



**ASSOCIATION FOR THE RELIEF OF AGED WOMEN**  
**Board Meeting | August 11, 2022 | 9:30 am**  
ARAW Office | 174 County Street | New Bedford | *Zoom option*

***Packet contents to be reviewed prior to the meeting:***

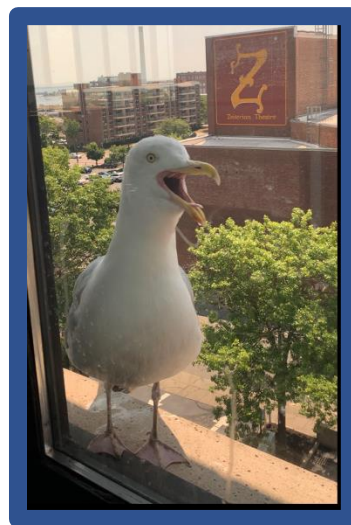
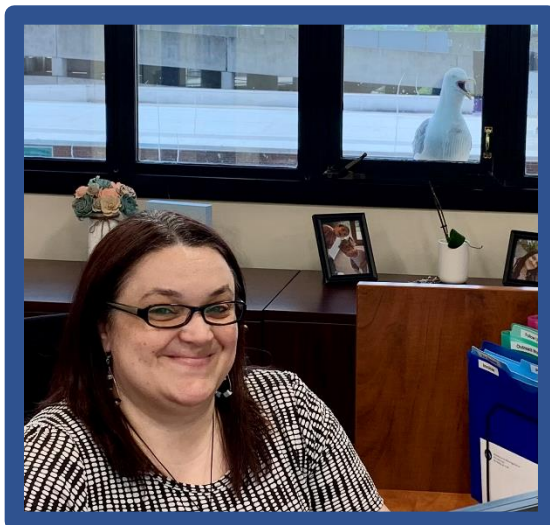
*July Minutes; August FLO Newsletter & BA Report; July activity sheet; July Financials; August Beneficiary Recommendations; Committees: Finance, Visiting, Governance, Personnel*

- 🕒 Moment of Silence
  - ♥ Lucille Duquette
- 🕒 Reflective Moment: Roseanne O'Connell
- 🕒 Call to Order: President Jane Stankiewicz
- 🕒 Roll Call: Clerk Gale Beaton
- 🕒 President's Report: Jane Stankiewicz – *see packet*
  - ✓ **Recommendation to approve July 2022 Board meeting minutes, as distributed – VOTE**
    - Welcome Helen Montague! → Change of date for October board meeting
    - Update: Retreat 9/14/22
- 🕒 Executive Director's Update: Clare Healy Foley – *see packet*
  - FLO Newsletter & BA report → Community Engagement
  - Questions: activity sheet → CPG updates
  - Staffing update → Beneficiary highlight
- 🕒 Finance Review: Treasurer Mary Ellis – *see packet*
  - Finance Committee/Investment Advisory Committee/BOA meeting update 7/22/22
  - ✓ **Recommendation to accept July finance report, as distributed – VOTE**
  - ✓ **Recommendation to accept the Investment Policy Statement (IPS), as distributed - VOTE**
- 🕒 Committee Reports
  - Visiting: Chair Jeannette Doyle – *see packet for upcoming birthdays*
    - Committee meeting update 7/21/22
    - ✓ **Recommendation to allow non-board member volunteers to fulfill the *friendship aspect of our mission* – VOTE**
    - August Visiting reports – 3 minutes each
      - \* Jeannette Doyle
    - Reporting in September: Gale Beaton
  - Beneficiary: Chair Pam McKnight – *see packet*
    - ✓ **Recommendation to accept decisions of beneficiary committee, as distributed – VOTE**
    - Highlight a new beneficiary

- Governance: Chair Debbie Brooke – *see packet*
  - Committee meeting update 7/26/22
  - Board survey review (sent previously)
  - Volunteer policies
  - Board Member Handbook update (bring binder)
- Grants: Chair Rosemary Saber
  - Nothing to report
- Legacy: Chair Diane Laflamme
  - Nothing to report
- Personnel: Chair Angela Natho
  - Committee meeting update 6/24/22
  - ✓ **Recommendation to continue health insurance benefit during paid family medical leave (PFML) – VOTE**
- Other business to be brought before the Board
- Executive Session, if needed

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

- Monday, August 8<sup>th</sup> | Board Focus Group | 174 Union | 3 pm**
- Wednesday, August 10<sup>th</sup> | Board Focus Group | 174 Union | 9:30 am**
- Thursday, August 11<sup>th</sup> | Board Meeting | 174 Union/Zoom | 9:30 am**
- Friday, August 12<sup>th</sup> | Finance Committee w/IAC & BOA | 174 Union/Zoom | 11:15 am**
- Thursday, August 18<sup>th</sup> | Legacy Committee | 174 Union | 9:30 am**
- Friday, August 19<sup>th</sup> | Retreat Planning Committee | 174 Union | 1 pm**
- Tuesday, August 23<sup>rd</sup> | Governance Committee | 174 Union/Zoom | 9:30 am**
- Tuesday, August 30<sup>th</sup> | TENTATIVE Retreat Planning Committee | 174 Union | 1 pm**
- Wednesday, August 31<sup>st</sup> | Beneficiary Committee | 174 Union/Zoom | 9:30 am**
- Thursday, September 8<sup>th</sup> | Regular Board Meeting | 174 Union/Zoom | 9:30 am**
- Wednesday, September 14<sup>th</sup> | Retreat | Wamsutta Club | 9:30 am**



**Association for the Relief of Aged Women  
Minutes of the Regular Monthly Meeting, July 14, 2022**

**Moment of Silence:** All present had a moment of silence for the beneficiaries who we lost since our last meeting:

1. Madeline Sinclair (84)
  - a. Westport resident
  - b. ARAW assisted w/EPERS, chiropractic, house cleaning, dentures
  - c. Devoted children – shared thanks for all ARAW has done
2. Shirley Mendonca (85)
  - a. Dartmouth/Whaler’s Cove resident
  - b. Made cards from own photography – many sent to & kept at ARAW office
  - c. Daughter couldn’t thank ARAW enough

**Reflective Moment:** With all the turmoil in the world, Jane Stankiewicz felt it appropriate to share a poem by Emily Dickinson about hope:

“Hope is a thing with feathers  
That perches in the soul  
And sings the tune without the words  
And never stops – at all  
  
And sweetest – in the Gale – is heard  
And sore must be the storm  
  
That could abash the little Bird  
That kept so many warm  
  
I’ve heard it in the chilliest land  
And on the strangest Sea  
Yet, never, in Extremity,  
It asked a crumb – of Me.

**President Jane Stankiewicz called the meeting to order at 9:35 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, Brooke, Doyle, Ellis, LaFlamme, Macomber, Mayall, McKnight, Natho, O’Connell, Saber, Stankiewicz.

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

**Members excused:** deSa.

The minutes of the June 9, 2022 board meeting were approved as distributed. **SO VOTED**

**Report of President:** President Jane Stankiewicz reported:

1. Welcome to Leah Macomber
  - a. Neighbors of Mary and Debbie – has been learning about ARAW for 5 years
  - b. Has been volunteering for 48 years
  - c. Professional life – non-profit fundraiser/consultant
2. Met with Bank of America Philanthropy team
  - a. Board education services available: Creating meaningful change, Board diversity and other topics
3. Board Retreat – September 14<sup>th</sup>
  - a. Executive Committee will serve as retreat committee – first meeting tomorrow
  - b. If need for Strategic Planning Committee identified during retreat – will be formed from whole board membership

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

1. Welcome to new office space
  - a. Thanks to all for making it happen – especially Cathy
  - b. Moved officially on Tuesday
  - c. Comcast not set up yet – will be next week
  - d. Used Tavares movers – great, got the job done
    - i. Also used by Fresh Start
  - e. Building owners and Jay, building manager, have been wonderful
  - f. County Street location – ours till end of July
  - g. So nice to all be together in ARAW's own office space – will always have option for Zoom in the future
2. FLO Newsletter
  - a. Coastal Neighbors Network luncheon
    - i. Andy Pollock hosting at Silverbrook Farm
    - ii. Open to Dartmouth and Westport beneficiaries
  - b. Fishing Heritage Center event next Tuesday
  - c. Encourage attendance for each with friends – you can join them
3. Activity sheet and BA Reports: would like to acknowledge all of Pat's hard work
4. Staffing update
  - a. Leonora
    - i. Not right fit for what ARAW needs right now
    - ii. Gave letter of recommendation (included in packet)
    - iii. Left with good feeling – going to be full time PCA for her mom
  - b. Ana Paz
    - i. Starting Monday 7/18 as full time beneficiary advocate
    - ii. Speaks Portuguese, critical thinker, hard worker
    - iii. Very eager and excited to join ARAW

5. Investment Conference
  - a. Attended with Mary, invited by Kevin O’Connell (IAC)
  - b. Very informative – many great presentations
  - c. Thank you for opportunity
6. Community Engagement
  - a. Have connected with more people in process of office move
  - b. Diane Edwards – new beneficiary
    - i. “I have been on my own since I was 16. So wonderful that strangers are helping me.”
    - ii. Has been sharing ARAW with employees at Rockland Trust – would like brochures to be sent to them
7. CPG updates
  - a. AHA! – received check for returned funds
  - b. Fishing Heritage Center – Grants Committee visited for a tour
  - c. Coastal Neighbors Network – ARAW has sent a few referrals
  - d. Cape Verdean Association
    - i. Zoom meeting rescheduled due to connectivity issues
    - ii. CVA will be sending new proposal
8. Beneficiary Highlight
  - a. In contact with many to update addresses for ARAW move
    - i. More capable than given credit for
    - ii. A few beneficiaries sent in thank yous by email
  - b. Inflation – affecting many beneficiaries (cost of groceries and gas)

**Report of Finance Committee:** Chair Mary Ellis reported:

1. Investment conference was excellent
  - a. Opportunity at lunch for interaction with peers
2. Office space was last big item to check off of Finance’s Strategic Plan goals
3. Kathleen McQuiggan’s education presentation included in board pack
4. Meeting next Friday, July 22<sup>nd</sup> with IAC & BOA – all welcome to attend
5. Motion made to accept June finance report with change of color on the accounting line item. SO VOTED

**Report of Visiting Committee:** Chair Jeannette Doyle reported:

1. Meeting on July 21<sup>st</sup>
  - a. Will discuss how it’s going, potential for in person, reporting
2. Visiting reports: Angela Natho
  - a. Marguerite “Marge” Whitehead
    - i. Sent lovely thank you note
    - ii. Joking about long name
    - iii. Ongoing issues with son’s addiction – doing better
    - iv. Sounds more upbeat recently

- v. Loved dancing at the COA
- vi. Calls 97 year old neighbor every day
- vii. Daughter calls everyday
- b. Isabel Sousa
  - i. Sits with other residents at her building outside
  - ii. Loves to bake
  - iii. Health decline in 2021 – getting back to normal
  - iv. Has never been so bored but says “If we can eat, walk, talk – we’re doing fine.”
- 3. Next month – Jeannette Doyle

**Report of Beneficiary Committee:** Chair Pam McKnight reported:

1. Beneficiary Task Force meeting June 20<sup>th</sup>
  - a. FLO Program
    - i. Opened up to more people during pandemic
    - ii. Back to original intent – socialization for those who are isolated and meet eligibility guidelines
2. New Beneficiary Highlights
  - a. Edith Lammers (77 y/o)
    - i. Recently moved to subsidized housing
    - ii. Lived with mother and nephew until mother’s death
    - iii. No friends her own age to share experiences
    - iv. Approved to join FLO program
3. A motion was made to accept recommendations from the Beneficiary Committee as distributed. SO VOTED
  - a. 16 requests, 9 updates
  - b. Discussion about facial & dental whitening – important for self confidence and socialization – stressed one time only

**Report of Governance Committee:** Chair Debbie Brooke reported:

1. A motion was made to invite Helen Montague to join the ARAW board. SO VOTED
  - a. President will send email
  - b. Orientation will be scheduled
2. Board survey sent out – responses due by end of today
  - a. Will help inform retreat planning

**Report of Grants Committee:** Chair Rosemary Saber reported:

1. Retreat will provide opportunity to look forward for RFP process
  - a. Calendar for RFP process will be reworked
2. Visit to Fishing Heritage Center – wonderful, very enthusiastic

**Report of Personnel Committee:** Chair Angela Natho reported:

1. A motion was made to opt out of the employer sponsored health plan and continue with the lump sum offering (up to \$7,000) towards a plan of the employee's own choosing, if the employee is the policyholder. SO VOTED
2. A motion was made that there be no waiting period for payment towards a Health Insurance Plan. SO VOTED
3. A motion was made to adopt Juneteenth as a paid holiday for our employees. SO VOTED

**Other Business:**

1. ARAW phone company Clear Sound subcontracts with New Horizons
  - a. Owner of New Horizons, Brad Fackler sent \$300 donation with letter which was shared with the board

The meeting was adjourned at 11:12 am.

Recorded by,  
Jenny Costa, Office Administrator

Approved by,  
Gale Beaton, Clerk

August 2022



## GOING WITH THE FLO

Friendship Lunches & Outings (FLO)  
Newsletter

**ARAW**

174 Union Street, Unit 4W  
New Bedford, MA 02740

**ARAW MOVED OFFICES ON JULY 12th...**

**If ARAW pays any of your bills, please make sure your billing address has been changed so that we continue to receive your bills.**

**WE WANT TO PAY THEM ON TIME!**

**If you run into any issues, please call us at (508) 717-0400**

**WE CAN'T WAIT TO HEAR FROM**

**YOU!**

**Please take a few minutes to fill out the enclosed survey. Mail back in the envelope provided and be entered into a raffle with a**

**CASH PRIZE!!!**

## Look at these masterpieces!

Congratulations to the ARAW artists who created beautiful works of art during the New Bedford Art Museum's Summer Painting Class.



**For more opportunity to enjoy art of all kinds....**

Please use the enclosed New Bedford Art Museum pass to visit the museum and bring some friends!





NEW BEDFORD FISHING HERITAGE CENTER



# Lunch & Learn

Join ARAW friends and our friends from the New Bedford Fishing Heritage Center for a fun and informative lunch at the Wamsutta Club  
**FRIDAY, AUGUST 26<sup>th</sup> | 12:30 pm – 2 pm**  
Call ARAW to Register (508) 717-0400  
*Transportation is available!*



Caring | Community | Connection

# THANK YOU!



Thank you to Andy Pollock of Coastal Neighbors Network for hosting some of our Dartmouth & Westport ARAW friends at Silverbrook Farm. It was an afternoon of fun, good food and friendship. They made beautiful bouquets with flowers fresh from the Farm while experiencing a taste of membership to Coastal Neighbors Network.

For ARAW eligible friends who live in Dartmouth & Westport, **FREE** membership is available through funding from an ARAW Community Partner Grant. To experience more fun like this plus invaluable services including transportation & friendly visits...

**Call Andy for more details  
(508) 556-4004**



## BEFORE YOU SWITCH HEALTH INSURANCE CONSULT WITH AN EXPERT.



### SHINE Counselors in the Greater New Bedford Area

Acushnet Council on Aging 59 1/2 South Main St., Acushnet	508-998-0280	Heather Sylvia
Dartmouth Council on Aging 628 Dartmouth St., Dartmouth	508-999-4717	Peggy Vollmer Ann Raymond
Fairhaven Council on Aging 229 Huttleston Ave, Fairhaven	508-979-4029	Dianne Perkins Carolyn Dantoni
GNB Community Health Center 874 Purchase Street, New Bedford	508-992-6553 x147	Derek Mendes
Immigrants' Assistance Center 58 Crapo St., New Bedford	508-996-8113	Lucy Oliveira
New Bedford Council on Aging 181 Hillman St. (for New Bedford residents only)	508-991-6250 508-991-6252	Natasha Franco Luisana Paez-Espinal
PACE, Inc. 166 William St., New Bedford	508-999-9920	Freda St. Marie-Johnson
Southcoast Health 200 Mill Road, Suite 109, Fairhaven	508-758-3781	Denise Dupuis Carla Marcelino Sandra Spoor

Westport Council on Aging also has counseling available.  
Just call (508) 636-1026 to speak to an expert.



2022 Farmer's Market coupons **DELAYED**  
now available after August 5th.  
Call your COA or Coastline case manager

# Help Keep Your EBT Card and DTA Benefits Safe!



Set a new EBT PIN before each issuance:

1. Call the number on the back of your card: 800-997-2555.
2. Choose your language.
3. Enter the number on the front of your card.
4. Press 2.
5. Enter the last 4 digits of your Social Security Number (SSN). If you do not have an SSN, enter the last 4 digits of your 99 number assigned by DTA.
6. Enter your Date of Birth (month/day/year – 2 digits for month, 2 digits for day, 4 digits for year). For example, 12 01 1989 for December 1, 1989.
7. Enter your NEW 4-digit PIN; then enter it again. Choose a different PIN from any previous PINs.

**This is the best way to try to protect your benefits if your card information has been stolen.**

If you receive TAFDC or EAEDC cash assistance, ask about having your benefits deposited to your bank account. Call your case manager to set up direct deposit.



Learn more at [Mass.gov/ProtectYourEBT](https://www.mass.gov/ProtectYourEBT)



# FAMILY FUN AT THE FISHING HERITAGE CENTER

## August AHA! Night

(New Bedford's monthly culture night)



**August 11, 2022 • 5:30-8 PM**

**38 Bethel Street, New Bedford MA**

Activities presented by MA Health Connector  
in partnership with the FHC,  
Fishing Partnership, and PACE:

- Pop-up games
- Silly Sally Bubble Show
- DJ spinning family-friendly tunes
- Balloon animals
- Health Connector info table
- Event partner booths



**Bring the grandkids!**



Kids can make their own instrument from 5:30-7, then join a Foo Foo Band led by Jeff Angeley! Foo Foo bands were 19th century impromptu bands formed from a fishing vessel's crew.





# ARAW wants to hear from YOU...



Dear Friends, ARAW exists solely to support women like you!

We want to make sure we are doing an excellent job meeting your needs.

Please take a few minutes to answer these questions and let us know how we are doing.

Please answer honestly. Your opinion is important. **THANK YOU!**

**YOUR NAME (optional):**

**EVERYONE WHO COMPLETES A SURVEY, AND CHOOSES TO SUBMIT THEIR NAME, WILL AUTOMATICALLY BE ENTERED IN A RAFFLE FOR A \$50 CASH PRIZE!**

What town do you live in?	X
Acushnet	
Dartmouth	
Fairhaven	
New Bedford	
Westport	

How long have you received financial assistance from ARAW?	X
Less than 1 year	
1 to 5 years	
More than 5 years	
I do not receive financial assistance from ARAW	
I don't know	

Which ARAW programs have you participated in? (Please check all that apply.)	X
Ongoing financial support	
Financial support for a one-time need	
Friendly phone calls from an ARAW representative	
Lunches & outings	
Transportation to programs & events	

If you have received financial assistance from ARAW, please tell us:	YES	NO	Don't remember
Was the application process easy for you?			
Were the people at ARAW helpful & understanding?			
<b>Do you have any suggestions on how we can improve our request for financial assistance?</b>			

If you have participated in a lunch or outing in the last year, were they:	YES	NO	Don't remember
Enjoyable?			
Well run?			
<b>What could have made the program better?</b>			

**If you have *not participated* in an ARAW lunch or outing in the last year, why not? (Check all that apply):**

- |   |   |
|---|---|
| <input type="checkbox"/> Wasn't aware of programs                     | <input type="checkbox"/> Hesitant to go on my own                           |
| <input type="checkbox"/> The activities offered don't appeal to me    | <input type="checkbox"/> Didn't know transportation was available           |
| <input type="checkbox"/> Not COVID vaccinated                         | <input type="checkbox"/> I don't want to ride in a cab alone                |
| <input type="checkbox"/> I didn't know I was eligible                 | <input type="checkbox"/> Unsure if could attend with wheelchair/walker/cane |
| <input type="checkbox"/> I didn't know the program pays meal/activity | <input type="checkbox"/> Special diet to be accommodated                    |
| <input type="checkbox"/> No one I know is attending                   | <input type="checkbox"/> PCA required when I go out                         |

<b>Other reasons?</b>

Many ARAW beneficiaries receive calls from an ARAW board member.	YES	NO	Don't remember
Have you received a call in the past year?			
If yes, was the board member friendly?			
If yes, was the board member respectful?			
If yes, was the board member a good listener?			
If you did not receive a call, would you like to hear from an ARAW board member?			

**What additional programs would you like to see offered? (Please check all that apply.):**

- |  |   |
|--|---|
| <input type="checkbox"/> Outdoor activities  | <input type="checkbox"/> Creative activities      |
| <input type="checkbox"/> Destinations (zoos, aquariums, museums, etc.)                                   | <input type="checkbox"/> art                      |
| <input type="checkbox"/> Dining out with peers   | <input type="checkbox"/> music                    |
| <input type="checkbox"/> Book Club   | <input type="checkbox"/> theater                  |
| <input type="checkbox"/> At home visitor/companion   | <input type="checkbox"/> movies                   |
| <input type="checkbox"/> Raffles/gift cards  | <input type="checkbox"/> Educational activities:  |
| <input type="checkbox"/> Delivered activities or special meals   | <input type="checkbox"/> guest speakers           |
| <input type="checkbox"/> Seasonal (ice cream, beach, holiday concerts, fall foliage, flower shows, etc.) | <input type="checkbox"/> learn a foreign language |
|  | <input type="checkbox"/> nutrition/cooking        |

**Other suggestions?**

**What else can you tell us about the quality of our programs and support?**

**What more can ARAW do for you?**



## July 2022: Beneficiary Advocate

*Patricia Midurski*

**REFERRALS:** Three referrals were received in July (later part of month) Home visits have been scheduled for the next two weeks and will be presented at the September meeting. A referral received in June was completed this month.

**UPDATES & REQUESTS:** Twelve annual updates were completed this month. Requests included: Comcast, PERS, medical bill assistance, nutritional drinks, incontinence products, health insurance, cell phone, Demand Response tickets, Charlie card, auto insurance, food support, taxi vouchers, real estate tax assistance (one-time gift) and an air conditioner.

**FLO:** Four updates were completed.

**Overdue:** Suzanne Auger, Regina Pollak and Veronica Croffut have been ill and their annual updates have been postponed to August. Barbara Miranda proved challenging to connect with and has agreed to meet early August. Priscilia Okpara, Lynn Laber and Pauline Benoit have visits scheduled for August.

**INACTIVE STATUS:** Ann Medeiros (LTC), Mary Crovello (grandson living w/her: refused to share financial info and denied need), Mary Jacques ("doesn't want to participate anymore"), Eva Liput (declined application process)

**Referrals made to:** SCCLS (4), Greater Boston Food bank (1), MassHealth help line, Senior Medicare Patrol number provided, Fresh Start, NB Housing Authority: The referrals to SCCLS were for: tenant rights in subsidized housing, scams x2 (health insurance and financial), eviction/housing

**Monthly Wrap Up:** The month of CHANGE..... Change in staffing, change in office location, change of billing addresses..... The changes are positive and demonstrate growth of the ARAW. Change can be disruptive and chaotic especially when we are dependent on technology for communication and work. However, once again, we rose to the occasion and survived the turmoil of a major relocation and it's subsequent adventures. However, our focus remained constant and consistent on the needs of the beneficiaries, a factor that has never changed in the 156 year history of the ARAW!



## July 2022: Beneficiary Advocate

*Ana Paz*

**REFERRALS:** (2) new referrals came in. None of which qualified due to:

(1) being over income and (1) age requirement <65y.o.).

**UPDATES/REQUESTS:** (3) annual updates assigned this month. (2)

Portuguese speaking (1) English speaking. All were annual reviews. All (3)

are being presented to the Board at the August meeting. (1) Is a request to make inactive as there is not need at the time and beneficiary is not interested in participating in any activities. (1) quite complex due to immigration status.

### **OVERDUE:**

Joana Antunes: Due 5/2022. Completed this month and will be presented to the Board in August.

Atanzia Barbosa: Due 6/2022. Completed this month and will be presented to the Board in August.

Susanne Auger: Due 6/2022. Pending annual review August. (2) call attempted to schedule annual visit with no response.

**INACTIVE STATUS:** Atanzia Barbosa will be requested to change to inactive status. To be presented at August meeting.

**REFERRALS MADE TO:** (1) referral made to CESI

**CHALLENGES:** Getting familiarized with resources in the community (i.e., IAC, CESI, SCCL, SNAP, etc..).

**TEACHING MOMEMNTS:** How common immigration status effects the population we serve and the need to obtain more information from IAC to better understand options available and challenges our beneficiaries have faced. Seeking to connect with IAC and learn as much as possible.

**GRATITUDE:** These past (2) weeks have been gratifying. It is an honor to be welcomed in one's home and be part of an opportunity to aid and hope. So very Happy to be part of ARAW!



### ARAW July 2022 Activity Sheet

Due Date	With	Staff	Type	Notes
7/1/2022	Oliveira, Alice	PMIDURSKI	Phone Call	LR - Spoke with son Paul re: information needed
7/1/2022	Oliveira, Alice	PMIDURSKI	Phone Call	LM for Caitlyn Venter/CM/CESI re: Alice Oliveira: Home visit for Update & investigate request
7/1/2022	Liput, Eva	CFOLEY	Phone Call	From NBFHC referral; hesitant about home visit; ref to SCCLS; will call back if move fwd with ARAW
7/1/2022	Todd, Kristine	PMIDURSKI	Phone Call	Apt bld sale: CHAMPS app mailed: Info re: NBHA, Section 8 vouchers, Boston Land (Taber Mill & Olympia)
7/1/2022	Todd, Kristine	JCOSTA	Phone Call	Building being sold, unsure what that will mean, being proactive & seeking resources, EM to PM to f/u
7/1/2022	Edwards, Diane	CFOLEY	Phone Call	Marketing for us; send brochures to Rockland; checking on cable package and sports fee
7/1/2022	Walker, Bonnie	PMIDURSKI	Phone Call	Billing address change: BW Will call today
7/1/2022	Spearin, Gail	PMIDURSKI	Phone Call	Billing address change: Home visit sched for 7/26
7/1/2022	Ponte, Karyn	PMIDURSKI	Phone Call	Change of billing address: KP to call today
7/1/2022	Chaput, Vanessa	JCOSTA	Phone Call	Unable to attend NBAM class this week w/Carol Cole & Isabel Sousa, left msg w/Devin, EM sent to NBAM
7/1/2022	Costa, Barbara	PMIDURSKI	Phone Call	Change of billing address: BC contacted Comcast: "TY for flag pin"
7/1/2022	Tuite, Janice	PMIDURSKI	Phone Call	Billing address change: JT to call today: "Lovely ride in van last Friday for Wamsutta Luncheon"
7/1/2022	Monteith, Judith	JCOSTA	Phone Call	TY for flag pin, inquiring where new office location is so she can drive by some time
7/1/2022	Vieira, Germaine	PMIDURSKI	Phone Call	Changing billing address: GV will call today
7/1/2022	Simard, Agnes	PMIDURSKI	Phone Call	VM left re: change of billing address: Info sent via mail
7/1/2022	Ventura, Natalina	CFOLEY	Phone Call	To confirm address change with Comcast was made
7/1/2022	Polek, Regina	PMIDURSKI	Phone Call	VM left re: need to change billing address and need to sched annual update
7/1/2022	Sampson, Janet	PMIDURSKI	Phone Call	Change of billing address: JS will change today
7/1/2022	Tavares, Maria	PMIDURSKI	Phone Call	Billing address change: MT to call today
7/1/2022	Mota, Lina	PMIDURSKI	Phone Call	To dgt Wendy re: change of billing address; Dgt to call Comcast today
7/1/2022	Simpkin, Carol	PMIDURSKI	Phone Call	VM left re: BCBS address change: Info sent via mail
7/1/2022	Roderiques, Bernadette	PMIDURSKI	Phone Call	Change of billing address: BR to call today "TY for flag pin"
7/5/2022	Parquette, Mary Jane	CFOLEY	Phone Call	Hoping our move went well and wishing us good luck
7/5/2022	Petrin, Joan	PMIDURSKI	Phone Call	To report BCBS address was changed Friday 7/1; "TY ARAW for everything!"
7/5/2022	Simpkin, Carol	PMIDURSKI	Phone Call	To confirm success in changing billing address for BCBS
7/5/2022	Curado, Alzira	PMIDURSKI	Phone Call	From Tina re: Comcast> Enc to call Comcast w/new address: Need AC name on bill: Tina notified
7/5/2022	Curado, Alzira	JCOSTA	Phone Call	From Tina, spoke to Comcast, to assist Alzira w/address change & obtaining paper bill tomorrow, will CB
7/5/2022	Polek, Regina	PMIDURSKI	Phone Call	BCBS address change: Adv new address w/newsletter: To call BCBS today: Annual HV sched 7/27
7/5/2022	Roderick, Anita	PMIDURSKI	Phone Call	To Alden SW: He will call sister to req she call ARAW re: billing change for Comcast
7/5/2022	Simard, Agnes	JCOSTA	Phone Call	Address change, adv new address & copies enclosed w/newsletter, to CB if any issues
7/5/2022	Monteith, Judith	PMIDURSKI	Phone Call	LR - she stated COMCAST already changed address over the phone & she's applied for a puppy
7/5/2022	Castello, Janice	PMIDURSKI	Phone Call	To report COMCAST billing address change completed: "TY I am so grateful for the ARAW help."
7/5/2022	Lada, Rosalie	PMIDURSKI	Phone Call	VM Left for social services dept re: need to change billing address for comcast: awaiting CB
7/5/2022	Costa, Barbara	PMIDURSKI	Phone Call	Stanley Steamer> BC to call SS re: payment to be made by landlord NOT ARAW, CB all set
7/5/2022	Arruda, Judith	CFOLEY	Phone Call	From JA rec'ed newsletter - very confused; we should call sister Gerry
7/5/2022	Santos, Laura	PMIDURSKI	Phone Call	Comcast address change: Adv new address w/newsletter: To call Comcast today: Not feeling well
7/5/2022	Lamontagne, June	PMIDURSKI	Phone Call	Address change, adv new address & copies enclosed w/newsletter: will call BCBS today: CB if any issues
7/5/2022	DeSouza, Joanne	PMIDURSKI	Phone Call	Annual update sched 7/15: ARAW address change: BCBS & Lively copies in newsletter: will CB if ?s
7/5/2022	Jenkins, Karen	PMIDURSKI	Phone Call	Sched annual update: HV 7/20:NBAM resched to Tues 7/12 5pto7p: Devon provide trans: ARAW Admin aware
7/5/2022	Crovello, Mary	PMIDURSKI	Phone Call	To cousin: PC w/o telephone: Dly SN & PCA twice wkly: Mom died 6/30: Annual HV sched: Cards mailed
7/5/2022	Miranda, Barbara	PMIDURSKI	Phone Call	VM left re: need to sched annual update and reminder of giveaway gift: req CB
7/5/2022	Kirklewski, Beatrice	PMIDURSKI	Phone Call	From FCOA re: POC for BK: VNA, CES, FEW app to be submitted: OC to advise son to get PERS asap
7/5/2022	DaCunha, Dolores	PMIDURSKI	Phone Call	To niece: Review of application reveals over income: Ineligible
7/5/2022	Oliveira, Alice	PMIDURSKI	Phone Call	LR - Spoke to Caitlyn at CESI re: status of insurance and transportation
7/5/2022	Benoit, Pauline Jeanne	PMIDURSKI	Phone Call	VM left for dgt Carol re: need to call ARAW re: Comcast billing address change
7/5/2022	Sharples, Mary	PMIDURSKI	Phone Call	ARAW address change: MS to call BCBS, Verizon & Comcast to change billing address
7/6/2022	Ventor, Rosalie	PMIDURSKI	Phone Call	BCBS address change: Clarification provided: will call BCBS today: No interest in museum or fishing stories

7/6/2022	Ventor, Rosalie	JCOSTA	Phone Call	Unable to get thru to BCBS, will call again this afternoon
7/6/2022	Sharples, Mary	CFOLEY	Phone Call	Confirmed COA w/BCBS, Verizon asked for Comcast ph number
7/6/2022	Bissonnette, Alice	PMIDURSKI	Phone Call	BCBS billing address change: Will call today: No interest in NBAM passes or fishing stories
7/6/2022	Morin, Jacqueline	PMIDURSKI	Phone Call	Reminder to change Comcast & Standard Times: Will call today to change billing address
7/6/2022	Messier, Ellen	PMIDURSKI	Phone Call	Billing address change for Comcast: To call today: No interest in July newsletter activities
7/6/2022	Galipeau, Beverly	PMIDURSKI	Phone Call	VM left re: BCBS billing address change
7/6/2022	Comeau, June	PMIDURSKI	Phone Call	From cousin: Emergency brain surgery 7/4: Stable: cousin awaiting CB from SCCLS
7/6/2022	Dillon, Sherry	PMIDURSKI	Phone Call	Re: clarification of BM questions re: request: CHF provided answers for BM
7/6/2022	Bramwell, Nancy	PMIDURSKI	Phone Call	BCBS: Will bring invoice to COA to scan to ARAW: EM to ACOA to confirm plan: HC in agreeance
7/6/2022	Almeida, Marie	PMIDURSKI	Phone Call	VM left req CB re: BCBS billing address change: Awaiting CB
7/6/2022	Letourneau, Diane	JCOSTA	Phone Call	To congratulate on move & reg for NBAM passes
7/6/2022	Mortensen, Marilyn	PMIDURSKI	Phone Call	To dgt Kim re: billing address change for Comcast: MM req BA speak w/dgt as she could not understand
7/6/2022	Gordon, Melba	PMIDURSKI	Phone Call	VM left w/dgt re: status of MG & comcast bill: Awaiting CB
7/6/2022	Dejesus, Eva	PMIDURSKI	Email	To grandgt req assistance w/ Comcast billing change: Acct # provided
7/6/2022	Smith, Debra	JCOSTA	Phone Call	Check on AT&T payment, adv sent on 6/30
7/6/2022	Medeiros, Ann	PMIDURSKI	Email	From CES case manager: AM is LT as of 6/1/2022: Inactive status
7/6/2022	Miguel, Maria	PMIDURSKI	Phone Call	From NBCOA re: award & billing: June, July&Aug 2022 for assist w/SDC to allow fam explore alter resources
7/6/2022	Furness, Betty	PMIDURSKI	Phone Call	Add change Comcast: Rcvd WA del in June: Sign up for Silverbrook luncheon
7/6/2022	Ponte, Marion	CFOLEY	Phone Call	Confirming address change; not interested in fishing; art classes not advanced enough; museum passes
7/6/2022	Fisher, Laura	PMIDURSKI	Phone Call	To confirm change in BCBS billing address: Completed: Req NBAM passes
7/6/2022	DeSouza, Joanne	PMIDURSKI	Phone Call	To confirm changes of billing address for BCBS and Lively phone service: Assured cell phone is 5G: Relieved
7/6/2022	Almeida, Lorene	PMIDURSKI	Phone Call	Comcast billing addr change: completed: Msg to BM Mary "I appreciate your calls" EM to JC
7/6/2022	Chor, Patricia	PMIDURSKI	Phone Call	Farmer's Market coupons: # for NBCOA provided: Not interested in Fishing stories or Museum passes
7/6/2022	Waite, Cynthia	PMIDURSKI	Email	From Diane @ ENOS: Approval for chair rcvd from SWH: Delivery to be sched by ENOS
7/6/2022	Mendes, Darlene	PMIDURSKI	Phone Call	Comcast billing addr change: Will call this week: Enc to call asap to avoid lapse in service
7/6/2022	Bizarro, Lucille	PMIDURSKI	Phone Call	Billing address changes for BCBS, Verizon, Comcast & Silverscript: LB to call today: Decline NBAM& Fish Her
7/6/2022	Drayton, Gail	PMIDURSKI	Phone Call	Comcast billing address change: Will complete today
7/6/2022	Livesley, Virginia	PMIDURSKI	Phone Call	Taxes: Req assist: Will change billing address for BCBS & Comcast: JC to notify BM of VL req for CB
7/6/2022	Fredette, Lucille	PMIDURSKI	Phone Call	BCBS address change to be completed today: Review of info: Declines NBAM passes/fishing stories
7/6/2022	Lima, Mary	PMIDURSKI	Phone Call	BCBS billing addr change: Will call today; Will CB re: CNN lunch "Let me read about it and CB"
7/6/2022	Lada, Rosalie	PMIDURSKI	Phone Call	To Sacred Heart NH: Social worker not working today: CB Thurs 7/7
7/6/2022	DaRosa, Priscilla	PMIDURSKI	Phone Call	BCBS billing address change: PDR to call today : Declines NBAM passes & NB fishing heritage seminar
7/6/2022	Ingham, Linda	PMIDURSKI	Phone Call	To sister who is very ill: BA to make HV to assist LI w/Comcast billing address change
7/6/2022	Liberatore, Gertrude	PMIDURSKI	Phone Call	To confirm add change for Spectrum: Sign up for CNN lunch, NBAM passes & NB Fishing Heritage 7/19
7/6/2022	Fragata, Maria	PMIDURSKI	Phone Call	To change BCBS billing addr: Confirmed dentist paid 6/22: Not interested in July activities
7/6/2022	Greenwood, Dorothy	PMIDURSKI	Phone Call	Need for change in billing address for BCBS: DG to call today
7/6/2022	Begnoche, Cecile	PMIDURSKI	Phone Call	From Dgt: Aetna & BCBS issues: Info re: Senior Medicare Patrol w/contact info: VNA & CES involved
7/6/2022	Moore, Carolyn	PMIDURSKI	Phone Call	VM left re: need for change in billing address for BCBS: Awaiting CB
7/6/2022	Ventura, Natalina	PMIDURSKI	Phone Call	Comcast billing address change>TO change billing add today> No interest in passes or fishing stories
7/6/2022	Curado, Alzira	PMIDURSKI	Email	From Comcast: name change, req to fwd current bill to ARAW, Tina notified
7/6/2022	DeCosta, Cynthia	PMIDURSKI	Phone Call	Comcast billing address change completed: ACP app mailed: Leary of crowds: declined NBAM & Fishing
7/6/2022	Hotte, Eileen	PMIDURSKI	Phone Call	BCBS billing add change: Support provided: To call today: "I appreciate the ARAW and pray for you all!"
7/6/2022	Huezo-Mendoza, Sonia	PMIDURSKI	Email	To IAC intern: HV sched for annual update 7/14 @ 12pm w/interpreter
7/6/2022	DosSantos, Cathrina	PMIDURSKI	Phone Call	To confirm change to BCBS billing address: "Thanks to ARAW!"
7/6/2022	Parquette, Mary Jane	PMIDURSKI	Phone Call	Change of billing addr for Comcast: Interested in NBAM passes & CNN luncheon
7/7/2022	Hotte, Eileen	PMIDURSKI	Phone Call	To sched HV re: request for Inc products: HV sched for 7/19 @ 1:30pm
7/7/2022	Mendonca, Shirley	JCOSTA	Phone Call	From dtr, SM @Brandon Woods on hospice, dtr to return equipment & cancel Comcast
7/7/2022	Roderick, Anita	PMIDURSKI	Phone Call	From dgt Carol re: billing address change: she will change today: AR "very appreciative for all ARAW does. TY"
7/7/2022	Roderick, Anita	PMIDURSKI	Phone Call	From SW Mark w/AR: Info provided re: Comcast billing: they will call to change address: TY ARAW!!
7/7/2022	Ingham, Linda	PMIDURSKI	Phone Call	To change Comcast billing address: Shomene comcast rep. completd request

7/7/2022	Lada, Rosalie	PMIDURSKI	Phone Call	From SW @ Sacred Heart: she will call RL nephew to change Comcast billing address
7/7/2022	Livesley, Virginia	PMIDURSKI	In Home Visit	To obtain supporting doc for request: Sched update via phone on Fri 7/8
7/7/2022	Beaubian, Joan	PMIDURSKI	Email	To reschedule annual HV
7/7/2022	Lamontagne, June	JCOSTA	Phone Call	BCBS address changed, interested in luncheon but lives in NB, not interested in other offerings
7/7/2022	Hennessy, Cheryl	PMIDURSKI	Phone Call	Auto ins policy in mail Nd current info for July -Dec 2022: CH to have mailed to ARAW
7/7/2022	Almeida, Marie	JCOSTA	Phone Call	From dtr Terry, to come by office w/BCBS bill – will explain address change; BOA oral surgeon still to come
7/7/2022	Martin-Mattos, Elaine	PMIDURSKI	Phone Call	From son: Son to call SC Cancer ctr to speak w/MSW who is exploring all re
7/7/2022	Kirklewski, Beatrice	PMIDURSKI	Phone Call	To Carolyn @FCOA re: PERS: Son to cover PERS: Estimate for hearing aid to be sent to ARAW for request
7/7/2022	DePina, Pam	PMIDURSKI	In Home Visit	For new request: MSP application mailed
7/7/2022	Bissonnette, Alice	PMIDURSKI	Phone Call	Need for in home assistance s/p surgery: Referral scanned to CESI w/consent of AO: FCOA aware
7/7/2022	Ventor, Rosalie	PMIDURSKI	Phone Call	VM from BM JB re: RV experiencing difficulty w/billing add change: PGM to call RV
7/7/2022	Ventor, Rosalie	PMIDURSKI	Phone Call	Billing add change BCBS: Support provided: CB fr RV: Conf change of add for BCBS
7/8/2022	DePina, Pam	PMIDURSKI	Phone Call	W/info re: real estate taxes and homeowners insurance: "TY for trying to help me."
7/8/2022	Snow, Lucinda	PMIDURSKI	Phone Call	BCBS billing address change: LS to call BCBS today: LS experiencing diff: HV sched for 7/13
7/8/2022	Smith, Debra	PMIDURSKI	Phone Call	Billing address change for AT&T: DS to notify AT&T today
7/8/2022	Chaput, Vanessa	JCOSTA	Phone Call	To reg for NBAM passes, also interested in luncheon but adv not Dart/West resident
7/8/2022	Quirini, Sandy	PMIDURSKI	Phone Call	Comcast billing address change: SQ to call today: "TY so much for this gift. It will help SO MUCH. TY"
7/8/2022	Benevides, Maria	PMIDURSKI	Phone Call	VM left for dgt re: Copay for Dr. Haitt HMA 7/13: awaiting CB to confirm appt & status of MH app
7/8/2022	Verissimo, Dalia	PMIDURSKI	Email	From PIDH ex dir w/req for fin assist w/balance for eyeglasses
7/8/2022	Parker, Delia	PMIDURSKI	Email	To SW re: approval for one-time taxi trans to audiologist
7/8/2022	Pereira, Maria	JCOSTA	Phone Call	From Andy @CNN, able to assist w/window repair, MP did not mention fence, left CNN info for future
7/8/2022	Waite, Cynthia	PMIDURSKI	Phone Call	Re: recliner/lift chair: Delivery this week: "I love my chair. THANK you ARAW for all your help!!"
7/8/2022	Pine, Hilda	PMIDURSKI	Phone Call	Comcast billing address change: Will call today to change
7/8/2022	Prata, Adelia	PMIDURSKI	Phone Call	VM left re: Comcast billing address change needed
7/8/2022	Livesley, Virginia	PMIDURSKI	Phone Call	To update app: Ref to SCCLS re: Scam & need for judgment proof: FCOA assist/ SNAP app, CB
7/8/2022	Chase, Pauline	PMIDURSKI	Phone Call	W/dgt: re: new add 4 H2O bill: Dem prog: do NOT call PC: Call dgt: 62yo son died 3/22: Condolences
7/8/2022	Moore, Carolyn	PMIDURSKI	Phone Call	Re BCBS billing address change: will change today>Surgery resched to 8/11d/t dental extraction
7/8/2022	Rosa, Zulmira	PMIDURSKI	Phone Call	Attempt to reach ZR (Port speaking only): VM left for son: ??? accurate phone # for son: To have AP f/u
7/8/2022	Okpara, Priscilia	PMIDURSKI	Phone Call	From Boa Vista RSC re: NBAM passes and luncheon: Adv not Dart/Westport resident
7/8/2022	Rocha, Margaret	PMIDURSKI	Phone Call	VM left re: need to change Comcast billing address
7/11/2022	Prata, Adelia	PMIDURSKI	Phone Call	COMCAST: Assured invoice pd: Req AP to change billing address: Acct# provided: to call today
7/11/2022	Silveira, Marie Lorraine	PMIDURSKI	Phone Call	Re: CNN luncheon> adv open to Dartmouth/Westport residents only
7/11/2022	Correia, Julia	JCOSTA	Phone Call	Inquiring about address change, adv all set
7/11/2022	Almeida, Mildred	PMIDURSKI	Phone Call	Comcast confirmation: Req info re: "legal services for elders": Info to SCCLS provided
7/11/2022	Prata, Adelia	CFOLEY	Email	From BM AN re: cable bill – pd in June/July not yet rec'd; PGM to f/u
7/11/2022	Pereira, Maria	PMIDURSKI	Phone Call	To dgt to update app: Dgt to CB re: involvement with CNN
7/11/2022	Pereira, Maria	CFOLEY	Email	To daughter Ali re: 2nd fridge request & f/u by PGM
7/11/2022	Benevides, Maria	PMIDURSKI	Phone Call	2nd VMM left 4dgt re: need for Copay 4 MD visit: Msg left re: ARAW move: Awaiting CB from dgt
7/11/2022	Benoit, Ruth	PMIDURSKI	Phone Call	New apartment number #230: JC notified and # changed in system
7/11/2022	Todd, Kristine	PMIDURSKI	Phone Call	Re: notice to vacate by 9/1: Ref to NBHA & SCCLS: CHAMPS app completed: NBCOA/Fresh Start # provided
7/11/2022	Quirini, Sandy	PMIDURSKI	Phone Call	AC unit: delivered Friday 7/8 and family installed on Sunday: "Thank you so much!"
7/11/2022	Walker, Bonnie	PMIDURSKI	Phone Call	??Balance on Comcast: JC reports no current balance on comcast bill
7/11/2022	Bissonnette, Alice	PMIDURSKI	Phone Call	CES: MOW begin 7/12: CM visit 7/14: BM JB to be updated by JC: AB aware of BA PGM
7/11/2022	DaCosta, Maria	PMIDURSKI	Phone Call	From son Eddie: Req to speak w/advocate re: needs: EMM to SR @ WCOA w/son phone #: SR to call son
7/12/2022	Duquette, Lucille	PMIDURSKI	Phone Call	Fr. Dgt Nancy Bernard 508-789-3879: LD in hospital: WCOA Susan notified of same
7/12/2022	DePina, Pam	PMIDURSKI	Phone Call	MSP app: Assured NOT MH app: PDP to complete & mal today
7/12/2022	Benevides, Maria	JCOSTA	Phone Call	From dtr Sandra for ck, adv will be ready to pick up 7/13
7/12/2022	Michel, Loretta	CFOLEY	Phone Call	From dtr apologize for not CB sooner, PM to f/u
7/12/2022	DeSouza, Joanne	CFOLEY	Phone Call	Looking for CM, EM to CM to call when able
7/12/2022	Laber, Lynne	JCOSTA	Phone Call	BCBS address change all set

7/12/2022	Roderick, Anita	PMIDURSKI	Phone Call	From dgt Tammy re: Comcast "shut off x2wks": PC to SW @ Alden: TV working: VMM left for dgt
7/12/2022	Tavares, Maria	JCOSTA	Phone Call	Looking for PGM, EM to PGM for f/u
7/12/2022	Tavares, Maria	PMIDURSKI	Phone Call	Change of BCBS billing address done by her son: Confirm July pd: Check cleared 7/11/22 per JC
7/12/2022	Curado, Alzira	PMIDURSKI	Phone Call	Fr Tina: Informed Tina bill was paid 7/8 and enc. Timely drop off of invoices to ARAW office
7/13/2022	Huezo-Mendoza, Sonia	PMIDURSKI	Phone Call	To Elizabeth @ IAC: She will confirm HV for 7/14
7/13/2022	Livesley, Virginia	PMIDURSKI	Phone Call	To FCOA: VL spoke w/"Emily @SCCL & Atty will CB in 2wks." VMM to Raquel @ SCCLS to confirm
7/13/2022	Costa, Barbara	CFOLEY	Phone Call	Confusion over award letter; 25 minute call re: rugs, family, etc.
7/13/2022	Obara, Teresa	CFOLEY	Phone Call	From CES re: car repair need; TC with TO re AAA (EDDF); estimate from mechanic; app update with PGM
7/13/2022	DeSouza, Joanne	CFOLEY	Phone Call	Call for Cathy; recent eye surgery went well
7/13/2022	Michel, Loretta	PMIDURSKI	Phone Call	VM left for dgt Kristin: Awaiting CB
7/13/2022	Benevides, Maria	PMIDURSKI	Phone Call	From dgt: MD appt resched to 9/9: Will drop off Comcast July invoice: Did change billing address for comcast
7/13/2022	Benevides, Maria	CFOLEY	Phone Call	From daughter; MD appt resched to Sept; Cable address changed will send July bill
7/13/2022	Kyle, Susan	CFOLEY	Phone Call	New referral from CES; will connect with Pat
7/13/2022	DePina, Pam	PMIDURSKI	Phone Call	VM left for Dana WA re: Covidien SureCare Bladder Control pads moderate: Request estimate sent to admin
7/13/2022	Snow, Lucinda	PMIDURSKI	In Home Visit	To change BCBS billing address: Unable to complete a BCBS system is "down": will try tomorrow
7/13/2022	Bissonnette, Alice	PMIDURSKI	Phone Call	To FCOA: Update provided to Carolyn OC re: services for AB
7/14/2022	Snow, Lucinda	PMIDURSKI	Phone Call	To BCBS customer services: Billing address changed to Union St:
7/14/2022	Kyle, Susan	PMIDURSKI	Phone Call	VM left re: CB to ARAW to discuss need and to screen
7/14/2022	Pryor, Joan	PMIDURSKI	Phone Call	Board approval for MSW & Auto Ins.: Waiting for papers to sign from SCCLS: Does not know atty name
7/14/2022	Lammers, Edith	PMIDURSKI	Phone Call	VM left re: approval for FLO
7/14/2022	Cambra, Joan	PMIDURSKI	Phone Call	To Patrick @Worley bedding re: Board approval for mattress: Will order: JC does not accept blocked PC
7/14/2022	Obara, Teresa	PMIDURSKI	Phone Call	Car repairs/ AAA EDDF/ Need estimate for repairs
7/14/2022	Grace, Barbara	PMIDURSKI	Phone Call	To notify of award: "Thank you ARAW. Bless you All!"
7/14/2022	Sousa, Rae	PMIDURSKI	Phone Call	To The Tremont: RS remains in rehab
7/14/2022	Huezo-Mendoza, Sonia	PMIDURSKI	Phone Call	HV w/IAC intern: Ref to SCCLS (hold 4 Imm. cases): IAC 4 SHINE: Catholic Social Services for Immigration
7/14/2022	Hotte, Eileen	PMIDURSKI	Phone Call	To confirm HV Tues 7/19: OK to bring new BA: BCBS billing address successfully changed per EH
7/14/2022	Souza, Ethel	PMIDURSKI	Phone Call	To notify of award: "Thank you to the ARAW. I am so grateful"
7/15/2022	DeSouza, Joanne	PMIDURSKI	In Home Visit	For annual update: Req cont w/phone, BCBS, Inc prod increase & Demand Response tix
7/15/2022	Burke, Shauneen	JCOSTA	Phone Call	Returning PGM call, will attend FHC event, will connect on Mon re: dental work payment
7/15/2022	Oliveira, Alice	PMIDURSKI	In Home Visit	To update financials: Has O2concentrator in home: Portable O2 tanks: Cont w/VNA
7/18/2022	Oliveira, Alice	PMIDURSKI	Phone Call	Son avail. Tues 7/19 after 11:30am: AO to CB if in person meeting vs phone call
7/18/2022	Snow, Lucinda	PMIDURSKI	Phone Call	To inquire about ARAW geographic service area in prep for relocation
7/18/2022	O'Connell, Joyce	PMIDURSKI	Phone Call	Farmer's Market coupons and SNAP HIP benefits: Explanation provided: JOD To call DCOA
7/18/2022	Dejesus, Eva	PMIDURSKI	Email	To family to sched HV: Req to assist w/increased rent: Await CB /EMM
7/18/2022	Burke, Shauneen	PMIDURSKI	Phone Call	Award: will call ARAW when apt sched: ?trans to NBFHC: PGM to CB
7/18/2022	Jenkins, Karen	PMIDURSKI	Phone Call	NBFHC: CES HMK sched for 9-11: Conf HV for 7/20 @ 11am: OK for covisit w/AP
7/18/2022	Huezo-Mendoza, Sonia	PMIDURSKI	Email	From IAC intern re: letter mailed to SHM re: TPS letter: SHM hung up on IAC: "I have insurance"
7/18/2022	Fletcher, Sally	PMIDURSKI	Phone Call	NBFHC: not avail: "Too hot:" has AC unit & 3 fans: Cannot have AC in BR d/t set up in apartment
7/18/2022	Almeida, Mildred	PMIDURSKI	Phone Call	NBFHC: not interested: SCCLS phone mtg today
7/18/2022	Begnoche, Cecile	PMIDURSKI	Phone Call	To sched annual home visit: 7/22 @ 10am: VNA dcd: CES services in place: Peapod for groceries
7/19/2022	Begnoche, Cecile	APAZ	Phone Call	Left message with CES CM Kristen re: home maker service. Still pending a homemaker.
7/19/2022	Hotte, Eileen	PMIDURSKI	In Home Visit	NEW request for briefs: Annual update completed: Covisit w/AP
7/19/2022	Hultgren, Mary	CFOLEY	Email	From bd JD - MH misses PGM; she will connect
7/19/2022	Obara, Teresa	PMIDURSKI	Phone Call	VM left re: AAA: Instructed to check email msgs & call AA for tow for estimate of repairs
7/19/2022	Burke, Shauneen	PMIDURSKI	Note to File	NBFHC: Her Story attendance: Enjoyed NBAM: TY to Board for everything
7/19/2022	Chaput, Vanessa	PMIDURSKI	Note to File	NBFHC: Her story attendance, TY to the Board 4 NBAM prog. Instilled confidence friends, empowerment
7/19/2022	Almeida, Marie	APAZ	Phone Call	Left message with Marie re: CNN luncheon
7/19/2022	Pryor, Joan	PMIDURSKI	Phone Call	Re: SCCLS> Info re: intake # provided: Court date 7/28: To CB ARAW
7/19/2022	Oliveira, Alice	PMIDURSKI	Phone Call	MH: Spoke w/son & provided MH site for speaking w/MH rep: Notified OA 4 ARAW & MH
7/20/2022	Pryor, Joan	PMIDURSKI	Phone Call	VM left re: need for current Auto ins Invoice & to discuss SCCLS

7/20/2022	Martin-Mattos, Elaine	PMIDURSKI	Phone Call	From MSW Andrea re: FV progr, SDC, Priv pay, Need to complete Financial app
7/20/2022	Graybill, Holly	APAZ	Phone Call	Left VM re: CNN Luncheon
7/20/2022	Pratt, Julie	APAZ	Phone Call	VM re: Luncheon
7/20/2022	Collins, Donna	APAZ	Phone Call	Spoke w/ Donna and she will be traveling to NH week of 7/24
7/20/2022	Gonsalves, Susan	APAZ	Phone Call	VM re: Luncheon
7/20/2022	Roy, Laura	APAZ	Phone Call	VM re: CNN luncheon
7/20/2022	Vieira, Kathy	APAZ	Phone Call	VM re: CNN luncheon
7/20/2022	Almeida, Laura	PMIDURSKI	Phone Call	Motorized scooter: LA reports her "insurance will cover the cost of the power chair!"
7/20/2022	Jenkins, Karen	PMIDURSKI	In Home Visit	For Annual update: Req cont of taxi vouchers
7/20/2022	Obara, Teresa	PMIDURSKI	Phone Call	VM x 2 left re: Need to sched HV asap for Aug Board meeting
7/20/2022	Parker, Delia	PMIDURSKI	Note to File	BB voucher mailed for 8/1 SCENT appt: EMMM to Sandy MSW to support DP in this process
7/20/2022	Pine, Hilda	PMIDURSKI	Phone Call	Comcast billing address change: Exp difficulty: HV sched 7/22 to assist
7/20/2022	Duarte, Bernice	PMIDURSKI	Phone Call	Re: lift/recliner chair: Confirm ARAW to order chair as BD cannot get to store: No preference color
7/20/2022	Sampson, Janet	PMIDURSKI	Phone Call	Award for auto repair: TC fr Tom's Garage to CHF; Check will be del after work completion
7/20/2022	DeCosta, Cynthia	APAZ	Phone Call	Spoke with Cynthia re: Board approval of Auto Ins. She dropped off invoice
7/20/2022	Hotte, Eileen	APAZ	Phone Call	CES is not able to offer meals as needed. Will let Eileen know.
7/20/2022	Hotte, Eileen	APAZ	Phone Call	Spoke with Eileen re: interest in SRTA. She declined & will continue with FCOA transportation
7/20/2022	Huezo-Mendoza, Sonia	PMIDURSKI	Phone Call	W/IAC intern to clarify TPS letter, MH status, immigration> Intern to call SHM re: letter to Social Security
7/20/2022	Mello, Eleanor	APAZ	Phone Call	Spoke with Eleanor. She was all set with CES & will be attending Luncheon 7/28
7/20/2022	Antunes, Joana	APAZ	Phone Call	Left message to call me re: home visit setup
7/20/2022	Francis, Eileen	APAZ	Phone Call	Was not able reach d/t blocked # restriction. On my list to call once phone are operational.
7/21/2022	Wetherell, Mary	APAZ	Phone Call	VM re: Luncheon
7/21/2022	Bissonnette, Alice	PMIDURSKI	Phone Call	From CES CM KS: Screened in 4 services: HHA/HMK 1hr 2xwk: RN to eval 4 PC services: Laundry referral made
7/21/2022	Duquette, Lucille	APAZ	Phone Call	VM re: Luncheon
7/21/2022	Thibault, Cecile	APAZ	Phone Call	VM re: Luncheon
7/21/2022	Alexander, Claudette	APAZ	Phone Call	To Claudette re: Luncheon. She would have attended but jus got home from hospital with pneumonia
7/21/2022	Yousif, Theresa	APAZ	Phone Call	VM re: Luncheon. She will not be able to attend.
7/21/2022	Flaherty, Eileen	APAZ	Phone Call	VM re: Luncheon
7/21/2022	Duarte, Bernice	PMIDURSKI	Phone Call	To report ENOS to call BD re: upcoming delivery of recliner/lift chair: "THANK YOU ARAW"
7/21/2022	Polek, Regina	PMIDURSKI	Phone Call	To resched annual HV due to painting in home: Resched for 8/4
7/21/2022	Barbosa, Atanzia	APAZ	Phone Call	Ms. Barbosa she was not able to understand reason for my call. LVM with Christine @ Taber to assist
7/21/2022	Blair, Cynthia	APAZ	Phone Call	VM re: Luncheon
7/21/2022	Godinet, Muriel	APAZ	Phone Call	VM re: Luncheon. She is not able to attend d/t hospitalization
7/21/2022	Crovello, Mary	PMIDURSKI	In Home Visit	Grandson living w/MC: declines to share financial info: Denies fin needs: Req Inactive status
7/21/2022	Rust, Alice	PMIDURSKI	Phone Call	From CES CM: NBPD EM: Bedbugs, challenges w/prep & extermination: SWH approved: Nd financial fr dgt
7/21/2022	Serdahl, Pauline	APAZ	Phone Call	VM re: Luncheon
7/21/2022	Dejesus, Eva	PMIDURSKI	In Home Visit	Ref to IAC, SRTA Dem Resp, SWH 4 shower bench: SRTA app mld: Rent ^\$200/m
7/21/2022	Pryor, Joan	PMIDURSKI	Phone Call	From JP re: SCCLS f/u: per CHF, Raquel # provided to JP to call Raquel re: missing paperwork: ?MSW ref status
7/22/2022	Benevides, Maria	JCOSTA	Phone Call	From dtr - Comcast has been shut off, adv will need physical bill to pay, dtr decided to pay past due
7/22/2022	Pryor, Joan	APAZ	Phone Call	Received paperwork from atty would like a CB from PGM: Court date 7/27: Erica to represent
7/22/2022	Cardoso, Isabel	APAZ	Phone Call	VM re: luncheon
7/22/2022	Gadomski, Marion	PMIDURSKI	Phone Call	To CHF to report grandson & family reportedly moving out fr 2nd fl apt: Not last month for HI payment
7/22/2022	Rust, Alice	PMIDURSKI	Phone Call	From CESI CM w/update: EM to dgt Laurie w/list of financials info needed for ARAW application
7/22/2022	Parquette, Mary Jane	JCOSTA	Phone Call	Unable to attend luncheon, has CT scan scheduled
7/22/2022	Pine, Hilda	PMIDURSKI	In Home Visit	To change Comcast billing address: Ortho MD visit 8/1 for knees: Not driving as car needs repairs
7/22/2022	Pereira, Maria	APAZ	Phone Call	VM re: luncheon
7/22/2022	Rocha, Margaret	APAZ	Phone Call	VM re: luncheon
7/22/2022	Hotte, Eileen	PMIDURSKI	Phone Call	To confirm income & expenses for annual app
7/22/2022	Whitehead, Marguerite	APAZ	Phone Call	Mailbox was full
7/22/2022	Chytrus, Leslie	PMIDURSKI	Phone Call	From BM: @The Royal s/p heart attack: card mailed

7/22/2022	Greenwood, Dorothy	JCOSTA	Phone Call	Will be getting laundry through CESI
7/22/2022	Prata, Adelia	APAZ	Phone Call	Will call back to confirm if she will be able to attend luncheon
7/22/2022	Begnoche, Cecile	PMIDURSKI	In Home Visit	Annual HV completed: To contact Fhvn PD re: scam w/health ins
7/22/2022	Francis, Eileen	APAZ	Phone Call	Not able to luncheon. She will cal Fallon Ins. next week re: EPERS upgrade and will call us with update.
7/22/2022	Wetherell, Mary	JCOSTA	Phone Call	Returned call, signed up for luncheon – will need trans, adv will CB w/info
7/25/2022	Livesley, Virginia	PMIDURSKI	Phone Call	Looking for PM, EM to PM for f/u: Inq re: status of request: Waiting 4 CB from SCCLS
7/25/2022	Mello, Eleanor	PMIDURSKI	Phone Call	CNN luncheon: Sched Dem Resp for trans ( 12:30 – 2:30pm)
7/25/2022	Curado, Alzira	PMIDURSKI	Note to File	OV by Tina to del. July auto loan payment: Instructed to bring to ARAW in a timely fashion
7/25/2022	Barbosa, Atanazia	PMIDURSKI	Phone Call	From Taber Mill RSC: HV sched for Wed 7/22 @ 11am
7/25/2022	Chor, Patricia	PMIDURSKI	Phone Call	Food: Fell spent \$190 OOP for pain patches: req assist w/food: Next check 8/1
7/25/2022	Cambra, Joan	PMIDURSKI	Phone Call	To notify of award: JC to call Worleys to sched delivery: "I needed good news. Deaths of friends & Illness"
7/25/2022	Rust, Alice	PMIDURSKI	Phone Call	From dgt: AR in SLH ER since Fri 7/22: "No electricity": EMM to CESi CM
7/25/2022	Grace, Barbara	PMIDURSKI	Phone Call	New cell phone: wants new #: Nephew to set up: "TY ARAW"
7/25/2022	Cardoso, Isabel	JCOSTA	Phone Call	To register for luncheon, will need transportation
7/25/2022	Lammers, Edith	PMIDURSKI	Phone Call	To THANK ARAW for FLO participation: Looking forward to August newsletter
7/25/2022	Camara, Laura	PMIDURSKI	Phone Call	Sangha yoga: EMM to Jeff @ Sangha re: process
7/25/2022	Dillon, Sherry	PMIDURSKI	Phone Call	To THANK ARAW for Dem Resp tix and Derm services: To sched appt w/Derm & CB
7/26/2022	Sharples, Mary	APAZ	Phone Call	CB PGM gave her Verizon#. Verizon has no contact on file. Very thankful for the Verizon #
7/26/2022	Oliveira, Alice	PMIDURSKI	Phone Call	Req to cont w/Ensure: EM to WA: bank tmrw re: savings acct: Son spoke w/MH: Aware MD to specify type of portable O2 device
7/26/2022	DePina, Pam	PMIDURSKI	Phone Call	BCBS/dental dental invoices
7/26/2022	Ambra, Patricia	PMIDURSKI	Note to File	NEW referral fr. her cousin who learned of ARAW "at a restaurant": Nd car repair: HV 8/16 d/t surgery
7/26/2022	Sharp, Barbara	PMIDURSKI	Note to File	NEW referral fr. CESI> Nds AC unit> HV sched for 7/29
7/26/2022	Spearin, Gail	PMIDURSKI	In Home Visit	For 6 month review: Fx right humerus:
7/26/2022	Guy, Nancy	APAZ	Phone Call	Referral sent to Coastline for meals on wheels
7/26/2022	Gonsalves, Susan	PMIDURSKI	Phone Call	Luncheon. Unable to attend brother ill and might need to sell her home
7/26/2022	Chor, Patricia	PMIDURSKI	Phone Call	To notify of one time gift \$50 S&S gift card for food insecurity: HV to deliver gift card: THANK You so much!!
7/26/2022	Antunes, Joana	APAZ	Phone Call	W/ Cindy. She was not able to find 1 bedroom apartment under \$1K and not eligible for HUD P
7/26/2022	Begnoche, Cecile	PMIDURSKI	Phone Call	To FCOA SHINE: CD to visit CB re: Aetna disenrollment form
7/27/2022	Almeida, Mildred	PMIDURSKI	Phone Call	Addition of Turner Classic TV to Comcast lineup: \$9.95/m: Old movies from 40's & 50's: Sept Board req
7/27/2022	Francis, Eileen	APAZ	Phone Call	Eileen is still awaiting to hear from Navicare on EPERS cost
7/27/2022	Lopes, Crispina	APAZ	In Home Visit	Verizon address change
7/27/2022	Prata, Adelia	APAZ	Phone Call	VM re: Luncheon. Might need transportation
7/27/2022	Beaubian, Joan	PMIDURSKI	Phone Call	3 TVs including one upstairs: No longer able to climb stairs: Will call Comcast and d/c 3rd TV
7/27/2022	Costa, Barbara	PMIDURSKI	Phone Call	To req paper she gave to PGM re: finances be mailed to her: Original sheet mailed
7/27/2022	Barbosa, Atanazia	APAZ	In Home Visit	Annual
7/27/2022	Boudreau, Jeanne	PMIDURSKI	Phone Call	VM left re: FLO ROE: PC to BW Dart & NB: Not @ either facility
7/27/2022	Almeida, Laura	APAZ	Phone Call	Re: luncheon. Trying to get a ride with Ellen Hull will call back to confirm if transp needed
7/27/2022	Lawrence, Gail	APAZ	Phone Call	VM re: Luncheon
7/27/2022	Delaney, Kathleen	PMIDURSKI	Phone Call	For annual FLO ROE: Doing well: Enjoys luncheons & newsletter: TY ARAW
7/27/2022	Rust, Alice	PMIDURSKI	Email	From dgt & CESI CM: AR remains @SLH Dgt w/o financial info May visit & will call ARAW if \$\$ info available
7/27/2022	Dean, Amy	PMIDURSKI	Phone Call	FLO ROE: Vision issues? Surgery?: Trans issues: CNN info provided: AD to call ARAW if interested: EM to AP
7/27/2022	Metivier, Claire	PMIDURSKI	Phone Call	For annual FLO ROE: "Mini Stroke" Aug 2021: Doing OK: Enjoys newsletter: Diff to eat & avoids gatherings
7/27/2022	Burke, Shauneen	JCOSTA	Phone Call	Appt w/Aahori on Aug 3rd, will ck be sent to Aahori or SB? PM to f/u: Mail check to SB
7/27/2022	Tavares, Marilyn	PMIDURSKI	Phone Call	For annual FLO ROE: Enjoys PC from BM & Newsletter: Health issues impede joining programs at this time
7/28/2022	Benoit, Pauline Jeanne	PMIDURSKI	Phone Call	VM left for sister Carol re: Annual update
7/28/2022	Messier, Ellen	APAZ	Phone Call	Scheduled Annual HV 2pm 8/1/22
7/28/2022	Sharp, Barbara	PMIDURSKI	Phone Call	VM left to confirm HV sched for 7/29
7/28/2022	Pryor, Joan	PMIDURSKI	Phone Call	To mail auto ins invoice: MSW visit w/goal to return to Texas
7/28/2022	Gadomski, Marion	PMIDURSKI	Phone Call	To sched 6 month f/u: HV sched for 8/5: Reports grandson & DIL moving out
7/28/2022	Laber, Lynne	PMIDURSKI	Phone Call	To confirm HV sched for 7/29: All set

7/28/2022	Dejesus, Eva	PMIDURSKI	Email	From Stan & Pauls w/AC unit estimate: EDDF: family notified and will p/u check
7/28/2022	Gordon, Melba	PMIDURSKI	Phone Call	VM to dgt re: update of MG: Per Hathaway Manor "tranf to another SNF"
7/28/2022	Miranda, Barbara	PMIDURSKI	Phone Call	VM to RSC>PC fr BM: Informed of nd for HV w/update: to CB 8/1 to sched appt: Injured R arm
7/28/2022	Dillon, Sherry	PMIDURSKI	Phone Call	Derm appt 8/9: Mail check to Derm: To begin Exercise @ DCOA: "TY to ARAW for Dem Resp vouchers"
7/28/2022	Michel, Loretta	APAZ	Phone Call	VM from daughter. Cancel 7/28 visit as she has Covid. Will call back Monday to reschedule.
7/28/2022	Elgar, Marcia	PMIDURSKI	Phone Call	To sched Annual update @ MD: to CB
7/28/2022	Ribeiro, Renay	PMIDURSKI	Phone Call	VM left re: sched annual update HV
7/28/2022	Harrington, Diane	PMIDURSKI	Phone Call	Re HV. Diane scheduled for 8/2/22 at 9:30am
7/28/2022	Harrington, Diane	APAZ	Phone Call	VM re: schedule HV next week
7/28/2022	Furness, Betty	APAZ	Phone Call	Will not attending CNN luncheon d/t humidity "Please let me know of any other events. I love going"
7/28/2022	Almeida, Laura	PMIDURSKI	Phone Call	To cancel attendance @CNN BBQ: "TY but I cannot attend today."
7/28/2022	Debrosse, Sezaltina	APAZ	Phone Call	Scheduled HV 9am 8/5/22
7/28/2022	Auger, Susanne	APAZ	Phone Call	VM requesting call back to schedule HV next week
7/28/2022	Boudreau, Jeanne	PMIDURSKI	Email	To CESI CM: JB inpt @The Royal FHVN: note mailed to JB
7/28/2022	Polek, Regina	PMIDURSKI	Phone Call	To resched HV: Sister has been hospitalized Gall stones: MD f/u 8/4: Change HV to 8/5
7/28/2022	Correia, Julia	PMIDURSKI	Phone Call	From dgt: JC relocating to Bedford tower 231 Middle St Apt 612 NB: JC notified
7/28/2022	Duarte, Bernice	PMIDURSKI	Phone Call	Re: Annual HV: Sched 8/3: VMM & EMM to Enos re: chair delivery status
7/28/2022	Simpkin, Carol	PMIDURSKI	Phone Call	Annual update sched 8/8: Back surgery 7/25: Get well card mailed
7/28/2022	Petrin, Joan	PMIDURSKI	Phone Call	Annual update HV sched for 8/4
7/28/2022	Okpara, Priscilia	PMIDURSKI	Email	To RSC @Boa Vista: Attempt to call son re: Annual HV: Phone Mailbox full
7/28/2022	Anastasi, Wilhelmina	APAZ	Phone Call	Scheduled HV 12pm 8/3/22
7/28/2022	Livesley, Virginia	PMIDURSKI	Phone Call	Re: tax req: Will have decision 8/4: Has not heard from SCCLS
7/28/2022	Sousa, Rae	PMIDURSKI	Phone Call	To Tremont: RS remains inpt: Note mailed to RS
7/28/2022	Roderick, Anita	PMIDURSKI	Phone Call	To dgt re: Annual update> Son Scott handles finances> to call Scott after 2pm
7/28/2022	Roderick, Anita	PMIDURSKI	Phone Call	To son Scott for financial update for annual review: AR seen at Alden Court: "TY ARAW"
7/28/2022	Gomes, Virginia	APAZ	Phone Call	Spoke with son Joe scheduled HV 10:30am 8/3/22
7/28/2022	Begnoche, Cecile	PMIDURSKI	Phone Call	FCOA w/addl medical invoices: BCBS coverage begins 8/1: ??? Part D? SHINE to confirm
7/29/2022	Estrella, Louise	PMIDURSKI	Email	From BM: PCP ref to sign form for left chair: LE to talk w/pain specialist
7/29/2022	Robillard, Rita	APAZ	Phone Call	VM to schedule annual home visit week of 8/8
7/29/2022	Auger, Susanne	PMIDURSKI	Phone Call	VM 2nd attempt requesting call back to schedule HV next week
7/29/2022	Conway, Isidora	PMIDURSKI	Phone Call	Re: CFC contact to check status of her fridge req: Family willing to purchase & not hardship
7/29/2022	Obara, Teresa	PMIDURSKI	Phone Call	Car repair completed @cost of \$247.50/Nds addl work in Westport: HV sched for 8/4
7/29/2022	Laber, Lynne	PMIDURSKI	Phone Call	Completed for annual update: needs dental work: to get estimate
7/29/2022	Elgar, Marcia	APAZ	Phone Call	Returning call. Will call PGM around 3pm
7/29/2022	Ribeiro, Renay	PMIDURSKI	Phone Call	To sched annual update HV 8/2
7/29/2022	Sharp, Barbara	PMIDURSKI	In Home Visit	Grandgt & her child reside w/ BP: 1-2 AC units in apt
7/29/2022	Benoit, Pauline Jeanne	APAZ	Phone Call	From Carol Morton. Cable hasn't been paid. Confirmed 7/19/22 payment. She will call Comcast.
7/29/2022	Morin, Jacqueline	PMIDURSKI	Phone Call	Standard Times billing: To obtain invoice fr Standard Times & forward to ARAW: JC notified

**Finance Committee Meeting Minutes**  
**Joint Meeting with BofA and Investment Advisory Committee**  
**July 22, 2022 9:30 AM**

Present: J Doyle, D Laflamme, C Mayall, R O'Connell, C Foley, MCE. Guests: J Beaulieu, P McKnight, R Saber, J Stankiewicz  
Investment Advisory Committee: K McQuiggan, K O'Connell, H Ziegler  
Bank of America: M Bennet, S Clark, E Greene

This meeting was an in-person meeting with our Finance Committee, Investment Advisory Committee and Bank of America portfolio management team. Its purpose was to make introductions in a format post-COVID Zoom and review our first quarter portfolio performance. Discussions had been held in the past with our IAC and BofA with the expressed need to meet face to face to cover an extensive agenda.

**Portfolio Review (copy available upon request)**

Sarah shared a presentation in which she discussed our asset allocations, individual performance highlights and trends of the current market. Value of our holdings has dropped (to \$18,537,447) as of end of June. Explanations continue to include residual supply chain issues, inflation, geopolitical tensions, interest increases by the Fed. Outlook remains uncertain for the two years ahead of us, but the feeling that this reset period, while not a 'bull' case, will not be as severe as an 'angry bear' or 'grizzly bear'.

There were recommendations discussed in a broad sense for rebalancing within the asset categories to put the portfolio in the best position for bounce back when (if) the market returns to normal. (Those recommendations will be discussed in greater detail at our next joint meeting on August 12.)

Restructure to minimize capital gains will be important.

Fee structures were discussed with general examples for BofA management fee (including a 20% discount) and the range of fees for different account managers and SMAs (separately managed accounts).

**Investment Policy Statement (IPS)**

With minor adjustments, the IPS will be ready to present to the board for a vote to accept at the August meeting. Target ranges within asset classes were agreed upon. Sarah will provide BofA-compatible language edits to complete the document.

**Joint Meetings Going Forward**

It was agreed that a quarterly meeting be held (in person, remote or hybrid) as we work together in building our relationship and understanding any changes or adjustments. These will be scheduled based on availability of quarterly data.

**Continuing Education**

Kathleen has offered to continue her education sessions with 'Investing 103' in the near future. These sessions will focus on today's discussion and investing options going forward with our new understanding.

It was a meeting of productive and engaged discussion on the part of all attendees. The time and distance traveled by our Advisors and portfolio management team were greatly appreciated. Our thanks to all participants.

**Next Meeting (in person): Friday, August 12 at time TBD at 174 Union St.**

Mary Ellis, Treasurer  
July 22, 2022



**July 2022 | ARAW Financial Report**

	FY23 Budget	YTD Budget	YTD Actual	July Budgeted	July Actual	NOTES
<b>Direct Support*</b>	<b>\$500,000</b>	\$156,000.00	\$127,367.27	\$39,000.00	\$30,741.23	
Grants	\$225,000	\$112,500.00	\$85,755.00	\$0.00	\$0.00	AHA! return of FY22 grant funds
Administration	\$30,000	\$10,000.00	\$10,533.88	\$2,500.00	\$2,102.91	Late mileage LR +\$6.76 (May)
Moving Costs	\$0	\$0.00	\$4,244.20	\$0.00	\$1,335.00	Tavares Moving, 1-800-GOTJUNK
Professional Dev	\$0	\$0.00	\$35.00	\$0.00	\$0.00	
Accounting	\$25,000	\$8,333.34	\$14,195.00	\$2,083.34	\$0.00	Late B&L bill +\$1,230 (JUN); no JUL bill
Staffing Costs	\$388,309	\$119,479.68	\$94,656.75	\$29,869.92	\$24,150.38	AP start 7/18; LR end 7/7 + part gift
Rent	\$16,000	\$5,333.33	\$7,080.00	\$1,333.33	\$3,450.00	432 & A174 Rent (July)
Utilities	\$6,000	\$2,000.00	\$2,313.97	\$500.00	\$824.13	Electric \$183.16; Gas \$21; Phone/internet \$619.97 - 174 & 243 (Jun)
BOA Fees	\$90,000	\$30,000.00	\$27,133.90	\$7,500.00	\$6,409.06	
Federal Taxes	\$30,000	\$0.00	\$0.00	\$0.00	\$0.00	
Outreach/Comm Engage	\$2,000	\$666.66	\$365.18	\$166.66	\$0.00	
Legal/Professional Fees	\$5,000	\$1,666.66	\$0.00	\$416.66	\$0.00	
FLO Program	\$12,000	\$2,832.00	\$2,935.04	\$708.00	\$303.03	Admin +\$303.03 (JUL)
Retreat/Start Plan	\$0	\$0.00	\$5,700.00	\$0.00	\$2,800.00	July payment on retreat planning
<b>TOTAL</b>	<b>\$1,329,309</b>	<b>\$448,811.67</b>	<b>\$382,315.19</b>	<b>\$84,077.91</b>	<b>\$72,115.74</b>	

**July 2022 | Direct Support Elements**

Reoccurring	July \$\$	July NOTES	YTD \$\$	YTD Notes
Health Insurance	\$10,294.54	10Q vs 8Q last month (2 d/c)	\$34,466.58	9Q, 3Q, 8Q, 10Q (VOID Booth \$195 AMJ)
Social Day	\$0.00	No bill from WCOA or NBCOA (JUL)	\$3,106.00	Late bills Carreira, Lopes +\$750 (JUN)
Personal Care	\$44.00	NO West Apoth bill rec'ed (JUL)	\$4,196.19	
Nutrition	\$0.00	NO West Apoth bill rec'ed (JUL)	\$3,210.64	
Cable/Phone/Internet	\$7,499.65	12 bills late	\$33,216.82	Ingham, Benevides, Benoit late bill +\$436.34 (JUN)
EPERS	\$1,543.35	1 d/c	\$6,389.07	
Rent	\$850.00		\$3,150.00	
Transportation	\$400.00	No Bluebird Apr, May, June, July bill	\$1,784.50	
Gift Cards	\$120.00		\$480.00	
Other reoccurring	\$48.00	only MMP Ingham	\$2,625.27	Late laundry Shea +\$130 & electric bills Christy & Costello +\$75 (JUN)
<b>Monthly TOTAL</b>	<b>\$20,799.54</b>		<b>YTD TOTAL</b>	<b>\$92,625.07</b>

Gifts	July \$\$	July NOTES	YTD \$\$	YTD Notes
Holiday Gifts	-\$50.00	VOID Croffut	-\$50.00	
Social Day	\$0.00		\$0.00	
Social Worker	\$600.00	Somers	\$1,100.00	Late CNHC bill Adesso +\$100 (JUN)
Dental	\$1,600.00	Burke, Almeida	\$3,561.00	
Hearing Aids	\$0.00	Rose & Desautels	\$10,070.00	
Glasses	\$0.00		\$303.00	
Car Bills	\$4,954.17	Curado (Loan), Souza (Loan), Tripp (Loan)	\$9,004.34	
Sandra Fogg	\$0.00		\$0.00	
Home Payments	\$409.00	Searpin (rent)	\$3,174.89	
Health Bills	\$346.29	Dillon, Bramwell	\$1,372.21	
Credit Card	\$0.00		\$0.00	
Furniture	\$1,657.00	Cambra, Waite	\$2,886.99	
Appliances	\$0.00		\$0.00	New category added for FY23
EDDF	\$425.23	see summary	\$1,315.95	
Other gifts	\$0.00	Shea (Sump), Perry (moving)	\$2,003.82	
<b>Monthly TOTAL</b>	<b>\$9,941.69</b>		<b>YTD TOTAL</b>	<b>\$34,742.20</b>

# ASSOCIATION FOR THE RELIEF OF AGED WOMEN

## Transaction Detail By Account

July 2022

	<u>Date</u>	<u>Name</u>	<u>Account</u>	<u>Amount</u>
Jul 22				
	07/19/2022	AAA MEMBERSHIP	OBARA, TERESA - AAA	84.00
	07/25/2022	M&M AUTO SERVICE	COLLINS, DONNA - CAR REPAIR	21.28
	07/26/2022	STOP & SHOP	CHOR, PATRICIA - GIFT CARD	50.00
	07/29/2022	STAN & PAUL'S INC.	DEJESUS, EVA - AC	269.95
Jul 22				<u>425.23</u>

Trade Date

**Account Summary**

Jul. 01, 2022 through Jul. 31, 2022

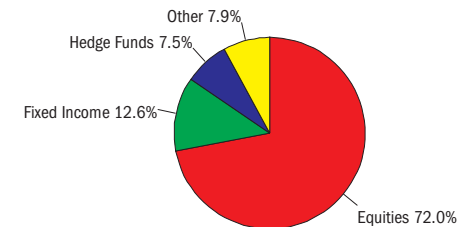
**Account:** 80-02-202-2363364 ASSOC RELIEF AGED WOMEN-COMB

**Market Value \$19,795,869.27**

Account Activity			Realized Gain/Loss Summary			Income Summary		
Description	Current Period	YTD Since 04/01/22	Description	Current Period	Fiscal YTD	Description	Current Period	YTD since 04/01/22
<b>Beginning Market Value</b>	<b>\$18,537,447.41</b>	<b>\$21,441,696.62</b>	Short-term	-\$268.93	-\$14,499.56	Dividends - Taxable	\$60,374.54	\$143,985.68
Income	60,856.04	144,960.48	Long-term	1,295.49	3,960.66	Interest - Taxable	481.50	974.80
Deposits	1,768.12	3,081.18	<b>Net Total</b>	<b>\$1,026.56</b>	<b>-\$10,538.90</b>	<b>Total Income</b>	<b>\$60,856.04</b>	<b>\$144,960.48</b>
Disbursements	-71,595.25	-282,908.31						
Bank Fees	-6,409.06	-27,133.90						
Change in Market Value	1,273,802.01	-1,483,826.80						
<b>Ending Market Value</b>	<b>\$19,795,869.27</b>	<b>\$19,795,869.27</b>						
Change in Account Value	1,258,421.86	-1,645,827.35						
Accrued Income	13,701.13	13,701.13						
<b>Ending Value + Accrued Income</b>	<b>\$19,809,570.40</b>	<b>\$19,809,570.40</b>						

**Portfolio Allocation**

Description	Market Value	Tax Cost	Unrealized Gain/Loss	Accrued Income	Estimated Annual Income	Current Yield
Cash/Currency	\$660,241.11	\$660,241.11	\$0.00	\$774.20	\$9,903.62	1.50%
Equities	14,253,165.76	7,799,010.64	6,454,155.12	7,513.32	222,245.44	1.55
Fixed Income	2,485,405.04	2,730,679.49	-245,274.45	5,247.19	93,824.97	3.77
Hedge Funds	1,484,252.85	1,538,771.16	-54,518.31	\$166.42	13,650.80	0.92
Tangible Assets	912,804.51	1,044,027.10	-131,222.59	0.00	179,274.60	19.64
<b>Total Assets</b>	<b>\$19,795,869.27</b>	<b>\$13,772,729.50</b>	<b>\$6,023,139.77</b>	<b>\$13,701.13</b>	<b>\$518,899.43</b>	<b>2.62%</b>
<b>Total</b>	<b>\$19,795,869.27</b>	<b>\$13,772,729.50</b>	<b>\$6,023,139.77</b>	<b>\$13,701.13</b>	<b>\$518,899.43</b>	



Assets representing less than 5% of total are grouped together as "Other" for display on the pie chart.

The amounts shown throughout this statement should not be used in the preparation of tax documents. Detail specifying taxable nature of income will be provided with year-end tax documentation. Please consult your tax advisor.



## STATEMENT OF INVESTMENT POLICIES AND OBJECTIVES

### I. INTRODUCTION

This statement of investment policies and objectives (“IPS”) governs the management of the investable assets of the **Association for the Relief of Aged Women of New Bedford** (“ARAW” or the “Organization”) and will be effective until modified and approved by the ARAW Board of Directors (the “Board”).

The ARAW Finance Committee (“Committee”) reports directly to the Board on all finance, accounting, and investment-related matters concerning the ARAW including the formation and monitoring of this IPS.

From time to time, the Committee may be advised by independent advisors on a hired (paid) or volunteer basis.

This statement will be reviewed at least annually by those representing the Committee and as necessary, with consultation from said advisors.

### II. PURPOSE

The purpose of the policy is to:

- (1) Establish broad guidelines for the Organization’s investment portfolio (“Portfolio”) in the areas that influence return and risk and are consistent with the Organization’s investment objective(s);
- (2) Incorporate the accountability standards that will be used to monitor the progress of the Portfolio;
- (3) Evaluate the contribution (positive and negative) made to the Portfolio by the strategy or strategies employed including underlying investment managers and/or vehicles.

### III. ROLES AND RESPONSIBILITIES

The Finance Committee, as authorized by the ARAW Board, is responsible for overseeing the management of the ARAW investment Portfolio and as allowed, to act on behalf of the ARAW in areas that include, but are not limited to the following:

- (1) Selecting and retaining one or more qualified professional investment advisors;

- (2) Determining the overall architecture of the portfolio and approving strategic asset allocation;
- (3) Monitoring and measuring the execution and results of the investment advisor;
- (4) Reviewing the asset segment exposure, underlying investment managers utilized, and/or the various investment vehicles.

#### *Investment Advisory Sub-Committee*

From time to time, the Committee may be advised on the above responsibilities and potential actions with input from an investment advisory sub-committee (“Sub-committee”) comprised of Committee members and outside advisors offering expertise on capital markets and investment management.

#### *Investment Advisor*

The investment advisor may be a consultant, an advisor directly to the Organization, a bank regulated by the Office of the Comptroller of the Currency (OCC), or a registered investment advisor overseeing one or more diversified, multi-manager vehicles used as part or all of the investment solution.

The investment advisor is expected to act as a fiduciary to the Organization and is responsible for activities outlined in an investment management agreement that may include, but are not limited to the following:

- (1) Ongoing discussions with the Committee about the Organization’s investment needs, requirements, and opportunities;
- (2) Selecting and monitoring investment managers and/or investment vehicles consistent with the needs and objectives of the Organization. Underlying investment managers in turn may have discretion with the parameters set by the investment advisor;
- (3) Portfolio rebalancing as appropriate, taking into consideration strategic policy target weights, short-term and intermediate-term tactical tilts, and the effect of market dislocations.
- (4) Providing updates to the Committee, at least quarterly, regarding the Organization’s investment portfolio, including, but not limited to:
  - a. Portfolio structure;
  - b. Investment performance;
  - c. Investment managers and strategies;
  - d. Tactical shifts;

- e. Operational matters such as fees, valuation practices, and service providers involved;

(5) Management of the portfolio in accordance with the return objective.

It is expected that any SEC-registered investment advisor or bank regulated by the OCC serving the Organization will furnish the Committee with all documentation as required by law as well as promptly provide any materials considered informative to the Committee. At a minimum, the advisor will share their firm's Form ADV, Part 2 annually.

Additionally, the Committee will evaluate all paid provider services on a periodic basis (3-5yr) and ask that all vendors interested in retaining their services to the Organization participate by responding to Due Diligence Questionnaire ("DDQ") or Request For Proposal ("RFP") processes when invited.

#### **IV. RETURN OBJECTIVE**

The Organization's return objective is to preserve and enhance the purchasing power of its investment portfolio over time in order to continue to fund charitable activities. This requires a minimum investment return equal to the rate of inflation (as measured by the Consumer Price Index ("CPI")), plus all costs and spending from the portfolio.

While keeping in mind a long-term view, and assuming a spending amount of 5% per annum, Portfolio investment results will be evaluated on a 3, 5, 7, and 10-year annualized basis with greater emphasis placed on longer periods which are more likely to capture a full market cycle (peak to trough to peak).

A more precise figure for annual spending and costs may be employed in place of 5% where available. See Section V – Spending Policy.

#### **V. SPENDING POLICY**

The ARAW intends to distribute 5% of its Portfolio annually. To comply with Federal Internal Revenue Code (IRC) 4942, and to avoid additional or unnecessary tax burden, ARAW aims to distribute no less than the amount required each fiscal year.

The Committee will review the current fiscal year budget on a timely basis and in council with its accountant(s) and advisor(s), determine the appropriate spending, which is expected to be at least 5% of trailing 12-month average assets, less costs associated with charitable operations.<sup>i</sup>

In certain circumstances, the Committee may elect to pay less than 5% when applying excess qualifying distributions that are carried forward as permitted. From time to time, the Board may request additional extraordinary distributions from the Portfolio.

The Board also reserves the right to temporarily deviate from this distribution policy if doing so is in the best interest of the Portfolio's long-term purpose.

## VI. ASSET ALLOCATION

### *Policy Portfolio*

Exhibit I sets forth the Policy Portfolio representing the long-term target allocation for the Organization's investment portfolio. The Policy Portfolio is reviewed annually based on research concerning forward-looking capital market assumptions and discussion involving the Committee, staff, the investment advisor(s), and others, as deemed necessary.

The Investment Advisor may propose its own proprietary asset allocation model to manage the Portfolio. The Committee will determine whether the external model is congruent with the Organization's policy portfolio on an annual basis.

*Portfolio Risk* It is understood and accepted that due to the perpetual nature of the ARAW and the Organization's long-term investment horizon, the Portfolio can and will accept a level of risk deemed commensurate with meeting its long-term return objective; however, the professional Investment Advisor(s) are expected to seek to minimize risk against the return objective.

To that end, the Portfolio should not exhibit a level of expected (forecast) or experienced volatility, defined as the standard deviation of returns 10% greater than its Policy Portfolio (Exhibit I) or a comparable global stock/bond 70/30% portfolio mix on a rolling 3-year basis.

If such a breach occurs, the cause and source of risk differences will be discussed by the Committee and Investment Advisor(s).

### *Investable assets including cash management.*

ARAW's cash and investments are divided into two main tranches:

- (1) Short- and intermediate-term funds for regular operating and immediate capital needs. The primary goal for these funds is to serve as a reserve as well as cover the daily cash requirements for ARAW. The target level and classification of these near-term funds are as follows:
  - a. Sufficient cash to cover 2-months of operating expense and approved capital expenditures.
  - b. A minimum of 4-months of operating expenses may be held in high-quality fixed-income instruments with an average duration not expected to exceed two years.

- (2) Long-term investments are any funds not deemed required for near-term regular operating expenditures and have a long-term investment horizon. These assets represent ARAW's core investment portfolio.

### *Tactical Asset Allocation*

The Policy Portfolio represents the asset mix likely to satisfy the Organization's long-term investment objectives. This asset mix represents policy norms that are strategic in nature. The Committee has approved a target range for each of these asset segments that:

- (1) Recognizes various asset segments may be under- or over-weighted due to one or more reasons including market performance;
- (2) Allows the Organization's investment advisor to deliberately over- and under-weight the investment portfolio's asset segments when it concludes an asset segment represents either an excess return opportunity or presents too much incremental risk.

## **VII. GUIDELINES FOR IMPLEMENTATION**

The portfolio will be managed utilizing an investment philosophy and approach characterized by:

- (1) Safety of principal with limited volatility of capital through proper diversification;
- (2) Emphasis on total return;
- (3) Sufficient return, stability, and liquidity to meet requirements defined in the spending policy.
- (4) Consideration for unique investment opportunities aligned with ARAW's mission.
- (5) Academic research supports the practice of incorporating environmental, social, and governance ("ESG") factors with other conventional financial analytical tools when evaluating investment opportunities. Responsible investing focuses on improving long-term, risk-adjusted returns of the portfolio. ESG factors may help identify potential opportunities and risks that conventional tools miss. The Organization encourages its manager(s) to include ESG factors in their analytical processes. ESG considerations are a factor in the analysis and should not be used as exclusionary screens to eliminate specific companies or sectors from consideration. Relevant ESG factors will vary by industry and should be applied appropriately to help assess risk and return.



## VIII. BENCHMARKING

Beyond the stated return objective (Section IV), the performance of the Portfolio will be measured against a blended market benchmark composed of asset segments, weighted according to the policy target weights, with each asset segment assigned a passive market index. Please see Exhibit I for the Organization's approved policy targets and corresponding benchmarks.

The portfolio may also be measured against a simplistic and traditional passive benchmark mix of 70% stocks (MSCI All Country World Index) and 30% bonds (Barclays US Aggregate Bond Index), and/or peer group benchmarks.

## IX. RESTRICTIONS

### *Liquidity Constraints*

The Committee intends to construct the portfolio to provide adequate liquidity to meet the spending and operational needs of the organization. Portfolio liquidity is expected to fall within the following guidelines:

<b>Category</b>	<b>Market Value Guideline</b>	<b>Liquidity Description</b>
Liquid	No less than 90%	Daily to monthly
Semi-Liquid	No more than 10%	Longer than 1-month, up to one year
Illiquid	Not permitted	One-year or longer

Due to market volatility and the uncertain nature of commitments, drawdowns and distributions, it may not be possible to monitor liquidity continuously. However, attempts will be made to manage liquidity guidelines to the greatest extent possible.

### *Leverage*

The Organization will not borrow money for the sole purpose of enhancing returns. However, the Portfolio may invest with managers that utilize leverage or in certain commingled investment vehicles that utilize borrowing as part of the investment strategy in order to enhance returns. Exposure to such managers or investments should be relegated to the Portfolios' alternatives or diversifying strategies allocation and not constitute more than the target weight.

### *Derivatives*

The Organization will not invest directly in derivatives to mitigate risk to the portfolio. However, the commingled investment vehicles utilized by the Organization may routinely employ derivatives or use investment managers that routinely use derivatives.

## **X. FIDUCIARY RESPONSIBILITIES**

In seeking to attain the investment objectives set forth, the Committee shall exercise prudence and appropriate care in accordance with the Uniform Prudent Management of Institutional Funds Act (“UPMIFA”). UPMIFA requires fiduciaries to apply the standard of prudence “to any investment as part of the total portfolio, rather than the individual investments.” All investment actions and decisions must be based solely on the best interests of the Organization. As summarized for the purposes of this IPS, UPMIFA states that the Committee is under a duty to the Organization to manage its funds as a prudent investor would, in light of the purposes, scope, objectives and other relevant circumstances. This standard requires the exercise of reasonable care, skill, and caution while being applied to investments not in isolation, but in the context of the Organization’s investment as a whole and as part of an overall investment strategy having risk and return objectives reasonably suited to the Organization. In making and implementing investment decisions, the Committee has a duty to diversify the investments unless, under special circumstances, the purposes of the Organization is better served without diversifying.

**Exhibit I**  
**Policy Portfolio incl. Sub-Asset Classes**  
**for ARAW Long-term Portfolio**

<b>Asset Class</b>	<b>Strategic Target</b>	<b>Range</b>	<b>Benchmark</b>
<b>Equity-Oriented Investments</b>	<b>70%</b>	<b>48% - 80%</b>	<b>MSCI All Country World Index</b>
U.S. Large Cap	26%	20% - 45%	S&P 500 Index
U.S. Mid Cap / REITS	16%	5% - 25%	Russell Mid Cap Index
U.S. Small Cap	9%	0% - 15%	Russell 2000 Index
International Developed Equity	13%	5% - 25%	MSCI EAFE Index
Emerging Markets	6%	0% - 12%	MSCI Emerging Markets Index
<b>Diversifying Investments</b>	<b>15%</b>	<b>0% - 30%</b>	<b>HFRX Global Hedge Index</b>
Hedge Funds	15%	0% - 30%	HFRX Global Hedge Index
Commodities	0%	0% - 10%	Bloomberg Commodity Index
Closed-end REITs	0%	0% - 10%	FTSE NAREIT Equity REITs
<b>Fixed Income Investments</b>	<b>15%</b>	<b>0% - 30%</b>	<b>Bloomberg Barclays US Aggregate Index</b>
U.S. Investment Grade Taxable	15%	0% - 30%	Bloomberg Barclays US Aggregate Index
Global High Yield Taxable	0%	0% - 10%	Bloomberg Barclays Global High Yield Index
Cash	0%	0% - 30%	ICE BofA 91 Day T-Bill Index

<sup>i</sup> <https://www.irs.gov/charities-non-profits/private-foundations/taxes-on-failure-to-distribute-income-private-foundations>

Minutes of Visiting Meeting on July 21, 2022 at ARAW office, 174 Union St., New Bedford, MA

Present: Angela Natho, Cathy Mayall, Jenny Costa, Jeannette Doyle, Clare Foley

Excused: Maria Gloria DeSa

We had an interesting and informative meeting this morning. We touched on many issues.

It was agreed that due to increasing Covid cases and the easily transmitted BA.5 variant, we should continue with telephone visits rather than try to resume “in person” visits to our beneficiaries’ homes.

Angela reported that she has a friend who she speaks with every week. If Angela doesn’t make the call, her friend will call her. Cathy and Jeannette do not have that close a relationship with their friends, but do make sure to connect with them every few months.

The length of the call should depend on the situation and need of the lady. Pertinent information should be relayed to the office, not necessarily chit chat. Some of the ladies are proficient “talkers”, others not so much, you kind of have to draw it out of them. This usually improves after a few phone calls.

Reporting to [Admin@arawofnb.org](mailto:Admin@arawofnb.org) is mandatory at least twice a year, but if you find it easier to report more often but on fewer ladies at a time, you can do that as well. It’s whatever works for you

The process was reviewed:

Make the call

Make notes on how it went – was your “friend” in good spirits or a bit down? This will determine how long the phone call should be.

Keep notes at least until reported to “Admin” and keep copies of reports

Mark a follow-up date on your calendar. You might want a conversation with your friend on how often she would like you to call. Most are OK with calls every few months, but if there is something sad going on in your friend’s life, you may want to follow up more often until things are better again. Your judgment.

We talked about ways to handle a change in relationship between a beneficiary and ARAW. When a beneficiary no longer qualifies for services or monetary assistance due to an increase in her income or a move out of our service area, the Beneficiary Advocate will be the person who will advise the beneficiary of her change in status. If the “friend” wishes, she may also send a note after the person has been notified.

Similarly, when a beneficiary passes away, her Advocate will reach out if she knows a family member or a contact person. The “friend” can also follow up with a card or note of condolence if appropriate. This will depend on the level of “friendship” that was developed with the beneficiary.

#### NEW BUSINESS

As you know, Shannon has reluctantly resigned from the ARAW Board. She was the visiting “guru” and enjoyed it immensely. She asked if she could be allowed to continue calling her beneficiary “friends”. The Committee seemed in favor of this although it would require a vote by the Board to adopt this practice.

Along this vein, Clare suggested we could take it a step further and explore the possibility of recruiting non-Board Member volunteers to help with the “not alms alone, but a friend” portion of our Mission. There are about 40 eligible ladies who currently do not receive phone calls from us. They may not all need them, but this personal touch is one of the things that makes us different from other non-profit organizations. We were just “thinking out loud” and would need Governance and entire Board input before any next steps were taken. Food for thought.

Respectfully submitted,

Jeannette Doyle,  
Visiting Chair

Name	Birth Date	Age	Board Member
Gibau, Maria	8/11/1931	91	Office
Jennings, Kathleen	8/11/1951	71	Debbie Brooke
Carreiro, Aida	8/12/1938	84	Office
Lopes, Doreen	8/12/1947	75	Rosemary Saber
Metivier, Claire	8/12/1930	92	Office
O'Connor, Shirley	8/12/1936	86	Pam McKnight
Blair, Cynthia	8/13/1948	74	Office
Gassar, Vera	8/14/1935	87	Office
Mello, Linda	8/14/1947	75	Office
Benoit, Ruth	8/15/1939	83	Office
Chase, Pauline	8/17/1928	94	Office
Cambra, Joan	8/18/1936	86	Jeannette Doyle
Drayton, Gail	8/19/1946	76	Rosemary Saber
Smith, Debra	8/19/1951	71	Office
Carter, Jessie	8/20/1944	78	Angela Natho
Godinet, Muriel	8/21/1950	72	Gloria deSa
Waite, Cynthia	8/21/1942	80	Office
Tavares, Marilyn	8/23/1940	82	Diane Laflamme
DeAndrade, June	8/24/1947	75	Mary Ellis
McNamara, Theresa	8/24/1932	90	Jo-Ann Beaulieu
Almeida, Marie	8/26/1941	81	Office
Benoit, Pauline Jeanne	8/26/1937	85	Office
Morin, Evangeline	8/26/1932	90	Roseanne O'Connell
Ingham, Linda	8/27/1946	76	Office
Furtado, Fatima	8/28/1948	74	Gloria deSa
Rapoza, Mary Lou	8/28/1943	79	Roseanne O'Connell
Vincent, Patricia	8/29/1938	84	Pam McKnight
Curado, Alzira	9/1/1947	75	Gloria deSa
Adesso, Dolores	9/2/1930	92	Rosemary Saber
Riley, Shirley	9/2/1929	93	Office
Miranda, Maria	9/4/1945	77	Mary Ellis
Oliveira, Alice	9/4/1934	88	Pam McKnight
Soares, Maria	9/9/1954	68	Office

# ARAW BENEFICIARY REQUEST: COMMITTEE RECOMMENDATIONS

AUGUST 2022 | VER 8/3/22

Beneficiary	Outreach	Biggest Concern	Notes	Specific Request	Recommendation
<p><b>New BENE#</b></p> <p><b>Camara, Mary</b> 78 y/o; 10/14/1943 <b>Income: \$1,472   H</b></p> <p><b>ARAW support: New</b></p> <p><b>MEB: -\$322</b></p>	<p>WCOA Andrea Lemos  (508) 636-1026</p>	<p>“Paying for my prescriptions especially my insulin. Also, I worry about not being able to pay for my bills.”</p>	<p>Lost husband and son – depressed, usually very social person</p> <p>Sometimes does not want to pick up Rx due to cost</p> <p><b>TC f/u questions 7/27</b></p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ BCBS \$226.29</li> </ul> <p><b>Weekly</b></p> <ul style="list-style-type: none"> <li>▪ Supportive Day Program with transportation \$120</li> </ul>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ BCBS \$226.29</li> </ul> <p><b>Weekly</b></p> <ul style="list-style-type: none"> <li>▪ Supportive Day Program with transportation \$120</li> </ul>
<p><b>BENE# 19-20/23</b></p> <p><b>Hotte, Eileen</b> 79 y/o; 7/6/1943 <b>Income: \$856   sub</b></p> <p><b>ARAW support \$8,743.84:</b> <b>Reoccurring:</b> BCBS \$678.06 '19, FCOA Van <b>Gifts:</b> Car ins \$265 '19, Car repair \$292 '19, AAA \$54 '19, Eye exam \$45 '19, Holiday \$150 '20-21</p> <p><b>MEB: \$259</b></p>	<p>BA Patricia Midurski (Ana Paz)  (508) 717-0400</p>	<p>“My very first wish is that I heard from my children more often. I understand they are busy with work &amp; that both my son &amp; daughter are helping with college tuition for my grandchildren. But I am very lonely. However, I also know that the ARAW cannot change that though I am grateful for my ARAW board member friend who calls me...I used to get my incontinence products from the FCOA however they don't always have my size or the brand I need.”</p>	<p>Struggles with loneliness &amp; depression</p> <p>Unable to get free briefs from FCOA</p>	<p><b>Quarterly:</b></p> <ul style="list-style-type: none"> <li>▪ <i>Continuation</i> of BCBS \$678.06</li> </ul> <p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Depends overnight large, 2 packages \$35.38</li> </ul>	<p><b>Quarterly:</b></p> <ul style="list-style-type: none"> <li>▪ <i>Continuation</i> of BCBS \$678.06</li> </ul> <p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Depends overnight large, 2 packages \$35.38</li> </ul>

## ARAW BENEFICIARY REQUEST: COMMITTEE RECOMMENDATIONS

AUGUST 2022 | VER 8/3/22

Beneficiary	Outreach	Biggest Concern	Notes	Specific Request	Recommendation
<p><b>BENE# 16-17/01</b></p> <p><b>Begnoche, Cecile</b> 88 y/o; 9/29/1933 <b>Income: \$1,429   sub</b></p> <p><b>ARAW support \$5,062:</b> <b>Reoccurring:</b> EPERS \$51.95 '16, FCOA Van <b>Gifts:</b> Eye exam \$185 '18, Holiday \$100-150 '16-21</p> <p><b>MEB: \$64</b></p>	<p style="text-align: center;">BA Patricia Midurski  (508) 717-0400</p>	<p>I do have my health issues &amp; unfortunately they are increasing. But I make the most of every day &amp; I am determined to maintain my independence. I need my EPERS however I will NOT wear a necklace. I am also worried about the goof up with my health insurance &amp; I have notified the police department as I believe this is a scam. I know I will have bills coming in from the hospital &amp; that worries me."</p>	<p>Health insurance scam</p> <p>Very independent</p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Continuation of EPERS \$29.95</li> </ul> <p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ <b>Invoice</b> Southcoast hospitalization balance \$335</li> </ul>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Continuation of EPERS \$29.95</li> </ul> <p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ <b>Invoice</b> Southcoast hospitalization balance \$335</li> </ul>
<p><b>BENE# 19-20/42</b></p> <p><b>Christy, Maria</b> 77 y/o; 11/14/1943 <b>Income: \$1,783   H</b></p> <p><b>ARAW support \$2,108:</b> <b>Reoccurring:</b> EPERS \$26.95 '21, Electric \$189 (varies) '22, <b>Gifts:</b> Test strips \$115 '22, Fridge \$507 '21, Glasses \$232 '20, Holiday \$150 '20-21 <b>Discontinued:</b> Health insurance \$272 '20</p> <p><b>MEB: -\$206</b></p>	<p style="text-align: center;">WCOA Andrea Lemos  (508) 636-1026</p>	<p>"My bills are a nightmare &amp; I am so grateful people have been helping me. I don't know what I would do, probably lose my home. I worry about my family because they all have something going on. Life today is so frustrating &amp; I wonder what is going to be ahead for my grandchildren. If I could get some assistance with the chair would be awesome."</p>	<p>Bad back due to being personal care attendant – difficulty getting in &amp; out of chairs</p> <p>Current chair broken</p>	<p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ <b>Invoice</b> Power lift recliner \$948.98 from Bob's Discount Furniture</li> </ul>	<p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ <b>Invoice</b> Power lift recliner \$948.98 from Bob's Discount Furniture</li> </ul>



# ARAW BENEFICIARY REQUEST: COMMITTEE RECOMMENDATIONS

AUGUST 2022 | VER 8/3/22

Beneficiary	Outreach	Biggest Concern	Notes	Specific Request	Recommendation
<p><b>BENE# 22/08G</b></p> <p><b>Hennessy, Cheryl</b> 65 y/o; 8/3/1956 <b>Income: \$892   H</b></p> <p><b>ARAW support \$1,925:</b> <b>Gifts:</b> Water heater \$1,775 '22, Holiday \$150 '21</p> <p><b>MEB: \$75</b></p>	<p>BA Patricia Midurski  (508) 717-0400</p>	<p>" I know I need to sell my house &amp; move into subsidized elder housing. However, the entire process is so overwhelming to me. My counselor is working with me to break this down into 'bite-sized pieces' but even that is causing me to be more anxious. With the anxiety comes immobility &amp; I don't get anything accomplished."</p>	<p>In process of finding subsidized housing</p> <p>Car gives her freedom to complete errands &amp; get to medical appts w/out relying on anyone</p> <p>No ongoing ask because 65 y/o</p>	<p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ <b>Statement</b> Auto insurance, 2 payments of \$735, total \$1,470</li> </ul>	<p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ <b>Statement</b> Auto insurance, 2 payments of \$735, total \$1,470</li> </ul>
<p><b>BENE# 20-21/08</b></p> <p><b>DeSouza, Joanne</b> 76 y/o; 9/13/1945 <b>Income: \$1,546   R</b></p> <p><b>ARAW support \$8,856:</b> <b>Reoccurring:</b> BCBS \$678 '20, Phone \$72 '21, Demand response \$25 '21, Personal care \$106 '20 <b>Gifts:</b> Upright walker \$189 '20, Holiday \$150 '20-21</p> <p><b>MEB: \$62</b></p>	<p>BA Patricia Midurski  (508) 717-0400</p>	<p>I was diagnosed with cancer earlier this year. I had surgery &amp; radiation treatments. I must see my drs every 3 months. Thank goodness I have BCBS! THANK YOU. Unfortunately due to the radiation I now have more significant urinary incontinence. I could benefit from additional pads as I wear 4-5 a day. I am grateful for the Demand Response tickets but I still have to purchase another book on my own as my appts have increased."</p>	<p>Has always used public transportation</p> <p>Diagnosed w/cancer early 2022</p> <p>Given info for ACCS</p> <p>Increased need for incontinence products due to radiation treatments</p>	<p><b>Quarterly:</b></p> <ul style="list-style-type: none"> <li>▪ <i>Continuation</i> of BCBS \$678.06</li> </ul> <p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ <i>Continuation</i> of phone w/emergency unit \$71.71</li> <li>▪ <i>Continuation</i> of SRTA Demand Response, 1 book \$25</li> <li>▪ SRTA Charlie Card \$28</li> <li>▪ Increase in incontinence products to 8 packages \$142.32</li> </ul>	<p><b>Quarterly:</b></p> <ul style="list-style-type: none"> <li>▪ <i>Continuation</i> of BCBS \$678.06</li> </ul> <p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ <i>Continuation</i> phone w/emergency unit \$71.71</li> <li>▪ <i>Continuation</i> of SRTA DR, 1 book \$25</li> <li>▪ Charlie Card \$28</li> <li>▪ <i>Continuation</i> of incontinence products to 8 packages \$142.32</li> </ul>

# ARAW BENEFICIARY REQUEST: COMMITTEE RECOMMENDATIONS

AUGUST 2022 | VER 8/3/22

Beneficiary	Outreach	Biggest Concern	Notes	Specific Request	Recommendation
<p><b>New BENE#</b></p> <p><b>DePina, Pam</b> 72 y/o; 8/23/1949 <b>Income: \$1,555   H</b></p> <p><b>ARAW support: New</b></p> <p><b>MEB: \$45</b></p>	<p>BA Patricia Midurski  (508) 717-0400</p>	<p>“The past 18 mths have been very challenging. I thought I would die during my chemo &amp; radiation treatments... Thankfully, the breast &amp; lymph node cancer seem to be gone. But now I have the upcoming hysterectomy for that cancer. My gyn/oncologist is leaving B&amp;W &amp; moving to Tufts in Boston which now pushes my surgery to Sep at the earliest. I hope it doesn't spread. Thankful that I have great insurance &amp; that I can choose my doctors &amp; do not need to obtain referrals.”</p>	<p>Referral from ARAW beneficiary</p> <p>Health insurance very important – going through cancer treatments</p> <p>Very supportive family &amp; friends</p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ BCBS Medex Bronze \$228.81</li> <li>▪ Delta Dental \$21.58</li> <li>▪ Incontinence products, 6 packages \$38.34</li> </ul>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ BCBS Medex Bronze \$228.81</li> <li>▪ Delta Dental \$21.58</li> <li>▪ Incontinence products, 6 packages \$38.34 through WA</li> </ul>
<p><b>BENE# 21-22/08</b></p> <p><b>Guy, Nancy</b> 85 y/o; 4/11/1937 <b>Income: \$1,443   sub</b></p> <p><b>ARAW support \$139:</b> <b>Reoccurring:</b> Demand Response \$25 '21</p> <p><b>MEB: -\$73</b></p>	<p>BA Ana Paz  (508) 717-0400</p>	<p>“It would be helpful to have the SRTA coupons on hand when I need them. I use the COA van when I can, but it is not always available &amp; the times of use are more limited. I appreciate the program for socializing. I love going out to eat &amp; socializing with the other ladies.”</p>	<p>Increased medical appts &amp; physical therapy – need for more Demand Response</p> <p>Concerned w/being out more &amp; worsening vision issues – wants EPERS</p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Increase to SRTA Demand Response, 1 book \$25</li> <li>▪ EPERS \$51.95</li> </ul>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Increase to SRTA Demand Response, 1 book \$25</li> <li>▪ EPERS \$51.95</li> </ul>

# ARAW BENEFICIARY REQUEST: COMMITTEE RECOMMENDATIONS

AUGUST 2022 | VER 8/3/22

Beneficiary	Outreach	Biggest Concern	Notes	Specific Request	Recommendation
<p><b>BENE# 18-19/01</b></p> <p><b>Livesley, Virginia</b> 77 y/o; 10/30/1944 <b>Income: \$1,153   H</b></p> <p><b>ARAW support \$23,511:</b> <b>Reoccurring:</b> EPERS \$51.95 '18, Cable/phone/internet \$237 '19, BCBS \$685 '18, FCOA Van <b>Gifts:</b> Holiday \$100-150 '18 <b>Discontinued:</b> Stipend \$100 '18-19</p> <p><b>MEB: \$227</b></p>	<p style="text-align: center;">BA Patricia Midurski  (508) 717-0400</p>	<p>" I don't have enough money to pay my real estate taxes which are due August 1st. Will the ARAW help me, please?"</p>	<p>RE Taxes due Aug 1<sup>st</sup></p> <p>Working w/SCCLS on credit cards – victim of scam</p>	<p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ 1<sup>st</sup> Quarter real estate taxes \$642.71</li> </ul>	<p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ 1<sup>st</sup> Quarter real estate taxes \$642.71</li> </ul>
<p><b>BENE# 21-22/30</b></p> <p><b>Spearin, Gail</b> 71 y/o; 12/19/1951 <b>Income: \$1,235   R</b></p> <p><b>ARAW support \$3,508:</b> <b>Reoccurring:</b> Cable/phone/internet \$179 '22 <b>Gifts:</b> Rent \$409 (for 6 months) '22</p> <p><b>MEB: \$158</b></p>	<p style="text-align: center;">BA Patricia Midurski  (508) 717-0400</p>	<p>" I am truly forever indebted to the ARAW for saving me during one of the lowest times in my life...Thanks to your support &amp; my counselor, I have been able to stay afloat emotionally &amp; financially. I have been faithful in decreasing my CC debt and I have not charged unless it's an absolute necessity...I know it is a lot to ask, but might the ARAW consider another 6 months of rent so I can pay off the last CC &amp; get more secure in my finances?"</p>	<p>Friend JoAnne taking over payment for 3 larger credit cards</p> <p>Recent fall fracturing humerous</p> <p>Long-standing relationship with mental health team</p>	<p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ Land rent, 6 months, \$409 per month</li> </ul>	<p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ Land rent, 6 months, \$409 per month</li> </ul>

# ARAW BENEFICIARY REQUEST: COMMITTEE RECOMMENDATIONS

AUGUST 2022 | VER 8/3/22

Beneficiary	Outreach	Biggest Concern	Notes	Specific Request	Recommendation
<p><b>BENE# 21/19G</b></p> <p><b>Parker, Delia</b> 87 y/o; 5/16/1935 <b>Income: \$1,234   R</b></p> <p><b>ARAW support: BB Taxi</b></p> <p><b>MEB: \$274*</b></p>	<p>BA Patricia Midurski  (508) 717-0400</p>	<p>" I was hoping to get approved for MassHealth so that I can get hearing aids as my hearing is so poor. Unfortunately, I have been denied MassHealth as John and I have always pooled our monies to run the house thus making my assets too high for MassHealth ( ~\$1000 over asset)."</p>	<p>Takes care of disabled son</p> <p>*MEB seems high due to combined incomes but not all personal expenses of son's are accounted for</p> <p>SCENT expressed desperate need for hearing aids</p>	<p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ A one-time gift of bilateral hearing aids: \$4,400</li> <li>▪ Round trip transportation to SCENT ~ \$60 via Blue Bird Taxi x 2 to obtain hearing aids &amp; fitting</li> </ul>	<p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ A one-time gift of bilateral hearing aids: \$4,400</li> <li>▪ Round trip transportation to SCENT ~ \$60 via Blue Bird Taxi x 2 to obtain hearing aids &amp; fitting</li> </ul> <p><i>Approved bc big ticket item poses a strain on limited budget.</i></p>
<p><b>BENE# 06-07/08</b></p> <p><b>DaCosta, Maria</b> 97 y/o; 10/12/1924 <b>Income: \$1,084   H</b></p> <p><b>ARAW support 32,376:</b> <b>Reoccurring:</b> Nutrition \$143 '11 <b>Gifts:</b> HOI \$600-1,500 '07-19, Car ins \$754 '06 &amp; \$658 '08, Holiday \$100-150 '08</p> <p><b>MEB: \$711</b></p>	<p>WCOA Susan Routhier  (508) 636-1026</p>		<p><b>Awaiting updated application</b></p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Continuation of nutrition \$143.28</li> </ul> <p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ <b>Policy</b> 2022-2023 Homeowners insurance \$2,146</li> </ul>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Continuation of nutrition \$143.28</li> </ul> <p><i>Homeowners insurance not approved due to lack of info from son who is living there w/o paying rent</i></p>

# ARAW BENEFICIARY UPDATE RECOMMENDATIONS

AUGUST 2022 | VER 8/3/22

Beneficiary	Outreach	Biggest Concern	Notes	Current Support	Current Support
<p><b>BENE# 20-21/07</b></p> <p><b>Costello, Margaret</b> 76 y/o; 11/26/1945 <b>Income: \$853   sub</b></p> <p><b>ARAW support \$1,645:</b> <b>Reoccurring:</b> Electric \$75 '20 <b>Gifts:</b> Holiday \$150 '20-21</p> <p>A/R Due: 7/18/2023</p> <p><b>MEB: \$115</b></p>	<p>WCOA Andrea Lemos (508) 636-1026</p>	<p>“Money worries me the most. I have so many things weong with me that I worry about my health. This world and the fact that there are two viruses now. I am afraid to go outside. If you could continue to help me with the electric that would be helpful.”</p>	<p>On oxygen 24 hrs per day &amp; needs AC during summer</p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Electric \$50-75</li> </ul> <p>Monthly total: \$50-75</p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Electric \$50-75</li> </ul> <p>Monthly total: \$50-75</p>
<p><b>BENE# 21/15G</b></p> <p><b>Pereira, Maria</b> 74 y/o; 3/22/1947 <b>Income: \$1,389   H</b></p> <p><b>ARAW support \$3,099: Gifts:</b> Glasses \$468 '20, Fridge \$716 '21, Dental \$1,615 '21, Holiday \$150 '20-21</p> <p>A/R Due: 6/17/2023</p> <p><b>MEB: \$211</b></p>	<p>BA Pat Midurski (Ana Paz) (508) 717-0400</p>	<p>“I worry because my fence is broken &amp; it has fallen into neighbor’s yard. My neighbor was upset. That’s the only thing that worries me.”</p>	<p>Referred to CNN for window &amp; fence repair</p> <p>Discussed 2<sup>nd</sup> fridge – dtr to explore other options</p>	<p>Move to FLO</p>	<p>Move to FLO</p>

## ARAW BENEFICIARY UPDATE RECOMMENDATIONS

AUGUST 2022 | VER 8/3/22

Beneficiary	Outreach	Biggest Concern	Notes	Current Support	Current Support
<p><b>BENE# 19-20/31</b></p> <p><b>Huezo-Mendoza, Sonia</b> 82 y/o; 2/17/1940 <b>Income: \$354   R</b></p> <p><b>ARAW support \$4,642:</b> <b>Reoccurring:</b> Charlie card \$20 '19, S&amp;S GC \$120 '21, Cable \$77 '20 <b>Gifts:</b> Rent \$118 '21, Holiday \$150 '20-21 A/R Due: 7/14/2023</p> <p><b>MEB: \$59</b></p>	<p>BA Pat Midurski  (508) 717-0400</p>	<p>" I will be losing my health insurance at the end of the year as I am not a legal resident of the US. I tried to get help in the past but I got nowhere. I cannot afford to pay all the fees. I appreciate the help I get &amp; I do my best to live within my means. At this time, I will accept help from any organization that can help me with my status &amp; health ins."</p>	<p>Working w/Catholic Social Services on TPS/Health Insurance</p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ SRTA Charlie Card \$28</li> <li>▪ Cable \$80</li> <li>▪ Grocery food card \$120</li> </ul> <p>Monthly total: \$228</p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ SRTA Charlie Card \$28</li> <li>▪ Cable \$80</li> <li>▪ Grocery food card \$120</li> </ul> <p>Monthly total: \$228</p>
<p><b>BENE# 19-20/45</b></p> <p><b>Antunes, Joana</b> 81 y/o; 12/2/1940 <b>Income: \$1,060   R</b></p> <p><b>ARAW support \$5,448:</b> <b>Reoccurring:</b> Cable \$67 '21, Rent \$200 '20 <b>Gifts:</b> Comforter \$36 '18, Holiday \$150 '21 A/R Due: 7/25/2023</p> <p><b>MEB: \$97</b></p>	<p>BA Ana Paz  (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." Her income has reduced by more than half. She is grateful for rent &amp; cable assistance.</p>	<p>Reduced babysitting (8 children to 3)</p> <p>Pays rent &amp; electric in cash – receives receipt from landlord</p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Rent \$200</li> <li>▪ Cable \$58</li> </ul> <p>Monthly total: \$258</p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Rent \$200</li> <li>▪ Cable \$58</li> </ul> <p>Monthly total: \$258</p>

## ARAW BENEFICIARY UPDATE RECOMMENDATIONS

AUGUST 2022 | VER 8/3/22

Beneficiary	Outreach	Biggest Concern	Notes	Current Support	Current Support
<p><b>BENE# 22/10G</b></p> <p><b>Jenkins (Alves-Freire), Karen</b> 68 y/o; 5/21/1954 <b>Income: \$1,870 H</b></p> <p><b>ARAW support \$517: Gifts:</b> Cab \$122.25 '22, \$199.20 '21 &amp; \$46 '20, Holiday \$150 '21</p> <p>A/R Due: 7/20/2023</p> <p><b>MEB: \$33</b></p>	<p>BA Pat Midurski  (508) 717-0400</p>	<p>"The taxi vouchers have been invaluable when I can't get a ride to my doctor appts. My son is helpful but he works full time &amp; my dtr is in Boston. My doctor would not complete the Demand response form as he wants me to walk. But he doesn't realize the pain I get in my legs from the lack of circulation. Plus my heart is not what it used to be &amp; I get shortness of breath after a block."</p>	<p>Rents 1<sup>st</sup> floor of home to son</p> <p>Working w/SCCLS on judgement proof</p> <p>Dr declined demand response app – will be asking vascular dr</p>	<p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>Continuation of as needed taxi voucher (not more than monthly) for medical appts \$60 (until Demand Response approval)</li> </ul> <p>Monthly total: \$60</p>	<p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>Continuation of as needed taxi voucher (not more than monthly) for medical appts \$60 (until Demand Response approval)</li> </ul> <p>Monthly total: \$60</p>
<p><b>BENE# 18-19/21</b></p> <p><b>Beaubian, Joan</b> 80 y/o; 3/18/1942 <b>Income: \$1,471 R</b></p> <p><b>ARAW support \$9,612:</b> <b>Reoccurring:</b> Cab/pho/int \$189 '19 <b>Gifts:</b> AC \$350 '20, Rent \$700 '18-19, Holiday \$100-150 '19-21 <b>Discontinued:</b> Stipend \$100 '19, Grocery card \$100 '19</p> <p>A/R Due: 7/22/2023</p> <p><b>MEB: \$19</b></p>	<p>BA Pat Midurski  (508) 717-0400</p>	<p>"I didn't imagine my life would come to this but I have to accept &amp; make the best. Thank God I have my PCA who helps me all the time as I am experiencing more health problems. I appreciate having the Comcast as I watch TV all day &amp; night as well as using the internet to communicate with family, pay bills &amp; order groceries &amp; supplies."</p>	<p>Health worsening – hospital bed being delivered</p> <p>Live in PCA</p>	<p><b>Exception:</b></p> <ul style="list-style-type: none"> <li>Continuation of living alone exception</li> </ul> <p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>Cable/phone/internet \$190</li> </ul> <p>Monthly total: \$190</p>	<p><b>Exception:</b></p> <ul style="list-style-type: none"> <li>Continuation of living alone exception</li> </ul> <p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>Cable/phone/internet \$190</li> </ul> <p>Monthly total: \$190</p>

# ARAW BENEFICIARY UPDATE RECOMMENDATIONS

AUGUST 2022 | VER 8/3/22

Beneficiary	Outreach	Biggest Concern	Notes	Current Support	Current Support
<p><b>BENE# 21-22/15</b></p> <p><b>DeJesus, Eva</b> 92 y/o; 9/13/1929 <b>Income: \$989   R</b></p> <p><b>ARAW support \$1,891:</b> <b>Reoccurring:</b> Nutrition \$43 '21, Cable/phone/internet \$122 '22 <b>Gifts:</b> Holiday \$150 '21</p> <p><b>MEB: \$81</b></p>	<p style="text-align: center;">BA Patricia Midurski  (508) 717-0400</p>	<p>"My landlord is increasing my rent again! I may be able to manage however I really need the ARAW to continue helping with the TV &amp; Ensure drinks. The heat has been intolerable this summer. I would like to have an air conditioner in my living room if at all possible please. I really appreciate the help. Thank you so much!!"</p>	<p>Rent increasing – does not want to move to sub housing</p> <p>SWH denied request to cover Ensure</p> <p>TV is socialization &amp; entertainment</p> <p>No AC in living room</p> <p>EDDF AC \$269.95</p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Continuation of cable/phone/internet \$125</li> <li>▪ Continuation of Ensure \$48</li> </ul>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Continuation of cable/phone/internet \$125</li> <li>▪ Continuation of Ensure \$48</li> </ul>
<p><b>BENE# 19-20/15</b></p> <p><b>Barbosa, Atanzia</b> 90 y/o; 10/9/1931 <b>Income: \$881   sub</b></p> <p><b>ARAW support \$1,047:</b> <b>Reoccurring:</b> Demand Response \$150 '20 <b>Gifts:</b> TV \$86 '20, Holiday \$150 '19-21</p> <p>A/R Due: 7/27/2023</p> <p><b>MEB: \$491</b></p>	<p style="text-align: center;">BA Ana Paz  (508) 717-0400</p>	<p>Ms. Barbosa does not have a current need at this time. She is happiest home praying. "When I pray for everyone, children hospitals, etc. it makes me so happy."</p>	<p>Stopped going to church during pandemic – no need for SRTA Demand Response</p>	<p>No needs – place inactive</p>	<p>No needs – place inactive</p>



# ARAW BENEFICIARY UPDATE RECOMMENDATIONS

AUGUST 2022 | VER 8/3/22

Beneficiary	Outreach	Biggest Concern	Notes	Current Support	Current Support
<p><b>BENE# 21/10G</b></p> <p><b>Jacques, Mary</b> 69 y/o; 6/27/1952 <b>Income: \$948   sub</b></p> <p><b>ARAW support \$1,400: Gift:</b> Recliner \$499 '21, Mattress \$516 '20, Air purifier \$84 '21, Holiday \$150 '20-21</p>	<p>BA Pat Midurski  (508) 717-0400</p>		<p>Does not want to provide financial info</p>	<p>Place inactive</p>	<p>Place inactive</p>
<p><b>BENE# 22/33G</b></p> <p><b>Booth, Sharon</b> 77 y/o; 4/28/1945 <b>Income: \$595   H</b></p> <p><b>ARAW support:</b> Awarded 6 months health ins &amp; car ins but never paid</p>	<p>WCOA Andrea Lemos  (508) 636-1026</p>		<p>Will be getting husbands SS</p> <p>No contact</p>	<p>Place inactive</p>	<p>Place inactive</p>

# ARAW BENEFICIARY UPDATE RECOMMENDATIONS

AUGUST 2022 | VER 8/3/22

Beneficiary	Outreach	Biggest Concern	Notes	Current Support	Current Support
<p><b>BENE# 22/01EDDF</b></p> <p><b>Crovello, Mary</b> 75 y/o; 10/17/1946 <b>Income: \$830   R</b></p> <p><b>ARAW support \$909: Gift:</b> Fridge \$759 '21, Holiday \$150 '21</p>	<p>BA Pat Midurski  (508) 717-0400</p>		<p>Grandson and his newborn child living with her</p> <p>Does not want to provide financial info</p>	<p>Place inactive</p>	<p>Place inactive</p>
<p><b>BENE# 22-23/12</b></p> <p><b>Comeau, June</b> 70 y/o; 6/24/1952 <b>Income: \$1,900   H</b></p> <p><b>ARAW support:</b> Awarded social day – not used</p>	<p>BA Pat Midurski  (508) 717-0400</p>		<p>Being admitted to long term care</p>	<p>Place inactive</p>	<p>Place inactive</p>

## Governance Committee Minutes July 26, 2022

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

Also Present: Healy Foley ED

Member Excused: Laflamme

We reviewed the results of the Annual Board Self Evaluation and agreed that we have every right to be very proud of ourselves and of our commitment and our progress in service of our mission. Mary Ellis and the Finance Committee received particularly great reviews as did Clare and her ace team. Although we have answered the same questions for 3 years, we felt that simplifying the answer choices and providing more opportunity for comments provided us with more information than in past years. Additionally, we were able to identify several questions that need to be reworded for enhanced clarity.

These results will be used by our consultants and by the team planning our upcoming retreat. Some results will be addressed by the Governance Committee in the coming months. A general overview of the results will be presented at the August Board meeting and the results will be sent to the full board well in advance of that meeting. Questions may be directed to Debbie or Clare at any time.

We continued to fine tune our protocol / guidelines for new member orientation and mentorship. Due to the usual busyness of summer schedules, Leah and Helen's first orientation session will not take place until after the August Board meeting. The committee felt it was important for us all to remember to encourage questions from our new members and take time to explain ourselves more thoroughly than we might ordinarily do.

We have received a new round of suggested edits for our Bylaws and Constitution from our attorney and the Bylaws Subcommittee will be meeting in August to dig through those.

And finally, the very comprehensive ARAW Volunteer Policy Handbook got final approval from the committee. We are grateful to Clare for guiding us through this document that was recommended by our attorney and is newly considered best practice. The Board will receive a copy in August.

Respectfully submitted,

Debbie Brooke, Chair

Personnel Committee Minutes  
July 15, 2022

Present: Cathy Mayall, Pamela McKnight, Rosemary Saber, Clare Foley, ED, Angela Natho

1. Unemployment insurance

Clare shared with us the Massachusetts guidelines for employer responsibilities during unemployment in the event we receive any claims. She has also been in touch with our accountant and will advise us of further details.

2. Paid family medical leave act

We reviewed our current policy and will recommend to the board to continue health insurance benefits during paid family medical leave. Clare will explore whether we may want to consider short and long term disability plans.

The next meeting is Friday, September 16, 2022

Respectfully submitted,

Angela Natho