



ASSOCIATION FOR THE RELIEF OF AGED WOMEN

Board Meeting | December 8, 2022 | 9:30 am

Wamsutta Club | New Bedford | Zoom option

Packet contents to be reviewed prior to the meeting:

*November Minutes; December FLO Newsletter & BA Report; November activity sheet;
November financials; December Beneficiary Recommendations;
Committees: Finance, Grants, Personnel*

- 🕒 Call to Order: President Jane Stankiewicz
 - ✓ **Recommendation to authorize the Office Administrator to take meeting minutes for review, approval and distribution by the Clerk. – VOTE**
- 🕒 Moment of Silence
 - ♥ Frances Devlin
- 🕒 Reflective Moment: Pam McKnight
- 🕒 Roll Call: Clerk Gale Beaton
- 🕒 President's Report: Jane Stankiewicz – *see packet*
 - ✓ **Recommendation to approve November 2022 Board meeting minutes, as distributed – VOTE**
 - ✓ **Recommendation to approve November 2022 Executive Session minutes, as distributed – VOTE**
 - Helen Montague
 - Strategic Plan update & committee
 - Holiday party
- 🕒 Executive Director's Update: Clare Healy Foley – *see packet*
 - Thank you!
 - FLO Newsletter & BA report
 - Questions: activity sheet
 - Comm Engagement impact
 - CPG updates: NBAM, Zeiterion
 - Beneficiary highlight
- 🕒 Finance Review: Treasurer Mary Ellis – *see packet*
 - Finance Committee meeting update 11/15/22
 - Finance Committee timeline
 - ✓ **Recommendation to approve November 2022 financials, as distributed - VOTE**
- Committee Reports
 - 🕒 → Visiting: Chair Jeannette Doyle – *see packet for upcoming birthdays*
 - December Visiting reports – 3 minutes each
 - * Rosemary Saber
 - Reporting in December Cathy Mayall

- Beneficiary: Chair Pam McKnight – *see packet*
 - ✓ **Recommendation to accept decisions of beneficiary committee, as distributed – VOTE**
 - Highlight a new beneficiary
 - ✓ **Recommendation, as of 1/1/23, to increase the ARAW income eligibility guideline to \$1,650 for subsidized housing residents and \$2,300 for non-subsidized residents due to scheduled CY23 8.7% SSI increase – VOTE**
- Governance: Chair Debbie Brooke – *see packet*
 - Committee meeting update 11/8/22
- Grants: Chair Rosemary Saber
 - Committee meeting update 11/16/22
 - Closed RFP release
- Legacy: Chair Diane Laflamme – *see packet*
 - Committee meeting update 11/21/22
- Personnel: Chair Angela Natho
 - Committee meeting update 11/18/22
- Other business to be brought before the Board
- Executive Session, if needed

ANNOUNCEMENTS/MEETINGS:

Thursday, December 8th | Board Meeting | Wamsutta Club | 9:30 am
Thursday, December 8th | Board & IAC Holiday Luncheon | Wamsutta Club | following board meeting
Friday, December 16th | Personnel Committee | 174 Union/Zoom | 9:30 am
Friday, December 16th | Beneficiary Holiday Luncheon | Wamsutta Club | 12:30 pm
Friday, December 16th | Board Holiday Party | Debbie’s House | 5:30 pm -7:30 pm
Monday, December 19th | Strategic Planning Committee | 174 Union/Zoom | 9:30 am
Monday, December 26th | Christmas Holiday | Office closed
Tuesday, December 27th | Governance Committee | 174 Union/Zoom | 9:30 am
Monday, January 2nd | New Year Holiday | Office closed
Wednesday, January 4th | Beneficiary Committee | 174 Union/Zoom | 9:30 am



Happy Birthday!!
Diane’s birthday 12/22

And...HAPPY HOLIDAYS!!!

**Association for the Relief of Aged Women
Minutes of the Regular Monthly Meeting, November 10, 2022**

President Jane Stankiewicz called the meeting to order at 9:31 AM.

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

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

1. Josephine Andrade (91) Acushnet
 - a. ARAW had provided electric, phone and homeowners' insurance
 - b. Firecracker personality
 - c. Severe hearing loss
 - d. Loving daughter – enjoyed rides together
2. Rae Sousa (79) New Bedford
 - a. Very strong, always looked adversity in the face

Reflective Moment: Cathy Mayall shared Robert Frost's poem *A Time to Talk*:

When a friend calls to me from the road
And slows his horse to a meaning walk,
I don't stand still and look around
On all the hills I haven't hoed,
And shout from where I am, What is it?
No, not as there is a time to talk.
I thrust my hoe in the mellow ground,
Blade-end up and five feet tall,
And plod: I go up to the stone wall
For a friendly visit.

Members in Attendance: Beaton (Via Zoom), Brooke (Via Zoom), deSa, Ellis, Laflamme, Macomber, Mayall, McKnight, Montague, Natho, O'Connell, Saber, Stankiewicz.

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

Members excused: Beaulieu, Doyle.

Report of President: President Jane Stankiewicz reported:

1. The minutes of the October 6, 2022 board meeting were approved as distributed. **SO VOTED**
2. Jo-Ann's Leave
 - a. Doing well, current medications making tired
 - b. Daughter recently moved and is adjusting well to new location
3. Strategic Plan Update
 - a. Jane and Clare met with consultants on November 1st

- b. Consultants advised how to form committee
 - i. President chooses committee
 - ii. Strategic Planning Committee members will be Executive Committee & chairs of Beneficiary, Governance and Grants
 - iii. Will bring other members in as needed
 - iv. First meeting is 11/28
 - c. Strategic planning update will be standing agenda item for board meetings with hand out
 - d. Will have a 2-3 hour retreat separate from board meeting
4. Holiday Party
- a. Friday, December 16th – time TBD
 - b. Debbie has offered to host
 - c. Potluck

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

- 1. Thank you to staff and board for keeping things running smoothly while on vacation – utmost faith in Jenny, allows for full enjoyment of vacation
- 2. FLO Newsletter
 - a. Featured getting to know Staff (featured Board last month)
 - b. Seagull's name is Gilly the Gull – has not been by to visit
 - c. Soup delivery in lieu of luncheon this month – November 18th
 - i. Will provide quart of soup, apple and cookies
 - ii. Registration has been slow (people out & about more now than during pandemic)
 - iii. Volunteer opportunity – please sign up to deliver if you are able
- 3. Activity sheet & BA Reports: no questions
- 4. Holiday Cards
 - a. Board Members given list of beneficiaries
 - b. Please fill out (message to be emailed) and return to office
 - c. Office to mail out with check on 12/9
- 5. Community Engagement
 - a. Clare gave presentation for NB Whaling Museum's volunteers
 - i. Some attendees involved with ARAW archive transcription
 - ii. Example of intentional outreach – more knowledge of ARAW
- 6. CPG updates
 - a. Meeting with WCOA – November 3rd
 - i. WCOA director & 3 outreach workers met with full ARAW staff at ARAW office
 - ii. Went over best practices and forms
 - iii. Time for questions and sharing
 - iv. Will continue quarterly meetings

b. Reporting

i. Received 2nd quarter reports – qualitative not quantitative

1. Offering info session to all community partners – good feedback so far

7. Beneficiary Highlight: Alice Oliveira

a. Complex case

b. Discussion of need for portable O2 tank began in May 2022

c. On MassHealth (doesn't technically qualify)

d. 14K in bank account – claims it's son's money

e. Liberties being taken in info given

f. Alternative resources have been given, insistent the ARAW needs to pay

g. Pat Midurski has gone above and beyond

Report of Finance Committee: Chair Mary Ellis reported:

1. Committee Meeting – October 18th

a. Discussed Executive Director Discretionary Fund (EDDF)

i. Change from previous chair to current President

ii. Discussion to change amount to \$800

iii. Motion was made to approve revised EDDF policy, as distributed with change in amount from \$700 to \$800. SO VOTED

2. Motion made to approve September 2022 financials, as distributed. SO VOTED

3. Motion made to approved October 2022 financials, as distributed with change to accurately reflect YTD budget to -\$95,080.01. SO VOTED

4. Meeting with Bank of America and Investment Advisory Committee – October 31st

a. Update on 2nd quarter

i. Tough market – won't rebound any time soon

ii. Sarah Clark rebalanced holdings

iii. Rebalanced portfolio – performed better than if not rebalanced

Report of Visiting Committee:

1. Visiting reports: Gale Beaton & Rosemary Saber in place of Jo-Ann Beaulieu

a. Rae Sousa

i. Gale's 1st solo visit – visited for many years

ii. Would ride in wheelchair from Tripp Towers to NB library and beyond

iii. Stoic, didn't talk about self – opened up when talking about books

iv. Recently diagnosed with lung cancer (kept diagnosis to self)

v. Last six months in and out of the hospital

vi. In the end accepted situation – transferred to Tremont Rehab

vii. Shared with Rosemary she "had been unnecessarily private"

1. Rosemary said she had done so well for so long – Rae patted herself on the head

viii. Rosemary made tapioca pudding, Rae's favorite

2. Next month – Rosemary Saber

Report of Beneficiary Committee: Chair Pam McKnight reported:

1. A motion was made to accept recommendations from the Beneficiary Committee as distributed. SO VOTED
 - a. 18 requests (6 new), 10 updates (1 inactive)
 - b. Many complex living situations
2. New Beneficiary Highlights
 - a. Gloria Medeiros (76 y/o)
 - i. Caregiver for husband who has MS
 - ii. Has emphysema
 - iii. Debt – modifications made to house due to health
 - iv. “Together we make a whole person” – she has body and he has brains
 - v. Negative month end balance (MEB)
 - vi. Exception granted due to care given and received from another and portable O2 tank (perceived as more beneficial)
 - b. Holiday gifts
 - i. Motion made to send a holiday gift in the amount of \$150 to every active beneficiary as of 11/3/22 totaling \$28,350. SO VOTED

Report of Governance Committee: Chair Debbie Brooke reported:

1. No meeting in October
2. Board Engagement Survey will be sent following this meeting
 - a. Interest in committees and leadership positions
 - b. Return by Tuesday, November 15th
3. Succession Plans
 - a. Developed by Governance Committee to guide process - distributed
 - b. Governance committee appoints officers
 - c. President appoints chairs
4. Motion made to accept revised bylaw and constitution, as presented, distributed and discussed in October. SO VOTED
 - a. Will file new Constitution with state
 - b. Copies for handbook will be distributed next month

Report of Grants Committee: Chair Rosemary Saber reported:

1. Meeting 10/28
 - a. Opting for “Closed RFP” for FY24 – focus on current partners due to financial uncertainty
 - b. Total grant amount placeholder will be sent to finance in January, final number in March

Report of Legacy Committee: Chair Diane Laflamme

1. Committee down to three people until Jo-Ann returns

2. Conducting interviews with previous board members
3. First boxing day a success! – boxes to sort, deciding what to keep for archival purposes
4. Next meeting November 21st

Other Business:

1. New director of Housing and Development in New Bedford
2. Volunteer Policy
 - a. Handed out with acknowledgement
 - b. Will need to sign off yearly
 - c. Additional items distributed for board handbook: New Table of Contents, Spending Strategy and Succession Plans

The meeting was adjourned at 11:34 am.

Executive Session to follow.

Recorded by,
Jenny Costa, Office Administrator

Approved by,
Gale Beaton, Clerk



ARAW Strategic Plan Update | December 2022

The Strategic Planning Committee met on Monday, November 28th for the first time with our Consultants, Susan and Amy, from Cahners & Donahue. All members were present with Gale on Zoom.

Guided by the Board's discussion at the Retreat, each Strategic Planning Committee meeting will focus on creating goals and objectives from the ideas and areas of focus identified at the Retreat. These can be found in the Retreat notes which were emailed to the entire Board directly after the Retreat.

At this initial Strategic Planning Committee meeting, Susan and Amy distributed a proposed timeline and mapped out the main topic of discussion for each meeting. During Board meetings and/or by reaching out to the President, Board Members will have a chance to weigh-in or provide input to each topic in advance of the Strategic Planning Committee's initial discussion. At each Strategic Planning Committee meeting there will be an opportunity to review and finetune the work of the previous meeting before moving on to the next topic at hand.

The Strategic Planning Committee anticipates a total of seven meetings inclusive of this first meeting and a Mini Retreat in February for the entire board. At the Mini Retreat, the Strategic Planning Committee will present the work done towards crafting goals with the hope of finalizing a working DRAFT plan. The remaining Strategic Planning Committee meetings will be dedicated to the creation of corresponding metrics, timeline and budget. The Committee hopes to present a final, full plan for the Board's approval at the Annual Meeting on April 27th.

The Strategic Planning Committee discussed the best way to ensure transparency, trust and input from the Board throughout the process. The Strategic Planning Committee felt confident that this approach would guarantee all voices are heard, considered and incorporated in the drafting of ARAW's Strategic Plan. And it will ultimately provide us with a functional road map for our combined efforts over the next three years.

November 28, 2022

NEW TOPIC: Beneficiaries

Areas of discussion: (see retreat notes) Growth what it means, how to measure, where to focus, what is impact on resources

December 19, 2022

Review and finetune Beneficiary discussion

NEW TOPIC: Grants

Areas of discussion: (see retreat notes) Future of grants program, exploration of opportunities and intentions

Members of the Strategic Planning Committee: Jane Stankiewicz, Diane Laflamme, Mary Ellis, Gale Beaton, Debbie Brooke, Rosemary Saber, Pam McKnight and Clare Healy Foley, ED.

December 2022



GOING WITH THE FLO

Friendship Lunches & Outings (FLO)
Newsletter



Holiday Luncheon

JOIN US!

at the Wamsutta Club

on Friday, December 16th | 12:30 pm – 2:30 pm

Space is limited | Transportation Available | Handicap accessible
Call today! (508) 717-0400



FREE TICKETS!!! Get into the holiday spirit with...



Yaniv Dinur, conductor & emcee
Appearances by the Southeastern
Massachusetts Youth Orchestra
& the Showstoppers

HOLIDAY POPS

SUNDAY, DECEMBER 11, 3:30 & 7 PM

**the New Bedford Symphony Orchestra Holiday Pops
call (508) 999-6276 to reserve your tickets**

Medicare's Part B standard monthly premium will fall to \$164.90 in 2023, a \$5.20 decrease from 2022, the Centers for Medicare & Medicaid Services (CMS) announced. The premium drop comes in the wake of the big 2022 increase, the largest dollar increase in the history of the program. Part B covers doctor visits, diagnostic tests and other outpatient services. Most Medicare beneficiaries have Part B premiums deducted directly from their monthly Social Security payments which is increases by 8.7% in January.



Should you have questions concerning your health insurance, contact a SHINE counselor at your local COA.

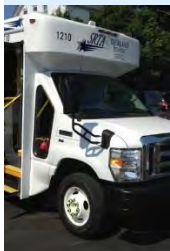
ARAW OFFICE CLOSURES

The ARAW office will be closed the following dates:

December 26th & January 2nd



As you celebrate the 2022 holiday season, be it Hanukkah, Christmas, Winter Solstice or Kwanzaa, we wish you good **health, happiness and peace.**



SRTA Announces "Try Transit" for the Holiday Season

Beginning November 25th through December 31st SRTA's will suspend fare collection on Fixed Route and Demand Response Services.

SRTA is participating in a statewide program to encourage more people to try transit during the holiday season. Leave your car at home and we'll leave a little extra cash in your pocket to enjoy the holiday season.

Seniors YOU'RE INVITED

Christmas Day Dinner

SPONSORED BY:
JEWISH COMMUNITY OF GREATER NEW BEDFORD

DECEMBER 25, 2022

HOLY NAME OF THE SACRED HEART OF JESUS
PARISH HALL
121 MOUNT PLEASANT STREET
NEW BEDFORD, MA

Doors open at 10AM
Dinner served at Noon

CALL (508) 999-4717
TO MAKE RESERVATIONS

DEADLINE 12/22

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

CALL (508) 717-0400
IF INTERESTED!

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

Let us know ASAP, first come, first served.

Please see the enclosed Flyer for more details!

New Bedford Festival Theatre : White Christmas
Movies Through the Decades: Miracle on 34th Street (1947)
Million Dollar Quartet Christmas



HOLIDAY FUN AT THE Z



MIRACLE ON 34TH STREET
SAT, DEC 17, 2PM
MOVIE TICKETS: 40 CENTS!



NB FESTIVAL THEATRE
WHITE CHRISTMAS
8 SHOWS!
NOV 26 - DEC 4



NB SYMPHONY ORCHESTRA
HOLIDAY POPS
SUN, DEC 11, 3:30 & 7PM



MILLION DOLLAR QUARTET
CHRISTMAS
FRI, DEC 23, 7:30PM

Creative Care

FREE

ART PROJECTS TO YOUR DOOR!

New Bedford Art Museum/ArtWorks!
is thrilled to announce free art care
kits to your door through our
Creative Care Program!

Art care kits include FREE engaging
art lessons and art materials for
seniors interested in getting creative
with NBAM.

**FREE home delivered
artkits will be
available weekly
January 16-
February 10**

Registration is
required.
Contact ARAW at
(508) 717-0400
for registration and
details.

Creative Care is an art program for seniors presented by the New Bedford Art
Museum/ArtWorks!. This program is made possible through a grant from the
Association for the Relief of Aged Women of New Bedford.



INTERGENERATIONAL

Holiday Lunch

December 18, 2022 ✦ 1 pm–3 pm
Wamsutta Club, New Bedford

We're inviting older LGBTQ+ adults (55+) and LGBTQ+ youth and adults (8-25) to join us for a *free* luncheon celebration of togetherness and sharing. REGISTER AT <http://bit.ly/3Xhq9My>.



For more information, email maureen@sc-lgbtqnetwork.org or call (774) 775-2656.

Free December Programs

AT NEW BEDFORD FISHING HERITAGE CENTER

FRIDAY, DECEMBER 2 (7 PM) AT THE CENTER

Hear stories from women who work on the water.



SATURDAY, DECEMBER 3 (12-5 PM) AT THE CENTER

Salty Santa visits the Center! Bring the grandkids and enjoy hot cocoa while you make fishy holiday ornaments.



THURSDAY, DECEMBER 8 (6 PM) AT THE CENTER

Painter and photographer Steve Kennedy gives an illustrated talk about his work.



FRIDAY, DECEMBER 16 (7 PM)

NATIONAL PARK THEATER, 33 WILLIAM ST

Film screening of "Culture and Traditional Boat Building in Lunenburg, Nova Scotia."



  New Bedford Fishing Heritage Center
38 Bethel Street (downtown New Bedford)

Questions? Call (508) 993-8894





South Coastal Counties Legal Services

Senior Law Project

South Coastal Counties Legal Services Senior and Elder Law Projects provide legal assistance to individuals age 60 and older who are economically or socially disadvantaged. Priority is given to legal matters identified in the Older Americans Act. Most older residents who seek legal help from SCCLS need assistance with housing, unemployment, public benefits, consumer debt or health care issues.

SCCLS will be holding a Senior Law Project legal clinic at the **Fairhaven Council on Aging on Monday, January 9, 2023.**

Please contact the Fairhaven Council on Aging for more information at **508-979-4029** to reserve an appointment.

Spaces are limited.



SCCLS will also be holding a Senior Law Project legal clinic at the **Dartmouth Council on Aging on Thursday, January 12, 2023.**

Please contact the Dartmouth Council on Aging for more information at **508-999-4717** to reserve an appointment.

Spaces are limited.



DARTMOUTH & WESTPORT RESIDENTS ONLY!

**Coastal Neighbors
cordially invites you to our**

Greens Making Workshop

**Learn how to make a simple
door Swag and enjoy light
refreshment**

Date: 12/8/22

Place: Silverbrook Farm 592 Chase Road, Dartmouth

Time: 2:00 to 4:00pm

Transportation Available

Please R.S.V.P by 12/6/2022

Email Andy@CoastalNeighborsNetwork.org

Call Phone 508 264 9064



November 2022: Beneficiary Advocate

Patricia Midurski

New REFERRALS: Total 10

- New Bedford Fishing Heritage Center (1) Ongoing evaluation
- NBPD (1) Home visit scheduled for Nov 30
- NBCOA/SHINE (1) Gathering of info continues
- FCOA (2) One declined referral: One to be presented at December meeting
- CESI (1) To be presented at December meeting
- Correia Construction Company (1) resides w/2 adult godchildren noncontributory to HH
- Self Referral (1) Former ARAW beneficiary: Referral to SHINE
- Tripp Tower RSC (1) HV November 30

Requests include: Real estate taxes, Garage Roof Repairs, Assistance with household bills (utilities, Comcast), Health Insurance, Mattress

UPDATES & REQUESTS: Total 10

- Five annual updates were completed this month.
- Five new requests were submitted for the Board to review at the December meeting.

Referrals made to: SNAP, PACE, CESI, SHINE, City of NB Community Development

FLO: Two FLO updates were completed.

Inactive Status: (1)

To Heaven: Mrs. Frances Devlin

Challenges: Mental health issues play a major role in the success of interventions. If a woman experiences anxiety, depression, unresolved grief or a major illness such as bipolar, paranoia, schizoaffective disorder, our recommendations will fall on deaf ears. This month I met with women who fell into this category and unfortunately are unable to follow thru with accessing community resources. Referrals are made to EMHOT and recommendations are made for counseling. However, these women need direction and encouragement provided by a care manager. Unfortunately, I am finding diminished support from those professionals in the community who are the designated care managers. In their defense, I realize they are carrying large caseloads who present with multiple complex situations. Experienced, responsive & compassionate care managers are vital particularly at a time of increased complexities in socioeconomic & psychosocial needs.

Education: The Medicare Counseling sessions led by Mrs. Peggy McDonough, former Regional SHINE Director provided essential tools enabling me to further assess beneficiaries for the most appropriate health insurance. With this up-to-date info, beneficiaries are screened for cost-saving programs as well as educated. If they are interested in pursuing, referrals are placed to SHINE. Currently, during OEP, all local COAs including the Regional SHINE office are booked and individuals must contact Medicare.gov for assistance! Once again, SHINE is doing as best they can & most counselors are volunteers however there is a lack of trained personnel to meet the needs of the community.

Gratitude: I am grateful I have the role to connect women with resources that can improve their QOL.



November 2022: Beneficiary Advocate

Ana Paz

New REFERRALS: (6) New referrals in November

(2) Did not qualify

(1) Pending initial visit

(2) On hold

(1) No needs at this time

UPDATES/REQUESTS: (10)

(5) Annual review

(3) New Request

(2) Termination letter (unable to reach after multiple attempts)

REFERRALS MADE TO: (3) Referrals made

(1) SHINE

(1) Coastline

(1) Southcoast County Legal Services

CHALLENGES:

Quite a few challenging cases this month. Most of which required follow-up, guiding and empowering beneficiaries to connect with community resources to solve issues such as home safety concerns, filing hardship for delinquency with utilities, debt, SNAP benefits and insurance review. Finding some willing to follow through, while others still hesitant to help themselves.

TEACHING MOMENTS:

Discovered new community resource programs such as New Start Program through Eversource where when filing for hardship, Eversource will set up a payment plan and match dollar for dollar when paid negotiated amount and payments are made on time. A lot of our beneficiary's request assistance with utilities through ARAW and this program really is a Godsend to our beneficiaries who have so much anxiety and guilt with their inability to keep up with utility payments.

GRATITUDE:

Very grateful for being able to participate in the Medicare Counseling training program. It provided me as Beneficiary Advocate so much knowledge that will further help our beneficiaries. The primary advantage of this training was gaining knowledge of insurance programs and their eligibility criteria. I have identified some beneficiaries who ARAW supports their insurance premiums and there are lower premium plans that provide the same services as their higher premium plans. Additionally, there are Special Enrollment Plans (SEP) that allow for changes to insurance plans outside the open enrollment period (Oct 15 – Dec 7). Having this knowledge allows me to identify if the beneficiary is eligible for a SEP, provide them the information and refer to SHINE to ensure they have the most cost effective and best coverage available to them. Most recently, I had a new referral request for assistance in ARAW support for dental work that potentially qualifies for MassHealth Standard Frail Elder Waiver that not only covers dental but other much needed resources without out-of-pocket costs. I referred her to Coastline for Frail Elder Waiver medical evaluation and application. A true Win-Win for ARAW and our beneficiaries.

ARAW November 2022 Activity Sheet

Due Date	Beneficiary	Staff	Type	Notes
11/1/2022	Riley, Shirley	PMIDURSKI	Phone Call	To sched Annual update: HV sched for 11/8 @ 1pm: "I enjoy your newsletter. TY"
11/1/2022	Mello, Jeanne	APAZ	Phone Call	Re: Setup Annual HV. Not able to LVM.
11/1/2022	Rose, Patricia	PMIDURSKI	Phone Call	Re: Comcast: Conf bill pd 10/27: "NBPD visit very nice: checklist&File of Life completed: TY ARAW!"
11/1/2022	DeSouza, Joanne	PMIDURSKI	Phone Call	Re: NBPD: Has not received a call from NBPD and no VMMS left
11/1/2022	Almeida, Lorene	APAZ	Phone Call	Re: Comcast monthly billing. Lorene will call. Also provided her # of RMV as she was very frustrated not able to reach a live person.
11/1/2022	Conway, Isidora	PMIDURSKI	Phone Call	Re: NBPD: Has not received a call from NBPD and no VMMS left
11/1/2022	Cory, Frances	PMIDURSKI	Phone Call	To report "I do not have lymphoma. The MD thinks I had a bad infection."
11/1/2022	Sousa, Rae	PMIDURSKI	Note to File	To Heaven 10/31
11/1/2022	Tuite, Janice	APAZ	Phone Call	Re: NBPD HV. "They haven't shown up -to-date and I was very looking forward to them stopping by".
11/1/2022	Reagan, Carole	PMIDURSKI	Phone Call	Re: discussion w/ED re: req for car repairs already pd in full: Aware of no approval: TY anyway"
11/1/2022	Borges, Jeanne	PMIDURSKI	Phone Call	VM left re: Annual Update and need for HV
11/1/2022	Okpara, Priscilia	PMIDURSKI	Phone Call	From Son Chido: He will deliver Verizon & Comcast supp docs next week to ARAW office
11/1/2022	Hultgren, Mary	PMIDURSKI	Phone Call	To sched Annual update: HV sched for 11/15@ 12pm: BIL died yesterday: 4 relatives passed this year
11/1/2022	DosSantos, Cathrina	APAZ	Phone Call	Re: Setup Annual HV 11/4 @ 2:30pm
11/1/2022	Rosa, Zulmira	APAZ	Phone Call	Re: Comcast upgrade plan cost. Updated application and letter & resubmitted.
11/1/2022	Baptista, Doris	APAZ	Phone Call	Re: Pick up most recent cable bill 11/1 @ 2:30pm.
11/1/2022	Best, Jacqueline	APAZ	Phone Call	x2 RE: Comcast bill. LVM to pick up copies 11/2 around 3pm.
11/1/2022	Charpentier, Lea	APAZ	Phone Call	Re: NBPD home visit experience. Email sent to admin.
11/1/2022	Lammers, Edith	PMIDURSKI	Phone Call	Re: Req for mattress & box spring: "very old": HV sched for 11/10 @ 10:30am
11/1/2022	Days, Viola	PMIDURSKI	Phone Call	VM left re: sched annual update: Req Call back to ARAW
11/1/2022	Oliveira, Alice	PMIDURSKI	Phone Call	Unable to connect w/AO via phone: TC to son: AO @ MD: He will ask AO to call ARAW re: Annual Update
11/1/2022	Sharples, Mary	PMIDURSKI	Phone Call	Re: BM concern: HV sched for 11/15: Undergoing numerous tests: Dgt here from VT
11/2/2022	Bramwell, Nancy	JCOSTA	Phone Call	Will be stopping by office with BCBS bill, dropped off
11/2/2022	Mello, Pauline	APAZ	Phone Call	Re: Provided direct line for Krystal at SCCLS
11/2/2022	Best, Jacqueline	JCOSTA	Phone Call	RC to AP, already gave last Comcast bill, message to AP
11/2/2022	Borges, Jeanne	JCOSTA	Phone Call	To PM, will call back tomorrow, EM to PM
11/2/2022	Tuite, Janice	JCOSTA	Phone Call	To register for soup & NBAM deliveries & Young@Heart
11/2/2022	Desautels, Louise	JCOSTA	Phone Call	To register for soup & NBAM deliveries, will think about Greens making
11/2/2022	Furness, Betty	JCOSTA	Phone Call	To register for soup day, will also call to register for senior holiday social
11/2/2022	Guy, Nancy	JCOSTA	Phone Call	Received ACP app, print too small to read, Would ARAW help w/Comcast bill? – AP to f/u
11/2/2022	Collins, Donna	JCOSTA	Phone Call	To register for NBAM deliveries, potential referral, adv to call office for screening
11/3/2022	Vieira, Kathy	APAZ	Phone Call	Re: computer problem and dental work question. Referred Kathy to DCOA for both
11/3/2022	Walker, Bonnie	PMIDURSKI	Phone Call	Re: NBPD: Has not recvd VM/TC fr NBPD: Increased medical issues: "TY for help w/transportation." Soup reg
11/3/2022	Cardoso, Isabel	APAZ	Phone Call	Re: HV today. Lupus very active not feeling well. Will call her 11/8
11/3/2022	Smith, Debra	APAZ	Phone Call	Re: AT&T bill received & will be paid today.
11/3/2022	Chaput, Vanessa	PMIDURSKI	Phone Call	VM left as follow up to earlier call
11/3/2022	Mortensen, Marilyn	APAZ	Phone Call	Re: Board Decision to discontinue payment of Comcast. Dgt will change address and apply ACP
11/3/2022	Parquette, Mary Jane	APAZ	Phone Call	Re: Board approval to continue support. "Thank you God"
11/3/2022	Arruda, Judith	APAZ	Phone Call	Re: Board approval to continue support. Could not LVM
11/3/2022	Parker, Delia	PMIDURSKI	Phone Call	To sign up for soup delivery: Requesting "friend" Agreeable to BM phone call: EM to JC w/req for BM
11/3/2022	Silva, Mary Theresa	APAZ	Phone Call	Re: Need stairs repaired ASAP. Provided # for NB Housing & Community Development.
11/3/2022	Livesley, Virginia	PMIDURSKI	Phone Call	Re: SCCLS docs & F/U: ACP app: HV sched for 11/7: Sign up for NBAM program
11/3/2022	Cory, Frances	PMIDURSKI	Phone Call	Re:Board approval for BCBS:"TY so much!!"Info provided re: SHINE Part D review(ACOA/FCOA/Middleboro COA)
11/3/2022	Lima, Mary	APAZ	Phone Call	LVM Re: Board approval to continue support
11/3/2022	Almeida, Mildred	PMIDURSKI	Phone Call	VM left re: Board approval: TC to Comm for Blind re: types of coverage: Awaiting CB
11/3/2022	Silveira, Marie Lorraine	APAZ	Phone Call	Re: sign up for art classes. She has been sick and hasn't worked since 10/20/2022
11/3/2022	Correia, Julia	APAZ	Phone Call	Re: Schedule HV. Recommend I call daughter. LVM to schedule HV
11/3/2022	Polek, Regina	PMIDURSKI	Phone Call	To register for Soup

Due Date	Beneficiary	Staff	Type	Notes
11/3/2022	Chytrus, Leslie	APAZ	Phone Call	Re: soup delivery. Chose chicken soup. Informed Holiday Social full.
11/3/2022	Borges, Jeanne	PMIDURSKI	Phone Call	Re: Annual Update; HV Sched for 11/10@2:30pm: Register for Soup delivery
11/3/2022	Galipeau, Beverly	APAZ	Phone Call	Re: Board approval "I thank you all so very much"
11/3/2022	Galipeau, Beverly	APAZ	Phone Call	LVM Re: Board approval to continue support
11/3/2022	Pryor, Joan	PMIDURSKI	Phone Call	To report hospitalized 10/25: to BW Dart rehab 10/28: Will call when home: EMM to MSW
11/4/2022	Oliveira, Alice	PMIDURSKI	Phone Call	To sched Annual Update: "CB Monday: I have to get appt for Eye injection." Will CB Mon 11/7
11/4/2022	Days, Viola	PMIDURSKI	Phone Call	To dgt to sched Annual update: Dgt states "HV are not allowed not even family" TC update approved CHF
11/4/2022	Adesso, Dolores	PMIDURSKI	Email	To CNHC MSW: Note mailed to Ms. Adesso
11/4/2022	Holden, Barbara	PMIDURSKI	Phone Call	From family member Ref by NBCOA P Foster: Intake completed: HV sched for 11/21
11/4/2022	Oiestad, Susan	PMIDURSKI	In Home Visit	For NEW request
11/4/2022	Roderick, Anita	PMIDURSKI	In Home Visit	To change billing address for Comcast
11/4/2022	Belanger, Elizabeth	PMIDURSKI	Phone Call	To register for soup: Surgery sched for 11/15: Req delivery
11/4/2022	Monteith, Judith	PMIDURSKI	Phone Call	To inform Auto Ins invoice arrived: HV to pick up document
11/4/2022	Robillard, Rita	APAZ	Phone Call	Re: Board decision of declination on Ensure. Daughter Ana understood and thanked me for my call.
11/4/2022	Grace, Barbara	PMIDURSKI	Phone Call	Re: missed appt: "I can get too within myself at times." HV resched: Register for soup delivery & NBAM
11/4/2022	Conway, Isidora	PMIDURSKI	Phone Call	To reg for Soup: NBAM: Y@H show: Multiple deaths in family: Family home fire: "It's too much."
11/4/2022	Debrosse, Sezaltina	PMIDURSKI	Phone Call	From CES CM Chelsea inquiring about possible assist w/new vacuum cleaner: EMM to AP
11/4/2022	Gibau, Maria	APAZ	Phone Call	LVM x3 to Emily CESI CM RE: ensure update. Need to complete annual HV 11/2022
11/4/2022	Chaput, Vanessa	PMIDURSKI	Phone Call	To register for NBAM art kits: Declined Soup
11/4/2022	Burke, Shauneen	PMIDURSKI	Phone Call	To register for NBAM: Soup: NBSO Christmas show
11/4/2022	Burke, Shauneen	APAZ	Phone Call	Re: sign up for Young at Heart and NBAM delivery. Will call PGM back re: Zs other shows update
11/7/2022	Grace, Barbara	JCOSTA	Phone Call	Didn't put appt w/PM in calendar, EM to PM to call tomorrow
11/7/2022	Livesley, Virginia	PMIDURSKI	In Home Visit	To pick up docs from SCCLS and to give ACP appl:"I am so confused about mu debt. Erica didn't help."
11/7/2022	Almeida, Mildred	JCOSTA	Phone Call	Inquiring about Thanksgiving meal, PM to f/u
11/7/2022	Marshall, Edith	PMIDURSKI	Phone Call	To register for Soup & NBAM: "This is so nice to have these events. TY!"
11/7/2022	Deree, Lucy	JCOSTA	Phone Call	New referral from WA, Bayada nurse called, needs rollator, meets guidelines, PM or AP to f/u
11/7/2022	Neyland, Linda	PMIDURSKI	Phone Call	VM left re: NEW referral
11/7/2022	Liput, Ewa	CFOLEY	Note to File	OV wanted to fill out app, adv PM would f/u to schedule HV
11/7/2022	Oliveira, Alice	JCOSTA	Phone Call	Thought she had HV today, adv PM will call to f/u
11/8/2022	Oliveira, Alice	PMIDURSKI	In Home Visit	To complete Annual Update & review
11/8/2022	Days, Viola	PMIDURSKI	Phone Call	To reschedule Annual update: "Mom is tired today." Resched to 11/14 @ 3pm
11/8/2022	Liput, Ewa	PMIDURSKI	Phone Call	To sched HV: Sched for Wed 11/9@ 3:00pm
11/8/2022	Machado, Delfina	PMIDURSKI	Phone Call	To register for Soup: Will be in Lobby: "Thank you for this gift!"
11/8/2022	Tripp, Teresa	APAZ	Phone Call	Re: SCCLS update. Schedule HV 11/14. Provided her direct # to Raquel
11/8/2022	Neyland, Linda	PMIDURSKI	Phone Call	F/u referral: Info mailed re: City of NB ER loan/grant: Discuss w/CHF: LN to explore options
11/8/2022	Deree, Lucy	APAZ	Phone Call	LVM Will call her back around 3pm today. New referral
11/8/2022	Deree, Lucy	APAZ	Phone Call	Re: New referral from Dana for rollator. Schedule call 9am 11/9 was going to appointment.
11/8/2022	Pare, Rita	PMIDURSKI	Phone Call	VM left for dgt Claudette: TC fr CESI >dgt declined services: "Dgt overwhelmed: RP to have PEG tube."
11/8/2022	Sobral, Mary	PMIDURSKI	Phone Call	Re: resched HV: "Concerned about cost of heating. Can the ARAW help?"Req CB to son on Mon 11/14
11/8/2022	Livesley, Virginia	PMIDURSKI	Phone Call	To SCCLS re: letter fr Atty Ericka: Raquel to speak w/Atty Gavin
11/8/2022	Beaubian, Joan	PMIDURSKI	Phone Call	VM re: register for Soup & NBAM: To return home today from Brandon Woods rehab
11/8/2022	Sampson, Janet	PMIDURSKI	Phone Call	Re: new Xfinity increase of \$45/m: JS added cell phone: to get invoice for Dec Board mtg
11/8/2022	Correia, Julia	APAZ	Phone Call	Re: HV scheduling. Second attempt. VM box full
11/8/2022	Okpara, Priscilia	PMIDURSKI	Note to File	OV w/son Chido to deliver supporting docs for req to pay Comcast: Info re: NBCOA for Senior ID
11/8/2022	Cardoso, Isabel	APAZ	Phone Call	Re: Schedule Annual HV. Schedules for 11/15 @ 2pm
11/8/2022	Pine, Hilda	APAZ	Phone Call	Re: Glucerna ins coverage. CESI CM requested ARAW stop. Ins covered since June 2022. WA informed.
11/8/2022	Furtado, Fatima	APAZ	Phone Call	Re: Annual HV. She is feeling better and visit is scheduled for 11/10 @ 12:30pm
11/8/2022	Riley, Shirley	PMIDURSKI	In Home Visit	For Annual Update and review: Doing well. No new requests: "TY ARAW"
11/8/2022	Gibau, Maria	APAZ	Phone Call	LVM Re: Ensure ins coverage w/ Emily Gonsalves CESI CM. Requested update asap
11/8/2022	Gibau, Maria	APAZ	Email	From CESI CM Emily. Pending Ensure availability. Emily will provide update.

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11/8/2022	Lawrence, Gail	APAZ	Phone Call	Re: Request for breaks assistance. HV 11/15. Gail to get estimate.
11/8/2022	Eisely, Geraldine	PMIDURSKI	Phone Call	Re: PACE (docs & app submitted): Confirm receipt of estimate from Worleys for Dec Board mtg request
11/8/2022	DeSouza, Joanne	JCOSTA	Phone Call	Received taxi voucher for Y@H, adv to pick up tickets at will call
11/9/2022	Mello, Eleanor	JCOSTA	Phone Call	WA having difficulty getting high protein Ensure, delivered another product, AP to f/u
11/9/2022	Livesley, Virginia	PMIDURSKI	Email	From Raquel SCCLS: she will make HV to explain docs: VL notified: "TY for your help."
11/9/2022	Liput, Ewa	PMIDURSKI	In Home Visit	For new request
11/9/2022	Pope, Dorothy	JCOSTA	Phone Call	From dtr, inq re: hearing aids, adv to call AL @WCOA, EM to AL
11/10/2022	Monty, Grace	PMIDURSKI	Phone Call	Req CB from AP: EMM to AP
11/10/2022	Liput, Ewa	PMIDURSKI	Phone Call	W/Director NBFHC: Discussion w/CHF
11/10/2022	Lammers, Edith	PMIDURSKI	In Home Visit	For a new request for a mattress & box spring: to get estimate from Worleys
11/10/2022	Rose, Patricia	PMIDURSKI	Phone Call	Re: overdue Comcast bill: paid 10/27: to speak w/JC
11/10/2022	Amaral, Maria	PMIDURSKI	Note to File	New referral from NBPD: Dgt available after 3:30pm
11/10/2022	Almeida, Mildred	PMIDURSKI	Phone Call	Re: Thanksgiving events @ FCOA & DCOA & CES DA event 11/30: MA to call & reg for DCOA & DA event
11/10/2022	Borges, Jeanne	PMIDURSKI	In Home Visit	For Annual Update: Exploring ALF for future move as health declines
11/10/2022	Perry, Susan	PMIDURSKI	Phone Call	Re: recent health changes: To register for CES DA day @ Century House: Will call CES
11/14/2022	Roderiques, Bernadette	PMIDURSKI	Phone Call	To notify of award: "Please tell the Board THANK You. This will help so much."
11/14/2022	Livesley, Virginia	PMIDURSKI	Phone Call	To notify of award: "That is so kind of the ARAW. TY so much!" WA notified to begin delivery Inc Prod
11/14/2022	Monteith, Judith	PMIDURSKI	Phone Call	To notify of award: "Blessings to all at the ARAW. Your birthday card meant so much tome. TY"
11/14/2022	Gadomski, Marion	PMIDURSKI	Phone Call	To dgt re: Board decision: Dgt understands and will call ARAW if family relocates from MG home
11/14/2022	Lawrence, Gail	APAZ	Phone Call	Re: Needs to reschedule new request HV to 11/18 10am
11/14/2022	Ponte, Karyn	PMIDURSKI	Phone Call	Re: nonpayment Comcast: reassured bill paid: ACP application mailed to KP
11/14/2022	Sobral, Mary	PMIDURSKI	Phone Call	New referral: VMM left req CB: FCOA has PACE application
11/14/2022	Pare, Rita	PMIDURSKI	Phone Call	To dgt notify of award: WA sent Em to begin delivery: RP has Vets \$: VNA involved: Ref CES at present
11/14/2022	Chaney, Willie Mae	PMIDURSKI	Phone Call	To notify of Board decision: "TY for your help. "Will continue to work w/Walt's Mobile Closet
11/14/2022	Powell, Charlotte	PMIDURSKI	Phone Call	NEW referral from CESI: HV sched for 11/17
11/14/2022	Amaral, Maria	PMIDURSKI	Phone Call	New referral: Dgt states ^health issues: ??Hospital??: Will ask PCP/oncologist for hospital bed: CB in week
11/14/2022	Rose, Patricia	PMIDURSKI	Phone Call	To notify of award: "The S&S card is so handy. TY." Reassured Comcast has been paid
11/14/2022	Bernardo, Annette	PMIDURSKI	Phone Call	To dgt & AB: HV sched for 11/21: NEW referral
11/14/2022	Medeiros, Gloria	PMIDURSKI	Phone Call	To notify of award: "TY all so much!! This is wonderful."
11/14/2022	Mendonca, Joan	PMIDURSKI	Phone Call	To cousin: She does not handle \$: Will speak w/sister who assists JM w/finances & CB ARAW
11/15/2022	Sharples, Mary	PMIDURSKI	In Home Visit	For annual update: New medical issues: Will consider PERS unit: "The ARAW does SO much for me. TY"
11/15/2022	DePina, Pam	PMIDURSKI	Phone Call	To notify of BCBS: Need invoice ASAP: TC from BCBS>will send invoice asap via mail & email in 3-5 days
11/15/2022	Medeiros, Gloria	PMIDURSKI	Phone Call	Re: need for current invoice w/balance for POC: SASE mailed to GM to send invoice to ARAW
11/15/2022	Burke, Shauneen	PMIDURSKI	Phone Call	Re: "reduction in SSI payment. It's not fair. I need a lawyer." Info provided for SCCLS
11/15/2022	Boucher, Linda	APAZ	Phone Call	LVM re: initial home visit. Requested call back.
11/15/2022	Best, Jacqueline	APAZ	Phone Call	Re: Board approval cable/internet/phone "Oh thank you God. This will change my life"
11/15/2022	Post, Jacqueline	APAZ	Phone Call	Re: approval "TY so much. Recent diagnosis of breast cancer & system will give much needed rest"
11/15/2022	Furtado, Fatima	APAZ	Phone Call	Re: Annual HV rescheduled 11/17 10am
11/15/2022	Soares, Maria	APAZ	Phone Call	LVM with IAC. Cannot locate Maria and hoping they can assist. Requested a call back.
11/15/2022	Mello, Jeanne	APAZ	Phone Call	Unable to LVM. Requires annual HV.
11/15/2022	Cardoso, Isabel	APAZ	In Home Visit	Annual HV completed. Application updated.
11/15/2022	Letourneau, Diane	APAZ	Phone Call	Re: "Thank you for the young at heart tickets. It was the most wonderful show"
11/15/2022	Palazzo, Sharon	PMIDURSKI	Phone Call	Reminder for Auto Insurance premium: SP contacted Progressive who will mail invoice
11/15/2022	Hultgren, Mary	PMIDURSKI	In Home Visit	For annual update: Reports son handles all finances: MH req I call son for info
11/15/2022	Rosa, Zulmira	APAZ	Phone Call	She will go to comcast & add Portuguese channel "I am so blessed. Now winter won't feel like a lifetime"
11/16/2022	Sampson, Janet	PMIDURSKI	Phone Call	Re: Comcast: She states cell phone was NOT added to Comcast bill: Separate bill to JS: will req assist
11/16/2022	Silveira, Marie Lorraine	PMIDURSKI	Phone Call	From Kim @ Regal House: Chair arrived: Nd to coordinate delivery & payment: EMM to AP & admin
11/16/2022	Gomes, Emily	PMIDURSKI	Phone Call	Re: concerns about health insurance & CES: HV sched for 11/22 to assess and refer as appropriate
11/16/2022	Almeida, Mildred	JCOSTA	Phone Call	Inquiring re: Senior Social, adv spots opened & call CES to register
11/16/2022	Cory, Frances	PMIDURSKI	Phone Call	Re: SHINE appt w/Middleboro COA: "I will save \$22/month. They are wonderful. TY for recommending."

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11/16/2022	Lopes, Doreen	PMIDURSKI	Phone Call	To cancel soup delivery as MD appt conflict @ 11:45am
11/16/2022	Oliveira, Alice	PMIDURSKI	Phone Call	To CES CM CV: PERS unit to be covered by MassHealth: req by CES CM to Lifeline: will cont A1 intial installed
11/17/2022	Baptista, Doris	APAZ	In Home Visit	To change comcast billing address. Doris will be going to Comcast and upgrade plan.
11/17/2022	Chaney, Willie Mae	PMIDURSKI	In Home Visit	To deliver coast from Walt's Mobile Closet: "OMG, I love this. TY so much"
11/17/2022	Boucher, Linda	APAZ	Phone Call	LVM x2 re: Initial HV. Requested a call back.
11/17/2022	Powell, Charlotte	PMIDURSKI	In Home Visit	For new referral
11/17/2022	Van Bibber, Gloria	JCOSTA	Phone Call	From RSC, previously worked w/LD @FCOA, over income, AP to f/u
11/17/2022	Todd, Kristine	PMIDURSKI	Phone Call	Needed to talk, friend died last yr in Nov, angry & depressed: EMHOT MA & neighbor to visit 11/17
11/17/2022	Liput, Ewa	JCOSTA	Note to File	OV req needed documents, have not received yet
11/17/2022	Bernardo, Annette	JCOSTA	Phone Call	Inq about soup delivery, adv will call if any cancellations
11/17/2022	Meehan, Norma	PMIDURSKI	Phone Call	Re: status of wheel chair: States 6 month process to bid & build chair: Will call ARAW prn
11/17/2022	Grace, Barbara	PMIDURSKI	In Home Visit	Attempted: NO answer to locked door: VM box full: Phone # changed: BG will resched HV
11/17/2022	DeSouza, Joanne	PMIDURSKI	Phone Call	To notify of free SRTA services 11/24 – 12/31: JC to deliver Charlie card 11/18
11/17/2022	DeSouza, Joanne	JCOSTA	Phone Call	Did not receive ck for Charlie Card, will drop off w/soup tomorrow
11/17/2022	Mendonca, Shirley	JCOSTA	Phone Call	From dtr, adv did receive ck from Whaler's Cove
11/17/2022	Conway, Isidora	JCOSTA	Phone Call	Inq about NBAM class, adv deliveries, will be contacted by NBAM
11/17/2022	Gibau, Maria	APAZ	In Home Visit	Was not able to update application could not get Maria to focus or provide any info.
11/17/2022	Furtado, Fatima	APAZ	In Home Visit	Safety issue with home. Follow up with CESI
11/17/2022	Correia, Julia	APAZ	In Home Visit	Application updated. Need to f/u with CESI re: Stockings
11/18/2022	Mello, Eleanor	APAZ	Phone Call	Re: HP ensure. She is buying with food stamps until approved by SWH
11/18/2022	Hultgren, Mary	PMIDURSKI	Phone Call	From son to provide financial info for annual update: Reminded of financial guidelines: Will submit to Board
11/18/2022	Rosa, Zulmira	APAZ	Phone Call	RVM re: wanted to make sure she was doing the right thing when increasing Portuguese channel
11/18/2022	Lawrence, Gail	APAZ	In Home Visit	Request update complete. Requesting tires. Will get back to ARAW with estimate
11/18/2022	Best, Jacqueline	APAZ	Phone Call	Re: Comcast upgrade less than expected \$190.52 mnth. "You have saved my life! Thank you"
11/21/2022	Medeiros, Gloria	APAZ	Phone Call	Re: mailed ppwrk. EMM to PGM
11/21/2022	Van Bibber, Gloria	APAZ	Phone Call	LVM re: HV initial request. Requested a return call.
11/21/2022	Bernardo, Annette	APAZ	Phone Call	Re: reschedule HV. She did not remember. PGM to call her tomorrow
11/21/2022	Deree, Lucy	APAZ	Phone Call	Re: HV. She is no longer in need of rollator.
11/21/2022	Holden, Barbara	APAZ	Phone Call	Re: reschedule HV. PGM to call tomorrow.
11/21/2022	Eisely, Geraldine	JCOSTA	Phone Call	Requesting CB from PM, EM to PM
11/21/2022	Ponte, Karyn	APAZ	Phone Call	Re: did not receive ACP ppwrk. Questioning Comcast bill payment. EMM to admin & PGM
11/21/2022	Furness, Betty	APAZ	Phone Call	Re: follow up with issue over weekend. Betty is well car got his by plow. She is more settled about it now.
11/21/2022	Chor, Patricia	APAZ	In Home Visit	Dropped off vouchers for eye appointment 11/22/22 3pm. PGM notified
11/21/2022	Chor, Patricia	APAZ	Phone Call	Re: vouch not yet received. EMM to adm & PGM
11/21/2022	Chor, Patricia	JCOSTA	Phone Call	From Eye Vision Health, PC saying ARAW will pay, no approval & ins will cover, needs to call for referral
11/21/2022	Antunes, Joana	APAZ	Phone Call	LVM re: Comcast CC payment.
11/22/2022	Gomes, Emily	PMIDURSKI	In Home Visit	Re: health insurance bill and concerns: Challenges to obtain financial info: EMM to CES CM EG
11/22/2022	Livesley, Virginia	PMIDURSKI	Phone Call	Req assist w/decluttering & letter writing: Ref to FCOA decluttering & SCCLS for follow up w/letters
11/22/2022	Drayton, Gail	APAZ	Phone Call	Re: comcast bill overdue. Check mailed 11/1. Not yet cashed.
11/22/2022	Monteith, Judith	JCOSTA	Phone Call	Comcast late, adv ck was sent, loved the chili, Ty so much!
11/22/2022	Burke, Shauneen	JCOSTA	Phone Call	Needed address for St. Gabriel's church to set up transportation
11/22/2022	Eisely, Geraldine	PMIDURSKI	Phone Call	Enc to submit req docs for PACE app: Offered trans to bank & declined: GE to call bank & req strtmt mailed
11/22/2022	Oiestad, Susan	PMIDURSKI	Phone Call	VM left re: deadline for submitting support docs for Dec req
11/22/2022	Holden, Barbara	PMIDURSKI	In Home Visit	W/BH & SIL: Ref to PACE, CFC, City of NB tax abatement: CB tax credit: SHINE
11/22/2022	Mendonca, Joan	PMIDURSKI	Phone Call	NEW ref from FCOA & NBPD: HV sched for 11/30 w/ JM & cousin
11/23/2022	Linhares, Genevieve	APAZ	Phone Call	LVM re: new referral. Requested a call back.
11/23/2022	Mello, Jeanne	APAZ	Phone Call	LVM for Kendra RSC at Oxford Terrace. Requested a call back.
11/23/2022	Correia, Julia	APAZ	Phone Call	To CESI regarding insurance coverage of elastic stockings. Still pending
11/23/2022	Sousa, Isabel	PMIDURSKI	Phone Call	Re: Senior Holiday Social: Contact info for CES provided: "Happy Thanksgiving to ARAW"
11/28/2022	Simard, Agnes	PMIDURSKI	Phone Call	To reg for Wamsutta Luncheon: Not interested in Z shows at this time

Due Date	Beneficiary	Staff	Type	Notes
11/28/2022	Mello, Eleanor	PMIDURSKI	Phone Call	Re: Senior Holiday Social: # for CES NS provided: EM to call CES
11/28/2022	Costa, Barbara	JCOSTA	Phone Call	Would like to send SOM a holiday card, adv to send to office & we'll forward to her
11/28/2022	Silveira, Marie Lorraine	PMIDURSKI	Phone Call	To reg for Wamsutta Luncheon
11/28/2022	Perry, Susan	PMIDURSKI	Phone Call	To reg for Wamsutta Luncheon: Burns are healing well
11/28/2022	Conway, Isidora	JCOSTA	Phone Call	RC to confirm sign up for luncheon
11/28/2022	Schoenfisch, Rosemary	PMIDURSKI	Phone Call	To reg for Wamsutta luncheon: Helping w/care of ill brother: "TY to ARAW for making me smile."
11/28/2022	Benoit, Susan	PMIDURSKI	Phone Call	Re: nonfunctioning stove: Req assistance: To get estimate: Reg for Z show White Christmas
11/28/2022	Delaney, Kathleen	JCOSTA	Phone Call	RC to confirm sign up for luncheon
11/28/2022	Ponte, Karyn	PMIDURSKI	Note to File	ACP application mailed again to KP
11/28/2022	Letourneau, Diane	JCOSTA	Phone Call	To register for luncheon, White Christmas, TY for soup!
11/28/2022	Rose, Patricia	PMIDURSKI	Phone Call	Re: S&S gift cards: Unsure if they belong to her: Explanation provided (Nov & Dec gift cards) "TY SO MUCH"
11/28/2022	Quirini, Sandy	PMIDURSKI	Phone Call	To reg for Wamsutta Luncheon: Will utilize SRTA
11/28/2022	Medeiros, Gloria	JCOSTA	Phone Call	Received statement, PM to f/u: PGM to pick up docs Tues 11/29 in morning
11/28/2022	Bernardo, Annette	PMIDURSKI	Phone Call	VM left to reschedule HV
11/28/2022	Sobral, Mary	PMIDURSKI	Phone Call	To f/u w/ref: Not interested: Will call ARAW in future if needed: "TY for caring." FCOA ref source notified
11/28/2022	Holden, Barbara	PMIDURSKI	Phone Call	From SIL: CFC unable to assist w/furnace until PACE app completed: SIL waiting for CB fr. PACE
11/28/2022	Amaral, Maria	PMIDURSKI	Phone Call	To dgt for follow up; In hospital x 2 wks: Dgt will call if needed
11/29/2022	Payan, Freda	APAZ	Phone Call	Re: new referral from Marisol will email admin. Spanish speaking only
11/29/2022	Medeiros, Gloria	PMIDURSKI	In Home Visit	To obtain POC invoice for payment: "Thank you so much ARAW. I am most grateful."
11/29/2022	Van Bibber, Gloria	APAZ	In Home Visit	Ref to CESI for FEW. Req pending FEW approval. Potential need in future if ins does not cover dental
11/29/2022	Gibau, Maria	APAZ	Phone Call	LVM with Emily at Coastline to follow-up on script to Westport Apothecary.
11/29/2022	Mello, Jeanne	APAZ	Note to File	Mailed termination letter. Unable to reach 4 times.
11/29/2022	DeSouza, Joanne	APAZ	Phone Call	Re: cancel outreach program participation. Does not want anyone in home.
11/29/2022	Blair, Cynthia	PMIDURSKI	Phone Call	FLO ROE: declined to share income: Rcvd increase from deceased spouse: EM to CK @WCOA
11/29/2022	Correia, Julia	APAZ	Phone Call	Re: Rx to be sent to CCA ins & they will provide 2 stocking every 6 months w/in next month, f/u in Jan
11/29/2022	Mello, Eleanor	PMIDURSKI	Phone Call	To register for Wamsutta Luncheon
11/30/2022	Francis, Eileen	APAZ	Phone Call	"Wishing all Happy Holiday and healthy new year. I thank God I am part of ARAW"
11/30/2022	Borges, Jeanne	PMIDURSKI	Phone Call	VM to notify of Board decision
11/30/2022	Hultgren, Mary	PMIDURSKI	Phone Call	To son re: Board decision: Req info for A1, he will pay for PERS: TY ARAW for all you have done for my mother.
11/30/2022	DosSantos, Cathrina	APAZ	Phone Call	Re: application comcast, Shine and OTC needs. Update and resubmit application.
11/30/2022	Guy, Nancy	APAZ	Phone Call	LVM to call back regarding cable payment request.
11/30/2022	Riley, Shirley	PMIDURSKI	Phone Call	To notify of Board decision
11/30/2022	Azevedo, Carmen	APAZ	Phone Call	RC CESI CM. Will visit Carmen December. Carmen has not followed through on utility hardship process.
11/30/2022	Bramwell, Nancy	PMIDURSKI	Phone Call	To sched drop off of BCBS invoice today: Questions re: BCBS Medigap vs Part C plan: Education provided
11/30/2022	Bernardo, Annette	PMIDURSKI	Phone Call	To resched HV: Appt sched for 12/1: Receiving VNA services: "Bad shoulder"
11/30/2022	Payan, Freda	PMIDURSKI	In Home Visit	W/RSC for translation: FP speaks & understands some English: Req mattress: to obtain estimate
11/30/2022	Days, Viola	PMIDURSKI	Phone Call	VM left for dgt re: Board approval of BCBS: EM to SHINE @ FCOA w/info for Part D review
11/30/2022	Sharples, Mary	PMIDURSKI	Phone Call	VM to notify of award decision by Board

Name	Birth Date	Age	Board Member
Rudnik, Martha	12/16/1949	73	Office
Canasta, Linda	12/17/1946	76	Office
David Martinez, Nilda	12/19/1955	67	Office
Lopes, Carole	12/19/1939	83	Office
Spearin, Gail	12/19/1951	71	Office
Almeida, Laura	12/21/1931	91	Angela Natho
Coleman, Carol	12/21/1950	72	Office
Silveira, Marie Lorraine	12/23/1940	82	Rosemary Saber
Desautels, Ms. Louise	12/24/1932	90	Cathy Mayall
Post, Jacqueline	12/24/1938	84	Office
Polek, Regina	12/26/1950	72	Debbie Brooke
Boucher, Cynthia	12/29/1942	80	Office
DeCosta, Ms. Cynthia	12/31/1947	75	Cathy Mayall
Schoenfisch, Rosemary	1/2/1948	74	Office
Lyons, Carol	1/3/1948	74	Office
Santos, Laura	1/5/1947	75	Office
Collins, Donna	1/6/1952	70	Office
Petrin, Joan	1/6/1935	87	Office
Fredette, Mrs. Lucille	1/8/1931	91	Office
Levesque, Beatrice	1/9/1945	77	Office
Lajoie, Elizabeth	1/10/1940	82	Office
Cournoyer, Marilyn	1/11/1944	78	Gale Beaton
Lammers, Edith	1/13/1945	77	Office
Dann, Donna	1/15/1958	64	Office

Finance Committee Meeting Minutes November 15, 2022

Present: J Doyle, D Laflamme, C Mayall, R O'Connell, MCE, C Foley

Joint Meeting with IAC and BofA - Commentary

We opened the meeting with a brief recap of the meaningful meeting that was held on October 31 with the IAC and BofA team. Overall opinion was that the information shared was useful and insightful. With the mid-term election results now known, we have a better understanding of what may be ahead of us for the next two years. We'll wait it out and watch for the rebound in our holdings.

Finance Committee and Budget Development Timeline

More work was done on the timeline with further fine-tuning of our activities relating to budget development and financial performance monitoring. We should be ready to sign off on the finished document.

In keeping with the timeline, the committee will request all chairs to submit their respective budget needs by January 10 as we prepare the preliminary budget. This request will go out in early December.

Continuing Board Financial Education

This topic was opened up and resulted in some excellent dialogue about what priorities we should have for financial tutorials at our board meetings. After much useful and plenty of strategic discussion, we came up with some subjects for the more immediate meetings, specifically focusing on the monthly financial performance statement: sources of data, month-to-month variations and adjustments, line-item contents. In having this discussion, we highlighted the need for and importance of our own further education as the Finance Committee.

Committee Make Up for FY24

While we await the results of the recent Board Engagement Survey, the current Finance Committee members have stated their intentions to remain on the committee. (PHEW!)

As always, the participation and discussions at this meeting were truly energizing. Thank you.

There will be no December meeting. Next Meeting: January on a date TBD in order to include the quarterly review meeting with IAC and BofA.

Mary Ellis, Treasurer
November 15, 2022

Finance Committee and Budget Development Timeline

May – Meet with Bank of America and IAC to review full year portfolio performance.

May/June – Obtain final financial attestation of prior fiscal year as directed by the Board. Present to the Board for vote.

July/August – Work with IAC and BofA to assess first quarter (AMJ) financial performance and amend portfolio as needed. Review IPS (every 2 years minimum).

October – Work with IAC and BofA to assess second quarter (JAS) performance. Amend portfolio as needed.

October/November – Receive recommendation from Grants Committee with estimate of upcoming year's grant package for RFP process.

November – Review Spending Strategy and other financial policies previously approved by the Board.

December – Issue reminder to staff and committees to submit their new year estimates (direct support, program needs, payroll, facilities, etc) no later than January 10.

January - Begin draft of new budget.

January – Meet with IAC and BofA to review third quarter (OND) performance and solicit any recommendations/considerations for new fiscal year.

January/February – Review recommendations of Grants Committee for final award amounts for upcoming fiscal year.

February/March – Obtain year end estimates from Burke & Lamb (taxes, BofA fees) and combine with in-house forecast for new year budget.

March – Determine new fiscal year's form of attestation (accountant financial review or audit). Present recommendation to the Board for vote.

March – Finalize budget for upcoming fiscal year and present to the Board for vote of approval.

April – Present preliminary year-end financials to the Board at Annual Meeting.



Breakdown of ARAW's Budget Line Items

Direct Support*

Direct support is financial support for the direct benefit of an individual beneficiary based on the applications received, reviewed and recommended by the Beneficiary Committee – and then subsequently voted on by the board at large. Direct support is segmented by frequency – ongoing (monthly/quarterly) or gifts (one time or with a finite end) – and spending is captured by common categories within each segment. Any refunds received are credited against the original award amount. * *see breakdown of all categories on monthly financial report*

Grants

Grants made to community partners based on the applications received, reviewed and recommended by the Grants Committee – and then subsequently voted on by the board at large. Any unspent funds are returned and credited against the original grant amount.

Administration

Administration costs are where we find the majority of our operating costs. These expenses include everything from office supplies, bank fees, computer software, copier costs, office cleaning, postage, insurance, professional Development and database costs, among others.

Accounting

The Accounting budget line item captures all of the billable accounting services performed by our accountant of record, Burke & Lamb. This work includes monthly charges for bank/credit card reconciliation, payroll matters and preparation of an adjusted monthly trial balance. Burke & Lamb also conducts a financial review at the end of our fiscal year, prepares and files our taxes/annual report and offers quarterly qualified spending reports. In the years the board chooses to have a full audit, this line item will also include billable accounting services from KPM, our auditor of record.

Staffing Costs

This line item captures all costs associated with our employees. They include wages, payroll taxes (approx. 7.9% of salary), health insurance (\$7,000 pp in FY23), mileage and Simple IRA match. Although annual assessment of wages is aligned with the fiscal year, health insurance (open enrollment June; plan start July) and Simple IRA (enrollment December; renewal January) are not.

Rent

Rent is submitted to our landlord, Union Street Energy Center, on a monthly basis. Our rent currently stands at \$2,175. The current lease is for a five-year term with a 3% increase on July 1, 2024 and each July 1st thereafter. Rent includes all utilities except phone, taxes and all common area maintenance which shall include cleaning, maintenance, lighting, trash removal, snow removal, landscaping as well as Public Liability and All Risk insurance covering the Premises and any other common area expense) and water, parking, general building maintenance and addressing simple issues as they arise.

Utilities

Utilities are phone/internet paid to New Horizons for Comcast services. Office alarm fees are paid to Clear Sound.

Bank of America Fees

Fees are paid to Bank of America for their portfolio management service. A standard amount is shown each month and the final actual figure is adjusted at the end of the fiscal year.

Federal Taxes

Burke & Lamb estimates our annual tax payments. This figure factors in any overpayment credit from the previous year and is impacted by the current fiscal year's investment income.

Outreach/Comm Engage

Outreach/Community Engagement captures costs associated with the establishment of a strong community presence. Many of the costs seen in this category are for branded marketing collateral, greeting cards for our beneficiaries or gifts for our Community Partners.

Legal/Professional Fees

Legal/professional fees capture any fees paid to an outside vendor such as legal, ARAW is currently using Lang, Xifaras & Bullard. Accounting, banking and investment fees are shown separately.

Friendship Program (FLO Program)

The Friendship Program (FLO Program) admin expenses are printing, stationery and postage costs for the newsletter. Expenses also include admission, food or transportation for outings. While COVID 19 has limited outings, we offer a monthly lunch and other programs through our Community Partners.

ASSOCIATION FOR THE RELIEF OF AGED WOMEN

Transaction Detail By Account

November 2022

	<u>Date</u>	<u>Name</u>	<u>Account</u>	<u>Amount</u>
Nov 22				
	11/01/2022	WHALER'S COVE	MENDONCA, SHIRLEY - RENT	-159.73
	11/15/2022	CITY OF NEW BEDFORD - FRESH START	TODD, KRISTINE - ORGANIZING	400.00
	11/17/2022	COMCAST - P OKPARA	OKPARA, PRISCILIA - CABLE	104.40
Nov 22				<u><u>344.67</u></u>

ARAW BENEFICIARY REQUEST: RECOMMENDATIONS

DECEMBER 2022 | VER 12/2/22

Beneficiary	Outreach	Biggest Concern	Notes	Specific Request	Recommendations
<p>BENE# FLO-23E</p> <p>Eisely, Geraldine 71 y/o; 8/5/1951 <i>Income: \$862 sub</i></p> <p>ARAW support \$914: Gifts: Fridge \$764 '21, Holiday \$150 '21</p> <p>MEB: \$261</p>	<p style="text-align: center;">BA Pat Midurski</p> <p style="text-align: center;">(508) 717-0400</p>	<p>"I recently learned that sleeping on this futon has been causing increased pain in my body. After sleeping in a "real" bed for a few weeks at my family's home, I realized I need to get a real bed. I have a twin bed frame but I need a mattress if possible. I truly appreciate your help. Thank you."</p>	<p>Dght working as PCA and delivering pizza – trying to save to move to a better neighborhood</p> <p>RA, Fibromyalgia, knee replacement</p> <p>Less pain with real bed instead of current futon</p>	<p>Exception:</p> <ul style="list-style-type: none"> ▪ Living alone guideline (daughter lives with her) <p>Gift:</p> <ul style="list-style-type: none"> ▪ Estimate Twin size mattress \$449 from Worley Beds 	<p>Exception:</p> <ul style="list-style-type: none"> ▪ Living alone guideline (daughter lives with her) <p>Gift:</p> <ul style="list-style-type: none"> ▪ Estimate Twin size mattress \$449 from Worley Beds
<p>BENE# 19-20/44</p> <p>DosSantos, Cathrina 72 y/o; 12/9/949 <i>Income: \$1,492 sub</i></p> <p>ARAW support \$15,650: Reoccurring: BCBS \$678 '20 Gifts: Dental \$8,228 '20, Holiday \$150 '20-21</p> <p>MEB: \$111</p>	<p style="text-align: center;">BA Ana Paz</p> <p style="text-align: center;">(508) 717-0400</p>	<p>"Insurance coverage is my biggest worry. I am in the gap or hole & have to pay out of pocket until they cover again."</p>	<p>Quarterly payment just made</p> <p>She will not be hole as of January and will have additional funds</p>	<p>Quarterly:</p> <ul style="list-style-type: none"> ▪ Continuation of BCBS \$687.21 (2023 rate) <p>Monthly:</p> <ul style="list-style-type: none"> ▪ Incontinence products \$80.45 from Westport Apothecary 	<p>Quarterly:</p> <ul style="list-style-type: none"> ▪ Continuation of BCBS \$687.21 (2023 rate) <p>Gift:</p> <ul style="list-style-type: none"> ▪ <i>3 months of incontinence products \$80.45 per month from Westport Apothecary</i> <p><i>Review again in 3 months due to upcoming changes</i></p>

ARAW BENEFICIARY REQUEST: RECOMMENDATIONS

DECEMBER 2022 | VER 12/2/22

Beneficiary	Outreach	Biggest Concern	Notes	Specific Request	Recommendations
<p>BENE# 19-20/33</p> <p>Okpara, Priscilia 77 y/o; 2/4/1945 <i>Income: \$800 sub</i></p> <p>ARAW support \$670: Reoccurring: Charlie card \$28 '20 Gifts: Holiday \$150 '20-21</p> <p>MEB: \$80</p>	<p style="text-align: center;">BA Pat Midurski (508) 717-0400</p>	<p>"I am so grateful for all the help I have received with the bus fare. That has been helpful. I enjoy walking but my legs are old now & painful. I make myself get out every day even if it is to visit a neighbor. But I am spending much time in my apartment watching TV or listening to music. I appreciate any help I can get from the group. Blessings to you all!"</p>	<p>EDDF outstanding balance</p> <p>Relies on sons for support – both have own families and worries things slip thru crack</p> <p>Enjoys socialization , when possible</p> <p>TV and music v important</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Cable \$50 (approx) 	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Cable \$50 (approx)
<p>BENE# 23/08G</p> <p>Tripp, Teresa 75 y/o; 5/10/1947 <i>Income: \$1,401 sub</i></p> <p>ARAW support \$1,228: Gifts: Car loan \$1,228 '22 (6 months pymts)</p> <p>MEB: \$60</p>	<p style="text-align: center;">BA Ana Paz (508) 717-0400</p>	<p>"It has been a nightmare since Covid. I have lost so many clients I had to reduce my work hours to only two & a half days per week. I am trying everything I can to stay working & manage my finances. If ARAW could help me for a little longer, I would be more than grateful."</p>	<p>Awaiting decision by new landlord as to future of her biz space – should know in 4 months</p> <p>SCCLS unable to help with biz matters; looking into debt management</p>	<p>Gift:</p> <ul style="list-style-type: none"> ▪ Car payments for three months, \$208 per month (Dec-Feb) 	<p>Gift:</p> <ul style="list-style-type: none"> ▪ Car payments for <i>four</i> months, \$208 per month (Dec-Mar)

ARAW BENEFICIARY REQUEST: RECOMMENDATIONS

DECEMBER 2022 | VER 12/2/22

Beneficiary	Outreach	Biggest Concern	Notes	Specific Request	Recommendations
<p>BENE# FLO-23N</p> <p>Lammers, Edith 77 y/o; 1/13/1945 Income: \$1,479 sub</p> <p>ARAW support: FLO only</p> <p>MEB: -\$13</p>	<p>BA Pat Midurski (508) 717-0400</p>	<p>"I am grateful for what I have & I have been putting off asking as I know there are folks worse off than me. However, this mattress I have is as old as the hills. I think it is more than 20 years old & it is showing its age like me! If the ARAW can help me I would be most grateful however I understand there are many folks who need help these days. Blessings to you all."</p>	<p>Hesitant to ask for anything</p> <p>Multiple health concerns</p> <p>With neg MEB cannot afford new mattress</p> <p>Exploring best insurance options</p>	<p>Gift:</p> <ul style="list-style-type: none"> ▪ Estimate Full size mattress & box spring \$1,019 from Worley Beds 	<p>Gift:</p> <ul style="list-style-type: none"> ▪ Estimate Full size mattress & box spring \$1,019 from Worley Beds
<p>BENE# 14-15/20</p> <p>Lourenco, Alice 78 y/o; 4/2/1943 Income: \$1,544 R</p> <p>ARAW support \$23,190: Reoccurring: BCBS \$226.29 '15 Gifts: Glasses \$1,257 '21 & \$680 '15, Dental \$1,697 '15, Holiday \$100-150 '15-20</p> <p>MEB: \$58</p>	<p>WCOA Andrea Lemos (508) 636-1026</p>	<p>"Right now I am grateful that I am still here. I am very thankful for all the help I have received from ARAW. Between my glasses & my partial which I use all the time is very helpful & not to mention the medical. Right now I am content & God Bless them all at ARAW. I am so grateful & it is a big, big plus having the help with the insurances."</p>	<p>Emergency surgery (extraction) needed</p> <p>Recent SHINE consultation</p> <p>Annual review due in January</p>	<p>Gift:</p> <ul style="list-style-type: none"> ▪ Statement Dental work \$350 from Oral Surgery Associates 	<p>Gift:</p> <ul style="list-style-type: none"> ▪ Statement Dental work \$350 from Oral Surgery Associates

ARAW BENEFICIARY REQUEST: RECOMMENDATIONS

DECEMBER 2022 | VER 12/2/22

Beneficiary	Outreach	Biggest Concern	Notes	Specific Request	Recommendations
<p>New BENE#</p> <p>Powell, Charlotte 76 y/o; 8/2/1946 Income: \$1,753 H</p> <p>ARAW support: New</p> <p>MEB: \$38</p>	<p>BA Pat Midurski (508) 717-0400</p>	<p>"I find myself beginning to get behind on my bills. My electric bill is over \$300 & I utilize my charge card for groceries, supplements & incidentals. I am frugal with my spending & really try to find deals. I would appreciate any help from the ARAW. Thank you for consideration."</p>	<p>Frugal living and increased health concerns</p> <p>Tenant and small income</p> <p>Purchased new mattress on payment plan</p> <p>TV keeps mind active as mobility decreases</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Cable \$62.56 from DirecTV <p>Gift:</p> <ul style="list-style-type: none"> ▪ Statement Pay off mattress \$1,767.74 	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Cable \$62.56 from DirecTV <p>Gift:</p> <ul style="list-style-type: none"> ▪ Statement Pay off mattress \$1,767.74 <p><i>Pay off seen as debt relief; in future make request prior to purchase</i></p>
<p>New BENE#</p> <p>Oiestad, Susan 65 y/o; 8/13/1957 Income: \$861 H</p> <p>ARAW support: New</p> <p>MEB: \$77</p>	<p>BA Pat Midurski (508) 717-0400</p>	<p>"I spoke with FCOA & I got incorrect info. I was told I would qualify for the circuit breaker & get \$1k. However, I was not 65 y/o until Aug so I do not qualify. I just found out. Unfortunately, I needed to have mold removed from a water leak in the roof as well as painting of the wall & ceiling. So when I thought I was getting this rebate from the CB, I opted to have the mold removal & painting completed upstairs. Now I don't have the money to pay my real estate taxes."</p>	<p>Not eligible for Circuit breaker funds until Jan 2024</p> <p>RE tax outstanding</p> <p>Electrical safety hazard</p> <p>Has researched all other possible avenues of support</p>	<p>Gift:</p> <ul style="list-style-type: none"> ▪ Remittance Real Estate Taxes \$677.94 & interest 	<p>Gift:</p> <ul style="list-style-type: none"> ▪ Remittance Real Estate Taxes \$677.94 & interest

ARAW BENEFICIARY UPDATE RECOMMENDATIONS

DECEMBER 2022 | VER 11/30/22

Beneficiary	Outreach	Biggest Concern	Notes	Current Support	Recommendations
<p>BENE# 15-16/06</p> <p>Lopes, Crispina 79 y/o; 1/28/1943 Income: \$945 sub</p> <p>ARAW support \$7,524: Reoccurring: Cable \$33 '15, Charlie card \$20 '19, Phone \$33 '15 Gifts: Bed \$759 '18, Clothing \$200 '15, Holiday \$100-150 '15-21</p> <p>A/R Due: 10/28/2023</p> <p>MEB: \$212</p>	<p style="text-align: center;">BA Ana Paz</p> <p style="text-align: center;">(508) 717-0400</p>	<p>"I don't ever want to be without Senior Whole Health."</p> <p>"I am so blessed to have your help."</p>	<p>Creole speaking</p> <p>MEB high but no \$ in bank</p> <p>Request key to mental and physical health</p> <p>Resistant to bundling</p> <p>V. thankful</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Cable \$32.84 ▪ Phone \$33 ▪ Charlie Card \$20 <p>Monthly total: \$85.84</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Cable \$32.84 ▪ Phone \$33 ▪ Charlie Card \$20
<p>BENE# 17-18/03</p> <p>Chase, Pauline 94 y/o; 8/17/1928 Income: \$1,572 H</p> <p>ARAW support \$13,542: Reoccurring: Water bill \$253 '18 Gifts: Holiday \$150 '18-21 Discontinued: BCBS \$645 '18-21 (MH FEW)</p> <p>A/R Due: 11/4/2023</p> <p>MEB: \$187</p>	<p style="text-align: center;">BA Ana Paz</p> <p style="text-align: center;">(508) 717-0400</p>	<p>Per daughter Susan mother gets very worried when people discuss her memory loss "I cannot say anything in front of her about her memory loss. She is getting more forgetful & if we mention & she hears, she worries."</p>	<p>Grandmothered water bill annual payment</p> <p>V responsible re water bill</p> <p>Daughter financing HHA on CC \$3,800/month & physically helping</p>	<p>Bi-annually:</p> <ul style="list-style-type: none"> ▪ Water bill \$253.45 <p>Monthly total: \$42.24</p>	<p>Bi-annually:</p> <ul style="list-style-type: none"> ▪ Water bill \$253.45

ARAW BENEFICIARY UPDATE RECOMMENDATIONS

DECEMBER 2022 | VER 11/30/22

Beneficiary	Outreach	Biggest Concern	Notes	Current Support	Recommendations
<p>BENE# 21/19G</p> <p>McHale, Joyce 75 y/o; 9/17/1947 Income: \$990 sub</p> <p>ARAW support \$1,951: Gifts: Electric \$1,342 '22, Chofa \$458 '20, Holiday \$150 '21 A/R Due: 11/10/2023</p> <p>MEB: \$68</p>	<p>BA Ana Paz (508) 717-0400</p>	<p>“My kids worry about me. I used to worry about my electric bill but now I don’t owe anything & I am so grateful. I thought I was going to get evicted.”</p>	<p>Recent diagnosis</p> <p>Applied for hardship when ARAW paid Eversource doubled payment – new program</p> <p>FLO is oppty for much needed socialization</p>	<p>Move to FLO & BM calls</p>	<p>Move to FLO & BM calls</p>
<p>BENE# 21-22/27</p> <p>Cardoso, Isabel 87 y/o; 11/12/1935 Income: \$1,060 H</p> <p>ARAW support \$439: Reoccurring: EPERS \$39.95 '22 A/R Due: 11/15/2023</p> <p>MEB: \$132</p>	<p>BA Ana Paz (508) 717-0400</p>	<p>“My lupus episodes have gotten really bad this year & my lime disease has too. I am very dizzy most of the time & I am very afraid to fall being alone most of the time.”</p>	<p>Will explore CNN and connect with DCOA once she has more energy</p> <p>Vertigo from Lyme – v. dizzy fall risk</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ EPERS \$39.95 <p>Monthly total: \$39.95</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ EPERS \$39.95

ARAW BENEFICIARY UPDATE RECOMMENDATIONS

DECEMBER 2022 | VER 11/30/22

Beneficiary	Outreach	Biggest Concern	Notes	Current Support	Recommendations
<p>BENE# 07-08/01</p> <p>Days, Viola 102 y/o; 11/4/1920 Income: \$1,922 H</p> <p>ARAW support \$43,074: Reoccurring: BCBS \$678.06 '07 Gifts: Holiday \$100-150 '07-21 Discontinued: EPERS \$31.95 '07-22</p> <p>A/R Due: 11/14/2023</p> <p>MEB: \$19</p>	<p style="text-align: center;">BA Pat Midurski (508) 717-0400</p>	<p>"My Mom is doing well for 102 years of age. Fortunately, the financial assistance from the ARAW helps her immensely. We remain very cautious & protective of her especially since the pandemic. Even my siblings do not make home visits as they travel too many places without masks."</p>	<p>Dghtr caregiver 1st FL; Gson tenant 3rd</p> <p>Phone call instead of home visit w/dgtr</p> <p>Doing best they can to help her – homebound</p> <p>Returning EPERS</p>	<p>Quarterly:</p> <ul style="list-style-type: none"> ▪ BCBS \$687.21 (2023 rate) <p>Monthly total: \$229.07</p>	<p>Quarterly:</p> <ul style="list-style-type: none"> ▪ BCBS \$687.21 (2023 rate)
<p>BENE# 19-20/16</p> <p>Borges, Jeanne 84 y/o; 6/28/1938 Income: \$1,023 sub</p> <p>ARAW support \$677: Reoccurring: Pers care \$25-35 '21-22 Gifts: Holiday \$150 '20-21 Discontinued: SRTA Demand Response \$25 '20-21</p> <p>A/R Due: 11/10/2023</p> <p>MEB: \$88</p>	<p style="text-align: center;">BA Pat Midurski (508) 717-0400</p>	<p>"My health is gradually deteriorating. I cannot get around like I used to. I need one of my daughters to be with me whenever I go anywhere outside my apartment. I cannot get on the SRTA bus so my daughter, who recently retired, brings me everywhere. I usually stay in the car while she goes into the stores but at least I get out of my apartment. I am still very careful about COVID due to my conditions."</p>	<p>Dghtrs v. supportive; could attend Flo w/dghtr (misses FLO)</p> <p>Paying off cc so not to leave to fam</p> <p>Considering ALF</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Preservision tablets \$35 ▪ Allowing companion (daughter) to attend FLO activities 	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Preservision tablets \$35 ▪ Allowing companion (PCA/daughter) to attend FLO activities due to physical need

ARAW BENEFICIARY UPDATE RECOMMENDATIONS

DECEMBER 2022 | VER 11/30/22

Beneficiary	Outreach	Biggest Concern	Notes	Current Support	Recommendations
<p>BENE# 13-14/02</p> <p>Sharples, Mary 84 y/o; 5/28/1938 Income: \$1,402 H</p> <p>ARAW support \$37,018: Reoccurring: BCBS \$678.06 '13, Cable \$40 '20, Phone/internet \$85 '17 Gifts: Hearing aid \$3,600 '19, Hot water heater \$1,150 '19, Car ins \$822 '18, Holiday \$100-150 '13-21</p> <p>A/R Due: 11/15/2023</p> <p>MEB: \$148</p>	<p>BA Pat Midurski (508) 717-0400</p>	<p>"I had an MRI & an ultrasound completed recently. I haven't heard from my doctor about the MRI however the ultrasound shows a blockage in my neck. I am scheduled for an appointment with a vein doctor. I am frightened. I already told my cardiologist I will not have a stent placed because they can float around in my body. He said medications can be used at times. I will have to hear my options."</p>	<p>Dog is her best pal; struggling with isolation and being alone</p> <p>Enjoys friendly calls; facing new health challenges</p> <p>Insurance, outside contact & connection important</p>	<p>Quarterly:</p> <ul style="list-style-type: none"> ▪ BCBS \$687.21 (2023 rate) <p>Monthly:</p> <ul style="list-style-type: none"> ▪ Cable \$30 ▪ Phone/internet \$85 <p>Monthly total: \$344.07</p>	<p>Quarterly:</p> <ul style="list-style-type: none"> ▪ BCBS \$687.21 (2023 rate) <p>Monthly:</p> <ul style="list-style-type: none"> ▪ Cable \$30 ▪ Phone/internet \$85
<p>BENE# FLO-22N</p> <p>Riley, Shirley 93 y/o; 9/2/1929 Income: \$938 sub</p> <p>ARAW support: FLO only</p> <p>A/R Due: 11/8/2023</p> <p>MEB: \$87</p>	<p>BA Pat Midurski (508) 717-0400</p>	<p>"All things considered, I am doing great! I really do not need anything else. I am content with what I have & make ends meet just fine. I enjoy the newsletter though I haven't gone any place just yet. But it is good to know I have invitations to be with other women in my predicament. Thank you."</p>	<p>V. active; lives frugally; need for socialization to keep her active</p>	<p>Continue with FLO</p>	<p>Continue with FLO</p> <p><i>We hope she will join us at a lunch!</i></p>

ARAW BENEFICIARY UPDATE RECOMMENDATIONS

DECEMBER 2022 | VER 11/30/22

Beneficiary	Outreach	Biggest Concern	Notes	Current Support	Recommendations
<p>BENE# 19-20/17</p> <p>Hultgren, Mary 86 y/o; 3/31/1936 Income: \$2,425 sub</p> <p>ARAW support \$18,497: Reoccurring: EPERS \$39.95 '20 Gifts: Hearing aids \$5,400 '22, \$5,400 '19 & \$2,200 '13, Dental \$3,287 '14, Holiday \$150 '20-21 A/R Due: 11/15/2023</p> <p>MEB: \$247</p>	<p>BA Pat Midurski (508) 717-0400</p>	<p>"I am very fortunate & I am grateful for my family. My son Dennis is so good to me. I do not need anything & I am grateful for everything that the ARAW has done for me."</p>	<p>Over income by \$925 w/ high MEB</p> <p>Son Dennis supportive in every way</p>	<p>Exception:</p> <ul style="list-style-type: none"> Income guidelines for subsidized housing (over \$925) <p>Monthly:</p> <ul style="list-style-type: none"> EPERS \$39.95 <p>Monthly total: \$39.95</p>	<p><i>Support to discontinue due to increased income and satisfactory resources</i></p> <p style="text-align: center;">Place inactive</p>
<p>BENE# 21-22/26</p> <p>Furtado, Fatima 74 y/o; 8/28/1948 Income: \$1,000 sub</p> <p>ARAW support \$5,594: Reoccurring: Charlie Card \$20 '22 Gifts: CC \$5,000 '21, Electric \$205 '21, Eye doctor \$169 '15 A/R Due: 11/17/2023</p> <p>MEB: \$191</p>	<p>BA Ana Paz (508) 717-0400</p>	<p>"Having your agency pay for my transportation is a miracle. I go everywhere. Doctor's appointments, shopping, etc. I hope they agree to continue to support me."</p>	<p>Connected to CES for safety concern in her home; landlord issues</p> <p>Transportation enables her to get out of tense situation and feel independent</p>	<p>Monthly:</p> <ul style="list-style-type: none"> Charlie Card \$20 <p>Monthly total: \$20</p>	<p>Monthly:</p> <ul style="list-style-type: none"> Charlie Card \$20

ARAW BENEFICIARY UPDATE RECOMMENDATIONS

DECEMBER 2022 | VER 11/30/22

Beneficiary	Outreach	Biggest Concern	Notes	Current Support	Recommendations
<p>BENE# 12-13/16</p> <p>Pope, Dorothy 97 y/o; 4/27/1925 Income: \$1,441 <i>sub</i></p> <p>ARAW support \$10,345: Reoccurring: EPERS \$51.95 '12 Gifts: Dental \$3,312 '18, Eye exam \$372.60 '16, Holiday \$100-150 '13-21</p> <p>A/R Due: 11/21/2023</p> <p>MEB: \$229</p>	<p style="text-align: center;">WCOA Andrea Lemos (508) 636-1026</p>	<p>“My hearing worries me along with my children. Being the last sibling weighs heavy on me & it is sad. Holidays are not the same with loved ones missing now. If you could continue with the Medical Alert Unit that would be a big help.”</p>	<p>Mass Health will not cover her EPERS</p> <p>EPERS brings security & comfort; enables her to remain in home where she most wants to be</p> <p>Depression over loss of family members; grndson murdered in April</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ EPERS \$51.95 <p>Monthly total: \$51.95</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ EPERS \$51.95

Grants Committee Minutes and Report

A meeting of the Grants Committee was held on Wednesday November 16, 2022 at the ARAW office.

Present were Mary Ellis, Pam McKnight, Leah Macomber, Clare Healy Foley and Rosemary Saber

After discussion about the current grantees and the current financial situation it was decided to recommend to the Board that we proceed with a closed RFP process for FY24. This would mean working with the current partners, if their FY 23 performance warrants consideration, and possibly one or two targeted organizations.

The Committee is recommending a sum up to \$200,000 for FY24 grants. It was agreed this would be a place holder for budget purposes, at this time.

As a courtesy Clare will reach out informally to the Whaling Museum and AHA. These were two organizations that had attempted a partnership last year but were not able to make it work.

Minor administrative adjustments were made to the FY 24 RFP application.

Clare has reached out to the existing partners with an opportunity for a review of how to effectively complete the quarterly reporting tools to provide the needed information to indicate success of outcomes as defined in their application. This will be offered on December 14.

The weakness in reporting has been a problem with most of the grant recipients, lacking critical information for evaluating the effectiveness of their programs. This information will be the basis of future funding .

Leah made some observations on reporting by the partners and Pam brought up our ongoing concern regarding our return on investment on grant money spent. Good discussion as we evaluate our work on what is a new approach for ARAW spending.

Thank you
Rosemary Saber, Chair

FY24 CPG KEY DATES & DEADLINES

RFP invitation and application materials published	December 1, 2022
One on One meetings	December 2022 through January 2023
Phone call inquiries	Up until submission deadline
Applications due	February 1, 2023
Interviews, as needed upon request*	Month of February 2023
Notification of decisions	March 9, 2023
Signed grant agreements due	March 31, 2023
Awards distributed	April 1, 2023
Earliest possible project start date	April 1, 2023
Latest possible project start date	July 1, 2023

**A request for an interview does not guarantee funding by the ARAW*

LEGACY COMMITTEE NOVEMBER 21, 2022

ATTENDANCE: ROSEANNE O'CONNELL, DIANE LAFLAMME GUEST: LEAH MACOMBER
ABSENT: DEBBIE BROOKE, JO-ANNE BEAULIEU

We were glad that Leah was able to join us for our meeting this month. We gave her a history of the legacy committee and a current status report. She joined us as we sorted through a couple of boxes of saved history. We will schedule a visit to the Whaling Museum after the holidays to view the archives.

This month we hope to interview three past board members to record their experiences as board members.

Our next meeting is schedule for Jan 26 at 9:30.

Personnel Committee Minutes

November 18, 2022

In attendance: Cathy Mayall, Pamela McKnight, Rosemary Saber, Clare Foley, ED, and Angela Natho

1. We reviewed the process and timeline for the annual review and compensation of the Executive Director.

We discussed the coordination between the Executive Committee, the Personnel Committee and Finance Committee. We discovered the job description in the handbook stated the personnel committee was responsible for these actions. Clare advised the President is responsible for these actions and, at her discretion, may involve the personnel committee. I was asked to check with Jane and she concurs. Clare will distribute the job description the Board voted on to insert in our Handbooks.

2. Clare gave us a preliminary review of staffing needs for calendar year 2023 and we will further discuss at our December meeting.

3. We discussed contribution to the IRA. The Committee recommends to stay at the current contribution of 3%.

4. Clare updated us on long-term disability and we will continue to review this issue.

5. In Other Business, Clare discussed future Contingency Planning.

The next meeting is scheduled for December 16, 2022 at 9:30 AM

Respectfully submitted,
Angela Natho