



ASSOCIATION FOR THE RELIEF OF AGED WOMEN
Board Meeting | May 11, 2023 | 9:30 am
174 Union Street, 4W | New Bedford | Zoom option

Packet contents to be reviewed prior to the meeting:

*April Minutes; May FLO Newsletter & BA Report; April activity sheet;
May Beneficiary Recommendations; 2023-2026 Strategic Plan; Committees: Finance, Governance, Grants*

- 🕒 Call to Order: President Jane Stankiewicz
- 🕒 Roll Call: Clerk Gloria DeSa
- 🕒 Moment of Silence
 - ♥ Lucille Fredette
- 🕒 Reflective Moment: Leah Macomber
- 🕒 President's Report: Jane Stankiewicz – *see packet*
 - ✓ **Recommendation to approve April 2023 Board meeting minutes, as distributed – VOTE**
 - Annual Meeting discussion
 - No June Board meeting
 - ✓ **Recommendation to approve creation of Legacy Task Force, purpose and timeline as distributed – VOTE**
- 🕒 Executive Director's Update: Clare Healy Foley – *see packet*
 - ?? Newsletter, activity sheet & BA report
 - Financial literacy workshop
 - Community Engagement update
 - Community Partner update
 - Policy Documents, Dues & Info Sheet
 - Beneficiary highlight
- 🕒 Finance Review: Treasurer Mary Ellis – *see packet*
 - BOA/IAC/FinComm Q4 review 4/20/23
- 🕒 Committee Reports
 - Visiting: *see packet for upcoming birthdays*
 - May Visiting reports – 3 minutes each
 - * Gloria deSa
 - Reporting in July: Jane Stankiewicz & Angela Natho
 - Beneficiary: Chair Pam McKnight – *see packet*
 - ✓ **Recommendation to accept decisions of beneficiary committee, as distributed – VOTE**
 - ✓ **Recommendation to approve Beneficiary request decisions via email in the months the Board does not meet – VOTE**
 - 2023 Sandra Fogg Beneficiary Award recipient - Barbara Sikorski
 - Highlight a new beneficiary

- Governance: Chair Gale Beaton – *see packet*
 - ✓ **Recommendation to accept Contingency Plan for President Succession, as distributed – VOTE**
 - ✓ **Recommendation to accept Contingency Plan for Officer Succession, as distributed – VOTE**
 - New Board Member Onboarding Guidelines, as distributed – reference document for handbook
 - ARAW Board Self-Evaluation Survey
- Grants: Chair Rosemary Saber – *see packet*
 - Approved incremental \$2,760 Coastal Neighbors Network for technology program
- Legacy: Chair Diane Laflamme
 - Committee meeting update 4/6/23 & 4/12/23
- Personnel: Chair Angela Natho
 - No meeting in April - nothing to report
- Strategic Planning Committee
 - ✓ **Recommendation to accept 2023-2026 Strategic Plan, as distributed – VOTE**
- 🌐 Other business to be brought before the Board
- 🌐 Executive Session

ANNOUNCEMENTS/MEETINGS:

- Monday, May 9th | Financial Literacy Workshop | 174 Union/Zoom | 1 pm**
- Thursday, May 11th | Board Meeting | 174 Union/Zoom | 9:30 am**
- Tuesday, May 16th | Finance Committee | 174 Union/Zoom | 9:30 am**
- Friday, May 19th | Personnel Committee | 174 Union/Zoom | 9:30 am**
- Friday, May 19th | Spring Plant Delivery Volunteer *Opportunity* | 174 Union | 11 am**
- Wednesday, May 24th | Beneficiary Luncheon & CNN Discussion | Wamsutta Club | 12:30 - 2:30 pm**
- Tuesday, May 23rd | Governance Committee | 174 Union/Zoom | 9:30 am**
- Monday, May 29th | Memorial Day Holiday | Office closed**
- Wednesday, May 31st | Beneficiary Committee | 174 Union/Zoom | 9:30 am**
- Thursday, June 1st | Legacy Committee | 174 Union/Zoom | 9:30 am**
- Thursday, June 8th | Board Meeting | 174 Union/Zoom | 9:30 am**



**Association for the Relief of Aged Women
Minutes of the Regular Monthly Meeting, April 13, 2023**

President Jane Stankiewicz called the meeting to order at 9:32 AM.

Members in Attendance: Beaton, Brooke, deSa, Ellis, Laflamme, Macomber, McKnight, Natho, Saber, Stankiewicz.

Executive Director Clare Healy Foley and Director of Data, Administration and Quality Assurance Jenny Costa also present.

Members excused: Mayall, O'Connell.

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

1. Jane Sykes (85) Westport
 - a. Part of ARAW family since 2018
 - b. Inactive with ARAW at time of death
 - c. ARAW provided dentures, credit card payment, 1 time cable
 - d. Decided she wanted to pay cable on her own – moved to FLO
2. Linda Tetrault (79) Acushnet
 - a. Part of ARAW since 2020
 - b. Inactive with ARAW at time of death
 - c. ARAW provided bathroom floor repair (safety issue)
 - d. Devoted niece
 - e. Many health issues – in and out of hospital
3. Barbara Holden (83) New Bedford
 - a. Part of ARAW family since December 2022
 - b. ARAW provided health insurance (paid for 2 months)
 - c. ARAW connected with other resources
 - d. Sister-in-law advocated for her
 - e. Went into hospital – Covid complications

Reflective Moment: Debbie Brooke shared the Starfish Parable:

One day, the old man was walking along a beach that was littered with thousands of starfish that had been washed ashore by the high tide. As he walked he came upon a young boy who was eagerly throwing the starfish back into the ocean, one by one.

Puzzled, the man looked at the boy and asked what he was doing.

The young boy paused, looked up, and replied “Throwing starfish into the ocean. The tide has washed them up onto the beach and they can’t return to the sea by themselves,” the boy replied. “When the sun gets high, they will die, unless I throw them back into the water.”

The old man replied, "But there must be tens of thousands of starfish on this beach. I'm afraid you won't really be able to make much of a difference."

The boy bent down, picked up yet another starfish and threw it as far as he could into the ocean. Then he turned, smiled and said, "It made a difference to that one!"

Report of President: President Jane Stankiewicz reported:

1. The minutes of the March 9, 2023 board meeting were approved as distributed. SO VOTED
2. The minutes of the March 9, 2023 executive session were approved with change to budget total. SO VOTED
3. Motion made to add "low income" to mission statement, as distributed. SO VOTED
4. Motion made to decrease frequency of Board meetings by omitting June, August and November meetings in FY24. SO VOTED
5. Jo-Ann Beaulieu
 - a. Resigned from ARAW Board – family and health issues
 - b. Possible volunteer opportunities in the future (has not been mentioned yet)
 - c. Will receive letter and gift at Annual Meeting along with Shannon and Jeannette
 - d. Very thoughtful Board member – mission was always front & center
 - e. Her quote for ARAW Board members - "Wise stewards doing a damn good job"
6. Strategic Plan update
 - a. Retreat went very well
 - b. Follow up committee meeting on Monday was a slower process
 - i. Setting dates was easy, success indicators have been challenging
 - ii. Meeting again April 18th and 28th
 - c. Will vote on Strategic Plan at May Board Meeting
7. Please RSVP for Annual Meeting if you have not done so

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

1. FLO Newsletter
 - a. Financial Literacy – 2 signed up so far, will be test run
 - b. March Luncheon incident
 - i. Thank you to hostesses who showed grace under pressure
 - ii. One beneficiary passed out
 1. 911 & ARAW office called
 2. Office called emergency contact
 3. Teaching moment – requiring emergency contact for all

4. Special credit to Cathy & Rosemary who were right there & handled situation well
 5. Thank you from beneficiary for care and concern
 - iii. Potential Covid exposure
 1. Everyone notified (no names given)
 2. No known cases reported
 3. Shows importance of vaccination requirement
 - c. In need of hostesses for April luncheon & Salsa class with Z
2. BA Reports – both seeing same trends of unsustainable living situations
3. Activity Sheet – longer & longer
4. Increase in referrals
 - a. 26 received since last meeting (14 pending, 10 ineligible, 2 withdrawn)
 - b. From multiple sources
5. Community Engagement
 - a. Thanks to Board members Gloria, Pam, Angela and all staff for attend Herstory event at NBFHC
 - i. ARAW beneficiary who was interviewed attended – exciting, doesn't get out much
 - ii. Angela Natho one of interviewees – fishing family
 - iii. Students conducted interviews
6. CPG update
 - a. Info session held to help with foundational report
 - i. Helped, evident with those who didn't attend
 - b. Majority of partners are attending Annual Meeting
7. Bequest
 - a. Received notification of bequest from Beverly Wilson of Fairhaven
 - i. Not known to ARAW
 - ii. Jo-Ann Beaulieu's husband is executor of will
 - iii. Partner predeceased her by two months
 - iv. ARAW is 1 of 4 to receive
 - v. Clare reached out to lawyer
 1. Not much info given – 2 estates to settle & house to sell before bequest realized
8. Institute for Trustees Virtual Conference Sessions
 - a. Board members shared some thoughts of sessions attended so far
 - b. May set up viewing of a particular session or sessions – discussion could follow
9. Beneficiary Highlight
 - a. Joan Pryor
 - i. Living in house that was sold – essentially a squatter
 - ii. Wanted to move to Texas

- iii. Would not follow steps given by social worker
- iv. Ultimately realtor to finance entirety of move to Texas
- b. Birthday Cards
 - i. Receive many thank you calls
 - ii. Barbara Miranda
 - 1. Suffers from severe depression
 - 2. Recently “dumped” by ARAW Pen Pal
 - 3. Received lottery ticket – going to hold on until birthday as it may be her only celebration

Report of Finance Committee: Chair Mary Ellis reported:

- 1. Motion made to approve March 2023 financials, with change to green on March Actual Direct Support. SO VOTED
 - a. Not finalized – bills still coming in
- 2. Portfolio – down \$2.3 million YTD – not unexpected
- 3. Meeting April 20th with Bank of America and Investment Advisory Committee
 - a. Will review full year results and look at FY24 outlook

Report of Visiting Committee:

- 1. Visiting reports: Debbie Brooke
 - a. Hilda Pine (87)
 - i. Beneficiary since 1996
 - ii. Born in Freetown, lived in New Bedford, now in Fairhaven
 - iii. Plaintive voice
 - iv. Worked in a mill that made elastics
 - v. Debilitating arthritis (especially knee)
 - 1. Hard time accepting situation
 - 2. Disillusioned with doctors
 - vi. Formerly drove disabled son until not able to – brother-in-law helps
 - vii. More isolated now – frequency of calls increased
 - viii. Needs wheelchair & knee surgery
- 2. Next month – Gloria deSa

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. 12 requests (6 new), 12 updates (7 FLO, 4 inactive)
- 2. New Beneficiary Highlight
 - a. Brenda Connors (66 y/o)
 - i. Month end balance -\$652
 - ii. Lives frugally

- iii. \$80k mortgage – bought out ex husband
- iv. 16-year-old dog – spending \$400 per month on meds
- v. Unstainable situation (young)
- vi. Many health issues
- vii. Help from Dartmouth COA – connected to resources
- viii. Ana connected with RAFT, SCCLS, ACP and others
- ix. To join FLO – isolated, lonely
- x. Will look again at 3 months when resources may have made impact

Report of Governance Committee: Chair Debbie Brooke reported:

1. Motion made to accept Leave of Absence policy, as distributed. SO VOTED
 - a. Spoke with consultants – large enough board to have policy
 - b. When on leave – not a voting member
 - c. Will aid in avoiding awkward situations while showing compassion

Report of Grants Committee: Chair Rosemary Saber reported:

1. Extension granted to NBAM to offset cost of materials used out of NBAM stock
2. Rosemary had discussion with Gail Fortes – pleased ARAW is partnering with YWCA for Walt’s Mobile Closet event as well as Financial Literacy presentation
3. Receiving 4th quarter reports – summary to come

Report of Legacy Committee: Chair Diane Laflamme reported:

1. Still going through boxes
2. Committee will morph into task force then become part of Governance Committee

Report of Personnel Committee: Chair Angela Natho reported:

1. Three meetings since last board meeting – thanks to committee and Clare
 - a. Discussion of employee categories, PTO, etc.
 - i. Clare sent to legal – will discuss at next meeting
2. FY23 Goals have been completed

Other Business:

1. Office closed Patriot’s Day

The meeting was adjourned at 10:57 am.

Executive session to follow.

Recorded by,
Jenny Costa, Office Administrator

Approved by,
Gale Beaton, Clerk

May 2023



GOING WITH THE FLO

Friendship Lunches & Outings (FLO)
Newsletter



On Thursday, April 27th ARAW celebrated another incredible year of *Women helping Women and friendship* at our 156th Annual Meeting.

We're so glad you were part of our 408 women strong ARAW family!

On behalf of the staff at ARAW, the ARAW Board members and our Community Partners,

Thank you for being our friend!

We are here for you. We are here because of you. We are here and have been since 1866.

We look forward to another exciting year ahead with you!

ZEITERION PERFORMING ARTS CENTER

Creative Classroom
explore the performing arts

**OPEN ENROLLMENT FOR
SPRING CLASSES**

- MODERN AFRICAN DANCE
- JAZZ HISTORY & IMPROVIZATION
- YOUTH UKULELE
- BEGINNER UKULELE
- BEYOND BEGINNER UKULELE
- SALSA ON 1: BEGINNERS
- SALSA ON 2: INTERMEDIATE

FREE! Transportation available

For more information call ARAW (508) 717 0400



REMINDERS

Make time for yourself and take breaks.

It's ok to have bad and unproductive days.

You deserve love, care and support.

Allow yourself to feel, don't ignore and hide your feelings, try to hear and accept them.

Listen to your emotions and what they are trying to tell you.

The same good you see in others is within you too.

It's ok to have days where the only thing you do is survive.

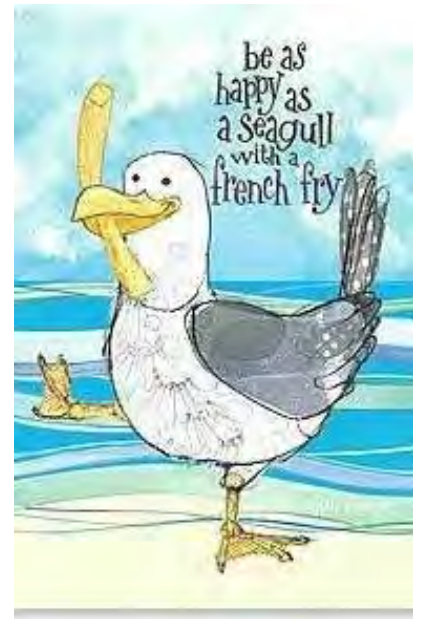
Trust yourself, the journey you are on and that things get better.

**DON'T
FORGET**

You Are Important!



Aging GRACEFULLY



Join Andy Pollock from Coastal Neighbors Network for lunch and conversation about ***Aging gracefully in a youth obsessed society.*** We will speak about planning, asking for help, accepting help, looking for positives and the benefits of community.

Bring your questions and thoughts on aging gracefully!

Wednesday, May 24th | Wamsutta Club | 12:30 – 2:30 pm

Handicap accessible | Transportation available | Dietary restrictions observed

Call ARAW (508) 717-0400 to register – Participants by lottery



SENIOR FARMER'S MARKET NUTRITION Program



Thanks to a \$1.4 million grant benefits increase this year from \$25 to \$50!!

For more details call Coastline or your Council on Aging!



April showers bring May flowers. But who brings the May flowers??

ARAW!!!

SPRING PLANT GIVE-AWAY

Friday, May 19th

Pick up or delivery of a spring plant to make you smile

Call ARAW (508) 717-0400 by Tuesday, May 16th



Dartmouth & Westport residents only

COASTAL NEIGHBORS NETWORK

NEWS

Tech help for YOU!

Do you have a computer? Would you like one and to learn how to use it? Contact Andy to receive a simple device and get connected. The devices are compliments of Coastal Neighbors. We will provide training, set-up and assistance. Join the modern age!

Call Andy at 508-556-4004

DID YOU KNOW?

Westport Council on Aging provides one-on-one tutoring for tech devices like your phone or laptop. It's free! Tell them you are from Coastal Neighbors. You can learn at your own pace, find some wonderful discoveries and surprise your friends and family with your ability! For help registering and for transportation, call Andy at

508-556-4004



Plant Perfection!

Come to Silverbrook Farm and make planters of lovely flowers or fragrant herbs. Soil, plants and pots are provided. Create a container for yourself and others. We will deliver planters to folks who can't get out. Let's have fun and do good! Refreshments will be provided. Rain or Shine.

When: May 11 2023, at 2:00 p.m.

Where: Silverbrook Farm, 592 Chase Road, Dartmouth

Wear: Comfortable shoes

RSVP: Call 508-556-4004 or register online at coastalneighborsnetwork.org

Handicap Accessible

Transportation Available. Call Andy at 508-556-4004.



Meet your neighbor!

Volunteer William Bullard sometimes helps members with small household tasks, but most of the time he's in the driver's seat, taking people to medical appointments, shopping and visiting friends. "I've met some of the most interesting, delightful people I've ever encountered, with fascinating backgrounds and life experiences," he says. Many of them are longtime Dartmouth and Westport residents, with deep knowledge of life on the South Coast. "These people have become friends," William says. As a boy, William spent summers in Nonquitt at the Bullard family home, where his dad started going as a young man. So when he drives Charles Alexander, a longtime Nonquitt resident, they often discuss Nonquitt goings-on, sports stories and the like. These are the kinds of relationships that make volunteering as rewarding for the volunteer as for the person being helped. William and his wife Diana moved to Dartmouth 7 years ago after raising their family in Baltimore, where William's professional career was in marketing, both with large corporations and independent schools. He continues to do marketing consulting with schools.

Garden Tour Volunteers Needed

Come and help out Coastal Neighbors on our bi-annual garden tour. This year we feature the beautiful Russells Mills Village. Help staff a table in a garden - chairs provided. All volunteers get to tour the gardens for free! There are morning and afternoon shifts available.

When: June 14, 2023. 9:30-12:30, and 1:00 to 4:00 shifts

Where: Russells Mills Village Dartmouth

Wear: Comfortable outdoor shoes

Handicap accessible

RSVP: Call 508-556-4004 to sign up as a volunteer.





New Bedford Art Museum/Artworks!



CREATIVE CARE

New Bedford Art Museum presents Senior Sundays! Step-by-Step Acrylic Painting. All Materials included. No prior experience required. Limited seating available. Please sign up in advance. To Sign up for Senior Sundays please email mrosa@newbedfordart.org or call Devin Mclaughlin at 508-525-6731.

SUNDAYS

May 14th-June 4th
11:00pm - 1:00pm

LOCATION:

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



New Bedford Art Museum/Artworks!



FRIYAY & TWIRL & WHIRL

FriYAY

Andy Anello

May 5th, 5-7pm

New Moon Dance Party brings radically inclusive underground dance music to the Art Museum. Come dance or just watch and enjoy the vibe.

LOCATION:

New Bedford Art Museum
608 Pleasant St.
New Bedford, MA 02740

Twirl & Whirl

Andy Russ

May 9th, 6-7pm

Standing at the crossroads of creative movement and dance, experience a cutting edge immersive performance inspired by Sound In Space, Sound in Place led by interdisciplinary artist, Andy Russ. This edition of Twirl & Whirl curated by dancer, choreographer, Ali Kenner-Brodsky.



FREE MAY PROGRAMS AT NEW BEDFORD FISHING HERITAGE CENTER

Come see our newest exhibit of archival photographs!

Thurs.-Sun. • 10-4 PM • Center (38 Bethel Street, New Bedford)

From the Hold: Photographs of the Port (1860s-1980s) shows historic pictures of New Bedford and Fairhaven, courtesy of the Spinner Publications archives. Images of celebrations, shoreside work, union meetings, and more make up this stunning collection of photos.



AHA! Night - "The History of Spinner" A Talk by Joe Thomas

Thurs., May 11 • 7 PM • Center (38 Bethel Street, New Bedford) • FREE

Joe Thomas, Co-Founder of Spinner Publications, gives a talk on the history of the organization as well as its involvement in documenting the fishing industry. Don't forget to check out our new exhibit "From the Hold!"



38 BETHEL STREET, NEW BEDFORD MA • (508) 993-8894

WWW.FISHINGHERITAGECENTER.ORG

HERSTORY@FISHINGHERITAGECENTER.ORG

FOR SOUTH COAST LGBTQ+ INDIVIDUALS 55+

THE FUN HAS JUST BEGUN!

Lots of fun in store for older LGBTQ+ individuals (55+) in the South Coast—now through the end of Pride Month! Join any or all events and meet new people or connect with old friends. All materials and refreshments provided. Email maureen@scigtbnetwork.org or call (774) 775-2656 for more info.

ALL EVENTS AT GROUNDWORK 1213 PURCHASE STREET, NEW BEDFORD THE FUN BEGINS AT 6:00 PM

April 4	Bingo!
April 18	Paint & Plant
May 2	Card Night
May 16	Pizza Social
May 30	Word Games
June 13	Design Your Own Flag
June 20	Ice Cream Social

ALL EVENTS AT FIRST PARISH CHURCH CHURCH GREEN, TAUNTON THE FUN BEGINS AT 5:30 PM

March 30	Pizza Social
April 13	Card Night
April 27	Word Games
May 11	Paint & Plant
May 25	Bingo!
June 8	Design Your Own Flag
June 22	Ice Cream Social



LGBTQ+ BREAKFAST CLUB

FOR LGBTQ+ INDIVIDUALS 55+

May 7, 2023 at 10 a.m.

Mikey B's Restaurant, 989 Victoria Street, New Bedford, MA 02745

REGISTRATION IN POST.

For more information, email maureen@scigtbnetwork.org or call (774) 775-2656 to reserve your spot.



With the Support of the Association for the Relief of Aged Women of New Bedford (ARAW)





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

CALL (508) 717-0400 IF INTERESTED!

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

Let us know ASAP, as these will be first come, first served.

Here is a list of upcoming show:

Thursday June 1st from 4:30PM-6PM | Educator Appreciation Party

Do you have a child, grandchild, or colleague who is currently an educator? Invite them to our free Educator Appreciation Party! From 4:30-5PM, educators can wind down on our stage with live music, teacher-themed cocktails, and light refreshments. Then, they will be treated to an exclusive preview of our 2023-2024 SchoolTime performance season and learn about scholarships and grants they can use for field trips to The Z! One lucky educator will walk away with 30 tickets so that their class can see the SchoolTime performance of their choosing!

**Saturday June 3rd at 8PM | With Love From Portugal:
A Night of Fado with Helder Moutinho & Maria Emilia**

Immerse yourself in the sounds of Portugal. This performance will feature the music and poetry of fado shared by world-renown fadistas Helder Moutinho and Maria Emilia.

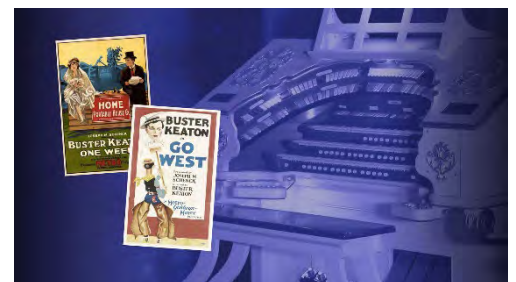


Sunday June 4th at 2PM | Movies through the Decades: Ratatouille

Celebrate The Z's 100th anniversary by watching Pixar's heartwarming, family-friendly movie on the big screen. This movie follows Remy, a determined young rat who is secretly working in one of the finest restaurants in Paris, as he follows his dream of becoming a chef.

**Sunday June 11th at 2PM | Buster Keaton Double Feature:
Silent Films with Live Wurlitzer Organ Accompaniment**

Take a trip back in time and watch two silent films on the big screen while organists from the Eastern Massachusetts Chapter of the Theatre Organ Society play live! The screening will feature two silent films: One Week and Go West. In the first film, Buster Keaton and Sybil Seeley star as newlyweds who receive a portable house as wedding gift and have a comically hard time assembling it. In the second film, a New Yorker who can't hold down a job finds himself herding cattle to The West Coast.



***Transportation available**

**Tuesday June 13th at 7PM | Utica: The Last Refuge
A Film Screening in Honor of World Refugee Day**

This newly released documentary follows the Azeins -- a family of 4 from Sudan -- who arrive in Utica, NY and attempt to start a new life, and in turn, bring back to life a city plagued by economic stagnation. The film is a hopeful look at America's commitment to those who cross our borders to be free. Following the film, we will host a panel discussion featuring local refugees, refugee and immigration advocates, and the Executive Director of The Center featured in the film, which has helped 16,500 refugees from 35 countries resettle in the Mohawk Valley region of NY.



**Saturday June 24th at 8PM |
Alan Cumming & Ari Shapiro:
Och & Oy! A Considered Cabaret**

This wildly entertaining evening of tunes and tall tales brings together Tony Award-winning actor Alan Cumming (Cabaret, The Good Wife) and NPR's *All Things Considered* host (and Pink Martini guest vocalist) Ari Shapiro.



**Thursday June 29th at 8PM |
An Evening with Bernadette Peters**

Join three-time Tony Award winner Bernadette Peters for an inspiring evening of songs from Rodgers and Hammerstein, Stephen Sondheim, and Jerry Herman, among others.



Share Your Story!

Do you remember coming to The State as a young woman? Do you have a memory from a show you've seen at The Z that you cherish? In honor of our 100th anniversary we are collecting your stories and memories of this historic building, as well as your hopes of its future. **Call our Story Hotline at (774) 425-3417 to record YOUR story!**



***Transportation available**

ARAW April 2023 Activity Sheet

Date	Beneficiary	Staff	Type	Notes
4/3/2023	Christensen, Carol	PMIDURSKI	Phone Call	VM to reschedule HV to assist w/Comcast billing address change
4/3/2023	Dalton, Simone	PMIDURSKI	Phone Call	To schedule new HV: 4/5/2023 @ 3pm
4/3/2023	Harrison, Patricia	PMIDURSKI	Phone Call	VM left req CB to schedule HV for NEW referral: EMM to referral source> UHC RN
4/3/2023	Jesus, Elizabeth	PMIDURSKI	Phone Call	NEW referral: HV 4/6/2023@ 2pm: FCOA referral: Needs transportation to appointments
4/3/2023	Pacheco, Deborah	PMIDURSKI	Phone Call	NEW Referral: HV: 4/7/2023: Recent surgery: Death of companion in Jan 23: Difficulty paying bills
4/3/2023	Burke, Shauneen	PMIDURSKI	Phone Call	To req. Z tickets for 2 shows: Tavares & Dori Rubbico: Informed Z will call re: performances
4/3/2023	Ponte, Karyn	PMIDURSKI	Phone Call	To req. Z tickets for Tavares: Informed Z will call re: performance
4/3/2023	Walker, Bonnie	PMIDURSKI	Phone Call	Re: ACP and challenges: Advised not to pursue: Very upset re: neighbors: SCCLS sent papers to complete
4/3/2023	Letourneau, Diane	PMIDURSKI	Phone Call	To reg. for Luncheon w/Salsa: "TY so much for helping w/Comcast. I don't worry as much now about \$\$."
4/3/2023	Pryor, Joan	PMIDURSKI	Phone Call	To confirm move to Texas at end of April: will be switching over to TX Auto insurance
4/3/2023	Bramwell, Nancy	PMIDURSKI	Office Visit	To bring BCBS invoice: Applying to S&S: To visit RAFT office (Neighborhood Housing) Sign up for luncheon
4/3/2023	Benevides, Maria	PMIDURSKI	Phone Call	To dgt Sandra to sched HV for annual update: Appt sched for 4/12 @ 2pm
4/3/2023	Benoit, Ruth	PMIDURSKI	Phone Call	VM left req CB to sched HV for annual update
4/3/2023	Almeida, Mildred	PMIDURSKI	Phone Call	To reg. for luncheon: Very interested in joining salsa lessons: Will need trans
4/3/2023	Openshaw, Pauline	PMIDURSKI	Phone Call	From ex: PO dx w. UTI and elevated cardiac enzymes: No work up completed yet re: abdominal masses
4/3/2023	Lamontagne, June	PMIDURSKI	Phone Call	To reg. for luncheon & salsa: Caring for ill 94 yo mother: "I need some time for me."
4/3/2023	DeSouza, Joanne	PMIDURSKI	Phone Call	To reg. for Z show Tavares & Luncheon: Will need trans for Z show
4/4/2023	Somers, Linda	PMIDURSKI	Phone Call	VM left by LS req. CB re: BB taxi vouchers for emergencies "even though the service is horrible."
4/4/2023	Medeiros, Margaret	PMIDURSKI	Phone Call	To register for luncheon and Z tickets: Will not need trans: "I enjoy these events. TY. It's nice to belong."
4/4/2023	Vieira, Nancy	APAZ	Phone Call	LVM x2. CES CM Cassidy will be seeing her this month. She is ok. Mailed letter.
4/4/2023	Cardoso, Isabel	PMIDURSKI	Phone Call	To register for Luncheon & observe salsa: Will need trans YWV
4/4/2023	Travers, Joyce	PMIDURSKI	Phone Call	NEW referral from Feb. 2023: Feeling much better and agreeable to exploring ARAW. HV sched 4/11
4/4/2023	Christensen, Carol	PMIDURSKI	Phone Call	To resched HV for assistance w/changing Comcast billing address: "Thank you all so much!"
4/4/2023	Nickerson, Elizabeth	APAZ	Phone Call	Re: Update. No need at this time. Not interested in FLO. EMM to admin to withdraw referral.
4/4/2023	Ramos, Safaa	APAZ	Phone Call	RC Jennifer DeCouto CES CM re rollator walker has not been requested. EM to admin to withdraw referral.
4/4/2023	Dobson, Sally	PMIDURSKI	Phone Call	NEW referral: NBPD responded to 911 for choking: SD reports she is struggling w/bills: HV 4/12
4/5/2023	Dalton, Simone	PMIDURSKI	In Home Visit	Met @ ACOA as she "forgot where to meet": ??over asset: Dgt to call BA to confirm savings & Rev mort
4/5/2023	Letourneau, Diane	PMIDURSKI	Phone Call	At SLH ER s/p fall in apartment: To rehab unknown which facility at this time
4/5/2023	Horne, Donna	PMIDURSKI	Phone Call	To reg for Luncheon: Will observe dancing:
4/5/2023	Dann, Donna	PMIDURSKI	Phone Call	To req "reactivation in ARAW:" has been in rehab x 2.5 months: SDC Tues, Thurs, Fri: EMM to AP for f/u
4/5/2023	Parkinson, Ann	PMIDURSKI	Phone Call	CB fr. VNA OT: Need remains for lift chair: EM to CCA GSSC re: CCA assist w/cost of lift chair
4/5/2023	Dillon, Sherry	PMIDURSKI	Phone Call	To sign up for Z shows. Will need trans: Recent falls x 2: Receiving PT
4/5/2023	Belanger, Elizabeth	PMIDURSKI	Phone Call	To inform of Board award for cont. of WA OTC products: "TY so much"
4/5/2023	Tavares, Maria	PMIDURSKI	Phone Call	VM left re: Board decision to cont. BCBS payment x 12 months
4/5/2023	Parker, Delia	PMIDURSKI	Phone Call	BM concern re: DP verbalizing need for "friendly in-home visitor d/t lonely." MSW 2x/m via Ins: CES 3hr/wk
4/5/2023	Carvalho, Patricia	PMIDURSKI	Phone Call	Fr. Pat Foster NBCOA req. assistance w/PC: Attending SDC 3x/wk: Applying for FEW: HV 4/12
4/6/2023	Barboza, Margaret	PMIDURSKI	Phone Call	To congratulate Senior Scope article and MB's involvement re: voting
4/6/2023	Chor, Patricia	PMIDURSKI	Phone Call	To report broken bed frame and box spring: Opting to decrease to twin: To call My Brothers Keeper & Worley

Date	Beneficiary	Staff	Type	Notes
4/6/2023	Lawrence, Gail	APAZ	Phone Call	Annual HV complete. Continued support requested.
4/6/2023	Ramos, Maria	PMIDURSKI	Email	From niece req assist w/lift chair: EMM to GSSC re: CCA potential assistance
4/6/2023	Greenwood, Dorothy	APAZ	In Home Visit	Annual HV completed 4/5/23. Continued request only.
4/6/2023	Fredette, Lucille	PMIDURSKI	Phone Call	Currently at SLH after a stay at rehab
4/6/2023	Best, Jacqueline	APAZ	Phone Call	LVM request a call back about Xfinity invoice needing to be monthly.
4/6/2023	Sikorski, Barbara	APAZ	In Home Visit	Annual HV completed. Continued and New Request of Xfinity upgrade and payment.
4/6/2023	Burke, Shauneen	PMIDURSKI	Phone Call	To sign up for Z show Tape Face: "TY so much. These shows bring so much joy into my life. TY."
4/6/2023	DeGrace, Carmen	PMIDURSKI	Phone Call	NEW Referral: TC to sched in-home visit for 4/12: EM to GSSC: Intro letter mailed to CDG
4/6/2023	Sebastiao, Ilda Maria	PMIDURSKI	Phone Call	NEW referral: Req ramp: Numerous resources provided: DIL unable to provide \$\$details: lives w/dgt: may CB
4/6/2023	Jesus, Elizabeth	PMIDURSKI	In Home Visit	HV completed for NEW referral: Req assist w/trans:
4/6/2023	Jesus, Elizabeth	PMIDURSKI	Phone Call	To referral source FCOA to discuss request: Freq MD appts: EJ paying volunteer drivers
4/7/2023	Victoria, Maria	APAZ	Phone Call	RC re: follow up home visit. Schedule 4/11 requesting Xfinity bill support. Just turned it off because cannot pay.
4/7/2023	Brito, Manuela	APAZ	Phone Call	Re: schedule HV. Requested to withdraw request. Is all set.
4/7/2023	Pacheco, Deborah	PMIDURSKI	In Home Visit	NEW referral; recent widow: numerous health issues: "I appreciate your talking with me. TY"
4/7/2023	O'Keefe, Lindelle	APAZ	Phone Call	Re: schedule HV 4/11.
4/7/2023	Dann, Donna	APAZ	Phone Call	LVM to schedule annual home visit. Requested a return call.
4/7/2023	DeJesus, Eva	PMIDURSKI	In Home Visit	For NEW request: Rent was increased last Fall & challenging to pay monthly bills:
4/7/2023	Graybill, Holly	APAZ	Phone Call	LVM to reschedule annual HV. Requested a call back.
4/7/2023	Espejo, Sharon	PMIDURSKI	Phone Call	Re: new SS amount: HV sched for 4/13 NEW request: RAFT # provided again
4/7/2023	Silva, Mary Theresa	APAZ	Phone Call	LVM to reschedule annual HV. Requested a call back.
4/7/2023	Lyons, Carol	PMIDURSKI	Phone Call	Re: Comcast: Attempt to change billing address & Comcast "hung up" call on Carol! HV next wk to assist
4/7/2023	Cory, Frances	PMIDURSKI	Phone Call	To thanks ARAW for Tavares tix and to wish everyone a Happy Easter
4/7/2023	Costa, Barbara	PMIDURSKI	Phone Call	Re: BB vouchers: "oops. I made a mistake." Req ARAW to cover this one time
4/7/2023	Almeida, Mildred	PMIDURSKI	Phone Call	Re: Comcast invoice every 2 months: MA to call Comcast to correct
4/7/2023	Costa, Maria	APAZ	Phone Call	LVM w/ daughter Lucy. Requested a call back to schedule annual HV.
4/7/2023	Tavares, Maria	PMIDURSKI	Phone Call	To "wish everyone @ ARAW a wonderful Easter. TY all so much. I love you all & will pray for you."
4/7/2023	Pine, Hilda	APAZ	Phone Call	Re ins issue w/ Glucerna. Will follow up on Monday w/ ED. Hilda to purchase w/ SNAP
4/10/2023	Costa, Maria	PMIDURSKI	Phone Call	VM from dgt Lucy returning call to AP: AP notified of VM and will follow up
4/10/2023	Drayton, Gail	PMIDURSKI	Phone Call	VM Re: receipt of notice re: unpaid Verizon bill: "I know ARAW will take care of it but I wanted to let you know."
4/10/2023	Best, Jacqueline	PMIDURSKI	Phone Call	Req AP re: Comcast: frustrated she can't reach person @ Comcast to discuss billing: Req CB from AP: EM to AP
4/10/2023	O'Connell, Joyce	PMIDURSKI	Phone Call	To sign up for Luncheon: "I have a meeting in the morning so I may not arrive in time for the Salsa."
4/10/2023	Carvalho, Patricia	PMIDURSKI	Phone Call	To confirm home visit is Thursday 4/20: Attending SDC 3d/wk @ new site: "Too many people but its OK."
4/10/2023	Pacheco, Deborah	PMIDURSKI	Phone Call	VM req CB re: Comcast docs
4/10/2023	Dalton, Simone	PMIDURSKI	Phone Call	To review finances: Available funds via Reverse Mortgage > \$211,000: Over asset
4/10/2023	Christensen, Carol	PMIDURSKI	In Home Visit	To assist with changing billing address for Comcast: "TY so much. I get so nervous."
4/11/2023	O'Keefe, Lindelle	APAZ	In Home Visit	Referred to DCOA, RAFT, Eversource. Requesting cable bill support.
4/11/2023	Rapoza, Janet	PMIDURSKI	Phone Call	NEW referral fr. ARAW beneficiary: JR having trouble "making ends meet with ^ prices." HV 4/19
4/11/2023	Rivera, Juanita	PMIDURSKI	Phone Call	From RSC Boa Vista: JR to PR to "bury dgt." RSC to call AP in morning to discuss new need
4/11/2023	Harrison, Patricia	PMIDURSKI	In Home Visit	For NEW referral: Req assist w/new full sized bedframe: Denies need for adjustable bed
4/11/2023	Miranda, Barbara	PMIDURSKI	Phone Call	To THANK ARAW for lottery tix: Is saving 4

Date	Beneficiary	Staff	Type	Notes
4/11/2023	Ribeiro, Renay	PMIDURSKI	Phone Call	Re: Salsa & Luncheon: Will attend
4/11/2023	Collins, Donna	APAZ	Phone Call	Re: Request ARAW support of new car payments and/or down payment. EM to ED to discuss.
4/11/2023	Letourneau, Diane	PMIDURSKI	Phone Call	Update @ BW Dart 4 rehab s/p fall: "May take a while b4 I return home." To call Wed 4/19 re: luncheon
4/11/2023	Pratt, Julie	PMIDURSKI	Phone Call	Re: Salsa & Luncheon: would like to attend
4/11/2023	Todd, Kristine	PMIDURSKI	Phone Call	Msg fr Maureen LGBTQ re: KT need for oil: Attempt to reach KT unsuccessful d/t VM box not set up on phone
4/11/2023	O'Connell, Joyce	APAZ	Phone Call	LVM re: luncheon attendance.
4/11/2023	Parkinson, Ann	PMIDURSKI	Phone Call	From Nightingale VNA RN: RN will work w/AP re: CCA process w/Care partner RN & rehab team to eval 4 chair
4/11/2023	Bramwell, Nancy	PMIDURSKI	Phone Call	Re: Luncheon: "I am so happy! I applied for a job @ S&S. I should hear tomorrow."
4/11/2023	Costa, Maria	APAZ	Phone Call	RC Annual HV scheduled 4/19 10am.
4/11/2023	Lyons, Carol	PMIDURSKI	Phone Call	From RSC Boa Vista: Fridge broken: \$350 of food lost: New fridge 4/12: Has shelf-stable food
4/11/2023	Lyons, Carol	PMIDURSKI	Phone Call	DTA info for replacement of lost/damaged foods: If \$\$ not received immediately, will request EDDF S&S GC
4/11/2023	Roderiques, Bernadette	PMIDURSKI	Phone Call	To confirm attendance @ Luncheon: Reports hands are better but cont w/limitations: "Frustrating @ x's"
4/11/2023	Pine, Hilda	APAZ	Phone Call	LVM Carolyn Whalen at Coastline. Requested a call back.
4/11/2023	DeSouza, Joanne	PMIDURSKI	Phone Call	Re: Luncheon. Will take bus: "I met new friends at the Wamsutta. I am going to their lunch tomorrow! TY"
4/11/2023	Chor, Patricia	PMIDURSKI	Email	From Worleys: Estimate for mattress set: HV sched w/PC to update financials
4/11/2023	DeMendonca, Theresa	PMIDURSKI	Phone Call	For annual FLO ROE: Unable to attend Salsa Luncheon d/t MD appt: "TY to ARAW. You brighten my days!"
4/11/2023	Desautels, Louise	APAZ	Phone Call	Re: Admitted to St. Anne's Hospital 11 days ago. Might be discharged tomorrow. Has CHF
4/12/2023	Lyons, Carol	PMIDURSKI	Phone Call	Working fridge in apt now: DTA to send form which CL must complete & return b4 \$: S&S GC del. TYSM
4/12/2023	Parquette, Mary Jane	APAZ	Phone Call	To inform Mary Jane she can attend Luncheon 4/20. Will participate in Salsa lessons
4/12/2023	Openshaw, Pauline	PMIDURSKI	Phone Call	To report he is considering LTC placement for PO as her "confusion is increasing. Multiple MD appts."
4/12/2023	Lyons, Carol	PMIDURSKI	In Home Visit	To del S&S gift card: "OMG! I am so blessed to have you all in my life." Attempt to change Comcast address
4/12/2023	Dillon, Sherry	PMIDURSKI	Phone Call	To report did not receive taxi vouchers: Del BB vouchers; TY so much
4/12/2023	Dillon, Sherry	PMIDURSKI	In Home Visit	To del BB vouchers for Z concert: Later TC rcvd by CHF re: fall in home & cancel to Z
4/12/2023	Tripp, Teresa	PMIDURSKI	Phone Call	For AP: TT will CB Thurs PM: "Going out w/sisters. My son died 4 weeks ago in CO fr. Aneurysm in heart."
4/12/2023	Benevides, Maria	PMIDURSKI	In Home Visit	For annual update: Dementia progressing: No longer driving: Wgt loss: Cont Comcast request
4/12/2023	Furtado, Fatima	APAZ	Phone Call	Re request to gift her cost of fridge paid in Oct 2022. ED declined. Will call Fatima 4/14 with decision.
4/12/2023	Shea, Joan	APAZ	In Home Visit	Request to participate in FLO
4/12/2023	Gregory, Madelyn	APAZ	Phone Call	To schedule HV. Requested a call tomorrow 4/13.
4/12/2023	Gregory, Madelyn	APAZ	Phone Call	Busy again today. Requested I call 4/14 10am
4/12/2023	DeGrace, Carmen	PMIDURSKI	In Home Visit	For NEW referral: Multiple medical issues w/fibromylgia: Mattress >30yo: To get estimate fr Worleys
4/12/2023	Medeiros, Kathleen	APAZ	In Home Visit	Requesting ARAW support for mattress and box spring.
4/13/2023	Todd, Kristine	PMIDURSKI	Phone Call	RC re: need for Oil; KT to call CES cm to inquire about little necessities fund: Will f/u w/ARAW
4/13/2023	Benoit, Ruth	PMIDURSKI	Phone Call	For annual update & review: "I am doing well. I like my new apartment. I want to bring my friend to a Z show."
4/13/2023	Espejo, Sharon	PMIDURSKI	In Home Visit	For NEW referral: Newly widowed: Req assist w/rent or bills: Ref to SHINE, DCOA OW, ACCS
4/13/2023	Livesley, Virginia	PMIDURSKI	Phone Call	Req assist w/car repairs that are being completed now: Has pending CB check: will use CB to pay for repairs
4/13/2023	DeMedeiros, Sharon	PMIDURSKI	Phone Call	To inquire process for assist w/car repair: To have mechanic send estimate for muffler repair: TY ARAW
4/14/2023	Fragata, Maria	APAZ	Phone Call	Re: invoice for 425/23 dental visit. Will have dentist's office all ARAW to get correct estimate
4/14/2023	Tripp, Teresa	APAZ	Phone Call	Requesting will help. Referred to SCCLS and DCOA.
4/14/2023	Horne, Donna	APAZ	Phone Call	RC: She will attend the luncheon on 4/20 including Salsa.
4/14/2023	Chaput, Vanessa	APAZ	Phone Call	Re: moving soon. Seeking ARAW next steps. Cannot move until she has keys next Tue. EM to PGM to F/U

Date	Beneficiary	Staff	Type	Notes
4/14/2023	Furtado, Fatima	APAZ	Phone Call	RC re: denied for request from ARAW reimburse fridge cost. Reviewed request process. Fatima aware.
4/14/2023	Martinez-Colon, Nilda	APAZ	Phone Call	To Coastline to get correct number for daughter. LVM to call back re board decision/Comcast address change
4/14/2023	Pina, Teresa	APAZ	Phone Call	Re: Approval of request. She will get help changing billing address to 174 Union Street NB
4/14/2023	Enoksen, Charlotte	APAZ	Phone Call	Re: Approval of request. "Blessings to all. I just started writing a poem last night!" Will arrive Tuesday.
4/14/2023	Alves, Louise	APAZ	Phone Call	From daughter request Board decision. Approved. "Thank you so very, very much for your help!"
4/14/2023	O'Keefe, Lindelle	APAZ	Phone Call	To provide DCOA Matt contact info. And application review.
4/14/2023	Gregory, Madelyn	APAZ	Phone Call	LVM re: missed TC. Requested a call back to review eligibility and schedule HV if qualifies.
4/14/2023	Dobson, Sally	APAZ	Phone Call	Reschedule home visit. EM to PGM and ADM.
4/14/2023	Hamel, Charlotte	APAZ	Phone Call	Re: New referral. HV schooled 4/18. Referred by NB Fishing Heritage. Referral form submitted to admin.
4/18/2023	Connors, Brenda	APAZ	Phone Call	Re" FLO approval. And CNN telephone number.
4/18/2023	Martinez-Colon, Nilda	APAZ	Phone Call	Re: approval of cable. Daughter will change address. Will call CFC re AC financial support.
4/18/2023	Silva, Marina	PMIDURSKI	Phone Call	Req assist w/forms: ref to NBHA, PACE, CES: Sched for heart surgery 4/26: Housing court 4/20
4/18/2023	Chaput, Vanessa	APAZ	Phone Call	RC: Informed Vanessa ok to call Tavares movers today. Approved \$280-\$414.: Move 5/4 tp Apt 9A
4/18/2023	Miranda, Leah	APAZ	Phone Call	LVM requesting return call to review FLO record of eligibility.
4/18/2023	Benoit, Susan	PMIDURSKI	Phone Call	Upset re: PACE & C&FS: Encouraged to call counselor
4/18/2023	Collins, Donna	APAZ	Phone Call	LVM re: approval of cell phone and car support follow up. Requested a call back.
4/18/2023	Zych, Joanne	APAZ	Phone Call	Inquiring on check. EMM to adm & PGM
4/18/2023	Espejo, Sharon	PMIDURSKI	Phone Call	Balances of CC: ACCS info provided: SE to call ACCS & SHINE re: supplemental Ins
4/18/2023	Vieira, Nancy	APAZ	Phone Call	LVM x4 requesting return call to review FLO record of eligibility. Will mail note.
4/18/2023	Todd, Kristine	PMIDURSKI	Phone Call	Re: Oil: Reports CES unable to help: "I will be OK. It's almost summer."
4/18/2023	Almeida, Mildred	CFOLEY	Phone Call	Confusion w/address change w/CC - 3rd party issues; will call when feeling better; just out of hosp - COVID 19
4/19/2023	Waite, Cynthia	PMIDURSKI	Phone Call	Re: Award: "TY. I appreciate all you do." EMMM to WA re: Award and req to begin delivery
4/19/2023	Ponte, Marion	JCOSTA	Phone Call	From SR @WCOA, mistake on award letter, office to send corrected one
4/19/2023	Ramos, Anna	PMIDURSKI	Phone Call	Re: Award: " TY so much!" EMM to WA re: award and req to begin delivery
4/19/2023	Furness, Betty	JCOSTA	Phone Call	To cancel luncheon attendance, not feeling well this week & doesn't want to risk being around people
4/19/2023	Bourgeois, Lucille	PMIDURSKI	Phone Call	Re: Award: "OMG. You answered my prayers." LB & Pam to sched install & billing to ARAW Union St
4/19/2023	Carter, Jessie	PMIDURSKI	Phone Call	Follow up: req clarification re: criteria for ARAW: Reminiscing about SOM and FLO activities
4/19/2023	Chor, Patricia	JCOSTA	Phone Call	Looking for PM, adv will call tomorrow
4/19/2023	Costa, Maria	APAZ	In Home Visit	Requesting continued support of Xfinity services, PERS unit, and new request for Poise Pads.
4/19/2023	Openshaw, Pauline	PMIDURSKI	Phone Call	To CES & WCALF re: escort for med appts: Escorts are available via SWH & CESI
4/19/2023	Silva, Mary Theresa	APAZ	In Home Visit	Requesting continued support of laundry services and personal products.
4/19/2023	Dann, Donna	APAZ	In Home Visit	Unable to be completed. Has rep payee who handles all finances. Will have FCOA call for commode request.
4/19/2023	Ponte, Karyn	CFOLEY	Phone Call	Re solicitor offering her discounted Comcast bill but must pay now - confused with ACP; advised to ignore
4/19/2023	Martinez-Colon, Nilda	APAZ	Phone Call	Re: AC request. Provided Stan & Paul's information and requested an estimate.
4/19/2023	Holden, Barbara	PMIDURSKI	Phone Call	To dgt re: d/c BCBS policy: Dgt will call again
4/19/2023	Powell, Charlotte	PMIDURSKI	Phone Call	Re: CC address and refund: States exchanged original for lower cost: To send docs to Admin
4/19/2023	Parkinson, Ann	JCOSTA	Phone Call	From visiting nurse, lift chair will be covered by insurance
4/19/2023	Hamel, Charlotte	APAZ	Phone Call	Regarding cost of renters. Usually \$500-\$600 monthly but will no longer rent due to Covid and health issues.
4/19/2023	Braley (CES), Jillian	JCOSTA	Phone Call	With potential referral, EM sent w/referral form & brochure
4/19/2023	Rapoza, Janet	PMIDURSKI	Phone Call	To resched HV: New appt Tues May 2

Date	Beneficiary	Staff	Type	Notes
4/19/2023	Dobson, Sally	PMIDURSKI	Phone Call	To resched HV: New appt 4/28
4/19/2023	DeGrace, Carmen	PMIDURSKI	Phone Call	Re: mattress estimate: Will go to Worley for 2nd estimate: "I thought it was over the top."
4/20/2023	Carvalho, Patricia	PMIDURSKI	Phone Call	To cancel HV for today d/t illness: Will CB next week to reschedule
4/21/2023	Murach, Barbara	PMIDURSKI	Phone Call	NEW referral: VM left re: sched HV: EMM to CES ref source to help w/connecting w/ BM
4/21/2023	Pacheco, Deborah	PMIDURSKI	Phone Call	VM left req. copy of recent Comcast bill: EMM to CES CM in attempt to connect w/DP
4/21/2023	Medeiros, Patricia	PMIDURSKI	Email	From CES CM: PM staying LTC at The Royal of Fhvn: Note card mailed: Will call re: FLO continuation
4/21/2023	Letourneau, Diane	PMIDURSKI	Phone Call	To report staying LTC @ BW Dart d/t "11 falls in 1 year." 30 day notice to OT
4/21/2023	Chor, Patricia	PMIDURSKI	Phone Call	To resched HV: HV 4/25 @ 2pm
4/24/2023	Bourgeois, Lucille	PMIDURSKI	Phone Call	To req BA "set up Comcast": Suggest LB call her friend Pam who has offered to assist prn
4/24/2023	Larrabee, Regina	PMIDURSKI	Phone Call	Re: status of relocation: No available apts: Awaiting next court date for eviction
4/24/2023	Jenkins, Karen	PMIDURSKI	Phone Call	To invite to financial literacy program: "Such a great opportunity. My health is improving."
4/24/2023	Medeiros, Margaret	PMIDURSKI	Phone Call	To invite to Financial literacy program: "I will resched babysitting to attend: I need to learn about \$\$."
4/24/2023	Fredette, Lucille	PMIDURSKI	Phone Call	From niece to inform of transition to Heaven 4/17: Condolences provided
4/24/2023	Brightman, Pauline	PMIDURSKI	Phone Call	VMM left for dgt for annual FLO ROE
4/24/2023	Boudreau, Jeanne	PMIDURSKI	Phone Call	From. BM Diane L w/concerns: TC to CES > JB hosp 4/14 then transferred to The Royal of Fhvn: BM to f/u
4/24/2023	Simpkin, Carol	PMIDURSKI	Phone Call	To inquire about financial literacy and Essential Women's Event. To attend both events!
4/24/2023	Sikorski, Barbara	APAZ	Phone Call	W/ Lisa regarding comcast quote for annual application submission. Lisa will call AP back today.
4/24/2023	Miranda, Leah	APAZ	Phone Call	LVM x2 requesting a call back to complete FLO record of eligibility and see how she has been.
4/24/2023	Ambra, Patricia	PMIDURSKI	Phone Call	VM left req CB to discuss status and financial literacy program
4/24/2023	Ingham, Nancy	PMIDURSKI	Phone Call	For update w/dentures: Next appt Aug 23: Needs brakes: To get estimate
4/24/2023	Duarte, Patricia	PMIDURSKI	Phone Call	To invite to Financial literacy program: "I would love to attend." Volunteer at Rotch Duff House
4/24/2023	Sharples, Mary	PMIDURSKI	Phone Call	From SCENT re: potential assist w/ hearing aid repair: TC to MS to update financials
4/24/2023	Bissonnette, Alice	APAZ	Phone Call	Re: requesting ARAW support of 2 new tired. Has estimate. HV scheduled 4/25.
4/24/2023	Christensen, Carol	PMIDURSKI	Phone Call	Re: Comcast: CC reports service has "been shut off due to nonpayment." \$302 pd 4/14 by ARAW
4/24/2023	Sylvia, Louise	PMIDURSKI	Phone Call	NEW referral: Dgt lives w/LS> Refused to provide financials: "I think you can help others > than us." withdrawn
4/24/2023	Belafano, Judith	APAZ	Phone Call	Re: new referral. Does not qualify d/t age (57) new to area. Referred to shelters and crisis center.
4/25/2023	Murach, Barbara	PMIDURSKI	Phone Call	VMM & EMM left for BM req call back to ARAW: CES cm aware of same: BM Experiencing phone & EM issues
4/25/2023	Macedo, Maria	PMIDURSKI	Phone Call	NEW Referral from NBCOA: Req assist w/home repairs: Ref to NB OHCD: May benefit from ARAW assist: To ADM
4/25/2023	Espejo, Sharon	PMIDURSKI	Phone Call	Re: health ins: working w/SHINE @ DCOA: D/C MH Buy In d/t ^income: Awaiting CB fr. ACCS
4/25/2023	Bissonnette, Alice	APAZ	In Home Visit	For new request. 2 back tires \$254
4/25/2023	Sharples, Mary	PMIDURSKI	Phone Call	To update financials for NEW req for assist w/hearing aid repair: "TY for all you do ARAW!"
4/25/2023	Collins, Donna	APAZ	Phone Call	Regarding address change for T mobile. Will be in effect June 2023
4/25/2023	Mello, Eleanor	APAZ	In Home Visit	For annual review. Continued support of SRTA booklet \$25/month
4/25/2023	Chor, Patricia	PMIDURSKI	In Home Visit	For NEW request & update: Rent increased to \$1100/m
4/26/2023	Carvalho, Patricia	PMIDURSKI	Phone Call	To Buttonwood SDC: Req staff to remind PC of HV tomorrow 4/27 @ 10am
4/26/2023	Larrabee, Regina	PMIDURSKI	Phone Call	To report housing court ZOOM hearing Tues 5/2 @ 11am: Mediation attempt: Will check Casey Miller for apt
4/26/2023	Somers, Linda	PMIDURSKI	Phone Call	To report fx R arm s/p Seizure & fall onto glass dining room table: In need of new table: to EM estimate
4/26/2023	Okpara, Priscilia	PMIDURSKI	Phone Call	From Son Felix who reports he will be changing Comcast billing address today: Family has been paying bill
4/26/2023	Michel, Loretta	PMIDURSKI	Phone Call	From Dgt req resumption of inquiry from 2022: LM @ LTC and needs assist w/Comcast
4/26/2023	Graybill, Holly	APAZ	Phone Call	RC scheduled annual HV 5/1 at 1pm

Date	Beneficiary	Staff	Type	Notes
4/26/2023	Medeiros, Kathleen	APAZ	Phone Call	To Worley Bed. They will be sending the estimate today.
4/26/2023	Medeiros, Kathleen	APAZ	Phone Call	Re: Worleybeds Factory Outlet Mattress estimate. Per Kathleen emailed to ARAW Monday 4/24. EM adm
4/26/2023	Monteiro, Joan	PMIDURSKI	Phone Call	NEW referral fr CES: Inq re: assist w/car repair: HV sched 5/2
4/26/2023	Oliver, Sharon	APAZ	Phone Call	New referral. Seeking assistance with sewer pipe replacement. HV scheduled 5/2
4/26/2023	Gregory, Madelyn	APAZ	Note to File	Mailed unable to reach letter. Requesting a call if services needed. Requested fuel assistance.
4/27/2023	O'Keefe, Lindelle	APAZ	Phone Call	RC Daughter Penny is working on all given resources. She will call back with an update within a month.
4/27/2023	Fragata, Maria	APAZ	Phone Call	Requesting ARAW support of water bill bi-annually \$275
4/27/2023	Carvalho, Patricia	PMIDURSKI	Phone Call	To req resched of HV as MD appt today: Resched to 5/4
4/28/2023	Souza, Ethel	PMIDURSKI	Phone Call	To sched annul update: HV sched for 5/10
4/28/2023	Gadomski, Marion	PMIDURSKI	Phone Call	To report grandson Moving out: Req assist w/finances: Has reverse mortgage
4/28/2023	Miranda, Leah	APAZ	Phone Call	RC completed ROE. No need. Submitted updated and cell phone change.
4/28/2023	Metheny, Diane	PMIDURSKI	Phone Call	NEW referral from CNN: to AP
4/28/2023	Dobson, Sally	PMIDURSKI	In Home Visit	For initial eval: Private rent increased from \$800 (2022) to \$1200 April '23: req assist/bills
4/28/2023	Sylvia, Debra	APAZ	In Home Visit	Initial Referral HV completed. Requesting full firm mattress/box spring. Going to shop week of 5/1
4/28/2023	Garceau, Beverly	APAZ	Phone Call	To set up initial referral HV. Phone just rang no VM. Will call Monday 5/1
4/28/2023	Macedo, Maria	APAZ	Phone Call	LVM with daughter to schedule initial referral visit week of 5/1
4/28/2023	Beauchamp, Jane	PMIDURSKI	Email	NEW referral fr CES: Req assist w/dryer or dog: Limited income \$800/month: Supportive family: HV 5/3
4/28/2023	Vasques, Maria	PMIDURSKI	Email	NEW referral fr CES:Req assist w/shower door:Legally blind: h/o falls:Info OHCD & MassRehab: HV sched for 5/5
4/28/2023	Therhault, Frances	PMIDURSKI	Phone Call	NEW referral from CNN: Assist w/monthly bills: to AP



April 2023: Beneficiary Advocate

Patricia Midurski

REFERRALS Received: 10

Sources of referrals: Coastline x 6, NBPD, ARAW Beneficiary, Tufts care manager, FCOA

Requests submitted: 6

EDDF: 2

Updates submitted: 3

Flo updates submitted: 2

Referrals made to: City of NB OHCD, My Brother's Keeper, DEAF, Inc., RAFT (Neighbor Works), ACCS, SHINE (DCOA), CES Little Necessities Fund, CES

Pending: 14

Ineligible: 1

Withdrawn: 2

Inactive: 0

HOLD: 1

To Heaven: 1

TRENDS: Referrals abound! Coastline has had a recent influx of new care managers. Upon learning of a new care manager, an ARAW brochure and referral form is sent with an introduction to the ARAW. The same applies for the SCO GSSCs and medical team which provided 2 referrals this month. Acushnet and Fairhaven remain active with exploring the ARAW as a resource.

Gratitude: Where to begin? I am ever so grateful for my supportive family and friend network, for my compassionate colleagues, for quality health insurance and accessible health care, for living within driving distance of the best healthcare in the world, for a job that allows remote work but places the employee health ahead of the work, for having a home with room to isolate with clean bedding and a comfortable bed with a new mattress, for having access to healthy food choices, for funds to purchase needed items to promote healing, for the luxury of being able to rest and to care for myself in order to heal.

When I talk with women who are not so fortunate, my heart aches and I once again thank my lucky stars for my current place here on Earth. Mahalo ~ As I return to the office, I am even more empathetic to those who find themselves in challenging situations no matter the reason.

If I Can Stop One Heart from Breaking

By Emily Dickinson

If I can stop one heart from breaking,

I shall not live in vain;

If I can ease one life the aching,

Or cool one pain,

Or help one fainting robin

Unto his nest again,

I shall not live in vain.



April 2023: Beneficiary Advocate

Ana Paz

REFERRALS RECEIVED: 11

REFERRAL SOURCES: 1 New Bedford COA, 3 Coastline, 3 Coastal Neighbors 1 Self, 1 NB Fishing Heritage, 1 Zeiterion, 1 Citizens for Citizens

UPDATES SUBMITTED: 8

REQUESTS SUBMITTED: 5 (1 EDDF)

FLO SUBMITTED: 1

REFERRALS MADE TO: 1 YWCA, 2 SCCLS, 1 Fresh Start, 1 Dartmouth COA, 1 New Bedford COA, 1 SNAP, 1 PACE, 2 RAFT, 2 EVERSOURCE (hardship program), 1 Crisis Center, 1 Homeless Shelter, 1 Food Pantry

PENDING: 13(1 FLO)

INELIGIBLE: 1

WITHDRAWN: 2

INACTIVE: 1

TRENDS: This month this Advocate has come across several woman who have fallen behind on their EVERSOURCE payment plan for similar reasons and circumstances who are requesting ARAW support. This Advocate identifies the primary reason being they are aware that their gas and electricity cannot be shut off due to age, however the inability to pay causes them great anxiety. They are finding themselves with monthly utility statements in average amount of approximately \$3,000 and are now subject to a downpayment before they can participate in the program again. This initial downpayment varies on their overdue amount and is over approximately \$200, which they struggle pay negotiated amount never mind this downpayment. When this Advocate asked why they found themselves unable to pay monthly payment plan amount, they all acknowledge it is because they are struggling in other financial situations, such as, credit card debt, pet care expenses, unexpected car, or home repairs, and simply not managing their finances. This Advocate encouraged these women to please not hesitate to call EVERSOURCE and explain their circumstances, and that perhaps EVERSOURCE can work with them again to ensure they are in good standings. Additionally, this Advocate provides Senior discount program application for an additional reduction in utility costs. In follow up, some have actively been working with EVERSOURCE, however, some just are reluctant to follow through for reasons they are unwilling to disclose, or shame.

GRATITUDE: This month it was a pleasure to meet some new women, existing and new who were absolutely terrified to meet with this Advocate. All visits went well and ended with much relief and optimism. These women open in ways, this Advocate isn't sure she could. Very courageous and trusting of them. Not only does this Advocate feel grateful of being able to meet and assist these women, but that they all took the time to call to thank and express what a relief, encouragement, and knowledge they received from the visit. What they did not realize is that they are not alone and that their circumstances are felt by so many others and that it is ok, and it will all work out with the right information, and determination. There are resources and ARAW can assist as last resort if possible.

Finance Committee Meeting Minutes
Joint Meeting with BofA and Investment Advisory Committee
April 20, 2023 9:30 AM

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

Per our goal established last year, 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 review portfolio performance of the last quarter of our fiscal year (and first quarter of the calendar year).

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 as of March 31 is \$19,168,007 with a 4.69% quarterly return and a -5.59% return for the year.

Market performance in this quarter was impacted favorably by a warmer winter, rapid reopening of China post-COVID and solid employment figures. All major asset classes showed gains. Offsetting this positive news was the banking sector turmoil in early March and its impact on Treasury yield and equities.

Looking Ahead

Many unknowns face the banking world in the near future. This unpredictability has never been experienced and BofA retains a 'neutral but defensive' outlook with our portfolio cautiously positioned. Additional interest rate increases by the Fed are possible and there is a general assumption there will be a slight recession later in the calendar year. In order to maintain our agility in responding to market changes, equity and fixed income were slightly reduced to provide cash should favorable investment opportunities arise. The impact (short- or long-term) of AI and developing technology is also of interest.

Continuing Education

As she effectively did last year, Kathleen has offered to continue our education with 'Investing 103' in the near future. Committee members are asked to submit suggested topics for upcoming sessions.

These minutes are a distillation of a detailed and informative meeting in which participants were engaged, thoughtful and helpful. Such quarterly reviews in the year to come promise to bring further understanding of the global banking world and ARAW's portfolio stability.

Next Meeting: TBD at 174 Union St.

Next Finance Committee Meeting: Tuesday, May 16 at 9:30 AM

Mary Ellis, Treasurer
April 24, 2023

Trade Date

Account Summary

Apr. 01, 2023 through Apr. 30, 2023

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

Market Value \$19,131,365.89

Account Activity			Realized Gain/Loss Summary			Income Summary		
Description	Current Period	YTD Since 04/01/23	Description	Current Period	Fiscal YTD	Description	Current Period	YTD since 04/01/23
Beginning Market Value	\$19,168,006.80	\$19,168,006.80	Short-term	\$0.00	\$36,433.24	Dividends - Taxable	\$16,503.60	\$16,503.60
Income	17,960.76	17,960.76	Long-term	0.00	349,678.91	Interest - Taxable	1,457.16	1,457.16
Deposits	2,124.75	2,124.75	Net Total	\$0.00	\$386,112.15	Total Income	\$17,960.76	\$17,960.76
Disbursements	-178,124.75	-178,124.75						
Bank Fees	-6,949.82	-6,949.82						
Change in Market Value	128,348.15	128,348.15						
Ending Market Value	\$19,131,365.89	\$19,131,365.89						
Change in Account Value	-36,640.91	-36,640.91						
Accrued Income	8,007.97	8,007.97						
Ending Value + Accrued Income	\$19,139,373.86	\$19,139,373.86						

Portfolio Allocation						
Description	Market Value	Tax Cost	Unrealized Gain/Loss	Accrued Income	Estimated Annual Income	Current Yield
Cash/Currency	\$565,961.47	\$565,961.47	\$0.00	\$2,339.41	\$27,035.97	4.77%
Equities	13,098,055.01	9,555,358.30	3,542,696.71	5,060.49	219,034.56	1.67
Fixed Income	2,955,790.62	2,881,529.58	74,261.04	320.95	86,588.87	2.92
Hedge Funds	2,494,368.13	2,576,024.78	-81,656.65	\$287.12	60,700.69	2.43
Tangible Assets	17,190.66	21,479.79	-4,289.13	0.00	644.23	3.74
Total Assets	\$19,131,365.89	\$15,600,353.92	\$3,531,011.97	\$8,007.97	\$394,004.32	2.05%
Total	\$19,131,365.89	\$15,600,353.92	\$3,531,011.97	\$8,007.97	\$394,004.32	



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.

ASSOCIATION FOR THE RELIEF OF AGED WOMEN

Transaction Detail By Account

April 2023

	<u>Date</u>	<u>Name</u>	<u>Account</u>	<u>Amount</u>
Apr 23				
	04/12/2023	STOP & SHOP	LYONS, CAROL - GC	100.00
	04/19/2023	STAN & PAUL'S INC.	MARTINEZ-COLON, NILDA - AC	649.95
	04/25/2023	HAWTHORN DENTAL, PC	FRAGATA, MARIA - DENTAL	215.00
	04/30/2023	TOWN OF FAIRHAVEN - VAN	JESUS, ELIZABETH - FCOA VAN	122.82
Apr 23				<u><u>1,087.77</u></u>

Name	Birth Date	Age	Board Member
Greenwood, Dorothy	5/15/1929	94	Office
Mendes, Darlene	5/16/1950	73	Cathy Mayall
Parker, Delia	5/16/1935	88	Gale Beaton
Chytrus, Leslie	5/19/1946	77	Gale Beaton
Martinez-Colon, Nilda	5/20/1933	90	Office
Vieira, Germaine	5/20/1937	86	Office
Harrington, Diane	5/21/1954	69	Mary Ellis
Jenkins, Karen	5/21/1954	69	Cathy Mayall
Costa, Maria	5/23/1941	82	Gloria deSa
Sharples, Mary	5/28/1938	85	Roseanne O'Connell
Wetherell, Mary	5/31/1937	86	Mary Ellis
Medeiros, Kathleen	6/1/1942	81	Office
DaRosa, Priscilla	6/3/1938	85	Rosemary Saber
Harrison, Patricia	6/7/1943	80	Office
Silva, Mary Theresa	6/8/1930	93	Rosemary Saber
Silva, Yvonne	6/8/1941	82	Office
Openshaw, Pauline	6/10/1946	77	Angela Natho
Polek, Andrea	6/10/1955	68	Office

ARAW BENEFICIARY REQUEST: RECOMMENDATIONS

MAY 2023 | VER 5/5/23

Beneficiary	Biggest Concern	Notes	Specific Request	Recommendations
<p>New BENE#</p> <p>Jesus, Elizabeth 84 y/o; 10/29/1938 Income: \$1,011 sub</p> <p>ARAW support: New</p> <p>MEB: -\$12</p> <p>ARAW: Pat</p>	<p>"I need to get to my medical appts. I had to cancel my eye appt last week & I have two appts next week. One is for my heart & the other is my primary care doctor for my diabetes. I thought I had free trans but the FCOA wants me to pay the volunteers \$10 per ride...I also miss being with people. I worked for 10 yrs as a greeter/security at Walmart. I loved that job as I was with people. I'd still be working if it weren't for my eyes. I know I would sleep better if I was busy during the day especially if I can be with people. I am a people person."</p>	<p>Dana Court Referred from FCOA</p> <p>Reliant of FCOA transportation – limited vision and hearing – cost forcing canceled appts</p> <p>EDDF transportation from FCOA until board review or Fallon picks up</p> <p>Fallon: social day, transportation, hearing aids</p>	<p>FCOA transportation for medical appointments</p> <p>FLO participation</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ FCOA transportation for medical appointments ▪ FLO participation
<p>New BENE#</p> <p>DeGrace, Carmen 67 y/o; 7/18/1955 Income: \$1,250 sub</p> <p>ARAW support: New</p> <p>MEB: \$23</p> <p>ARAW: Pat</p>	<p>"I have made mistakes with my finances over the years & I just cannot seem to get out of the loop. I took a loan to consolidate my CC & now I find the CC beginning to add up again. I live frugally & most of my belongings are from the 80s. My bedroom set is more than 30 year old including my mattress. With my fibromyalgia & sleep apnea, I get very little sleep due to my pain. Now I need an MRI of my right shoulder due to increasing pain. I don't know if it is bursitis or a torn rotator cuff. My doctor said either is possible. I don't mean to complain as so many are worse off than me but I could use some help.</p>	<p>Residence at Buttonwood (section 8) – refer from GSSC</p> <p>Hesitant to ask for support</p> <p>High usage and balance on credit cards</p> <p>Plans to attend financial literacy workshop</p> <p>Fibromyalgia causes sleep problems – old mattress</p>	<p>Gift:</p> <ul style="list-style-type: none"> ▪ Estimate Queen size mattress & box spring with frame \$1,369.50 from Worley Beds 	<p>Gift:</p> <ul style="list-style-type: none"> ▪ Estimate Queen size mattress & box spring with frame \$1,369.50 from Worley Beds

ARAW BENEFICIARY REQUEST: RECOMMENDATIONS

MAY 2023 | VER 5/5/23

Beneficiary	Biggest Concern	Notes	Specific Request	Recommendations
<p>BENE# 19-20/28</p> <p>Costa, Maria 81 y/o; 5/23/1941 Income: \$1,294 H</p> <p>ARAW support \$7,529: Reoccurring: Cable/phone \$143 '19, EPERS \$51.95 '19 Gifts: Holiday \$150 '20-22</p> <p>MEB: \$136</p> <p>ARAW: Ana</p>	<p>"I don't worry. I have ARAW who helps me tremendously. I really appreciate this support & hope it will continue. The biggest help would be to continue helping me & if I can ask for Poise pads size 4."</p>	<p>Spend most of her time watching Portuguese channel</p> <p>ARAW funded EPERS allows safety while walking outside (MH units only inside)</p> <p>MH provided personal care products sub-par</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Continuation of cable/phone \$143 ▪ Continuation of EPERS \$51.95 ▪ Poise pads, 2 packages \$33 from Westport Apothecary 	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Continuation of cable/phone \$143 ▪ Continuation of EPERS \$51.95 ▪ Poise pads, 2 packages \$33 from Westport Apothecary
<p>BENE# 21-22/36</p> <p>Sikorski, Barbara 83 y/o; 4/10/1940 Income: \$1,741 H</p> <p>ARAW support \$4,584: Reoccurring: EPERS \$51.95 '22 Gifts: Home equity loan \$3,759 '22, Holiday \$150 '22</p> <p>MEB: \$88</p> <p>ARAW: Ana</p>	<p>Barbara was recently diagnosed with ovarian cancer and had surgery. She is healing and very unsteady on her feet. She worries that if she falls, while she has medical alert necklace, family won't know. She is hoping to get cameras installed in the home, but needs internet and she cannot afford it.</p>	<p>Paying off cc debt incurred by late son down from \$2,500 last year</p> <p>Recent diagnosis of ovarian cancer complete hysterectomy – refusing chemo</p> <p>Weakened state – staying at home cable important – add internet for safety</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Cable/phone/internet \$134.95 	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Cable/phone/internet \$134.95

ARAW BENEFICIARY REQUEST: RECOMMENDATIONS

MAY 2023 | VER 5/5/23

Beneficiary	Biggest Concern	Notes	Specific Request	Recommendations
<p>BENE# 13-14/02</p> <p>Sharples, Mary 84 y/o; 5/28/1938 Income: \$1,511 H</p> <p>ARAW support \$39,251: Reoccurring: BCBS \$687.21 '13, Cable \$51.29 '20, Phone/internet \$84.53 '17 Gifts: Hearing aid \$3,600 '19, Hot water heater \$1,150 '19, Car ins \$822 '18, Holiday \$100-150 '13-22</p> <p>MEB: \$94</p> <p>ARAW: Pat</p>	<p>"The ARAW has done so much for me & I am most grateful. THANK YOU!! I have been experiencing increased difficulty hearing & I went to SCENT for an evaluation. I was informed that my hearing aid needs repairs & unfortunately it is not under warranty any longer. The audiologist suggested I explore if ARAW would help with the cost but I hate to ask. That is why Heather called from SCENT on my behalf. I already get so much help from you. I truly appreciate all you do for me."</p>	<p>Hearing aid repair needed (ARAW purchased in 2019)</p> <p>No longer under warranty</p> <p>\$2,200 in bank – homeowner</p> <p>Very lonely</p>	<p>Gift:</p> <ul style="list-style-type: none"> ▪ Estimate Hearing aid repair \$225 from SCENT 	<p>Gift:</p> <ul style="list-style-type: none"> ▪ Estimate Hearing aid repair \$225 from SCENT
<p>BENE# 21-22/06</p> <p>Chor, Patricia 86 y/o; 10/22/1936 Income: \$2,241 R</p> <p>ARAW support \$3,544: Reoccurring: Cab \$50 '21 Gifts: Veteran's \$289 '20, Rent \$850 '21 & \$600 '20, Glasses \$538 '20, SS Gift card \$50 '22, Holiday \$150 '20-22</p> <p>MEB: \$79</p> <p>ARAW: Pat</p>	<p>"My mattress is so old like me. I was hoping I might be able to save money & buy one but my rent increased in January & now this is not possible for me to buy. I appreciate all you do for me. Thank you!"</p>	<p>Continued grievances with landlord plus rent increase but has chosen to remain in apt</p> <p>Taxi vouchers used to shop at MB – specialized food</p> <p>Mattress set old – reports body aches (was saving \$ for new but then rent increase)</p> <p>Daughter contributes to expenses</p>	<p>Exception:</p> <ul style="list-style-type: none"> ▪ <i>Continuation</i> of living alone guideline <p>Monthly:</p> <ul style="list-style-type: none"> ▪ <i>Continuation</i> of cab vouchers, 2 round trips to Market Basket, up to \$50 <p>Gift:</p> <ul style="list-style-type: none"> ▪ Estimate Mattress and box spring \$1,019 from Worley Beds 	<p>Exception:</p> <ul style="list-style-type: none"> ▪ <i>Continuation</i> of living alone guideline <p>Monthly:</p> <ul style="list-style-type: none"> ▪ <i>Continuation</i> of cab vouchers, 2 round trips to Market Basket, up to \$50 <p>Gift:</p> <ul style="list-style-type: none"> ▪ Estimate Mattress and box spring \$1,019 from Worley Beds

ARAW BENEFICIARY REQUEST: RECOMMENDATIONS

MAY 2023 | VER 5/5/23

Beneficiary	Biggest Concern	Notes	Specific Request	Recommendations
<p>BENE# 21-22/15</p> <p>DeJesus, Eva 93 y/o; 9/13/1929 Income: \$989 R</p> <p>ARAW support \$3,784: Reoccurring: Ensure \$48 '21, Cable/phone/internet \$135 '21 Gifts: AC \$270 '22, Holiday \$150 '21-22</p> <p>MEB: \$1</p> <p>ARAW: Pat</p>	<p>"My landlord increased my rent last September. I have tried to adjust my budget but I am getting behind in my electric. Rising prices of everything especially groceries make paying all my bills a challenge with the higher rent. Even with the ARAW helping with the TV & Ensure drinks, I am experiencing difficulty. Do you think I could get a little bit of help with my rent? I am too old to move at this time in my life & I understand there isn't much available out there."</p>	<p>General increase of items is prohibitive for her</p> <p>Denied support of ensure</p> <p>Rent increase – not able to support too old to move</p> <p>Will explore CB</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Continuation of cable/phone/internet \$135 ▪ Continuation of Ensure \$48 from Westport Apothecary <p>Gift:</p> <ul style="list-style-type: none"> ▪ Invoice Rent assistance \$150 per month for 6 months 	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Continuation of cable/phone/internet \$135 ▪ Continuation of Ensure \$48 from Westport Apothecary <p>Gift:</p> <ul style="list-style-type: none"> ▪ Invoice Rent assistance \$150 per month for 6 months <p><i>Report back on situation in 6 months</i></p>
<p>BENE# 21-22/28</p> <p>Curado, Alzira 75 y/o; 9/1/1947 Income: \$931 sub</p> <p>ARAW support \$8,895: Reoccurring: Cable/phone/internet \$185 '21 Gift: Car insurance \$1,040 '22-23, Car loan \$229.79 per month in '22 & \$689.37 (3 mos) '21, Holiday \$150 '20-22</p> <p>MEB: \$87</p> <p>ARAW: Pat</p>	<p>"I need help with my car. I will need to borrow \$1,000 from Tina (neighbor) to fix my car. I hit a truck & I need to get the car repaired. Will you pay off the balance of my car? How about continuing with my car insurance payments & my Comcast bill? I need to help my son in Florida & I want to pay back my son in New Bedford for the headstone."</p>	<p>Provides cell phone and sneds son money</p> <p>Husband's headstone – paid other son back in full</p> <p>Declines MMP</p> <p>Uncertain if information provided is complete or accurate (past history)</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Cable/phone/internet \$185 for five months (May-Sep) 	<p style="text-align: center;">Ongoing support not approved – due to uncertainty of situation and lack of follow through on offered "solutions" and resources</p> <p>Gift:</p> <ul style="list-style-type: none"> ▪ Will pay off debt up to \$1,200 and then place inactive

ARAW BENEFICIARY REQUEST: RECOMMENDATIONS

MAY 2023 | VER 5/5/23

Beneficiary	Biggest Concern	Notes	Specific Request	Recommendations
<p>BENE# 23-24/03</p> <p>Martinez-Colon, Nilda 89 y/o; 5/20/1933 Income: \$930 sub</p> <p>ARAW support: Approved for phone/internet 4/2023</p> <p>MEB: \$164</p> <p>ARAW: Ana</p>	<p>Nilda & family are concerned with her health in the summer months. She moved into Melville Towers 2 months ago & has no AC. The family used to live there & know how hot the apartments get & she has extreme CHF & the heat can cause her to faint & be hospitalized.</p>	<p>New to Melville Towers with high temperatures coming – heat complicates CHF – safety concern</p>	<p>Gift:</p> <ul style="list-style-type: none"> ▪ Price Quote AC \$649.95 from Stan & Paul’s 	<p style="text-align: center;"><i>Approved EDDF Due to safety concern</i></p>
<p>New BENE#24/02EDDF</p> <p>Hamel, Charlotte “Sherry” 76 y/o; 4/3/1947 Income: \$1,951 H</p> <p>ARAW support: New</p> <p>MEB: \$62</p> <p>ARAW: Ana</p>	<p>“What worries me the most is not being able to sustainably live in my home for much longer. Currently I have no hot water & I don’t even know what I am going to do to replace it.”</p>	<p>Applying to city NB for financial Program and emergency repair (roof)</p> <p>No other support available</p> <p>Plans to sell home after repairs done – recognizes unsustainable living situation</p> <p>Had been very resistant to ask for help until BA intervention</p> <p>Virtual vote sent to Bene Comm</p>	<p>Gift:</p> <ul style="list-style-type: none"> ▪ Estimate Hot water tank & installation \$1,500 from Fred’s Plumbing and Heating 	<p style="text-align: center;"><i>Approved EDDF with committee consent</i></p>

ARAW BENEFICIARY REQUEST: RECOMMENDATIONS

MAY 2023 | VER 5/5/23

Beneficiary	Biggest Concern	Notes	Specific Request	Recommendations
<p>New BENE# 24/01EDDF</p> <p>Harrison, Patricia 79 y/o; 6/7/1943 Income: \$914 H</p> <p>ARAW support: New</p> <p>MEB: \$10</p> <p>ARAW: Pat</p>	<p>"My son tried to help me by cleaning my bedroom. Evidently when he moved my bed, he broke the frame. It is very old so I am not blaming him. But my nurse & therapist say I cannot sleep on my bed because it is dangerous. So I have been sleeping in my chair in the living room. This has been a few months now & I would like to sleep in my bed one day."</p>	<p>Broken bedframe – unsafe and deemed dangerous by Nurse and therapist</p>	<p>Gift:</p> <ul style="list-style-type: none"> ▪ Estimate Full size bed frame and headboard \$219.99 from Bob's Furniture 	<p style="text-align: center;"><i>Approved EDDF Due to safety concern</i></p>
<p>New BENE# 24/03EDDF</p> <p>Medeiros, Kathleen 80 y/o; 6/1/1942 Income: \$1,063 sub</p> <p>ARAW support: New</p> <p>MEB: \$233</p> <p>ARAW: Ana</p>	<p>Kathleen has been suffering for a while with chronic, severe back pain that came out of nowhere 20 years ago. She believes it is due to the aging process & being a waitress close to 50 yrs. She has been sleeping on the floor because her 26 y/o mattress is too soft & the floor provides more relief. She cannot afford a firm mattress & box spring. "Kim told me about ARAW. I was going to settle w/ sleeping on the floor the rest of my life because I cannot afford to buy a mattress."</p>	<p>Hidden Brook Apts (section 8) CES referral</p> <p>Very ill – only leaves apt for medical appointments</p> <p>Former waitress – back pain; old mattress 32 minutes to get out of bed</p> <p>Sleeping on bedroom floor!!!</p>	<p>Gift:</p> <ul style="list-style-type: none"> ▪ Estimate Queen size mattress and box spring \$849 from Worley Beds 	<p style="text-align: center;"><i>Approved EDDF Due to safety concern</i></p>

ARAW BENEFICIARY REQUEST: RECOMMENDATIONS

MAY 2023 | VER 5/5/23

Beneficiary	Biggest Concern	Notes	Specific Request	Recommendations
<p>BENE# 06-07/03</p> <p>Bissonnette, Alice 81 y/o; 10/9/1941 <i>Income: \$1,625 sub</i></p> <p>ARAW support \$4,584: Reoccurring: BCBS 687.21 '06 Gifts: Car loan \$1,625 '22, Car repair \$1,254 '21, \$661 '20, 225 '19 & \$725 '18, CC \$725 '12, Dental \$1,505 '16, \$1,600 '11, \$1,760 '10, \$700 '09 & \$1,000 '08, Hearing aids \$4,200 '21, Holiday \$100-150 '07-22</p> <p>MEB: \$475</p> <p>ARAW: Ana</p>	<p style="color: red;">Missing on application</p>	<p>McGann Terrace</p> <p>Recent break-in (personal info stolen) and auto tampered with</p> <p>Tires need repair – will not drive until back tires replaced</p> <p>High month end balance - saving for funeral as she has no one</p>	<p>Quarterly:</p> <ul style="list-style-type: none"> ▪ <i>Continuation</i> of BCBS \$687.21 <p>Gift:</p> <ul style="list-style-type: none"> ▪ Estimate Two tires \$254 from Arias Auto Repair 	<p><i>Withdrawn – annual update due in August</i></p>

ARAW BENEFICIARY UPDATE DECISIONS

MAY 2023 | VER 5/3/23

Beneficiary	Biggest Concern	Notes	Current Support	Current Support
<p>BENE# 16-17/04</p> <p>Greenwood, Dorothy 93 y/o; 5/15/1929 Income: \$1,860 H</p> <p>ARAW support \$22,937: Reoccurring: BCBS \$687.21 '16, EPERS \$51.95 '19, FCOA Van \$37.37 (used once in '22) Gifts: Recliner \$688.99 '21, Holiday \$100-150 '16-22 Discontinued: Laundry \$60-80 '19-22 (Now covered by CES)</p> <p>MEB: \$297</p> <p>ARAW: Ana</p>	<p>What worries Dot the most is losing her independence now that she can no longer see. Per Dot, "I am very independent. I have been all my life. Not being able to grocery shop because I can't see the items anymore is bringing my spirits way down. I might pay my friend \$20 to go with me & be my eyes."</p>	<p>Blind in both eyes – needs assistance with shopping (online?)</p> <p>Car expenses but does not use</p> <p>Should not be paying FCOA – we pay</p>	<p>Quarterly:</p> <ul style="list-style-type: none"> ▪ BCBS \$687.21 <p>Monthly:</p> <ul style="list-style-type: none"> ▪ EPERS \$51.95 <p>Monthly total: \$281.02</p>	<p>Quarterly:</p> <ul style="list-style-type: none"> ▪ BCBS \$687.21 <p>Monthly:</p> <ul style="list-style-type: none"> ▪ EPERS \$51.95
<p>BENE# 22-23/06</p> <p>Lawrence, Gail 73 y/o; 9/13/1949 Income: \$1,399 sub</p> <p>ARAW support \$4,633: Reoccurring: BCBS \$232.17 '22 Gifts: Car repair \$1,802 '21, Holiday \$150 '21-22</p> <p>MEB: \$275</p> <p>ARAW: Ana</p>	<p>Gail's reoccurrent cancer 2 years ago is on her mind. She remains positive. ARAW support of BCBS is such a relief for her. "I am more than thankful to have ARAW pay my health insurance for me."</p>	<p>Crossroads</p> <p>Significant health issues – insurance paramount</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ BCBS \$232.17 <p>Monthly total: \$232.17</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ BCBS \$232.17

ARAW BENEFICIARY UPDATE DECISIONS

MAY 2023 | VER 5/3/23

Beneficiary	Biggest Concern	Notes	Current Support	Current Support
<p>BENE# 12-13/10</p> <p>Shea, Joan 90 y/o; 3/29/1933 Income: \$1,111 H</p> <p>ARAW support \$45,615: Reoccurring: EPERS \$51.95 '16, Laundry \$20-40 '21 Gifts: Sump pump \$595 '22, Car insurance \$681 '19, Electric \$268 '19, CC \$3,125 '19, Vet \$1,278 '20 & \$1,432 '19, Atty fees \$2,812 '18, Asbestos \$950 '16, HOI \$1,522 '22, \$1,259 '21, \$1,042 '20, \$864 '19, \$676 '18, \$701 '17 & \$906 '16, RE taxes \$2,155 '13-14, Furnace \$3,550 '16, Stove \$389 '13, Plumbing \$90 '21, Holiday \$100-150 '13-22</p> <p>MEB: \$599</p> <p>ARAW: Ana</p>	<p>Joan's greatest worry is to pay off all her debt before she passes. Her current desire is to pay the neighbor back for a car he bought her that she no longer has. She also hopes to pay FCOA for a Chimney placement. Joan constantly expressed her gratitude for all ARAW has done for her these past 10 years "ARAW has been so good to me all these years. I am now able to financially care for myself and cannot ask for more."</p>	<p>No longer drives – saves \$ (online shopping from S&S)</p> <p>Due to increase in SSI feels she can pay HOI</p> <p>Concerned about perceived loans which are not expected to be paid back (car & chimney)</p> <p>EPERS for safety & laundry due to advanced age</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Laundry \$80 ▪ EPERS \$51.95 <p>Monthly total: \$131.95</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Laundry \$80 ▪ EPERS \$51.95
<p>BENE# 23/06G</p> <p>Benoit, Ruth 83 y/o; 8/15/1939 Income: \$1,042 sub</p> <p>ARAW support \$1,111: Gifts: Car repair \$681 '22, Moving costs \$280 '22, Holiday \$150 '22</p> <p>MEB: \$211</p> <p>ARAW: Pat</p>	<p>"I guess I am pretty lucky. I have a nice apartment, plenty of food, enough clothes, a car that works, & a few friends. What more is there? I cannot thank the ARAW enough for helping with my move to this apartment. It has made a big difference in my legs. Thank you! I go out bowling on Sunday evenings & I enjoy singing karaoke with my friend on Wednesdays. I keep asking her to come with me to a show at the Z because I can get tickets from you but she tells me NO. But I am going to keep trying."</p>	<p>Manomet Place</p> <p>Very social wants to engage with FLO activities</p>	<p>Move to FLO & BM calls</p>	<p>Move to FLO & BM calls</p>

ARAW BENEFICIARY UPDATE DECISIONS

MAY 2023 | VER 5/3/23

Beneficiary	Biggest Concern	Notes	Current Support	Current Support
<p>BENE# 22-23/07</p> <p>Benevides, Maria 79 y/o; 12/6/1943 Income: \$1,271 R</p> <p>ARAW support \$1,811: Reoccurring: Cable/phone \$150 '22 Gifts: Medical copay \$90 '22, Holiday \$150 '22</p> <p>MEB: \$44</p> <p><i>ARAW: Pat</i></p>	<p>"I think I am losing my mind. I was sick with fever for 3 days & now I am forgetting all the time. I have lost 10 lbs & my friends tell me I look sick. I try to eat & my family buys my favorite pastries but I am having a hard time getting weight on. I used to drive to Church every day & sing in my choir. Now I go with my family on Sundays as my car is broken. I watch Mass on TV & watch my shows. Thankfully, my family are always visiting & helping me to remember."</p>	<p>Diminished mental health and memory due to grief of late husband – Alzheimer diagnosis</p> <p>FEW being pursued</p> <p>Majority of day spent watching catholic mass on TV and Portuguese channel</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Cable/phone \$150 <p>Monthly total: \$150</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Cable/phone \$150
<p>BENE# 18-19/15</p> <p>Silva, Mary Theresa 92 y/o; 6/8/1930 Income: \$1,228 H</p> <p>ARAW support \$4,881: Reoccurring: Laundry \$50 '20, Personal Care (annual \$250) '19 Gifts: Hearing \$2,966 '18, Holiday \$150 '19-20</p> <p>MEB: \$58</p> <p><i>ARAW: Ana</i></p>	<p>"The incontinence products are such a help. I have a prolapse bladder & I cannot hold it in most of the time. And the laundry comes in so handy, especially now that I have been feeling a bit weaker. Thank you!"</p>	<p>Daughter lives on 2nd floor and helps out with ADLs and expenses</p> <p>Increased pain and decreased mobility</p> <p>Church very important to her</p> <p>Personal products and laundry due to incontinence</p> <p>Sent photo of herself to us – very appreciative</p>	<p>Annually:</p> <ul style="list-style-type: none"> ▪ Personal care products \$250 (approx) from Westport Apothecary <p>Monthly:</p> <ul style="list-style-type: none"> ▪ Laundry \$50 <p>Monthly total: \$70.83</p>	<p>Annually:</p> <ul style="list-style-type: none"> ▪ Personal care products \$250 (approx) from Westport Apothecary <p>Monthly:</p> <ul style="list-style-type: none"> ▪ Laundry \$50

ARAW BENEFICIARY UPDATE DECISIONS

MAY 2023 | VER 5/3/23

Beneficiary	Biggest Concern	Notes	Current Support	Current Support
<p>BENE# 21-22/28</p> <p>Curado, Alzira 75 y/o; 9/1/1947 Income: \$931 sub</p> <p>ARAW support \$8,895: Reoccurring: Cable/phone/internet \$185 '21 Gift: Car insurance \$1,040 '22-23, Car loan \$229.79 per month in '22 & \$689.37 (3 mos) '21, Holiday \$150 '20-22</p> <p>MEB: \$87</p> <p>ARAW: Pat</p>	<p>"I need help with my car. I will need to borrow \$1,000 from Tina (neighbor) to fix my car. I hit a truck & I need to get the car repaired. Will you pay off the balance of my car? How about continuing with my car insurance payments & my Comcast bill? I need to help my son in Florida & I want to pay back my son in New Bedford for the headstone."</p>	<p>Provides cell phone and sends son money</p> <p>Husband's headstone – paid other son back in full</p> <p>Declines MMP</p> <p>Uncertain if information provided is complete or accurate (past history)</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ Cable/phone/internet \$185 for five months (May-Sep) 	<ul style="list-style-type: none"> ▪ Ongoing support not approved – due to uncertainty of situation and lack of follow through on offered "solutions" and resources ▪ Will pay off debt up to \$1,200 and then place in active
<p>BENE# 16-17/05</p> <p>Mello, Eleanor 89 y/o; 6/30/1933 Income: \$1,063 sub</p> <p>ARAW support \$3,417: Reoccurring: Demand response \$25 '21 Gifts: Car ins \$963 '16, Holiday \$100 '16, \$150 '17,21-22 Discontinued: Nutrition \$84 '21-22</p> <p>MEB: \$232</p> <p>ARAW: Ana</p>	<p>Eleanor expressed concern with low body weakness & inability to walk without assistance. She is very hopeful ARAW will continue to provide SRTA tickets so that she can visit her friend in the nursing home.</p>	<p>Embarrassed by incident at FLO luncheon – has not regained her strength</p> <p>ENSURE support no longer needed now covered by insurance</p> <p>SRTA allows her shop, socialize and visit friend in nursing home</p> <p>In touch with daughter; grandson is main contact and support</p> <p>Wants to pay off cc before she dies</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ SRTA Demand Response, 1 book \$25 <p>Monthly total: \$25</p>	<p>Monthly:</p> <ul style="list-style-type: none"> ▪ SRTA Demand Response, 1 book \$25

ARAW BENEFICIARY UPDATE DECISIONS

MAY 2023 | VER 5/3/23

Beneficiary	Biggest Concern	Notes	Current Support	Current Support
<p>BENE# FLO-23E-V</p> <p>DeMendonca, Theresa 73 y/o; 2/13/1950 Income: \$1,656 sub</p> <p>ARAW support \$660: Gifts: Holiday \$150 '21-22 Discontinued: SRTA Demand Response \$25 '21-22</p> <p>MEB: Unknown</p> <p>ARAW: Pat</p>	<p>Theresa thoroughly enjoys the luncheons as well as reading the monthly newsletter. "The ARAW brightens my days which can be very dark at times. Thank you for being my friends."</p>	<p>Very active FLO participant – depression and anxiety</p> <p>Socialization helps her very much – slightly over income</p>	<p>Exception:</p> <ul style="list-style-type: none"> ▪ Income guideline (over \$6) <p>Continue with FLO & BM calls</p>	<p>Exception approved:</p> <ul style="list-style-type: none"> ▪ Income guideline <p>Continue with FLO & BM calls</p>
<p>BENE# FLO-21E-V</p> <p>Morin, Evangeline 90 y/o; 8/26/1932 Income: \$1,864 sub</p> <p>ARAW support \$8,523: Gifts: Dental \$2,900 '14, \$1,460 '12 & \$2,515 '11, Contacts \$364 '08, Loan \$1,162 '07, Holiday \$100 '07</p> <p>MEB: Unknown</p> <p>ARAW: Pat</p>	<p>Has had a few emergency room visits however is "doing well". Driving less. No in-home services. Enjoys monthly newsletter.</p>	<p>4/14/22 Approved exception: over \$178</p>	<p>Exception:</p> <ul style="list-style-type: none"> ▪ Income guideline (over \$214) <p>Continue with FLO</p>	<p>Exception approved:</p> <ul style="list-style-type: none"> ▪ Income guideline <p>Continue with FLO</p>

ARAW BENEFICIARY UPDATE DECISIONS

MAY 2023 | VER 5/3/23

Beneficiary	Biggest Concern	Notes	Current Support	Current Support
<p>BENE# FLO-22E</p> <p>Brightman, Pauline 81 y/o; 3/16/1942 <i>Income: \$1,078 sub</i></p> <p>ARAW support \$4,642: Gifts: Rent \$1,759 '18, Moving costs \$150 '18, Holiday \$150 '20 Discontinued: Cable/internet \$150 '19-21</p> <p>MEB: Unknown</p> <p><i>ARAW: Pat</i></p>	<p>Enjoying her new apartment at Taber Mill. Looks forward to monthly newsletter from the ARAW and shares with her daughter Gail. In need of dentures & working with CCA SCO.</p>	<p>Enjoys newsletter</p>	<p>Continue with FLO</p>	<p>Continue with FLO</p>
<p>BENE# FLO-20E</p> <p>Miranda, Leah 76 y/o; 4/15/1947 <i>Income: \$1,548 sub</i></p> <p>ARAW support: FLO only</p> <p>MEB: Unknown</p> <p><i>ARAW: Ana</i></p>	<p>No need. Doing ok. Was hospitalized 4/15 thru 4/17 due to allergic reaction to MSG. Has RN homecare service twice a day for insulin administration. Will call if a need arises. Is still pending 1st floor apartment. "Thank you for my Birthday card".</p>	<p>Existing FLO</p>	<p>Continue with FLO</p>	<p>Continue with FLO</p>

ARAW BENEFICIARY UPDATE DECISIONS

MAY 2023 | VER 5/3/23

Beneficiary	Biggest Concern	Notes	Current Support	Current Support
<p>BENE# 22/11G</p> <p>Dann, Donna 65 y/o; 1/15/1958 Income: \$914 sub</p> <p>ARAW support \$1,717: Gifts: Social day \$188 '21, Lift chair \$1,230 '22, Holiday \$150 '21-22</p> <p>MEB: \$363</p> <p>ARAW: Ana</p>			<p>No needs – place inactive</p>	<p>No needs – place inactive</p>



CONTINGENCY PLAN FOR PRESIDENT SUCCESSION

DRAFT | March 2023

Board leadership plays an essential role in the success of every nonprofit organization. ARAW recognizes the importance of succession planning and has developed succession planning for Board Officers. ARAW also recognizes proactively planning in the case of an unexpected temporary, short term or permanent vacancy of the Board President due to disability, death or departure prior to her full term is satisfied, can bring order, peace of mind and continuity in a time of unforeseen transition.

An unplanned absence is one that arises unexpectedly, in contrast to a planned leave, such as a vacation or a sabbatical. A temporary absence is one of less than three months in which it is expected that the Board President will return to her position once the events precipitating the absence are resolved. A long-term absence (LOA) is one that is expected to last more than three months. A permanent vacancy, or resignation, is one in which it is firmly determined that the Board President will not be returning to the position.

The Board President is to immediately inform the Executive Committee of the necessary absence or resignation. Short-term absences require approval from the Executive Committee. Long-term absences require approval from the full Board. As soon as it is feasible, the Vice President should convene the remaining members of the Executive Committee to affirm the procedures prescribed in the plan or make any modifications the Executive Committee deems appropriate.

The position of Acting President will be filled by the Vice President for short term, long term or permanent absences. Should the standing appointee to the position of Acting Board President be unable to serve, such vacancy may be filled by any of the Directors. The Governance Committee shall propose prospective President to the Board of Directors at a meeting at least one month prior to the meeting at which the election is to take place. Per ARAW Bylaws, two or more offices may be held by the same person.

If it is determined to be an approved short term or long-term absence, the Acting Board President shall serve until the Board President's return. Per the ARAW Bylaws, in the event of permanent vacancy, the Acting Board President shall serve until the next Annual Meeting or until a successor is formally elected.



CONTINGENCY PLAN FOR OFFICER SUCCESSION

DRAFT | March 2023

Board leadership plays an essential role in the success of every nonprofit organization. ARAW recognizes the importance of succession planning and has developed succession planning for Board Officers. ARAW also recognizes proactively planning in the case of an unexpected temporary, short term or permanent vacancy of an officer of the Board due to disability, death or departure prior to her full term is satisfied, can bring order, peace of mind and continuity in a time of unforeseen transition.

An unplanned absence is one that arises unexpectedly, in contrast to a planned leave, such as a vacation or a sabbatical. A temporary absence is one of less than three months in which it is expected that the Officer will return to her position once the events precipitating the absence are resolved. A long-term absence (LOA) is one that is expected to last more than three months. A permanent vacancy, or resignation, is one in which it is firmly determined that the Officer will not be returning to the position.

The Officer is to immediately inform the President of the necessary absence or resignation. Short-term absences require approval from the Executive Committee. Long-term absences require approval from the full Board. As soon as it is feasible, the President should convene the remaining members of the Executive Committee to affirm the procedures prescribed in the plan or make any modifications the Executive Committee deems appropriate.

The Officer position left vacant will be filled by a member of the Executive Committee for short-term, long-term or permanent absences. Per ARAW Bylaws, two or more offices may be held by the same person. In the event that no member of the Executive Committee is willing to serve in the vacant Officer position, per ARAW Bylaws, such vacancy may be filled by any of the Directors. The Governance Committee shall propose prospective Officers to the Board of Directors at a meeting at least one month prior to the meeting at which the election is to take place.

If it is determined to be an approved short term or long-term absence, the Acting Officer shall serve until the elected Officer's return. Per the ARAW Bylaws, in the event of permanent vacancy, the Acting Officer shall serve until the next Annual Meeting or until a successor is formally elected.

NEW MEMBER ONBOARDING GUIDELINES FOR GOVERNANCE COMMITTEE

DRAFT | March 28, 2023

Any Board member may propose a new member by contacting a member of the Governance Committee and presenting a brief bio. It is assumed that some prior conversations regarding ARAW have occurred, and the proposed members has a sincere interest in learning more about ARAW, and the proposer believes, to the best of her ability, that this individual would be a contributor and a good fit for membership.

If the Governance Committee decides to move this proposal forward, they or the proposer will speak about the potential member at a Board Meeting. The Board Members then have one week to be in touch with the Governance Chair about any concerns or with any questions.

If no concerns are raised, an initial meeting with the prospective new member will be attended by a subset of the Governance committee, the proposer, the new member, and the Executive Director. Before this initial meeting the potential new member will be provided with a packet including:

Website

Vision Mission Values

Philosophy

Board Member Job Description

Meeting Schedule

List of board members

After this initial meeting the whole Governance Committee will meet to learn more details about the prospective member and their suitability for membership. The Governance Committee will decide whether to propose this person for membership.

If the recommendation moves forward, a CORI check will be conducted. The appropriate Board agenda will note the prospective member's name and upcoming vote.

If the prospective member is elected to the Board the proposer will notify her, and the President will send a welcome note. The Executive Director will be in touch to schedule an orientation meeting which will be held as soon as possible in the ARAW offices and led by the

Executive Director. The new member, mentor (see below), and other interested members to be included. The Handbook will be provided with initial focus areas defined.

After the initial orientation and within the next month or two, the Chairs of the Beneficiary Committee, Finance Committee, and Governance Committee will invite the new member to attend an upcoming meeting and will follow up to provide answers or explanations shortly after the meeting.

After approximately 3 months, a second Orientation Meeting will be held to answer questions and add further background and explanation about the work of these 3 committees.

Legacy, Grants and Personnel Committee meetings will be attended as they occur on the calendar in the ensuing months. The respective Chairs will reach out with an invitation.

At 6 months, a third Orientation Meeting will be held with the new member's mentor, a representative from the Governance Committee and the Executive Director to continue the educational process, review the visiting process as well as answer any questions and concerns. The new Board Member is welcome to audit and participate in as many committee meetings as they would like until the six-month orientation when they will be asked to make ongoing committee commitments.

MENTORSHIP GUIDELINES

The role of the mentor for new members is a volunteer position. (The proposer may fill that role, or the new member may wish to broaden their connection to the board by having a different member serve as mentor.)

The mentor will attend all three Orientation Meetings and follow up with new the member.

The mentor will sit with the new member at Board Meetings and follow up shortly after each meeting. Or arrange for a substitute member to take their place.

The mentor will check in with the new member after Committee meetings they both attend.

The mentor will be available to sit with them and review the Handbook if desired.

The mentor will in any way appropriate be supportive, provide guidance, motivation, and role modeling.

Coastal Neighbors Network ARAW 2024 Grant Addendum

In today's world, online access is an increasingly important resource to us all and as became very clear during the recent pandemic, it can be an integral component of one's ability to connect and communicate with others. The importance of social connection cannot be overstated: According to the National Institute of Health (NIH) and the National Library of Medicine, meta-analyses have found that social isolation or loneliness in older adults is associated with a 50% increased risk of developing dementia, a 30% increased risk of incident coronary artery disease or stroke, and a 26% increased risk of all-cause mortality.

To alleviate the inability of many of the ARAW women to effectively use a computer, we propose a pilot program of supplying twelve of the Coastal Neighbors members with simple electronic tablets and providing each recipient with the required training so that they may comfortably use them (we anticipate this will take an average of five hours each). In addition to helping them sign-up for Coastal Neighbor's services in the future, this computing ability will enable each woman access to the internet and email which can provide hours of enjoyment and connectedness. They can then also participate in Zoom events which can further open a myriad of social and educational opportunities, and can use Coastal Neighbors transportation services to attend additional computing classes at the Councils of Aging. The Westport Council of Aging specializes in one-on-one tutoring for specific technical needs.

All tablets will be owned by the recipients. We will establish connectivity in a fashion that provides continued service for participants beyond the grant period.

12 Tablets for CN ARAW Members@\$80	\$960
Tablet Training for CN ARAW Members@\$5 hours x \$30/hr/person x 12 people	<u>\$1,800</u>
TOTAL	\$2,760

We strongly believe that by working together, ARAW and Coastal Neighbors Network significantly enriches the lives of our members. We thank ARAW for your support and look forward to our continued partnership.

-- FINAL DRAFT --



The Association for The Relief
of Aged Women
of New Bedford

Strategic Plan

2023-2026

“Women helping women.”

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BACKGROUND

The Association for the Relief of Aged Women of New Bedford (ARAW) was founded in 1866 and Rachel Howland, a local Quaker minister and one of the founders, became the first President. Over the course of more than 150 years the organization has held true to the mission of providing assistance, relief, and friendship to elderly women in need in the greater New Bedford area.

Originally \$10,000 was raised and membership was sold for a contribution of \$1.00. The organization was entirely dependent on voluntary contributions and bequests.

During the first 50 years ARAW helped 525 women with funds, rent, board, material goods and friendship and a total of \$288,110.00 was spent.

Through the decades, the organization's funds and outreach grew under careful leadership, effective committee work, and fortuitous stock market growth. Although men were called upon as advisors during the first century of ARAW's growth, the Board members and beneficiaries have always been women.

In 1996, for the first time, a decision was made to put money into the hands of community agencies and a grants committee was formed to find appropriate grantees as a means of reaching more women and spending the disbursements that were required by the IRS.

Until 2007, ARAW was completely administered by the Board members. In 2006 there were 160 beneficiaries and the Board realized that it was time to hire an executive director and open an office in order to adequately and efficiently meet needs in the community and stay true to the mission.

A strategic plan was created in 2008, shortly after opening the office, and at that time the Board was very focused on infrastructure (roles and responsibilities) and on formalizing giving levels and policies regarding beneficiaries.

In 2019, still embracing the original mission, and still led by devoted volunteer Board members and a small dedicated staff, the Association directly supported the needs of 228 women as well as many additional women through grant-funded programs. In that year, a 3-year strategic plan was developed with an emphasis on expanding our outreach efforts and ensuring prudent financial management. Most every goal and strategy in that plan was successfully accomplished.

This current plan is a natural extension of the 2019 plan. Over the next 3 years ARAW will continue to extend its reach to help previously underserved groups of women. We will redefine how we deliver on our mission of friendship and we will strengthen our evolving grants-making program. To support these efforts, we will streamline Board work and begin to engage non-Board volunteers. We will also launch an annual fundraising program to provide for growing needs and long-term sustainability of our investment fund.

VISION, MISSION, VALUES

VISION

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

MISSION

We furnish financial assistance, provide friendship, and promote the welfare and relief of low-income elderly women.

We do this by:

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

VALUES

- Women helping women.
- Not alms alone, but a friend.

STRATEGIC GOALS

BENEFICIARIES

Ensure that we are prepared to meet the growing number of elderly women in need within our community.

At the heart of our mission are our beneficiaries; the low-income elderly women who need our assistance, support, and friendship. Over the last three years we have been tracking the number of beneficiaries we serve and the gifts and direct support which they receive. The beneficiary numbers have been growing but it has been organically, as opposed to planned. Our belief is that we can serve even more women if we are proactive and intentional about our growth. This intentionality will provide us with the opportunity to identify and reach out to new populations of elderly women as well as those who are not yet aware of our services. Last but not least, we will continue to review the Beneficiary Committee's process for reviewing and granting requests in an effort to streamline it, while at the same time lessening the Committee's workload.

FRIENDSHIP

Ensure that friendship is a part of the ARAW experience for all our beneficiaries.

An integral part of ARAW's mission is to prioritize friendship as a key component of the support we offer our beneficiaries. Historically, providing friendship took the form of social visits from our Board members. However, given the evolution of ARAW, the increase in the number of beneficiaries, and the lessons learned from working with our beneficiaries during the pandemic, it is time for us to rethink and redefine how we deliver on our mission of friendship. A broader definition of friendship and a more holistic approach to delivering on this part of our mission will ensure that we indeed provide "not alms alone but a friend" to every one of our beneficiaries.

GRANTS

Assess and refine the current grants program to ensure that our grants are supporting and establishing programs which engage our current beneficiaries and identify new beneficiaries.

One of the goals of the last strategic plan was to increase the efficacy of our grant-making process. A piece of that effort was determining our funding priorities and identifying new approaches and initiatives to fund. These new approaches included a departure from funding Councils on Aging in favor of funding a variety of community partners who could help us identify and support the women we serve. We are two years into the current grants program and it remains a work in progress, evolving and improving with each grant cycle we undertake. We have learned that we need to work more closely with our grantees to ensure that their initiatives continue to meet our primary goals of identifying and engaging more elderly women in need of ARAW's services. In order to meet this objective, we also

need to develop a methodology by which we can measure the success and impact of our grants. We remain committed to the current grants program and believe that the strategies in this plan will enhance and solidify it.

GOVERNANCE

Create a governance infrastructure which allows us to attract and retain Board members and volunteers.

In our last strategic plan, the Board focused on creating a governance infrastructure which strengthened the Board's oversight role, as well as the work of its committees. We made substantial progress in both of these areas but maintaining a strong governance infrastructure is an ongoing process. The needs of the Board are constantly evolving, as are the needs of ARAW and the elderly women it serves. With this in mind, the Board will review and refine its committee structure, its meeting structure, and also identify ways to involve more volunteers in ARAW's work, beyond serving on the Board and the Investment Advisory Committee. We are also continuing our efforts to implement an intentional and strategic recruitment process so that we recruit, engage, and retain Board members and volunteers who can help us serve ARAW today and into the future.

SUSTAINABILITY

Preserve the value of our investment fund over the long term.

As stewards of ARAW's investment fund, we are charged with ensuring that our portfolio maintains or increases its value as it has for the last 157 years. After many years of seeing the investment fund grow, we are now faced with a different set of economic circumstances. In the past few years, the economy and financial markets have been volatile and we have seen a decrease in the fund's value. If we do not take steps to maintain or grow the fund, we will risk depleting the investment fund over time. We cannot predict the future financial environment but we have the time and latitude to be proactive in protecting the portfolio by implementing sound fiscal policies and practices and beginning to fundraise to provide additional support for ARAW's initiatives.

STRATEGIC PLAN

Goal #1 Beneficiaries

Ensure that we are prepared to meet the growing number of elderly women in need within our community.

STRATEGY	ACTION STEPS	TARGET DATE	RESPONSIBILITY	SUCCESS INDICATORS
<p>Strategy 1</p> <p>Refine how the Beneficiary Committee reviews beneficiary requests in order to handle more requests on a monthly basis.</p>	<ol style="list-style-type: none"> 1. Allow the Executive Director to make more decisions on annual beneficiary updates. 2. Review and monitor the policy for the Executive Director’s Discretionary Fund (EDDF) to provide the ED with the latitude to meet the urgent and routine needs of the beneficiaries. 	<ol style="list-style-type: none"> 1. May 2023 2. June 2023 	<ol style="list-style-type: none"> 1. Beneficiary Committee 2. Finance, Beneficiary Committee 	<p>Beneficiary Committee completes its review of requests in one 2-hour meeting per month.</p>
<p>Strategy 2</p> <p>Develop and implement an outreach plan to grow the number of beneficiaries by 15% each year.</p>	<ol style="list-style-type: none"> 1. Identify and support elderly women in need of our services, who are: <ol style="list-style-type: none"> a. Not currently connected to other established services and programs. b. At risk of housing insecurity. 2. Broaden our engagement with the Portuguese and Cape Verdean community. 3. Optimize our engagement opportunities with our community partners. 4. Educate community organizations and leaders about ARAW. 	<p>March 2024</p>	<p>ED, Beneficiary Advocates</p>	<p>Number of beneficiaries grows by 15% or more.</p> <p>Growth in the number of beneficiaries who are Cape Verdean, Portuguese and women at risk of housing insecurity.</p>

STRATEGY	ACTION STEPS	TARGET DATE	RESPONSIBILITY	SUCCESS INDICATORS
<p>Strategy 3</p> <p>Increase total direct support dollars by 15% each year.</p>	<ol style="list-style-type: none"> 1. Add FLO expenses to the direct support line in the budget. 2. Budget specific dollar amounts for each type of support. <ol style="list-style-type: none"> a. Increase re-occurring gifts by 10% each year. b. Increase one-time gifts by 24% each year. c. Increase FLO by 15% each year. 3. Monitor the distribution of direct support for each beneficiary category. 	<ol style="list-style-type: none"> 1. Complete 2. Complete 3. End of each year 	<ol style="list-style-type: none"> 1. Finance, ED 2. Beneficiary, ED 3. Beneficiary 	<p>Target percentages for each support category are met.</p>
<p>Strategy 4</p> <p>Educate ourselves on issues facing our ARAW community and develop ways to address them.</p>	<ol style="list-style-type: none"> 1. Pursue ongoing educational opportunities for the staff and Board so they can better serve our beneficiaries. 	<p>Complete/on-going</p>	<p>Governance, ED</p>	<p>1-2 educational offerings per year.</p>

Goal #2 Friendship

Ensure that friendship is a part of the ARAW experience for all our beneficiaries.

STRATEGY	ACTION STEPS	TARGET DATE	RESPONSIBILITY	SUCCESS INDICATORS
<p>Strategy 1</p> <p>Create a Friendship Task Force to redefine ARAW's model for friendship to go beyond visiting and include other outreach and engagement activities.</p>	<ol style="list-style-type: none"> 1. Revisit the purpose behind our current visiting program and its structure and realign the program to reflect the new friendship model. 2. Determine ongoing roles and responsibilities for all elements of the new friendship model. 3. Present recommendations to the Board for adoption. 	<p>End of Sept. 2023</p>	<p>Friendship Task Force, Board President</p>	<p>Annual beneficiary survey indicates beneficiaries feel that they have friends at ARAW.</p>

Goal #3 Grants

Assess and refine the current grants program to ensure that our grants are supporting and establishing programs which engage our current beneficiaries and identify new beneficiaries.

STRATEGY	ACTION STEPS	TARGET DATE	RESPONSIBILITY	SUCCESS INDICATORS
<p style="text-align: center;">Strategy 1</p> <p style="text-align: center;">Collaborate with our current and future grantees to align their initiatives with the goals of our grants program.</p>	<ol style="list-style-type: none"> 1. Work with our grantees to help them find ways to identify potential ARAW beneficiaries. 2. Encourage grantees to diversify funding beyond their ARAW grant so that their programs are sustainable. 3. Continue to deepen our community partnerships by supporting our grantees as they develop and implement programs for our beneficiaries. 	<p style="text-align: center;">Ongoing</p>	<ol style="list-style-type: none"> 1. ED 2. Grants, ED 3. ED 	<p>Stated objectives of the Grants program are being met.</p>
<p style="text-align: center;">Strategy 2</p> <p style="text-align: center;">Continue to improve the efficiency and efficacy of our grant-making process.</p>	<ol style="list-style-type: none"> 1. Offer multi-year grants to successful grantees. 2. Develop and utilize rubric which allows us to evaluate applicants' proposals against a set of criteria which align with our goals and our targeted funding areas. 3. Ensure that the Board has a full understanding of the grants that are being recommended for approval. 4. Develop measurements of success to assess the impact of each grant and the overall grants program. <ol style="list-style-type: none"> a. Develop a bi-annual grants report and dashboard which will be shared with the Board. 	<ol style="list-style-type: none"> 1. Dec. '23 2. Feb. '25 3. Mar. '24 4. June '23 4a. Nov. '23 May '24 	<p style="text-align: center;">Grants, ED</p>	<p>Consistently use standardized tools to measure our grant-making in an effort to optimize our investments.</p>

Goal #4 Governance

Create a governance infrastructure which allows us to attract and retain Board members and volunteers.

STRATEGY	ACTION STEPS	TARGET DATE	RESPONSIBILITY	SUCCESS INDICATORS
<p>Strategy 1</p> <p>Adopt and implement an intentional and uniform Board recruitment process.</p>	<ol style="list-style-type: none"> 1. Determine desired criteria for Board membership such as age, profession, experience, ethnicity, geography, economic diversity, and attributes as well as skills. <ol style="list-style-type: none"> a. Create and fill out a Board profile matrix. b. Create recruiting materials and talking points that describe the workload and commitment required of ARAW Board members. 2. Define diversity and the benefits of having a diverse board as it pertains the ARAW Board. 3. Grow and maintain the Board size at 15 members. 	<ol style="list-style-type: none"> 1. Oct. '23 1a. June '23 1b. Sept. '23 2. June '24 3. April '25 	<ol style="list-style-type: none"> 1. Governance, ED 2. Governance, Board 3. Governance, Board 	<p>The Board has 15 members with the needed skills and attributes to undertake the work of the board and ARAW.</p>
<p>Strategy 2</p> <p>Identify and create volunteer opportunities, other than the Board, to engage new and current individuals to serve on behalf of ARAW and stay connected.</p>	<ol style="list-style-type: none"> 1. Create an ad hoc committee member role to engage more people in ARAW committee work. <ol style="list-style-type: none"> a. Engage former Board members on committees or task forces. 2. Create a director emerita position for former Board members who have made significant contributions to ARAW. 3. Engage volunteers to befriend some beneficiaries. 4. Ask volunteers to host FLO luncheons. 	<ol style="list-style-type: none"> 1. Dec. '24 2. April '25 3. Dec. '23 4. Dec. '23 	<ol style="list-style-type: none"> 1. Governance 2. Governance 3. ED, Staff 4. ED, Staff 	<p>Volunteers are engaged with and working on behalf of ARAW.</p>

STRATEGY	ACTION STEPS	TARGET DATE	RESPONSIBILITY	SUCCESS INDICATORS
<p>Strategy 3</p> <p>Review Board meeting structure and content.</p>	<ol style="list-style-type: none"> 1. Reduce the number of meetings to 9 per year. 2. Plan a full Board review of finances quarterly, rather than monthly. 3. Allow for the approval of beneficiary gifts to be done via email in months when the Board does not meet. 	<ol style="list-style-type: none"> 1. Complete 2. July '23 3. June '23 	<ol style="list-style-type: none"> 1. Governance, Board President 2. Finance, Board 3. Beneficiary 	<p>Board continues to operate efficiently and effectively.</p>
<p>Strategy 4</p> <p>Streamline the current committee structure.</p>	<ol style="list-style-type: none"> 1. Reassess committee service requirements. 2. Reassess the frequency of each committee's meetings as well as the time-of-day meetings are held. 3. Change the Legacy Committee to a task force which will disband when it finishes reviewing archival records and recording ARAW history. 4. Ensure that ARAW's historical narrative is maintained once the Legacy task force disbands by having: <ol style="list-style-type: none"> a. The Governance Committee take over the responsibility of interviewing departing Board members. b. The Board President, through their annual President report, continue to record the ARAW historical narrative. c. The staff store and maintain the archival records and historical documents based on the criteria developed by the Legacy Task Force. 	<ol style="list-style-type: none"> 1. Dec. '23 2. Dec. '23 3. May '23 4. April '24 	<ol style="list-style-type: none"> 1. Governance 2. Committee Chairs, Governance 3. Governance, Board 4a. Governance 4b. Board President 4c. ED, Staff 	<p>Committee work is at a manageable level for Board members and is completed on time.</p>
<p>Strategy 5</p> <p>Ensure that all Board members feel included and appreciated.</p>	<ol style="list-style-type: none"> 1. Arrange an annual check-in meeting with each Board member to make sure they are engaged and satisfied and to solicit their feedback on Board service. 2. Develop bios for existing Board members for internal use. 3. Plan 1 or 2 Board social events per year. 	<ol style="list-style-type: none"> 1. June '23 2. Sept. '23 3. Dec. '23 	<ol style="list-style-type: none"> 1. Board President, Governance Chair 2. Governance and ED 3. Governance 	<p>Board members have high satisfaction levels per the annual Board evaluation survey.</p>

**Goal #5
Sustainability**

Preserve the value of our investment fund over the long term.

STRATEGY	ACTION STEPS	TARGET DATE	RESPONSIBILITY	SUCCESS INDICATORS
<p style="text-align: center;">Strategy 1</p> <p style="text-align: center;">Put in place the necessary financial policies and controls to guarantee sound financial planning.</p>	<ol style="list-style-type: none"> 1. Develop a financial control policy outlining at what level of variance (budget versus actual) the Executive Director and Finance Committee must seek Board approval. 2. Develop realistic 3-year proforma financial projections annually which reflect anticipated growth and the associated expenses. 3. Review and, if necessary, adjust the spending strategy. 	<ol style="list-style-type: none"> 1. Oct. '23 2. Feb. '24 3. Feb. '24 	<ol style="list-style-type: none"> 1. Finance, ED 2. ED, Finance 3. ED, Finance 	<p>There is more guidance and control on budgeting and spending.</p>
<p style="text-align: center;">Strategy 2</p> <p style="text-align: center;">Launch an annual fundraising program to raise \$15,000 in FY2025, \$50,000 in FY2026, with a goal of raising \$150,000 annually by FY2028.</p>	<ol style="list-style-type: none"> 1. Provide the Board with education on fundraising. 2. Develop an annual development plan and a case for support. 3. Form a development committee made up of Board members and volunteers. 4. Define the Board's role in fundraising and expectations for Board members. 	<ol style="list-style-type: none"> 1. Sept. '23 2. Mar. '24 3. Mar. '24 4. Jan. '24 	<ol style="list-style-type: none"> 1. ED 2. ED, Development 3. Governance, ED, Board President 4. Governance, ED 	<p>Fundraising goals are met or exceeded.</p>

NEXT STEPS

The creation of this document is only a first step in achieving ARAW's objectives. The next step is for the Executive Director and Board of Directors to further develop the appropriate plans, action steps, and timeline to meet the goals.

During the implementation of the plan, it is the Board's responsibility to ensure that the organization is meeting its goals by monitoring progress on a regular basis and evaluating performance against each goal.

This is a working document, a tool to help ARAW achieve its goals. As such, it may be adjusted and modified as needed to support the changing environment and the needs of the organization.

ADDENDUM A: PRO FORMA BUDGET

	FY23 (not final)	FY24	FY25	FY26
Revenue				
Investment Income ¹	\$ 465,440	\$ 450,000	\$ 450,000	\$ 450,000
Contributions	\$ 2,449	\$ 2,000	\$ 15,000	\$ 50,000
Realized Gains ¹	\$ 2,476,981	\$ 1,200,000	\$ 1,200,000	\$ 1,200,000
Total	\$ 2,944,870 ⁵	\$ 1,652,000	\$ 1,665,000	\$ 1,700,000
Expenses				
Direct Support	\$ 459,633	\$ 535,000	\$ 612,250	\$ 707,538
Grants	\$ 182,510	\$ 204,239	\$ 205,000	\$ 205,000
Administration ²	\$ 46,244	\$ 42,000	\$ 43,000	\$ 44,500
Staffing Costs ³	\$ 319,599	\$ 342,868	\$ 356,583	\$ 370,846
Rent and Utilities	\$ 30,145	\$ 30,300	\$ 32,687	\$ 33,488
BOA Expenses	\$ 80,377	\$ 90,000	\$ 90,000	\$ 90,000
Federal Taxes	\$ 31,844	\$ 30,000	\$ 30,000	\$ 30,000
Accounting	\$ 22,884	\$ 28,000	\$ 28,000	\$ 28,000
Other Expenses ⁴	\$ 23,550	\$ 9,750	\$ 10,000	\$ 10,000
Total	\$ 1,197,025	\$ 1,312,157	\$ 1,407,520	\$ 1,519,372
Unspent Funds	\$ 1,747,845	\$ 339,843	\$ 257,480	\$ 180,628
Notes				
¹ Calculated on a 5-year average				
² Administration includes BBGM, Professional Development, Newsletter				
³ Staffing Costs increase at 4% inflation per year				
⁴ Other expenses includes outreach, legal fees and FY24 strategic planning				
⁵ Unusually high due to 1-time reallocation of funds				

BUDGET ASSUMPTIONS

	FY21	FY22	FY23 Projected	FY24 Budget	FY25	FY26
Total # Beneficiaries Receiving \$ Support	251	278	284	327	376	432

Type of Support	FY21	FY22	FY23 Projected	FY24 Budget	FY25	FY26	% Growth FY24- FY26
Re-occurring	\$244,310	\$244,103	\$299,876	\$338,000	\$371,800	\$408,980	10%
Gifts	\$115,389	\$187,020	\$141,486	\$182,000	\$226,200	\$278,720	24%
FLO	\$5,210	\$11,443	\$11,796	\$15,000	\$17,250	\$19,838	15%
TOTAL	\$364,910	\$442,566	\$453,158	\$535,000	\$615,250	\$707,538	15%
Total w/o FLO	\$359,700	\$443,123	\$441,362	\$520,000	\$598,000	\$687,700	
Avg. gift w/o FLO	\$1433	\$1594	\$1554	\$1590	\$1590	\$1592	

	FY21	FY22	FY23	FY24	FY25	FY26
Fundraising Income			\$2449	\$2000	\$15,000	\$50,000

ADDENDUM B: TIMELINE

		FY 23	FY2024				FY2025				FY2026			
		Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
			AMJ	JAS	OND	JFM	AMJ	JAS	OND	JFM	AMJ	JAS	OND	JFM
Beneficiaries	Refine beneficiary request review process													
	Allow ED to make more decisions		X											
	Review EDDF policy		X											
	Outreach plan													
	Identify/support women in need					X								
	Engage Portuguese and Cape Verdeans					X								
	Optimize community partners					X								
	Educate community about ARAW					X								
	Increase direct support \$													
	Add FLO to direct support in budget	X												
	Budget for each type of support	X												
	Monitor support by category					X				X				X
	Educate on and address community issues													
	Education for Board and staff	X												
Friendship	Friendship task force													
	Realign visiting program			X										
	Roles and responsibilities			X										
	Recommendations to Board			X										
Grants	Collaborate with grantees													
	Identify potential beneficiaries		X											
	Diversify funding		X											
	Support grantees		X											
	Improve grant-making process													
	Multi-year grants				X									
	Develop rubric					X								
	Educate Board					X				X				X
Measurement		X		X		X		X		X		X		

		FY 23	FY2024				FY2025				FY2026			
		Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
			AMJ	JAS	OND	JFM	AMJ	JAS	OND	JFM	AMJ	JAS	OND	JFM
Governance	Board recruitment process				X									
	Determine criteria				X									
	Define diversity						X							
	15 members										X			
	Volunteer opportunities													
	Ad hoc committee role								X					
	Director emerita										X			
	Friendship volunteers				X									
	FLO host volunteers				X									
	Board meetings													
	Reduce to 9 meetings per year	X												
	Quarterly finance reviews			X	X	X	X	X	X	X	X	X	X	X
	Beneficiary approval by email		X	X	X		X	X	X		X	X	X	
	Committee structure													
	Reassess committee service requirements				X									
	Reassess committee meeting schedules				X									
	Legacy Committee to task force		X											
	Disband Legacy task force						X							
	Board appreciation													
	Annual check-in		X				X				X			
	Bios			X										
Social events				X				X				X		
Financial policies														
Develop policy				X										
Develop pro forma budgets					X				X				X	
Review spending strategy					X									
Fundraising														
Board education			X											
Development plan					X				X				X	
Development committee					X									
Define Board's role					X									

ADDENDUM C: METHODOLOGY

The Board of Directors of the Association for the Relief of Aged Women (ARAW) held a retreat in the Fall of 2022 to discuss its priorities for the next several years.

To prepare for the retreat, they hired Amy Cahners and Susan Donahue of Cahners & Donahue Associates LLC who conducted focus groups, interviews, and electronic surveys to gather the perspectives of multiple constituencies. These included the Board, staff, beneficiaries, and community partners. Amy, Susan, and a retreat planning task force developed a S.W.O.T. analysis using the collected data.

At the retreat, the Board reviewed the data and the S.W.O.T. analysis and discussed its various strategic options. The Board determined that it should embark on a strategic planning process, similar to the process undertaken in 2019.

A strategic planning committee was formed and began meeting with Amy and Susan to draft 3-year goals and strategies, based on the Board retreat discussions as well as the collected data.

The full Board met again in March 2023 to discuss, offer input to, and agree upon the drafted goals and strategies.

The strategic planning committee reconvened to draft the plan, a timeline, and pro forma budget.

This document lays out a plan that guides the work and priorities of ARAW through March 2026.

The ARAW Board of Directors voted to approve this plan on _____ 2023.

ADDENDUM D:
BOARD OF DIRECTORS AND STRATEGIC PLANNING COMMITTEE

BOARD OF DIRECTORS

Jane Stankiewicz, President
Gale Beaton
Deborah Brooke
Maria Gloria deSa
Mary Ellis
Diane Laflamme
Leah Macomber
Cathy Mayall
Pam McKnight
Angela Natho
Roseanne O'Connell
Rosemary Saber

STRATEGIC PLANNING COMMITTEE

Jane Stankiewicz, President
Gale Beaton
Mary Ellis
Diane Laflamme
Pam McKnight
Rosemary Saber

Clare Healy Foley, Executive Director