURSKI	In Home Visit	To gather financial info from friend Ken: VMM leftw/Ken re: balance, OI OA, PACE, Cir Breake
5/27/2022	Comeau, June	PMIDURSKI	Phone Call	HV resched to 6/14: SCCLS intake # provided: CES involved
5/27/2022	Quirini, Sandy	LROBINS	Phone Call	Re: Wamsutta luncheon, SQ had "a great time at Wamsutta Club and it was very nice."
5/27/2022	Chaput, Vanessa	LROBINS	Phone Call	To reg for art classes at NBAM: Req re: assist w/ move costs: HV sched for update w/PG
5/27/2022	Hennessy, Cheryl	PMIDURSKI	Phone Call	To sched annual update: 6/23 @ 2:30pm
5/27/2022	Almeida, Lorene	LROBINS	Phone Call	HV scheduled for annual review Friday 6/3
5/27/2022	Mendes, Darlene	LROBINS	Phone Call	To DM for f/u on needed info for application
5/27/2022	Mendes, Darlene	LROBINS	Phone Call	To gather some info. Line was busy. To continue calling throughout the day.
5/27/2022	Pine, Hilda	LROBINS	Phone Call	To Caroline Wayland/GSCC/CES for HP, awaiting TC from Fallon nurse re: coverage of Glucerna
5/27/2022	Pine, Hilda	LROBINS	Phone Call	To suggest calling HMA for another bill to be sent from 01/05/2022, then send ARAW the bill
5/27/2022	Okpara, Priscilia	CFOLEY	Phone Call	From OT RSC; PO dropped @OT for Z lunch; RSC helped to get her to right spot; Z called to open doors
5/27/2022	Sampson, Janet	PMIDURSKI	Phone Call	To sched annual; update: 6/20/@ 1pm
5/27/2022	DaRosa, Priscilla	LROBINS	Phone Call	Re: how Wamsutta was. She stated "it was very, very nice." Had a "lovely time."
5/27/2022	Thibault, Cecile	PMIDURSKI	Phone Call	From dgt Valerie Martin re: changing Spectrum billing to ARAW: EM to AL @ WCOA w/req for f/u
5/27/2022	Mello, Eleanor	LROBINS	Phone Call	RE: Wamsutta luncheon, EM was "very happy and everything at Wamsutta was beautiful!"
5/31/2022	Sousa, Isabel	PMIDURSKI	Phone Call	To sign up for NBAM: will ride with friend to event
5/31/2022	Barbosa, Atanazia	LROBINS	Phone Call	To AB to schedule Annual HV, no answer, no VM, To f/u with a TC later in day
5/31/2022	Hotte, Eileen	PMIDURSKI	Phone Call	Req info re: BCBS payments made by ARAW be sent to her for recert of apartment: JC notified
5/31/2022	Hoglund, Deborah	PMIDURSKI	Phone Call	FLO ROE: MVA: Home w/ VNA (PT, OT, SN): May need assist w/trans in future: BM AN to be notified by JC
5/31/2022	Duarte, Patricia	PMIDURSKI	Phone Call	To inq about assist w/property tax: Lives w/son to help pay his mortgage: Income > \$5000/month
5/31/2022	Almeida, Laura	PMIDURSKI	Phone Call	FLO ROE: Needs trans d/t friend w/COVID: Info provided re: CNN: "TY ARAW for all you do!"
5/31/2022	Machado, Delfina	PMIDURSKI	Phone Call	VM left for third time, note mailed in attempt to reach DM
5/31/2022	DeMedeiros, Irene	PMIDURSKI	Phone Call	VM left re: ref from NBPD: assist w/moving expenses? ARAW info provided w/CB requested



May 2022: Beneficiary Advocate

Patricia Midurski

REFERRALS: Ten referrals were assigned this month. Three were over asset/over income. One had resided in Fall River for the past 17 years. Three will be visited in June. One is awaiting supporting documents (estimate of hearing aids) Two new referrals are being presented at the June 9th Board meeting.

Referrals were received from: Grace Episcopal Church (1): Coastal Neighbors Network (1): ARAW beneficiary (1): Boa Vista RSC (1): ACOA (1): FCOA (1): IAC (1): NBPD (1): Project Independence ADH (1): MSW (1)

Requests include: Assistance with moving costs, nursing service for medication prefill, medical bills, PERS unit, housing, car payment/health insurance, hearing aids, FLO

UPDATES & REQUESTS:

Nine beneficiary updates were processed and completed this month. Requests include assistance with COMCAST bill, taxi vouchers, SRTA Demand Response tickets, fax machine, Social Day program with transportation, MSW visit, personal hygiene products, OTC products, health insurance

FLO: Three updates were completed: One individual was left several VMM and a card was mailed.

Overdue: Veronica Croffut and Bernice Duarte remain at The Royal. Ms. Duarte's chair has not been purchased due to hospitalization and rehab stay. Patricia Carvalho and Barbara Grace have been ill and annual updates have been pushed to June.

INACTIVE STATUS: One (per her request via Spanish speaking CES case manager)

Referrals made to: SCCLS, SHINE, ACOA, CESI

Gratitude: Mrs. Louise Desautels received a onetime gift of hearing aids in April. She called the office the day after Mother's Day to thank the ARAW. *"I heard my great grandchildren for the very first time. That was THE Best Mother's Day gift. All thanks to the ARAW. THANK YOU ALL!"*

Education: Via ZOOM I attended two educational programs this month. The first presented by MA Law Reform Institute focused on Elder Benefits Programs including MassHealth, FEW, Medicare Savings Program, SCOs, SSA benefits for elders, PACE, SNAP and Senior Circuit Breaker Credit. The second ZOOM presentation also hosted by MLRI provided up to date information on the Affordable Connectivity Program. Both programs included handouts and slides which are available for review by ARAW staff.

UPDATES & REQUESTS:

6 Annual Home Visits, updates, were done this month. Requests included continued assistance with COMCAST, assistance with an air conditioner, SRTA DEMAND passes. Two requests are pending supporting documents.

GRATITUDE:

Maria Louisa Correia was thrilled," someone speaks my language, Portuguese." Sandra Quirini stated," thank you for your help!" Darlene Mendes was "so happy with help from ARAW."

Priscilla DaRosa was so happy that "ARAW ladies are going to continue helping me. Wamsutta Club was fantastic and I loved the music." Diane Edwards," thank you for all you folks do."

Again, the beneficiaries have all extended their joy and gratitude for any help from ARAW.

To ARAW Board Members:

On a personal note, thus far, I would like to express my gratitude for the nurturing environment, knowledge of the fantastic work done by ARAW, and the growth I have felt by the direction of my training. The job has enriched the ability and passion to be the advocate and voice for those in need. I continue to look forward to the future of being a part of ARAW and the future of ARAW itself.

From: [N Kurtz](#)
To: [Clare Foley](#)
Subject: Re: thank you
Date: Saturday, May 14, 2022 3:58:04 PM

Hi Clare,

Thank you for your extensive response to my questions. Your summary is **most** interesting and represents an impressive amount of leadership, direction, dedication and work on your part and the Board's. Wow! Not sure I could keep up with it anymore! Rachael Howland would be proud! Serving on the board is a real growth experience both working together with other board members following our mission and plus (or especially) learning about the hardship so many women endure. Both knowing and helping the ladies is so rewarding -- "not alms alone, but a friend". Thank you for taking the time and effort to respond. Thank you also for the email addresses.

Would it be OK with you if I shared your email with Zelinda Douhan? Zelinda brought me onto the board and was a valuable mentor for me for several years.

Many thanks again.

Best wishes,

Nancy

On 5/9/2022 12:07 PM, Clare Foley wrote:

Nancy!

You ended up in my "junk/spam" folder - please don't take it personally! Thank you for your questions and for reading the packet. I will do my best to answer, but if you ever want to talk through any of this, please let me know.

Regarding the grants for outreach and drivers... when I came on board we started to look very carefully at how we were investing our grant funds and what/how our beneficiaries were benefiting. With a renewed focus on communication, accountability, support and consistency, we undertook a thorough analysis of current programs, community partners, outreach methods, processes and reporting. We started by cleaning up the current database and physical files, establishing new internal operational processes, creating new documents (application, request summary, consent forms, monthly reporting, grant agreements, etc.), generating relevant data to accurately track our impact, increasing communication to our community partners through quarterly meetings and monthly newsletters and tightening up the request process so that more requests could be considered each month.

Through this process we were able to evaluate the true rate of *mission-based* return of

our investment in community partners which led to overhauling our grant offerings, suspending the community partners' discretionary funds, establishing in-house bookkeeping and recentralizing operations through the ARAW office. We endeavored to refocus our outreach grantees on the work of ARAW instead of the ever-expanding work of the COA. This meant looking at funding the *work* done rather than the positions – the latter being a complicated slippery slope. We clearly defined ARAW specific work in the grant agreements as screening of applicants, conducting due diligence of request submissions, facilitating fulfillment of ARAW support when awarded and ensuring continued connection to ARAW through thoughtful stewardship. Through dedicated quarterly meetings and monthly communications, we reinforced expectations, provided insight, offered support, insured transparency and aspired to *inspire* a team approach as we introduced this refocused approach.

We provided extensive and ongoing support to under-performing and non-compliant community partners – those who were simply relying on ARAW funding as a guaranteed budget line item and then spending “as needed”. Individualized performance improvement plans were developed to get some of these community partners back on track. Unfortunately in the end, and with mutual agreement, we parted ways with some of our outreach grantees – New Bedford Council on Aging, Immigrants' Assistance Center, Greater New Bedford Health Center – who were not willing or able to fulfill the terms and conditions of the grant agreement. Even in those circumstances we remained committed to an ongoing relationship and to continue to serve their clients/patients – through direct support – when needs arose. We now see them as active referral sources.

This also applied to the programmatic funding which had been granted. For example, instead of funding a whole transportation program which, through reporting, we discovered little to no ARAW eligible women were taking advantage of, we instead committed to funding on an individual participation basis. The same is true of social day and socialization.

Ultimately, I do not think this is anyone's “fault” it was just natural evolution reflective of the times. Over the years, the COAs have grown their offerings, responsibilities and duties while ARAW simultaneously worked diligently towards our fiduciary and strategic goals of *broadening our reach and deepening our support*. We started to see that our expectations, associated with the ARAW grant funded community-based representatives at COAs, were getting lost in the shuffle. We recognized *our* greatest need was an investment in someone who truly understood the ARAW's mission and who could make it a priority. This led us to a pilot in-house Beneficiary Advocate position who could not only wholly devote herself to ARAW beneficiary needs but who would also have a direct line of communication and a seat at the ARAW table. This new position had the added benefit of deepening the office's, and subsequently the board's, firsthand knowledge of the work involved with beneficiary relations. Hence, affording us the opportunity to further expound on best practice development.

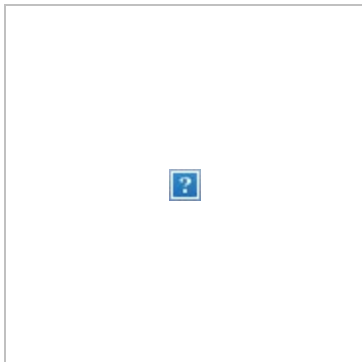
I hope all of that makes sense... it's a lot. And I may not have adequately communicated all of the activities and thought that went into this evolutionary step. So, if you would like to talk it through, please just let me know!

I definitely think we should add former board members to our in memoriam recognition. We do so at our regular board meetings, so I am not sure why we didn't include at the annual meeting. My fault! I will make a note for next year. Thank you for the suggestion – former board members *are* the reason ARAW is where it is today.

Finally, here are the emails you requested: Jeannette patjeadoyle@comcast.net, Rosemary rcmsaber711@aol.com, Jo-Ann joannmck42@gmail.com and Jane janeross1924@gmail.com.

OK, this turned out to be a long email – I am not known for my brevity! I hope it addresses your questions... you know where to find me if not.

Best,
Clare



Clare Healy Foley
Executive Director
Association for the Relief of Aged Women
432 County Street | New Bedford, MA 02740
cfoley@arawofnb.org | (508) 717-0400 | www.arawofnb.org

-----Original Message-----

From: N Kurtz <nwk62@comcast.net>
Sent: Friday, April 29, 2022 12:34 PM
To: Clare Foley <cfoley@arawofnb.org>
Subject: thank you

Hi Clare

Thank you the invitation to the annual meeting yesterday. I found it most interesting and wonderful to see familiar faces with whom I worked for a number of years. I am really sorry I was not only late but then couldn't stay to visit afterwards. I was impressed with how you have jumped right in and problems long recognized have been addressed head-on. Your sense of humor is wonderful!

I carefully read through the packet and found the activities most interesting, especially the grants, which I chaired for several years.

Your new partner relationships sound most promising, especially with the presentations given yesterday. Is ARAW no longer supporting outreach workers & drivers at COA's, or did I miss something? (I saw NBCOA & IAC are no longer supported.) It is sad how many beneficiaries are lost each year but good that they are remembered at annual meetings. I might also suggest that former board members who are lost might also be remembered. Former board members have each contributed to where ARAW is today.

There are a few members whom I would like to touch base with. Would you be able send me their email addresses? They are Jeannette, Rosemary, Joann and Jane.

Thank you for all you are doing for ARAW and the ladies.

Best wishes,

Nancy

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This email has been checked for viruses by AVG.

<https://www.avg.com>



Virus-free. www.avg.com

From: [Zelinda Douhan](#)
To: [Clare Foley](#)
Subject: ARAW Annual Report
Date: Friday, May 27, 2022 7:49:52 AM

Dear Clare:

Thank you for sending the ARAW Annual Meeting report packet.

BRAVA! The report is spectacular. The professionalism of ARAW today is impressive. The strategic planning that is the basis of your work is of the highest standard.

At the same time, throughout the reports, the underlying care and love for the women ARAW serves is a main thread.

In the years I served on the board, as we moved from the small group of women we helped and branched out to include greater numbers of women and grants to agencies, a recurring concern from some of the board members was that we were becoming too “businesslike.” Our initiatives called for new policies and bylaws. Some challenged our previous norms.

Your work of the committees, as displayed in your Annual Report, is evidence that ARAW can be an organization with the highest level of professionalism and maintain its core mission of care.

Congratulations to you for your leadership and the outstanding work of your competent staff and the ARAW board of directors.

Keep up the great work!

With warm regards,

Zelinda M Douhan



May 27, 2022

Amy DiPietro & Ann Raymond
Dartmouth Council on Aging
628 Dartmouth Street
Dartmouth, MA 02748

Dear Amy & Ann,

We are very proud of the support that the ARAW has been able to bring to the residents of Dartmouth throughout the long history of partnership with the Dartmouth Council on Aging.

Because of this partnership, there are countless women in Dartmouth who received much needed support, guidance and friendship. And, over recent years, I have seen the fruits of your compassionate, personalized care and the resulting financial support. We celebrate your commitment and efforts on behalf of these women.

As the core work of ARAW and ARAW relationship management of beneficiaries moves in-house, we know that this will allow you to devote staff and activities wholly to the ever-expanding work of the Council on Aging while still having ARAW as a resource for your residents. We remain committed to an ongoing relationship and to continue to serve your clients through direct support – when needs arise. We look forward to Dartmouth Council on Aging becoming an active referral source. And, in this way, you will always be considered part of the ARAW family.

Ann, you are a compassionate, caring, knowledgeable and devoted advocate for your neighbors. We know how incredibly fortunate Dartmouth Council on Aging has been to have you as indispensable member of staff. Your sympathetic and comprehensive approach are sure to be an asset as you continue to follow your passion and dedication for the work you so enjoy and in which you excel.

And so, all that is left to say is, thank you to you both and to Dartmouth Council on Aging as a whole. Thank you on behalf of the ARAW – our past and present staff here, our past and present board and, most of all, our past and present beneficiaries.

With appreciation,

A handwritten signature in blue ink that reads 'Clare'.

Clare Healy Foley
Executive Director

Finance Committee Meeting Minutes
May 17, 2022 11:30 AM

Present: J Doyle, D Laflamme, C Mayall, R O'Connell, J Stankiewicz, C Foley, MCE. Absent: S Bachman. Guest: R Saber

Investing 101

We had a discussion and recap of last Friday's (May 13) session with Kathleen McQuiggan and Kevin O'Connell of the IAC where some investing fundamentals were presented. Kathleen had prepared a PowerPoint deck outlining asset classes, the scope of their risks and returns, and their historic performance. The Committee found this information extremely enlightening and useful and agreed to accept her offer of similar 'tutorials' in the near future. This knowledge will enable Finance to participate in any future reallocation of assets that may be suggested by BofA.

Developing Relationship with New BofA Portfolio Manager

With the professional and important guidance of the IAC, we will review and discuss the recent proforma provided by Sarah Clark illustrating ideas for portfolio adjustments in asset classification. A meeting with ourselves and Sarah will be scheduled once we have a better understanding of the document that is currently in the hands of the IAC.

New Strategic Plan Preparation

At our May board meeting, President Stankiewicz expressed a goal of developing a new strategic plan. The Committee was asked to give thought to goals we might set for ourselves when the plan is brainstormed by the larger board.

Possible New Office Space (174 Union St)

Cathy and Clare presented the fruits of their labor in identifying suitable office space for the future of the ARAW. After reviewing the financials comparing costs of new space (174 Union St, 4W) with our current office and sharing a schematic of the layout, a supportive discussion and Q&A gave everyone a chance for comment. Using a suggested approval process of Executive Committee, Finance Committee and then entire Board, ***a unanimous vote by the Finance Committee approved the proposal to be taken to the Board.*** Our profound thanks to Cathy and Clare in their relentless pursuit of office space in a very limited and competitive real estate market!

As always, the Committee is to be commended for their enthusiasm and involvement in the work with which we have been charged. Thank you all.

Next regular meeting of the committee is June 21 at 9:30 AM. The meeting of Finance and IAC (Investing 102) will be communicated once determined.

Mary Ellis, Treasurer
May 18, 2022

**ASSOCIATION FOR THE RELIEF OF AGED WOMEN
OF NEW BEDFORD
(A Not-for-Profit Organization)**

FINANCIAL STATEMENTS

For the Years Ended March 31, 2022 and 2021

DRAFT

May 31, 2022

Ms. Clare Healy Foley
Association for the Relief of Aged Women of New Bedford
432 County Street
New Bedford, MA 02740

Dear Clare:

Enclosed please find a copy of the financial statements of Association for the Relief of Aged Women of New Bedford for the years ended March 31, 2022 and 2021. (See Independent Accountants' Review Report).

Very truly yours,

Peter C. Lamb, CPA

DRAFT

ASSOCIATION OF THE RELIEF OF AGED WOMEN OF NEW BEDFORD

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DRAFT

INDEPENDENT ACCOUNTANTS' REVIEW REPORT

To the Board of Directors of
Association for the Relief of Aged Women of New Bedford
New Bedford, Massachusetts

We have reviewed the accompanying financial statements of Association for the Relief of Aged Women of New Bedford (a not-for-profit organization), which comprise the statement of financial position as of March 31, 2022 and 2021, and the related statements of activities, functional expenses and cash flows for the years then ended, and the related notes to the financial statements. A review includes primarily applying analytical procedures to management's financial data and making inquiries of management. A review is substantially less in scope than an audit, the objective which is the expression of an opinion regarding the financial statements as a whole. Accordingly, we do not express such an opinion.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement whether due to fraud or error.

Accountants' Responsibility

Our responsibility is to conduct the review engagement in accordance with Statements on Standards for Accounting and Review Services promulgated by the Accounting and Review Services Committee of the American Institute of Certified Public Accountants. Those standards require us to perform procedures to obtain limited assurance as a basis of reporting whether we are aware of any material modifications that should be made to the financial statements for them to be in accordance with the accounting principles generally accepted in the United States of America. We believe that the results of our procedures provide a reasonable basis for our conclusion.

We are required to be independent of Association for the Relief of Aged Women of New Bedford and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements related to our review.

Accountants' Conclusion

Based on our review, we are not aware of any material modifications that should be made to the accompanying financial statements, in order for them to be in accordance with accounting principles generally accepted in the United States of America.

Burke & Lamb, P.C.
Certified Public Accountants
New Bedford, Massachusetts
May 31, 2022

ASSOCIATION OF THE RELIEF OF AGED WOMEN OF NEW BEDFORD

STATEMENT OF FINANCIAL POSITION

March 31, 2022 and 2021

	<u>2022</u>	<u>2021</u>
<u>ASSETS</u>		
Current assets		
Cash	\$166,695	\$23,311
Grants receivable	-	10,750
Prepaid expenses	17,519	10,687
Prepaid federal taxes	10,503	1,022
Total current assets	<u>194,717</u>	<u>45,770</u>
Fixed Assets		
Property and equipment	19,381	19,381
Less: accumulated depreciation	(8,860)	(5,495)
	<u>10,521</u>	<u>13,886</u>
Other Assets		
Investments	<u>21,452,378</u>	<u>21,321,282</u>
Total Assets	<u>\$21,657,616</u>	<u>\$21,380,938</u>
<u>LIABILITIES AND NET ASSETS</u>		
Current liabilities		
Accounts payable	\$15,521	\$11,186
Accrued expenses	6,591	11,880
Total current liabilities	<u>22,112</u>	<u>23,066</u>
Net assets		
Without donor restrictions	21,369,459	21,091,827
With donor restrictions	266,045	266,045
Total net assets	<u>21,635,504</u>	<u>21,357,872</u>
Total Liabilities and Net Assets	<u>\$21,657,616</u>	<u>\$21,380,938</u>

See Independent Accountants' Review Report and Accompanying Notes

ASSOCIATION OF THE RELIEF OF AGED WOMEN OF NEW BEDFORD

STATEMENT OF ACTIVITIES

For the Year Ended March 31, 2022

	Without Donor Restrictions	With Donor Restrictions	Total
Revenue, gains and support:			
Dividends and interest, net	\$760,696	-	\$760,696
Net realized gains on investments	1,170,657	-	1,170,657
Net unrealized loss on investments	(695,257)	-	(695,257)
Contributions	1,296	-	1,296
Miscellaneous	15	-	15
Total revenues, gains and support	<u>1,237,407</u>	<u>-</u>	<u>1,237,407</u>
Expenses:			
Program	826,214	-	826,214
Management and general	133,561	-	133,561
Total expenses	<u>959,775</u>	<u>-</u>	<u>959,775</u>
Change in net assets	277,632	-	277,632
Net assets, beginning of year	<u>21,091,827</u>	<u>266,045</u>	<u>21,357,872</u>
Net assets, end of year	<u>\$21,369,459</u>	<u>\$266,045</u>	<u>\$21,635,504</u>

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See Independent Accountants' Review Report and Accompanying Notes

ASSOCIATION OF THE RELIEF OF AGED WOMEN OF NEW BEDFORD

STATEMENT OF ACTIVITIES

For the Year Ended March 31, 2021

	Without Donor Restrictions	With Donor Restrictions	Total
Revenue, gains and support:			
Dividends and interest, net	\$345,059	-	\$345,059
Net realized gains on investments	900,062	-	900,062
Net unrealized gain on investments	5,614,166	-	5,614,166
Contributions	710	-	710
Miscellaneous	14	-	14
Total revenues, gains and support	<u>6,860,011</u>	<u>-</u>	<u>6,860,011</u>
Expenses:			
Program	745,619	-	745,619
Management and general	116,936	-	116,936
Total expenses	<u>862,556</u>	<u>-</u>	<u>862,556</u>
Change in net assets	5,997,456	-	5,997,456
Net assets, beginning of year	<u>15,094,371</u>	<u>266,045</u>	<u>15,360,416</u>
Net assets, end of year	<u>\$21,091,827</u>	<u>\$266,045</u>	<u>\$21,357,872</u>

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See Independent Accountants' Review Report and Accompanying Notes

ASSOCIATION OF THE RELIEF OF AGED WOMEN OF NEW BEDFORD

STATEMENT OF FUNCTIONAL EXPENSES

For the Year Ended March 31, 2022

	Program Services	General and Administrative	Total
Salary	\$ 247,322	\$ 23,318	\$ 270,640
Payroll taxes	19,588	1,864	21,452
Fringe benefits	15,163	1,231	16,394
	<u>282,073</u>	<u>26,413</u>	<u>308,486</u>
Grants to non-profit organizations	88,768	-	88,768
Direct Support:			
Recurring	243,595	-	243,595
Gifts	186,719	-	186,719
Accounting and legal fees	-	25,346	25,346
Office expenses	-	38,052	38,052
Outreach	-	2,305	2,305
Occupancy	10,343	10,343	20,686
Friends, lunch and outings program	14,716	-	14,716
Federal taxes	-	27,737	27,737
Total expenses before depreciation	<u>826,214</u>	<u>130,196</u>	<u>956,410</u>
Depreciation	-	3,365	3,365
Total expenses	<u>\$ 826,214</u>	<u>\$ 133,561</u>	<u>\$ 959,775</u>

See Independent Accountants' Review Report and Accompanying Notes

ASSOCIATION OF THE RELIEF OF AGED WOMEN OF NEW BEDFORD

STATEMENT OF FUNCTIONAL EXPENSES

For the Year Ended March 31, 2021

	<u>Program</u> <u>Services</u>	<u>General and</u> <u>Administrative</u>	<u>Total</u>
Salary	\$ 194,215	\$ 21,743	\$ 215,958
Payroll taxes	14,943	1,683	16,626
Fringe benefits	11,591	743	12,334
	<u>220,749</u>	<u>24,169</u>	<u>244,918</u>
Grants to non-profit organizations	149,852	-	149,852
Direct Support:			
Recurring	242,406	-	242,406
Gifts	115,278	-	115,278
Accounting and legal fees	-	26,965	26,965
Office expenses	-	33,255	33,255
Outreach	-	2,221	2,221
Occupancy	9,528	9,527	19,055
Friends, lunch and outings program	7,806	-	7,806
Federal taxes	-	18,238	18,238
Total expenses before depreciation	<u>745,619</u>	<u>114,375</u>	<u>859,994</u>
Depreciation	<u>-</u>	<u>2,561</u>	<u>2,561</u>
Total expenses	<u>\$ 745,619</u>	<u>\$ 116,936</u>	<u>\$ 862,555</u>

See Independent Accountants' Review Report and Accompanying Notes

ASSOCIATION OF THE RELIEF OF AGED WOMEN OF NEW BEDFORD

STATEMENT OF CASH FLOWS

For the Years Ended March 31, 2022 and 2021

	2022	2021
Cash Flows from Operating Activities:		
Change in net assets	\$277,632	\$5,997,456
Adjustments to reconcile change in net assets to net cash used in operating activities:		
Depreciation	3,365	2,561
Net unrealized and realized gains on investments	(475,400)	(6,514,228)
Decrease (increase) in assets:		
Grants receivable	10,750	(10,750)
Prepaid expenses	(6,832)	11,120
Prepaid federal taxes	(9,481)	8,470
Increase (decrease) in liabilities:		
Accounts payable	4,335	5,144
Accrued expenses	(5,289)	3,537
Net cash used in operating activities	(200,920)	(496,690)
 Cash Flows from Investing Activities:		
Purchase of property and equipment	-	(14,020)
Net change in cash included in investments	104,567	(200,622)
Investment purchases	(3,165,787)	(2,509,276)
Proceeds from investment sales	3,405,524	3,229,840
Net cash provided by investing activities	344,304	505,922
 Net Increase in cash	143,384	9,232
 Cash, beginning of year	23,311	14,079
 Cash, end of year	\$166,695	\$23,311

See Independent Accountants' Review Report and Accompanying Notes

ASSOCIATION FOR THE RELIEF OF AGED WOMEN OF NEW BEDFORD
NOTES TO FINANCIAL STATEMENTS

March 31, 2022 and 2021

NOTE A - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES:

a. Nature of Organization:

The Association for the Relief of Aged Women of New Bedford (the Association) is a Massachusetts nonprofit, organized and incorporated in 1866. The purpose of the Association is to furnish assistance to and promote the welfare and relief of elderly women. The communities served in Southeastern Massachusetts are Acushnet, Dartmouth, Fairhaven, New Bedford and Westport. The Association's support comes primarily from investment income.

b. Basis of Presentation:

The financial statements of the Association have been prepared on the accrual basis in accordance with accounting principles generally accepted in the United States of America.

Net assets, revenues, and gains and losses are classified based on the existence or absence of donor or grantor-imposed restrictions. Accordingly, the net assets of the Association and changes therein are classified as follows:

Net assets without donor restrictions: Net assets that are not subject to donor-imposed restrictions and may be expended for any purpose in performing the primary objectives of the Association. The board may designate assets without restrictions for specific operational purposes from time to time. Gains and losses on investments are reported as increases or decreases in net assets without donor restrictions unless their use is restricted by explicit donor stipulations or laws.

Net assets with donor restrictions: Net assets subject to stipulations imposed by donors, and grantors. Some donor restrictions are temporary in nature; those restrictions will be met by actions of the Association or by the passage of time. Other donor restrictions are perpetual in nature, where by the donor has stipulated the funds be maintained in perpetuity. When a restriction expires, net assets with donor restrictions are reclassified to net assets without donor restrictions and reported in the statement of activities as net assets released from restrictions.

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ASSOCIATION FOR THE RELIEF OF AGED WOMEN OF NEW BEDFORD

NOTES TO FINANCIAL STATEMENTS

March 31, 2022 and 2021

NOTE A - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED):

b. Basis of Presentation (continued):

Net assets with donor restrictions also includes the original amount of gifts and investment earnings required by the donor to be permanently retained. Generally, the donors of these assets permit the Association to use all or part of the income earned on related investments for general or specific purposes.

c. Use of Estimates:

The preparation of financial statements in accordance with generally accepted accounting principles requires management to make estimates and assumptions that affect reported amounts of assets and liabilities at the date of the financial statements. Estimates also affect the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

d. Cash and Cash Equivalents:

The Association considers all highly liquid investments purchased with an original maturity of three months or less to be cash equivalents. There were no cash equivalents as of March 31, 2022 and 2021. The Association maintains its cash balances at a financial institution located in Massachusetts. The cash balances are insured by the Federal Deposit Insurance Corporation. At times these balances may exceed the federal insurance limits; however, the Association has not experienced any losses with respect to its bank balances in excess of government provided insurance. Management believes that no significant concentration of credit risk exists with respect to these cash balances as of March 31, 2022 and 2021.

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e. Property and Equipment:

Property and equipment are stated at cost if purchased or at fair market value if donated.

Cost of minor furnishings and equipment are consistently charged to expense when incurred because the Association does not deem such amounts to be sufficiently material to warrant capitalization. Significant capital expenditures are capitalized and depreciated over their estimated useful lives.

The Association computes depreciation using the straight-line method over the following estimated lives:

Office Equipment	5 years
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Depreciation expense for the years ended March 31, 2022 and 2021 was \$3,365 and \$2,561, respectively.

NOTES TO FINANCIAL STATEMENTS

March 31, 2022 and 2021

NOTE A - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED):

f. Investments:

The Association reports its investments in marketable securities at fair value in accordance with FASB ASC 958-320-50-3. Investments in marketable securities with readily determinable fair values and all investments in debt securities valued at their fair values based on quoted prices in active markets (all Level 1 measurements) are reported at their fair values in the statement of financial position.

Included in investments are certain money market funds with maturities of less than three months. Such money funds are held for the express purpose of investment. All investment income and sale proceeds are deposited in these accounts until the funds can be reinvested or distributed. As such, these money market funds are reported as investments rather than cash equivalents in the accompanying financial statements.

Investments measured at fair value are disclosed in one of the following categories:

Level 1: Financial instruments with unadjusted, quoted prices listed on active market exchanges.

Level 2: Financial instruments lacking unadjusted, quoted prices from active market exchanges, including over-the-counter traded financial instruments. The prices for the financial instruments are determined using prices for recently traded financial instruments with similar underlying terms as well as indirectly observable inputs, such as interest rates and yield curves that are observable at commonly quoted intervals.

Level 3: Financial instruments that are not actively traded on a market exchange. This category includes situations where there is little, if any, market activity for the financial instrument. The prices are determined using significant unobservable inputs or valuation techniques.

g. Contributions and Unconditional Promises to Give:

Contributions received are recorded as net assets without donor restrictions or net assets with donor restrictions depending on the existence and/or the nature of any donor restrictions. All contributions are considered to be available for unrestricted use unless specifically restricted by donor.

h. Donated Services:

Donated Services are recognized as contributions if services (a) create or enhance nonfinancial assets or (b) require specialized skills, are performed by individuals with those skills, and would otherwise be purchased by the Association. As of March 31, 2022, management estimated volunteers donated 2,030 hours to administer the Association's programs throughout the year that are not recognized as contributions in the financial statements since the recognition criteria were not met.

ASSOCIATION FOR THE RELIEF OF AGED WOMEN OF NEW BEDFORD

NOTES TO FINANCIAL STATEMENTS

March 31, 2022 and 2021

NOTE A - SIGNIFICANT ACCOUNTING POLICIES (CONTINUED):

i. Functional Expenses:

The cost of providing programs and the administration of the Association have been summarized on a functional basis in the statement of activities. Accordingly, certain costs have been allocated among the programs and supporting services benefited.

j. Income Taxes:

The Association qualifies as an organization formed for charitable purposes under Section 501(c)(3) of the Internal Revenue Code. The Code imposes an excise tax of 1.39% on net investment income of private foundations.

NOTE B – INVESTMENTS:

Investments are valued at fair value on a recurring basis using level 1 inputs and are comprised of the following:

Investments as of March 31, consist of the following:

	2022		2021	
	Fair Market Value	Cost	Fair Market Value	Cost
Cash/Currency	\$ 812,041	\$ 812,041	\$ 913,055	\$ 913,055
Equities	15,527,252	7,809,960	16,584,745	8,402,826
Fixed Income	2,593,626	2,715,907	2,182,452	2,162,477
Hedge Funds (mutual funds only)	1,523,621	1,561,477	1,241,418	1,192,379
Tangible Assets (mutual funds only)	985,156	1,046,913	385,377	445,656
Accrued Investment Income	10,682	10,682	14,235	14,235
Total	\$ 21,452,378	\$ 13,956,981	\$ 21,321,282	\$ 13,130,628

Investment return consisted of the following for the years ended March 31:

	2022	2021
Interest and dividends, net	\$ 760,696	\$ 345,059
Net realized gains	1,170,657	900,062
Net unrealized gain (losses)	(695,257)	5,614,166
Total	\$ 1,236,096	\$ 6,859,287

ASSOCIATION FOR THE RELIEF OF AGED WOMEN OF NEW BEDFORD

NOTES TO FINANCIAL STATEMENTS

March 31, 2022 and 2021

NOTE B – INVESTMENTS (CONTINUED):

Investment income reported in the statement of activities is net of investment fees of \$89,404 and \$95,488 for the years ended March 31, 2022 and 2021, respectively.

Subsequent to March 31, 2022 the stock market experienced a significant decline in value. As of May 31, 2022, the S&P 500 Index declined 8.8%, the Dow Jones industrial average decline 4.8% and the Nasdaq composite index declined by 11.1%, since March 31, 2022. During this time it is estimated that the Association's investments declined 6.8% or \$1,450,000. The Association will continue to monitor its investments as it has successfully done in the past, but has no immediate plans to change its investment portfolio.

NOTE C – NET ASSETS WITH DONOR RESTRICTIONS:

Net assets with donor restrictions consist of resources available to meet future obligations, but only in compliance with the restrictions specified by donors. As of March 31, 2022 and 2021, net assets with donor restrictions are restricted for the following purposes or periods:

Donor restricted funds:

Bequest donated to endowment	<u>\$ 266,045</u>
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NOTE D – OPERATING LEASE COMMITMENT:

The Association occupies an office for administrative purposes under a non-cancelable, operating lease agreement with an expiration date of June 30, 2022. The minimum annual operating non-cancelable lease commitment for the Association is as follows:

2022	\$	3,630
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The Association on May 20, 2022 entered into an agreement to rent the same office on a month by month basis for \$1,275 per month. Rent expense for the years ended March 31, 2022 and 2021 was \$14,520 and \$14,445, respectively.

NOTE E – EMPLOYEE BENEFITS:

The Association has a Simple IRA plan for the benefit of its employees. The Association matches 100% of the elective deferral up to 3% of compensation. For the years ended March 31, 2022 and 2021, the pension expense totaled \$5,704 and \$1,191, respectively.

NOTE F – FEDERAL TAXES:

The Association was subject to federal excise tax on its net investment income amounting to \$27,737 and \$18,238 for the years ended March 31, 2022 and 2021, respectively.

NOTE G – ENDOWMENT:

The Association accepts endowment gifts under the stipulations that the funds are invested in perpetuity. Unless otherwise restricted by the donor, the investment income is to be used in accordance with the Association's endowment spending policy.

ASSOCIATION FOR THE RELIEF OF AGED WOMEN OF NEW BEDFORD

NOTES TO FINANCIAL STATEMENTS

March 31, 2022 and 2021

NOTE G – ENDOWMENT (CONTINUED):

a. Uniform Prudent Management of Institutional Funds Act

The Association's management and investment of donor-restricted endowment funds are subject to the provisions of the Uniform Management of Institutional Funds Act (UMIFA). In 2006, the Uniform Law Commission approved the model act, Uniform Prudent Management of Institutional Funds Act (UPMIFA), which serves as a guideline to states to use enacting legislation. UPMIFA was adopted by the Commonwealth of Massachusetts effective June 30, 2009. Among UPMIFA's most significant changes is the elimination of UMIFA's important concept of historic dollar value threshold, the amount below which an organization could not spend from the fund, in favor of a more robust set of guidelines about what constitutes prudent spending.

The Board of the Association has interpreted the UPMIFA as requiring the preservation of the fair value of the original gift as of the gift date of the donor-restricted endowment funds absent explicit donor stipulations to the contrary. Further, per the interpretation, the UPMIFA classifies as net assets with donor restrictions (a) the original value of gifts donated to the permanent endowment, (b) the original value of subsequent gift to the permanent endowment and (c) accumulations to the permanent endowment made in accordance with the direction of the applicable donor gift instrument at the time the accumulation is added to the fund. The remaining portion of the donor-restricted endowment fund that is not classified in the permanent portion of net assets with donor restrictions is classified in the temporary portion of net assets with donor restrictions until those amounts are appropriated for expenditure by the Association in a manner consistent with the standard of prudence prescribed by the UPMIFA.

b. Appropriation of Endowment Assets for Expenditure

The Association considers the following factors in making a determination to appropriate endowment funds for expenditure:

- 1) The duration and preservation of the fund
- 2) The purpose of the Association and the donor-restricted endowment fund
- 3) The expected total return from income
- 4) Other resources of the Association
- 5) The investment policies of the Association
- 6) General economic conditions

c. Return Objectives and Risk Parameters

The Association has adopted investment and spending policies for endowment assets that invest in a thoughtful and prudent manner to preserve and/or enhance the Association's ability to help provide for the future benefit of the recipients of the Association. The oversight of the endowment funds is the responsibility of the Finance Committee. Endowment assets include those assets of donor-restricted funds that the Association must hold in perpetuity. Under this policy, as approved by the Board, the endowment assets are invested in a manner that is intended to preserve the endowment funds' principal, considering inflation and to regulate the long-term ability and short-term needs to distribute income.

ASSOCIATION FOR THE RELIEF OF AGED WOMEN OF NEW BEDFORD

NOTES TO FINANCIAL STATEMENTS

March 31, 2022 and 2021

NOTE G – ENDOWMENT (CONTINUED):

d. Strategies Employed for Achieving Investment Objectives

To satisfy its objectives, the Association relies on a total return strategy in which investment returns are achieved through both capital appreciation (realized and unrealized) and current yield (dividends and interest). The Finance Committee meets at least twice a year with the portfolio manager and has a goal of approximately 70% in equities.

e. Spending Policy and Investment Objectives

The Association records 100% of the annual investment return as net assets without donor restrictions and is included in the investments until appropriated for expenditure.

f. Funds with Deficiencies

From time to time, the fair value of assets associated with individual donor-restricted endowment funds may fall below the level that the donor requires the Association to retain as a fund of perpetual duration. In accordance with GAAP, deficiencies of this nature are reported in net assets without donor restrictions. These deficiencies may result from unfavorable market fluctuations that occurred shortly after the investment of new restricted contributions. Subsequent gains that restore the fair value of the assets of the endowment fund to the required level will be classified as an increase in net assets without donor restrictions. There were no such deficiencies as of March 31, 2022 and 2021.

NOTE H – LIQUIDITY AND AVAILABILITY OF FINANCIAL ASSETS:

The following reflects the Association's financial assets as of March 31, 2022 within one year from the statement of financial position date.

Financial assets at year-end:	
Cash	\$ 166,695
Grants receivable	-
Investments	21,452,378
Total	<u>21,619,073</u>
Less: financial assets not available for general expenditures:	
Donor-restricted fund	<u>(266,045)</u>
Financial assets available for general expenditures within one year	<u>\$ 21,353,028</u>

As part of the Association's liquidity management, it has a policy to structure its financial assets to be available as its general expenditures, liabilities, and other obligations come due. In addition, the Association invests cash in excess of daily requirements in short-term investments. The Association's endowment funds consist of donor-restricted endowments. Income from donor-restricted endowments is unrestricted and is available for general use. Donor-restricted endowment funds are not available for general expenditure. On an annual basis the Association reviews its budget and its investments with its financial advisor and appropriates accordingly based on need.

ASSOCIATION FOR THE RELIEF OF AGED WOMEN OF NEW BEDFORD

NOTES TO FINANCIAL STATEMENTS

March 31, 2022 and 2021

NOTE I – SUBSEQUENT EVENTS:

Management has evaluated subsequent events through May 31, 2022, the date on which the financial statements were available to be issued. No such events requiring disclosure subsequent to year end were noted as of May 21, 2022, except as noted in Note B.

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Name	Birth Date	Age	Board Member
Openshaw, Pauline	6/10/1946	76	Angela Natho
Polek, Andrea	6/10/1955	67	Office
Ventura, Natalina	6/13/1931	91	Jeannette Doyle
Rosa, Zulmira	6/17/1936	86	Gloria deSa
Elgar, Marcia	6/22/1942	80	Office
Roderick, Mrs. Anita	6/23/1937	85	Roseanne O'Connell
Guadalupe, Cecilia	6/24/1940	82	Office
Jacques, Mary	6/27/1952	70	Cathy Mayall
Borges, Jeanne	6/28/1938	84	Office
Cole, Carol	6/29/1953	69	Mary Ellis
Mello, Mrs. Eleanor	6/30/1933	89	Jo-Ann Beaulieu
Todd, Kristine	6/30/1951	71	Office
Vieira, Kathy	7/3/1941	81	Office
Fernandes, Lucilia	7/5/1936	86	Office
Hotte, Eileen	7/6/1943	79	Jo-Ann Beaulieu
Roderiques, Bernadette	7/6/1948	74	Jane Stankiewicz
Correia, Julia	7/9/1929	93	Gale Beaton
Costa, Mrs. Barbara	7/10/1947	75	Gale Beaton
Gagnon, Alyce	7/11/1934	88	Shannon Bachman
Dias, Theresa	7/12/1942	80	Angela Natho
Letourneau, Diane	7/12/1943	79	Shannon Bachman

ARAW BENEFICIARY REQUEST COMMITTEE RECOMMENDATIONS

JUNE 2022 | VER 6/3/22

Beneficiary	Outreach	Biggest Concern	Notes	Specific Request	Recommendations
<p>New BENE#</p> <p>O’Connell, Joyce 86 y/o; 4/29/1936 Income: \$2,015 H ARAW support: New</p>	<p>DCOA Ann Raymond (508) 999-4717</p>	<p>“I worry about my Thomas. I know he needs to go to the vet but I’m afraid of the cost. He has a little cough...I worry something major will let go in the house and that will be it. I have no savings...I do all my research on the computer. I love to learn and research things!”</p>	<p>Worries about cat Computer broke Concerned no savings for home repair</p>	<p>Gift:</p> <ul style="list-style-type: none"> ▪ HP Laptop \$449.99 from Best Buy ▪ Estimate Vet bill \$215 	<p>Gift:</p> <ul style="list-style-type: none"> ▪ HP Laptop \$449.99 from Best Buy ▪ Documentation needed Comcast bill (over & above monthly bill) if still outstanding <p><i>NO to vet bill, other support should enable payment. Instill feeling of independence and taking care of pet.</i></p>
<p>BENE# 22/24G</p> <p>Collins, Donna 70 y/o; 1/6/1952 Income: \$990 sub ARAW support \$492: Gifts: Car repair \$342 ‘21, Holiday \$150 ‘21</p>	<p>DCOA Ann Raymond (508) 999-4717</p>	<p>“I’m in desperate need of reliable transportation. I’m worried to be without transportation.”</p>	<p>Repairs extensive – letter from mechanic</p>	<p>Gift:</p> <ul style="list-style-type: none"> ▪ Estimate Car repairs \$1,856.38 from M&M Auto 	<p>Gift:</p> <ul style="list-style-type: none"> ▪ Estimate Car repairs \$1,856.38 from M&M Auto
<p>New BENE#</p> <p>Benevides, Maria 78 y/o; 12/6/1943 Income: \$1,193 R ARAW support: New</p>	<p>BA Pat Midurski (Leonora Robins) (508) 717-0400</p>	<p>“I worry about my bills & having enough money. Any help that they can provide would be helpful.”</p>	<p>Referral from IAC Portuguese speaking MassHealth application in process</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Cable/phone \$135 <p>OR</p> <ul style="list-style-type: none"> ▪ Assist with copays 	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Cable/phone \$135 ▪ Assist with copays for medical office visits up to \$45 for 6 months or until MH is in effect

ARAW BENEFICIARY REQUEST COMMITTEE RECOMMENDATIONS

JUNE 2022 | VER 6/3/22

Beneficiary	Outreach	Biggest Concern	Notes	Specific Request	Recommendations
<p>New BENE#</p> <p>Deatherage, Nancy 92 y/o; 5/9/1930 Income: \$1,497 sub ARAW support: New</p>	<p>WCOA Andrea Lemos (508) 636-1026</p>	<p>Mrs. Deatherage stated that she worries about being a burden to her son because she never wanted to be one. She worries about her grandson & great grandchildren. Those are her two biggest worries.</p>	<p>Very independent – doesn't want to be burden on son</p> <p>Saving for funeral</p>	<p>Monthly:</p> <ul style="list-style-type: none"> United Healthcare health insurance \$263 	<p>Monthly:</p> <ul style="list-style-type: none"> United Healthcare health insurance \$263 <p>Gift:</p> <ul style="list-style-type: none"> SW assessment visit to explore options including funeral plans & car insurance
<p>BENE# 22/15G</p> <p>Rudnik, Martha 72 y/o; 12/16/1949 Income: \$1,266 sub ARAW support \$1,693: Gifts: Tires \$703 '22, Car insurance \$840 '21, Holiday \$150 '21</p>	<p>WCOA Susan Routhier (508) 636-1026</p>	<p>Mrs. Rudnik worries about keeping her car in good condition because it gives her the ability to help with her grandchildren & assist her stepmother. "I like to get into the car to be able to help people. By ARAW helping with the car insurance, I feel a weight has been lifted off me."</p>	<p>Uses car to spend time with her grandchildren, help stepmother & attend church</p>	<p>Gift:</p> <ul style="list-style-type: none"> Estimate 2022-2023 Car insurance \$1,000 (Last year \$840.20) 	<p>Gift:</p> <ul style="list-style-type: none"> Estimate 2022-2023 Car insurance \$1,000 (based on estimate)
<p>New BENE#</p> <p>Almeida, Marie 80 y/o; 8/26/1941 Income: \$1,347 H ARAW support: New</p>	<p>DCOA Ann Raymond (508) 999-4717</p>	<p>Worries the most about her teeth. She fell down steps on Thanksgiving & broke her front teeth. "I want to be able to pay my bills but it's hard. I need my teeth fixed because I feel like everyone is looking at me so I don't leave the house. I'm embarrassed to be seen."</p>	<p>Self-conscious of teeth</p> <p>Very involved children</p> <p>Working on SNAP, Pace & senior disc</p>	<p>Gift:</p> <ul style="list-style-type: none"> Estimate Dental \$1,000 from Oral Surgery Associates Estimate Dental \$990 from Dr. Desiree Winterhalter 	<p>Gift:</p> <ul style="list-style-type: none"> Estimate Dental \$1,000 from Oral Surgery Associates Estimate Dental \$990 from Dr. Desiree Winterhalter <p>Monthly:</p> <ul style="list-style-type: none"> Documentation needed BCBS \$114 <p><i>Follow up re: impact of SANP, PACE, SHINE, etc.</i></p>

ARAW BENEFICIARY REQUEST COMMITTEE RECOMMENDATIONS

JUNE 2022 | VER 6/3/22

Beneficiary	Outreach	Biggest Concern	Notes	Specific Request	Recommendations
<p>BENE# 14-15/05</p> <p>Monteith, Judith 82 y/o; 11/12/1939 Income: \$1,356 sub</p> <p>ARAW support \$19,504.42: Reoccurring: Cable/internet \$194 '19 Gifts: Holiday \$100-150 '14-21 Discontinued: BCBS \$197.74 '14-19, EPERS \$41.95 '18-21 (MH SCO)</p>	<p>BA Pat Midurski (508) 717-0400</p>	<p>"I am forever grateful for all the assistance the ARAW has provided to me. I don't know where I would be without the support. My family turned their backs on me when I needed them most & the ARAW stood by me."</p>	<p>Estranged from family</p>	<p>Monthly:</p> <ul style="list-style-type: none"> Continuation of cable/phone/internet \$194 <p>Gift:</p> <ul style="list-style-type: none"> MSW Visit up to 2, \$150 per visit 	<p>Monthly:</p> <ul style="list-style-type: none"> Continuation of cable/phone/internet \$194 <p>Gift:</p> <ul style="list-style-type: none"> Up to 2 SW assessment visits to explore needs and resources
<p>BENE# 19-20/37</p> <p>Chytrus, Leslie 75 y/o; 5/19/1946 Income: \$914 sub</p> <p>ARAW support \$3,469: Reoccurring: Demand Response \$50 '20 Gifts: Walker \$229 '21, AC \$594 '21, CC \$200 '21, Stockings \$90 '20, Lift chair \$1,389 '18, Holiday \$150 '20-21</p>	<p>BA Pat Midurski (508) 717-0400</p>	<p>"I do appreciate the DR tickets as I enjoy getting out when I can. I enjoy the FLO program & going out to eat with the group when I am able to attend."</p> <p>Contacted ARAW 5/18 to request assistance with the purchase of fax machine which she needs to complete her PCA forms.</p>	<p>Demand Response tickets allow her to be independent</p> <p>Must fax PCA time sheets to OPTIONS in Quincy 1x/week</p>	<p>Monthly:</p> <ul style="list-style-type: none"> Continuation of SRTA Demand Response 2 books \$50 <p>Gift:</p> <ul style="list-style-type: none"> Fax machine \$219.99 from Staples 	<p>Monthly:</p> <ul style="list-style-type: none"> Continuation of SRTA Demand Response 2 books \$50 <p>Gift:</p> <ul style="list-style-type: none"> Fax machine \$219.99 from Staples

ARAW BENEFICIARY REQUEST COMMITTEE RECOMMENDATIONS

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Beneficiary	Outreach	Biggest Concern	Notes	Specific Request	Recommendations
<p>New BENE#</p> <p>Bramwell, Nancy 79 y/o; 10/2/1942 Income: \$1,247 R</p> <p>ARAW support: New</p>	<p>BA Pat Midurski (508) 717-0400</p>	<p>"I am most concerned about having enough money. I have \$500 left for the month & I need another \$500 to pay the rent for June. I have borrowed money from my daughter but I cannot keep doing that. I spent all my savings & I am desperate for a job."</p>	<p>Referral from ACOA</p> <p>Working on other resources – on housing list</p>	<p>Gift:</p> <ul style="list-style-type: none"> BCBS \$227 per month for six months 	<p>Gift:</p> <ul style="list-style-type: none"> BCBS \$227 per month for six months Up to 2 SW assessment visits to explore options as living situation is not sustainable (living beyond means)
<p>BENE# FLO-20E</p> <p>Quirini, Sandra 77 y/o; 9/26/1943 Income: \$1,091 sub</p> <p>ARAW support: FLO only</p>	<p>BA Leonora Robins (508) 717-0400</p>	<p>She has requested continued assistance with SRTA Demand Response books. She stated, "It would be wonderful to go out & enjoy the day."</p>	<p>Likes to get out & enjoy the company of others</p> <p>Request for AC in near future</p>	<p>Monthly:</p> <ul style="list-style-type: none"> SRTA Demand Response 1-2 books \$25-50 	<p>Monthly:</p> <ul style="list-style-type: none"> SRTA Demand Response 1-2 books \$25-50 Documentation needed Comcast cable
<p>BENE# 19-20/14</p> <p>Eleuterio, Sofia 85 y/o; 10/15/1936 Income: \$1,879 H</p> <p>ARAW support \$9,511: Reoccurring: BCBS \$226.29 '19 Gifts: Dental \$1,240 '21, Car repair \$775 '19, Holiday \$150 '19-21</p>	<p>WCOA Cindy Kinnane (508) 636-1026</p>	<p>Sofia is worried about her continued dental issues. Along with her continued issues, Sofia has some large unpaid dental bills. Sofia does not have dental insurance. Sofia has contributed to some of the bill herself, but would be relieved if ARAW could take away from some of the financial burden.</p>	<p>Has pd \$200 toward dental bill</p> <p>Money is savings to be used for mattress, porch repair</p> <p>Monthly balance \$445</p>	<p>Monthly:</p> <ul style="list-style-type: none"> Continuation of BCBS \$226.29 <p>Gift:</p> <ul style="list-style-type: none"> Statement Dental bill \$965 Estimate Dental work \$1,500 	<p>Monthly:</p> <ul style="list-style-type: none"> Continuation of BCBS \$226.29 <p>Gift:</p> <ul style="list-style-type: none"> Estimate Dental work \$1,500 <p><i>\$ in bank and high monthly income but feel she is proactively planning ahead as a homeowner; Will provide support for work which has not been completed only</i></p>

ARAW BENEFICIARY REQUEST COMMITTEE RECOMMENDATIONS

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Beneficiary	Outreach	Biggest Concern	Notes	Specific Request	Recommendations
<p>New BENE#</p> <p>Menard, Mariette 87 y/o; 6/18/1934 Income: \$1,280 H</p> <p>ARAW support: New</p>	<p>WCOA Cindy Kinnane (508) 636-1026</p>	<p>"I was taking care of my son when he died. I am at peace now. I am just starting to get up on my feet again. My bills worry me because everything is so expensive."</p>	<p>Son who lived w/ her died Feb 2022 – was previously helping by paying rent</p> <p>Uses car for doctor and hair appts</p>	<p>Gift:</p> <ul style="list-style-type: none"> Invoice 2022-2023 Car insurance balance \$118.25 	<p>Gift:</p> <ul style="list-style-type: none"> Invoice 2022-2023 Car insurance balance \$118.25 Estimate 2023-2024 Car insurance based on estimate of \$673
<p>New BENE#</p> <p>Waite, Cynthia 79 y/o; 8/21/1942 Income: \$1,775 sub</p> <p>ARAW support: New</p>	<p>BA Pat Midurski (508) 717-0400</p>	<p>"I have difficulty getting around because of my legs. I have bad circulation, neuropathy, bone on bone in my right knee & deformed toes on my left foot which will be operated on in the near future."</p>	<p>Referral Nightingale Home Care</p> <p>Lift chair safety & comfort</p> <p>SWH apprv motor</p> <p>Monthly balance \$303</p>	<p>Exception:</p> <ul style="list-style-type: none"> Income guidelines (over \$275) <p>Gift:</p> <ul style="list-style-type: none"> Invoice Lift Chair \$868 (patient portion) 	<p>Exception granted:</p> <ul style="list-style-type: none"> Income guidelines due to health concerns <p>Gift:</p> <ul style="list-style-type: none"> Invoice Lift Chair \$868 (patient portion) <p><i>Please look into tires and brake for possible future request</i></p>
<p>BENE# 20-21/06</p> <p>Whitehead, Marguerite 79 y/o; 9/24/1942 Income: \$1,325 sub</p> <p>ARAW support \$2,962: Reoccurring: EPERS \$39.95 '20 Gifts: Husband's funeral \$970 '20, Hearing aids \$854 '20, Holiday \$150 '20-21</p>	<p>DCOA Ann Raymond (508) 999-4717</p>	<p>"I can't chew at all. I don't digest because I don't chew. I can't wear my bottom ones. I've had these dentures for over 15 years." The biggest help would be to get her dentures to fit.</p>	<p>Apprv April 2022 – CC is in daughter's name</p> <p>Difficulty with chewing, couldn't speak clearly</p>	<p>Gift:</p> <ul style="list-style-type: none"> Statement Denture repair \$798 to be paid to daughter's credit card 	<p>Gift:</p> <ul style="list-style-type: none"> Statement Denture repair \$798 to be paid to daughter's credit card <p><i>Per advice of Accountants, pay the credit card directly; retain documentation showing how credit card payments/work directly correlate to credit card charge</i></p>

ARAW BENEFICIARY REQUEST COMMITTEE RECOMMENDATIONS

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Beneficiary	Outreach	Biggest Concern	Notes	Specific Request	Recommendations
<p>New BENE#</p> <p>Edwards, Diane 74 y/o; 4/5/1948 <i>Income: \$1,022 sub</i> ARAW support: New</p>	<p>BA Leonora Robins (508) 717-0400</p>	<p>“To have a land line because my smart phone is always broken. I feel more comfortable with a phone because of trauma earlier in my life when I couldn’t reach a phone.”</p>	<p>Trauma – unable to reach a phone – brings flashbacks</p> <p><i>Sup docs, groceries, pet expense, emergency contact</i></p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Cable/phone/internet \$??? 	<p style="text-align: center;">HOLD</p> <p style="text-align: center;"><i>Additional information not available at time of committee review.</i></p>

ARAW BENEFICIARY UPDATE COMMITTEE RECOMMENDATIONS

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Beneficiary	Outreach	Biggest Concern	Notes	Current Support	Recommendation
<p>BENE# 21-22/02</p> <p>Souza, Ethel 86 y/o; 4/22/1936 Income: \$1,493 sub</p> <p>ARAW support \$1,021: Reoccurring: OTC \$60 '21 Gifts: Car repair \$280 '19, Holiday \$150 '21 A/R Due: 5/4/2023</p>	<p>BA Pat Midurski (508) 717-0400</p>	<p>"I worry about not having enough money to pay for my rent & groceries. The prices of everything are skyrocketing & I can only stretch my money so far. I am so very grateful for the help the ARAW provides to me. If they can continue helping me with Voltaren for my pain relief that would be most appreciated."</p>	<p>Connected with friends & family</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ OTC products (Voltaren) up to \$60 <p>Monthly total: \$60</p>	<p>Gift:</p> <ul style="list-style-type: none"> ▪ Documentation needed Pay off outstanding debt associated with car loan \$2,000 <p>Monthly:</p> <ul style="list-style-type: none"> ▪ OTC products (Voltaren) up to \$60
<p>BENE# 22/05G</p> <p>Bishop, Sarah 68 y/o; 10/4/1953 Income: \$970 sub</p> <p>ARAW support \$2,092: Gifts: Moving \$1,520 '21, Gas \$198 '21, Electric \$374 '21 A/R Due: 5/5/2023</p>	<p>BA Pat Midurski (508) 717-0400</p>	<p>"I can never thank the ARAW enough. They saved me in my darkest time. My former landlady promised she would never sell the house & next I know I am being told I have one month to move. Thankfully, this apartment became available & with the help of ARAW I was able to move."</p>	<p>Few friends Researching SCOs</p>	<p>Remain on FLO & BM calls</p>	<p>Remain on FLO & BM calls</p>

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Beneficiary	Outreach	Biggest Concern	Notes	Current Support	Recommendation
<p>BENE# 19/02G</p> <p>Miranda, Maria 76 y/o; 9/4/1945 Income: \$1,418 H</p> <p>ARAW support \$2,136: Gifts: Car insurance \$934 '20, HOI \$902 '19, Holiday \$150 '20-21</p> <p>A/R Due: 5/5/2023</p>	<p style="text-align: center;">WCOA Susan Routhier (508) 636-1026</p>	<p>Ms. Miranda is concerned about keeping her house in good repair.</p>	<p>Very independent</p>	<p>Remain on FLO & BM calls</p>	<p>Remain on FLO & BM calls</p>
<p>BENE# 21-22/03</p> <p>Mendes, Darlene 72 y/o; 5/16/1950 Income: \$1,000 sub</p> <p>ARAW support \$3,040: Reoccurring: Cable/phone/internet \$161 '21 Gifts: Car repair \$451 '21 & \$750 '20, Holiday \$150 '21</p> <p>A/R Due: 5/5/2023</p>	<p style="text-align: center;">BA Leonora Robins (508) 717-0400</p>	<p>“Losing my companion, Spicy and all the other losses I’ve had so close together.” Ms. Mendes did not mention the names of her deceased sons. Up observation, speaking of her sons left her “very upset”.</p>	<p>Dog passed away April 2022 – no longer has pet expenses</p> <p>Paying off friend for final vet bill</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Cable/phone/internet \$161 <p>Monthly total: \$161</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Cable/phone/internet \$161

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Beneficiary	Outreach	Biggest Concern	Notes	Current Support	Recommendation
<p>BENE# 16-17/09</p> <p>DaRosa, Pricilla 83 y/o; 6/3/1938 Income: \$1,498 H</p> <p>ARAW support \$32,779: Reoccurring: BCBS \$678.06 '16, EPERS \$51.95 '16 Gifts: Recliner \$954 '20, Glasses \$610 '19, CC \$900 '19 & \$2,459 '10, Hearing aid \$3,800 '20, \$3,000 '18 & \$2,500 '16, Holiday \$100-150 '16-21</p> <p>A/R Due: 5/9/2023</p>	<p>BA Leonora Robins (508) 717-0400</p>	<p>“Having a scooter would be so wonderful for me to get out of the house & go to Dollar Tree store. My daughter is working with the insurance company to purchase one. I love Dollar Tree store!”</p> <p>“Having my alert button helps to make me feel safer.”</p>	<p>Numerous medical issues</p> <p>No longer has car expenses</p> <p>Monthly balance \$390</p>	<p>Quarterly:</p> <ul style="list-style-type: none"> ▪ BCBS \$678.06 <p>Monthly:</p> <ul style="list-style-type: none"> ▪ EPERS \$51.95 <p>Monthly total: \$277.97</p>	<p>Quarterly:</p> <ul style="list-style-type: none"> ▪ BCBS \$678.06 <p>Monthly:</p> <ul style="list-style-type: none"> ▪ EPERS \$51.95 <p><i>EOM high but stable with current support so no change recommended</i></p>
<p>BENE# 21-22/04</p> <p>Ramos, Anna 75 y/o; 2/26/1952 Income: \$1,001 sub</p> <p>ARAW support \$2,582: Reoccurring: Personal care \$174 '21 Gifts: Lift chair \$865 '21, Holiday \$150 '21</p> <p>A/R Due: 5/10/2023</p>	<p>BA Pat Midurski (508) 717-0400</p>	<p>“I had a stroke in my 50s & I have not walked since that time as the stroke affected my right side. I am off balance & weak on my right side. I can stand for a short time with my walker & Cheryl’s assistance. My life has improved so much since this time last year thanks to the ARAW.”</p>	<p>Granddaughter resigned as PCA</p> <p>Friend is now PCA</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Personal care \$175 <p>Monthly total: \$175</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Personal care \$175

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Beneficiary	Outreach	Biggest Concern	Notes	Current Support	Recommendation
<p>BENE# 21-22/16</p> <p>Miguel, Maria 83 y/o; 12/1/1938 Income: \$500 H</p> <p>ARAW support \$6,135: Reoccurring: Social day \$432 '21 Gifts: Holiday \$150 '21</p> <p>A/R Due: 5/20/2023</p>	<p style="text-align: center;">BA Pat Midurski (508) 717-0400</p>	<p>“My mom has flourished since attending the Social Day program. If she had to stay home she would not be doing as well as she is. She has severe depression which worsens if she doesn't have socialization.”</p>	<p>Enrolled in GAFC; active day funding from NBCOA & SWH</p> <p>Lives w/ dgthtr, dgthtr's spouse, spouse's mother & grndgthtr when not @ college</p> <p>Dgthtr doesn't want switch to PCA or adult day health (coved by MH)</p>	<p>Exception:</p> <ul style="list-style-type: none"> ▪ Continuation of living alone exception <p>Monthly:</p> <ul style="list-style-type: none"> ▪ Social Day program with transportation \$432 <p>Monthly total: \$432</p>	<p>Exception:</p> <ul style="list-style-type: none"> ▪ Continuation of living alone exception <p>Monthly:</p> <ul style="list-style-type: none"> ▪ Social Day program with transportation \$432 for 6 months <p><i>Decision based on medical condition & depression; reassess in 6 mnths</i></p>
<p>BENE# 17-18/20</p> <p>Correia, Maria Luisa 82 y/o; 2/13/1940 Income: \$936 R</p> <p>ARAW support \$14,450: Reoccurring: Rent \$250 '18 Gifts: Stove \$350 '18, Holiday \$150 '18-21</p> <p>A/R Due: 5/13/2023</p>	<p style="text-align: center;">BA Leonora Robins (508) 717-0400</p>	<p>During the visit, daughter Maria was present. Mrs. Correia expressed gratitude for this writer speaking Portuguese and “all the help that she is give.” In the past, it's been difficult to ask for any help. She is a very proud person. With the assistance from ARAW, she continues to live independently as she “had dreamed of”.</p>	<p>Connected to neighborhood</p>	<p>Annually</p> <ul style="list-style-type: none"> ▪ 2-3 cab rides for medical appointments as needed <p>Monthly:</p> <ul style="list-style-type: none"> ▪ Rent assistance \$250 <p>Monthly total: \$250</p>	<p>Annually</p> <ul style="list-style-type: none"> ▪ 2-3 cab rides for medical appointments as needed <p>Monthly:</p> <ul style="list-style-type: none"> ▪ Increase rent assistance \$300 <p><i>Increase decision based on small EOM balance and rising costs of everything</i></p>

ARAW BENEFICIARY UPDATE COMMITTEE RECOMMENDATIONS

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Beneficiary	Outreach	Biggest Concern	Notes	Current Support	Recommendation
<p>BENE# 16-17/22</p> <p>Tuite, Janice 83 y/o; 4/18/1939 Income: \$1,279 H</p> <p>ARAW support \$20,477: Reoccurring: BCBS \$678 '17, SRTA \$25 '19, Personal care \$40 '20 Gifts: Funeral \$3,440 '14, Holiday \$150 '17-21 A/R Due: 5/20/2023</p>	<p style="text-align: center;">BA Pat Midurski (508) 717-0400</p>	<p>“My health has taken a turn. I was at Hawthorn Medical 5 days last week! I told them that they will be out of business when I die. I have been losing blood but they cannot figure out where. I have had several iron infusions & now have to have the endo & colonoscopy.”</p>	<p style="text-align: center;">New health concerns</p>	<p>Quarterly:</p> <ul style="list-style-type: none"> ▪ BCBS \$678.06 <p>Monthly:</p> <ul style="list-style-type: none"> ▪ Incontinence products \$40.17 from Westport Apothecary ▪ SRTA Demand Response, 1 book \$25 ▪ Taxi voucher, as needed <p>Monthly total: \$291.19</p>	<p>Quarterly:</p> <ul style="list-style-type: none"> ▪ BCBS \$678.06 <p>Monthly:</p> <ul style="list-style-type: none"> ▪ Incontinence products \$40.17 from Westport Apothecary ▪ SRTA Demand Response, 1 book \$25 ▪ Taxi voucher, as needed
<p>BENE# 21-22/06</p> <p>Chor, Patricia 85 y/o; 10/22/1936 Income: \$1,684 R</p> <p>ARAW support \$2,756: Reoccurring: Cab \$25-50 '21 Gifts: Veterans \$289 '20, Glasses \$538 '20, Rent \$600 '20 & \$850 '21, Holiday \$150 '20-21 A/R Due: 5/18/2023</p>	<p style="text-align: center;">BA Pat Midurski (508) 717-0400</p>	<p>“Everything is so expensive. Groceries have gone sky high. Thank God my daughter has SNAP & helps with the grocery bill. She is diabetic & I have kidney disease so we both need to eat healthy nutritious foods.”</p>	<p style="text-align: center;">Lives with daughter Applying for Demand Response</p>	<p>Exception:</p> <ul style="list-style-type: none"> ▪ <i>Continuation</i> of living alone exception <p>Monthly:</p> <ul style="list-style-type: none"> ▪ Taxi vouchers, 2 round trips to Market Basket, up to \$50 <p>Monthly total: \$50</p>	<p>Exception:</p> <ul style="list-style-type: none"> ▪ <i>Continuation</i> of living alone exception <p>Monthly:</p> <ul style="list-style-type: none"> ▪ Taxi vouchers, 2 round trips to Market Basket, up to \$50

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Beneficiary	Outreach	Biggest Concern	Notes	Current Support	Recommendation
<p>BENE# 19-20/21</p> <p>Rocha, Margaret 81 y/o; 11/19/1940 Income: \$1,469 H</p> <p>ARAW support \$4,269: Reoccurring: Cable/phone \$111 '19 Gifts: Surgery \$346 '18, Glasses \$398 '21, Holiday \$150 '20-21</p> <p>A/R Due: 5/13/2023</p>	<p>DCOA Ann Raymond (508) 999-4717</p>	<p>"I know I have money in my checking account but that is for my funeral." She said she is thankful for the help the ladies are doing by paying her cable bill. "One less bill I have to worry about." She cuts her own grass to save money.</p>	<p>Money in checking for funeral</p> <p>Will not apply for SNAP</p> <p>Doesn't want EPERS</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Cable/phone \$111 <p>Monthly total: \$111</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Cable/phone \$111
<p>BENE# 19-20/45</p> <p>Antunes, Joana 81 y/o; 12/2/1940 Income: \$700 R</p> <p>ARAW support \$4,914: Reoccurring: Rent \$200 '20, Cable \$67 '21 Gifts: Comforter \$36 '18, Holiday \$150 '20-21</p> <p>A/R Due: 5/10/2023</p>	<p>BA Leonora Robins (508) 717-0400</p>	<p>Ms. Antunes repeatedly asked for "any help that she can have". Due to her health, she remains "unable to babysit as she used to".</p>	<p>Babysitting is only income</p> <p>Looking for new apartment</p> <p>Declines other services</p> <p>How is she paying rent?</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Rent assistance \$200 ▪ Cable \$67 <p>Monthly total: \$267</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Rent assistance \$200 ▪ Cable \$67 <p>Monthly total: \$267</p>

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Beneficiary	Outreach	Biggest Concern	Notes	Current Support	Recommendation
<p>BENE# 21-22/14</p> <p>Hernandez Rolon, Francisca 71 y/o; 1/24/1951 Income: \$942 <i>sub</i></p> <p>ARAW support \$273: Reoccurring: Cable \$123 '21 (only pd once) Gifts: Holiday \$150 '21</p>	<p style="text-align: center;">BA Pat Midurski (508) 717-0400</p>		<p>Approved cable – never changed address</p> <p>Does not wish to continue with ARAW</p>	<p style="text-align: center;">Place inactive</p>	<p style="text-align: center;">Place inactive</p>

Governance Committee Meeting Minutes – May 24, 2022

Members Present: Beaton, Beaulieu, Brooke, Doyle, Ellis, Laflamme, McKnight

Members Excused: Bachman

Also Present: Stankiewicz, Board President and Healy Foley, Executive Director

We began our meeting with a discussion of next steps for strategic planning. It is one of our goals for this year and our President would like it on a front burner. We discussed the pros and cons of hiring consultants vs proceeding with the process ourselves, and we discussed the pros and cons of using the same consultants we have used in the past vs bring in new blood. Our unanimous consensus was that we proceed with the initial steps of rehiring our prior consultants Amy Cahners and Susan Donahue of Cahners and Donahue Associates in Wellesley MA.

We agreed that outside leadership was important and will not distract effort from ongoing administrative business. We felt that Susan and Amy were dynamic, understood our ethos and mission well, and were easy and encouraging to work with. This will most likely be a less expensive process than previously because they will not need to take as deep a dive into our landscape and our status, and we have an existing plan to build on. Clare and Jane will be in touch with Susan and Amy to begin discussion and get a proposal that can be brought to the board for review and approval. We will also be able to augment the process with materials that are available to us without charge from Bank of America.

We also looked carefully at the format we have used for the past 2 years for our Board Self Evaluation. We compared it with a few other samples and decided that we would continue with our original for comparative purposes, but we will simplify the number of options for answers and include more opportunity for comments. Clare will put it together for us and we will review before it goes out to the Board later in June.

Those of us who had met/interviewed Leah Macomber updated the rest of the committee. We are all in agreement that she will make an excellent Board member. CORI check is next and then we will speak about her to the Board at our June meeting and move to approve her membership.

I did not receive any questions or concerns about Roseanne O'Connell's candidate, Helen Montague, and so we will proceed with setting up a meeting with her and a few representatives of this committee plus Clare and Roseanne. We will arrange that meeting for the near future so that we will be able to discuss her candidacy at our next committee meeting and hopefully bring her name forward to the Board in July.

We also discussed the process of updating our Membership Handbook for this new year. We have already formed a list of changes, additions etc. and Jeannete and Pam agreed to review the Committee Descriptions and the Job Descriptions to ensure that they are still up to date. The entire committee was asked to leaf through their copy and assure themselves that we have everything covered. We agreed that at the June or July Board meeting we will ask the members to bring their Handbooks and we will distribute the necessary updates.

Clare has pulled together a draft Volunteer Policy that, as best practice, all Directors should sign as we are all volunteers. Debbie will send it to the committee for review before our next meeting.

Respectfully submitted,
Debbie Brooke, Chair