



ASSOCIATION FOR THE RELIEF OF AGED WOMEN
Board Meeting | July 13, 2023 | 9:30 am
174 Union Street, 4W | New Bedford | Zoom option

Packet contents to be reviewed prior to the meeting:

*May Minutes; July FLO Newsletter & BA Report; June & July activity sheet;
July Beneficiary Recommendations; Committees: Finance, Governance, Grants, Personnel*

🕒 Call to Order: President Jane Stankiewicz

🕒 Roll Call: Clerk Gloria DeSa

🕒 Moment of Silence

♥ Marilyn Mortensen
♥ Rosalie Lada

♥ Mariette Menard

🕒 Reflective Moment: Jane Stankiewicz
→ New sign up sheet

🕒 President's Report: Jane Stankiewicz – *see packet*

- ✓ **Recommendation to approve May 2023 Board meeting minutes, as distributed – VOTE**
- ✓ **Recommendation to approve creation of Friendship Task Force, purpose and timeline as distributed – VOTE**
 - Membership for task forces
 - Board member check-ins
 - ED goals
 - No August Board meeting

🕒 Executive Director's Update: Clare Healy Foley – *see packet*

- ?? Newsletter, activity sheet & BA report
- Ice Cream Social
- Community Engagement update
- Staffing update
- Board member handbook
- Beneficiary highlight

🕒 Committee Reports

- Finance Committee: Treasurer Mary Ellis – *see packet*
 - Committee meeting update 5/16 & 6/20
 - Q1 Financial report – *to be sent in separate email*
 - BOA/IAC/FinComm Q1 review 7/26
- Visiting: *see packet for upcoming birthdays (July & August)*
 - July Visiting reports – 3 minutes each
 - Jane Stankiewicz
 - Angela Natho
 - Reporting in September: New sign up sheet

- Beneficiary: Chair Pam McKnight – *see packet*
 - ✓ **Recommendation to revise the Executive Director Discretionary Fund (EDDF) policy, as distributed – VOTE**
 - ✓ **Recommendation to accept decisions of beneficiary committee, as distributed – VOTE**
 - Highlight a new beneficiary
- Governance: Chair Gale Beaton – *see packet*
 - Committee meeting update 5/23 & 6/27
 - ARAW Board Self-Evaluation Survey
 - Bios
- Grants: Chair Rosemary Saber – *see packet*
 - Committee meeting update 6/2
 - How to learn about CPG
 - Community Partner update
 - Reporting & Rubric
- Legacy: Chair Diane Laflamme
 - Committee meeting update 6/1 & 6/29
- Personnel: Chair Angela Natho
 - Committee meeting update 5/19 & 6/16
- 🌐 Other business to be brought before the Board
- 🌐 Executive Session, if needed

ANNOUNCEMENTS/MEETINGS:

Thursday, July 13th | Board Meeting | 174 Union/Zoom | 9:30 am

Wednesday, July 19th | Ice Cream Social | The Bucket in South Dartmouth | 2 pm – 3:30 pm

Wednesday, July 26th | BOA/ IAC/Finance Committee Q1 Review | 174 Union/Zoom | 9:30 am

No meeting in July | Personnel Committee

No meeting in July | Governance Committee

Wednesday, August 2nd | Beneficiary Committee | 174 Union/Zoom | 9:30 am

Wednesday, August 9th | ARAW Summer Soiree | Gale's house

Tuesday, August 15th | Finance Committee | 174 Union/Zoom | 9:30 am

Friday, August 18th | Personnel Committee | 174 Union/Zoom | 9:30 am

Tuesday, August 22nd | Governance Committee | | 174 Union/Zoom | 9:30 am

TBD | Grants Committee Meeting

No meeting in August | Board Meeting

Monday, September 4th | Labor Day | Office Closed

Thursday, September 14th | Board Meeting | 174 Union/Zoom | 9:30 am

**Association for the Relief of Aged Women
Minutes of the Regular Monthly Meeting, May 11, 2023**

President Jane Stankiewicz called the meeting to order at 9:30 AM.

Members in Attendance: Beaton, Brooke, deSa, Ellis, Laflamme, McKnight, Natho, O’Connell, Saber, Stankiewicz.

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

Members excused: Macomber, Mayall.

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

1. Lucille Fredette (92) New Bedford
 - a. Part of ARAW family since 2017
 - b. Lived at Taber Mill
 - c. ARAW provided health insurance
 - d. Disabled daughter – devoted to each other’s care
 - e. Devoted son
 - f. Niece sent donation – recognized importance of ARAW and WCAP in her aunt’s life
 - g. WCAP mentioned in obituary

Reflective Moment: With the approach of Mother’s Day, Gloria shared “For My Mother” by Michele Wolf:

I sharpen more and more to your
Likeness every year, your mirror
In height, autonomous
Flying cloud of hair,
In torso, curve of the leg,
In high-arched, prim, meticulous
Feet. I watch my aging face,
In a speeding time lapse,
Become yours. Notice the eyes,
Their heavy inherited sadness,
The inertia that sags the cheeks,

The sense of limits that sets
The grooves along the mouth.
Grip my hand.
Let me show you the way
To revolt against what
We are born to,
To bash through the walls,
To burn a warning torch
In the darkness,
To leave home.

Report of President: President Jane Stankiewicz reported:

1. The minutes of the April 13, 2023 board meeting were approved as distributed.
SO VOTED
2. Annual Meeting
 - a. Comments: wonderful, good to have Community Partners there

- b. Sandy Fogg forgotten in Memoriam – death happened between board meetings, email notification sent to board instead of reporting at meeting
 - c. Community Partners who did not attend will be invited to future board meeting
3. Reminder: No June Board Meeting
 4. Motion made to approve creation of Legacy Task Force, purpose and timeline with change to closing line from “following tasks” to “above tasks”. SO VOTED

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

1. FLO Newsletter
 - a. Two volunteer opportunities
 - i. Plant deliveries May 19th
 - ii. Wamsutta Luncheon May 24th featuring talk by Andy Pollock from Coastal Neighbors Network
 - b. Financial Literacy Workshop
 - i. 10 beneficiaries signed up, 4 attended along with Pat and Rosemary
 - ii. Positive feedback from those who attended
 - iii. Good 1st step, not exact match for ARAW needs – exploring other options
2. BA Reports – evolving, providing good data
3. Activity Sheet – no questions
4. Community Engagement
 - a. ARAW table at Walt’s Mobile event at the YWCA
 - i. Thanks to Pat for “womanning” the table
 - ii. Mostly younger, homeless in attendance
 - b. Future luncheon with Our Sister School – intergenerational experience
 - i. Thanks to Gale for coordinating
5. CPG update
 - a. All foundation reports in
 - i. Some concerns with New Bedford Art Museum
 1. Waiting on Q4 reports
 2. Foundational reports sent back 4 times for edits (did not attend info session)
 3. Clare had discussion with ED Suzanne de Vegh
 - a. Suzanne wants to sign grant agreement
 - b. Shows leadership wants grant to be successful
 4. Programming is good – just need reports to reflect
6. Please return Policy Documents, Dues and Info Sheet if you have not already
7. Beneficiary Highlight
 - a. Barbara Costa
 - i. Landlord sold building

- ii. Unknown to us - has been living with Barbara and claiming to be PCA (receiving 23 hours)
- iii. Landlord pushing to find 2 bedroom so he can stay with her
- iv. Coastline and NB Housing Authority involved
- v. Two protective cases have been filed for financial exploitation & the case has been picked up
- vi. Landlord spoke with Clare – identified himself as Barbara’s son
- vii. ARAW has extracted from situation – redirected to Coastline
 - 1. Will step in if a financial need presents itself

Report of Finance Committee: Chair Mary Ellis reported:

- 1. Portfolio – First month of FY24 – down \$36,640
- 2. In process of finalizing year end for FY23
- 3. Financials will be reviewed by full board quarterly, by committee monthly
- 4. Meeting with Bank of America and Investment Advisory Committee
 - a. Went well, will continue to meet quarterly

Report of Visiting Committee:

- 1. Visiting reports: Gloria deSa
 - a. Fatima Furtado (74)
 - i. ARAW has assisted with credit card debt, Eversource, Charlie Card
 - ii. Immigrant from Portugal
 - iii. Hotel cleaner on Cape Cod for 30 years
 - iv. 3 children – not much connection with them
 - v. No car – feels isolated
 - vi. Section 8 housing – difficult landlady, issue with stairs
 - vii. Still goes to day care 1 to 2 times per week
 - viii. Would like to move to a different neighborhood
 - ix. Would like to take a trip to the Azores – may considered moving there permanently
- 2. Next month – Jane Stankiewicz and Angela Natho

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. 10 requests (5 new, 2 EDDF, 1 Withdrawn), 13 updates (4 FLO, 1 inactive)
- 2. Sandy Fogg Award recipient
 - a. Barbara Sikorski (83)
 - i. Recent surgery for ovarian cancer, decision of no chemo
 - ii. Lost son 2 years ago

- iii. Lots of anxiety – trips to emergency room
 - iv. Award to pay off credit card debt and remainder for in home camera system
- 3. Motion made to approve Beneficiary request decisions via email in the months the Board does not meet. SO VOTED
- 4. In lieu of a New Beneficiary Highlight, FY23 data slides were reviewed
 - a. 20% increase in requests from FY22
 - b. Down in number of people who received support, up in total \$ support
 - c. Breakdown of towns compared to populations – still many more in need to be reached
 - d. Number of new beneficiaries down but received more referrals – many ineligible referrals, BAs referring to other resources
 - e. Ongoing Direct Support – health insurance & cable biggest categories by \$ amount
 - f. Gifts Direct Support – car bills, holiday & hearing aids biggest categories by \$ amount
- 5. Take aways:
 - a. Office is busier than ever – more referrals, resources
 - b. Committee seeing more requests
 - c. Fewer beneficiaries, more money spent
 - d. Many more to reach
 - e. FLO thriving
- 6. Reporting data benefits
 - a. Annual Meeting - helps past Board Members & Community Partners understand ARAW
 - b. Good to focus in on information at board meeting
 - c. Can always ask for other data (Age breakdown to be sent)

Report of Governance Committee: Chair Gale Beaton reported:

- 1. Motion made to accept Contingency Plan for President Succession, as distributed. SO VOTED
- 2. Motion made to accept Contingency Plan for Officer Succession, as distributed. SO VOTED
- 3. New Board Member Onboarding Guidelines – to be distributed for hand book at future meeting
- 4. ARAW Board Self-Evaluation Survey – will be sent soon, please use comment sections

Report of Grants Committee: Chair Rosemary Saber reported:

- 1. Approved incremental \$2,760 to Coastal Neighbors Network for technology program

2. Will be setting a meeting date to review Q4 and Foundational reports – will bring summary to board

Report of Legacy Committee: Chair Diane Laflamme reported:

1. Still going through boxes, transitioning to task force
2. Next meeting June 1st

Report of Personnel Committee: Chair Angela Natho reported:

1. No meeting – nothing to report

Other Business:

1. Roseanne resigning from board July 1st
 - a. Will focus on Legacy tasks until then
 - b. ARAW well positioned with clear vision for future per Strategic Plan
 - c. Privilege to have served on board since 2008
 - d. Jane – thank you for leadership and all hard work

The meeting was adjourned at 11:02 am.

Executive session to follow.

Recorded by,
Jenny Costa, Office Administrator

Approved by,
Gloria deSa, Clerk



FRIENDSHIP TASK FORCE

DRAFT | June 2023

Purpose: A task force to ensure friendship is part of the RAW experience for all of our beneficiaries.

Responsibilities:

- Redefine ARAW's model for friendship going beyond visiting.
 - Revisit the purpose behind our current visiting program and its structure.
 - Realign the program to reflect the friendship model.
 - Refine the guidelines for visiting to maximize the value of the visits for both the beneficiaries and the visiting volunteers and to fulfill the role of true friendship.
 - Provide recommendations and guidance to board members on frequency, structure and reporting of visits.
 - Recognize various outreach and engagement activities that deliver friendship.
 - Ensure we are meeting the needs of the beneficiaries as well as the board members.
 - Consider establishing a volunteer program for non-board members that aids in delivery of the friendship model.
- Present recommendations to the board for adoption.
- Provide education to all board members, incoming and current, on the revised guidelines for delivery of friendship.
- Periodically hold informal gatherings for board members to share information and experiences about friendships with the beneficiaries.
- Consider effective ways to document these experiences for ARAW archives
- The Friendship Task Force will disband when these tasks are complete, which is anticipated to be April 2024

Members:

Chair

At least 2 additional Board Members

Board President (ex officio)

July 2023



GOING WITH THE FLO

Friendship Lunches & Outings (FLO)
Newsletter



YOU'RE INVITED TO AN
ICE CREAM SOCIAL

Wednesday, July 26th | 2:00 pm – 3:30 pm

The Bucket in South Dartmouth | 77 Gulf Rd | Dartmouth

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!!

Call your Council on Aging for your coupons!

Wow!

Did you know that ...
you can

Get Free or Discounted

to various local museums and attractions (dependent on library and availability) like...

- Battleship Cove, Blithewold Mansion, Gardens & Arboretum, Boston Children's Museum, Buttonwood Park Zoo, Heritage Museums & Gardens, Isabella Stewart Gardner Museum, Massachusetts State Park Pass, Museum of Fine Arts – Boston, Museum of Science – Boston, Mystic Seaport - CT, New Bedford Art Museum, New Bedford Fishing Heritage Center, New Bedford Whaling Museum, New England Aquarium, Rotch-Jones-Duff House & Garden Museum, Roger Williams Park Zoo, USS Constitution Museum

MUSEUM ADVENTURE PASS

★ VISIT YOUR LIBRARY AND ★

Check Out a Museum

- Acushnet – Public Library (508) 998-0270
- Dartmouth – North Branch Library (508) 999-0728
- Dartmouth – Southworth Library (508) 999-0726
- Fairhaven – The Millicent Library (508) 992-5342
- New Bedford – Main Library (508) 991-6275
- Westport – Free Public Library (508) 636-1100

Summer days can be hot! Gilly the Gull stopped by to share some summer safety tips!!



Summer Safety Tips



Stay Hydrated
Drink 8 or more glasses of water per day to stay healthy & hydrated



Know the Side Effects of Medications
Some medications have side effects such as drowsiness or sun sensitivity



Stay Cool
Stay in the A/C, indoors, go swimming, etc.



Wear Light, Loose Fitting Clothing
Wear breathable clothing and light colors that reflect the sun



Have Emergency Contacts
Have a list of people to call in case of emergency



Know the Weather Forecast
Plan your days accordingly depending on the weather



Budgeting Tips & Resources to Consider

HAVE YOU?

Taken advantage of all the benefits available to you?

- Tax programs?
- Fuel/Electric assistance?
- OTC cards?

Explored ways to save money on food?

- SNAP card? Check your balance! Remember HIP!
- Farmer's Market Coupons?
- Food Pantries?
- Greater Boston Food Bank deliveries?
- Coupons through newspaper, mail or at store?

Talked to someone to make sure you have the best health insurance for you?

- SHINE consultation at local COA

Considered subsidized housing?

Signed up for the Affordable Connectivity Program?

9 MAGICAL FOODS TO STAY HYDRATED WITHOUT WATER



Cantaloupe



Skim Milk



Watermelon



Celery



Cucumber



Strawberry



Spinach



Tomatoes



Lemons



NEW BEDFORD ART MUSEUM

SENIOR PAINTING CLASS

SUNDAYS
JULY 9 - 30
11AM - 1PM
FREE, 65+



SENIOR SUNDAYS STEP-BY-STEP ACRYLIC PAINTING

This program aims to bring high quality art education to elderly women on a fixed income.

No prior experience required. All materials included.

Limited seating available. To check eligibility and sign up in advance please contact Devin McLaughlin: (508) 525-6731

NEW BEDFORD ART MUSEUM
608 PLEASANT ST
NEW BEDFORD, MA 02740

This class is generously funded by the
Association for the Relief of Aged Women.



@NBAM_AW | PHONE: (508) 961-3072 | NEWBEDFORDART.ORG

Introducing a support group designed to help older LGBTQ+ individuals in the South Coast understand and process grief in its many forms.

Good Grief

A SIX-MONTH SERIES TAKING PLACE ON THE
LAST WEDNESDAY OF THE MONTH

Beginning June 28 @ 6:00 PM at Groundwork Fall River

To register—or for more information—email maureen@sc-lgbtqnetwork.org
or call (774) 775-2656.

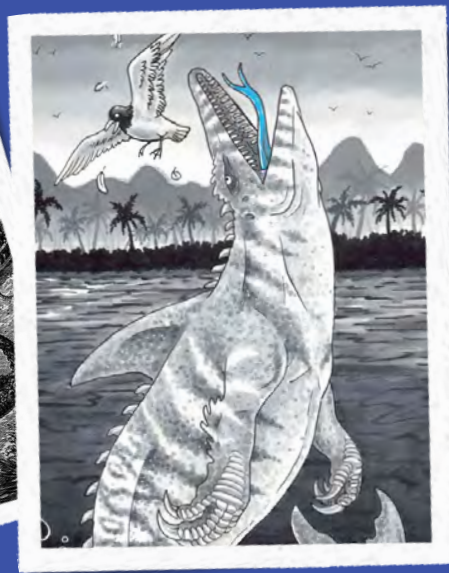
MODERATED BY TERRY RUBY, LMHC, PhD

Clinical Supervisor, Elder Mobile Outreach Team
Community Counseling of Bristol County



THIS PROGRAM IS FUNDED IN PART BY A
GRANT FROM BRISTOL ELDER SERVICES, INC., THROUGH A
CONTRACT WITH THE MASSACHUSETTS OFFICE OF ELDER AFFAIRS





SEA MONSTERS: REAL AND IMAGINED

Exhibit Opening: July 13, 2023 (AHA! Night)

5-8 PM • FREE

New Bedford Fishing Heritage Center

38 Bethel Street, New Bedford MA

508-993-8894



THE S'MORE.

A SOUTH COAST LGBTQ+
INTERGENERATIONAL EVENT

THE MERRIER!



We're bringing older (60+) and younger (14-20 years old) LGBTQ+ individuals together for a campfire get-together where we'll be making s'mores and memories. Registration required. For more information, email maureen@sc-lgbtq-network.org or call (774) 775-2656.



JULY 14, 2023
6:00-7:30 PM

SILVERBROOK FARM
592 CHASE ROAD
NORTH DARTMOUTH

REGISTER AT:
[BIT.LY/LGBTQ-SMORES](https://bit.ly/lgbtq-smores)



THE LGBTQ+
NETWORK
SOUTH COAST MASSACHUSETTS



THE ASSOCIATION FOR THE RELIEF
OF AGED WOMEN OF NEW BEDFORD



**AHA! Night | Thursday, July 13 | 5-7PM
Free Stuff Giveaway**

Stop by The Z to help yourself to the school/office items, decor, party supplies, and posters we're donating to the public! Bring your own bags to carry out your treasures by the end of the event. This free event will take place in The Z's lobby.

**FREE TO ATTEND | Saturday, August 12 | 5-9PM
Decades Dance Party**

Join us for an epic dance party on the street outside of the theater with DJ Anghelli playing the hits through the decades and dance moves taught by talented teaching artists Victor Fonseca, Sue Young, Geovanny Sequeira, and JunnYahh Burnett. We'll have tours of the building, a live mural painting by David Guadalupe, kids' crafts, lawn games, raffles, food trucks, an outdoor bar, and more. Plus, a reading by New Bedford's Poet Laureate Sarah Mulvey and a Toast at Twilight! Feel free to dress in your favorite decade from 1920-2020.



**ONLY FOUR TICKETS AVAILABLE
Preference given to new attendees
Friday, September 8 at 7PM
Get The Led Out at Madeira Field**

The ultimate Led Zeppelin concert! Get The Led Out brings a "whole lotta love" with a two-hour rock homage to the legendary British super group. This performance is in partnership with The Madeira Feast and will take place at Madeira Field located at 50 Madeira Ave, New Bedford. This performance is rain or shine.

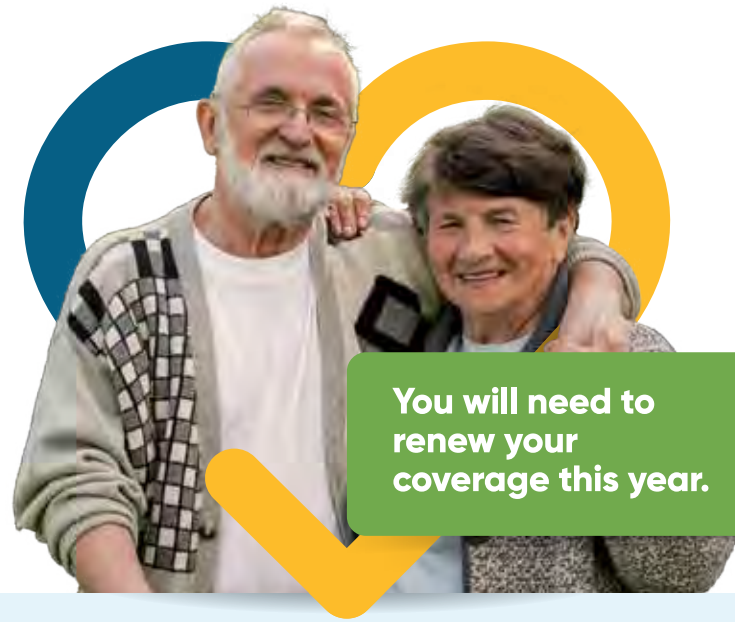
Share Your Story!

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!



Attention MassHealth members 65 or older



You will need to
renew your
coverage this year.

Take three steps to renew your coverage:

 **1. Update your info**
The easiest way to update
your information is to call
Customer Service at
(800) 841 2900 TDD / TTY: 711

 **2. Check your mail**

 **3. Respond to MassHealth**

Note: if you turned 65 since March 2020,
this year's renewal form will look a little
different. We will now review your assets
along with your income.

**If you are no longer eligible for MassHealth,
there are other programs available to meet
your healthcare needs.**

Loss of MassHealth is a Special Enrollment
Period (SEP) that allows you to enroll in
Medicare outside of standard enrollment
periods.

Individuals who do not qualify for Medicare
may be eligible for Connector coverage.

Other programs include: The Medicare
Savings Program (MSP), The Frail Elder Waiver
(FEW), Prescription Advantage, and PACE.

If you need help from a family member or friend to fill out your renewal, you can fill out
and sign the Permission to Share Information (PSI) or Authorized Representative
Designation (ARD) Form.

- This form lets us share your eligibility information with the persons listed on the form
(the "designee").
- If you filled out a PSI more than 12 months ago, you will need to fill out a new one.

Act now. Stay covered. [masshealthrenew.org](https://www.masshealthrenew.org)
800-841-2900 (TTY: 711)



ARAW May 2023 Activity Sheet

Date	Beneficiary	Staff	Type	Notes
5/1/2023	Fragata, Maria	JCOSTA	Phone Call	Looking for AP, said she would call again tomorrow, EM to AP
5/1/2023	Correia, Maria Luisa	JCOSTA	Phone Call	From daughter, concerned rent check not received, adv in the mail today
5/1/2023	Mendes, Darlene	APAZ	Phone Call	Schedule annual review. HV to be conducted 5/3 at 1130am.
5/1/2023	Gadomski, Marion	JCOSTA	Phone Call	Looking for PGM, adv will CB tomorrow, EM to PGM for f/u
5/1/2023	Bissonnette, Alice	APAZ	Phone Call	LVM regarding her recent new request application. Requested a call back.
5/1/2023	Metheny, Diane	APAZ	Phone Call	LVM regarding new referral request and schedule HV
5/1/2023	Lopes, Doreen	PMIDURSKI	Phone Call	Re: Z tickets for Tavares: Info sent to Z box office who will connect w/DL: No trans needed if tix available
5/1/2023	Michel, Loretta	PMIDURSKI	Phone Call	From dgt re: visit this week: Will bring supporting docs
5/1/2023	Edwards, Diane	APAZ	Phone Call	To setup annual HV. Requested extension until June d/t many medical appts.
5/1/2023	Monteiro, Joan	PMIDURSKI	Phone Call	To confirm HV Tues 5/2
5/1/2023	Medeiros, Kathleen	APAZ	Phone Call	Regarding review of application. Reviewed, updated and resubmitted to adm via EMM
5/1/2023	Rapoza, Janet	PMIDURSKI	Phone Call	To confirm HV for Tues 5/2: "I look forward to this visit."
5/1/2023	Macedo, Maria	APAZ	Phone Call	LVM 2x w/ daughter to setup new referral HV. Requested a call back.
5/1/2023	Murach, Barbara	PMIDURSKI	In Home Visit	For NEW referral: Req for Comcast internet, TV & landline
5/1/2023	Garceau, Beverly	APAZ	Phone Call	Unable to LVM x2. Will call back end of week. CESI CM aware.
5/1/2023	DeGrace, Carmen	PMIDURSKI	Phone Call	To confirm type of housing: residence of Buttonwood Acres: Section 8
5/1/2023	Harrison, Patricia	PMIDURSKI	Phone Call	To notify of EDDF approval box spring & headboard: "TY SO much!!" Check mailed to Bob's Furniture JC
5/2/2023	Pacheco, Deborah	PMIDURSKI	Email	To CES CM req assist w/ connecting w/DP: DP voicemail full & not accepting calls
5/2/2023	Dobson, Sally	PMIDURSKI	Phone Call	To req assist w/Direct TV: Will mail invoice to ARAW office for supporting doc
5/2/2023	Hamel, Charlotte	APAZ	Phone Call	Re: approval of hot water tank "Thank you all for doing this so quickly and giving me this wonderful gift"
5/2/2023	Medeiros, Kathleen	APAZ	Phone Call	To notify of approval of mattress. Kathleen would like me to extend a huge thank you to all involved via EMM
5/2/2023	Rapoza, Janet	JCOSTA	Phone Call	With information for PGM, EM to PGM to f/u tomorrow
5/2/2023	Oliver, Sharon	APAZ	In Home Visit	New request visit completed. Request for sewer pipe replacement \$8K+. Provided resources.
5/2/2023	Rapoza, Janet	PMIDURSKI	In Home Visit	For NEW referral: Req mattress, box spring & full size frame
5/2/2023	Monteiro, Joan	PMIDURSKI	In Home Visit	Attempted: States she cancelled appt this AM: JM to call ARAW to resched
5/2/2023	Bramwell, Nancy	PMIDURSKI	Office Visit	To bring BCBS invoice: has been hired PT @ S&S: "I am so happy to be working! I must not earn too much."
5/2/2023	Gadomski, Marion	PMIDURSKI	Phone Call	To state ARAW cannot count Rev. Mort: Family moving out: "I can't use the RM as my family will not get \$\$."
5/2/2023	Martinez-Colon, Nilda	APAZ	Phone Call	RC re: AC approval. SIL, on behalf of Nilda "Thank you so much for helping Nilda. She's really grateful."
5/2/2023	Chor, Patricia	PMIDURSKI	Phone Call	To req BB vouchers: Gentle reminder to stay w/in monthly limits: "I appreciate the ARAW assistance."
5/2/2023	Hotte, Eileen	APAZ	Phone Call	RC re: Eileen called BCBS and they will be sending a bill. Requesting a copy to provide to Housing.
5/2/2023	Huezo-Mendoza, Sonia	PMIDURSKI	Phone Call	Re: S&S gift card & Buss pass: Mailed Monday 5/1: "Thank you so much!"
5/2/2023	Okpara, Priscilia	PMIDURSKI	Phone Call	Re: Charlie Card check: Mailed Monday 5/1: Son Chido > "TY for helping my Mom."
5/2/2023	Duarte, Bernice	PMIDURSKI	Phone Call	BM concern: BD in Sippican for rehab: Plan to return home: ETA ??: Note card mailed
5/2/2023	Fragata, Maria	APAZ	Phone Call	Regarding new request application savings account question. Updated and will submit to ADM
5/3/2023	Curado, Alzira	PMIDURSKI	Phone Call	VM left w/PCA Tina re: nd for doc re: debt r/t to car loan
5/3/2023	Miranda, Maria	APAZ	Phone Call	Re: Mary Ellis missed calls. EM to adm.
5/3/2023	DeMedeiros, Sharon	PMIDURSKI	Phone Call	Re: status req for car repair: "I have been very busy. I will call when I have time to sched a HV."
5/3/2023	Ventura, Natalina	PMIDURSKI	Phone Call	To report inpt @ SLH s/p fall: Fx knee & spine: "I will return home but it may be a while."
5/3/2023	DeSouza, Joanne	PMIDURSKI	Phone Call	Inquiring about bus pass & newsletter: Assured bus check mailed Mon 5/1
5/3/2023	Mendes, Darlene	APAZ	In Home Visit	Annual HV complete. Continued request of cable, internet, phone.

Date	Beneficiary	Staff	Type	Notes
5/3/2023	Espejo, Sharon	PMIDURSKI	Phone Call	Re: status w/SHINE & ACCS: SHINE appt 5/16: Has not called ACCS yet: Will call ARAW after SHINE visit
5/3/2023	Michel, Loretta	PMIDURSKI	In Home Visit	For NEW referral: Req assist w/Cable TV
5/3/2023	Walker, Bonnie	PMIDURSKI	Email	BM concern :w/o working phone: EM to CES CM>They are unable to reach also> CES HV next wk & will f/u ARAW
5/3/2023	Benevides, Maria	PMIDURSKI	Phone Call	To dgt to inform of Board approval of request: "TY so much. My mom will be so happy."
5/3/2023	Beauchamp, Jane	PMIDURSKI	In Home Visit	For NEW request: Assist w/dryer
5/3/2023	Rapoza, Janet	PMIDURSKI	Phone Call	VM left as f/u to her call: Req CB to ARAW
5/3/2023	Hamel, Charlotte	APAZ	In Home Visit	To drop off check for approved water tank. She is very relieved and looking forward to hot shower at home.
5/3/2023	Pacheco, Deborah	PMIDURSKI	Email	From CES CM: rcving hmk services: Notecard mailed to DP req CB to ARAW for follow up
5/4/2023	Macedo, Maria	APAZ	Phone Call	Re: New request. Daughter Elizabeth to call back today at noon.
5/4/2023	Theriault, Frances	APAZ	Phone Call	LVM re: Eligibility and HV. Requested a call back.
5/4/2023	Azevedo, Carmen	APAZ	Note to File	Mailed no contact letter. Recent request was down payment for Eversource hardship program.
5/4/2023	Vieira, Nancy	APAZ	Email	To adm regarding status. Sent no contact letter 4/25. No return call to date. PER CESI CM Nancy is fine.
5/4/2023	Victoria, Maria	APAZ	Phone Call	Re: Update HV. Sick no need. EM to adm to inactivate.
5/4/2023	Almeida, Lorene	APAZ	Phone Call	Schedule annual HV. Lorene requested June. Will call her next month to set up. Son is in critical condition.
5/4/2023	Benoit, Susan	PMIDURSKI	Phone Call	W/update: Has begun MMP w/CES: Considering selling home: Opting out of Rev Mort: ACOA involved
5/4/2023	Carvalho, Patricia	PMIDURSKI	In Home Visit	For NEW request fr. NBCOA: Very HOH: Agreeable to referral to DEAF Inc.
5/4/2023	Curado, Alzira	PMIDURSKI	Office Visit	By Tina to bring Auto Loan statement
5/4/2023	DaRosa, Priscilla	APAZ	Phone Call	LVMM schedule annual HV next week.
5/5/2023	Correia, Maria Luisa	APAZ	Phone Call	RC Annual HV scheduled for 9am 5/11. Daughter will be present
5/5/2023	Rocha, Margaret	APAZ	Phone Call	Re: schedule annual HV. Scheduled for 5/12 at 10am
5/5/2023	Letourneau, Diane	PMIDURSKI	Phone Call	To inquire about services to clean out apt @ OT: Info given re: My Brother's Keeper
5/5/2023	Bourgeois, Lucille	PMIDURSKI	Phone Call	To "THANK ARAW for Comcast service. I am loving watching the news in the AM & PM. Plus my shows. TY"
5/5/2023	Fisher, Laura	APAZ	Phone Call	LVM regarding attendance on 5/9 for financial literacy workshop. Requested a call back.
5/5/2023	Metheny, Diane	APAZ	Phone Call	x2 LVMM to schedule New Request HV. Requested a call back.
5/5/2023	Almeida, Marie	APAZ	Phone Call	LVM regarding annual HV schedule for next week. Requested a call back.
5/5/2023	Garceau, Beverly	APAZ	Phone Call	x3 unable to LVM. Made CESI Case Manager aware. Trying to schedule New Referral visit.
5/8/2023	Vasques, Maria	PMIDURSKI	Phone Call	Re: estimates>to mail shower door estimate: req handyman to mail his estimate for installation
5/8/2023	Chaput, Vanessa	APAZ	Phone Call	Re: Tavares Z Show dates and time. Provided information Sunday, May 14th at 7pm.
5/8/2023	Chaput, Vanessa	APAZ	Phone Call	Re: "Thank everyone for the help with the move. It was a blessing". She is all settled in
5/8/2023	Ponte, Karyn	PMIDURSKI	Phone Call	Re: \$10 credit Comcast d/t power outage: Reg for plant giveaway
5/8/2023	Edwards, Diane	APAZ	Phone Call	Re: Plant delivery. Added to May signup sheet.
5/8/2023	Ingham, Nancy	APAZ	Phone Call	Re: struggling financially this month. EM to PGM to call when she returns to office.
5/8/2023	Bissonnette, Alice	APAZ	Phone Call	Re: HV 5/10 1pm to discuss assistance. Added to calendar
5/8/2023	Openshaw, Pauline	PMIDURSKI	Phone Call	VM left for James re: Comcast Invoice: EMM to WCALF& CES re: status of PO's comcast
5/8/2023	Cole, Carol	APAZ	Phone Call	Re: 5/24 luncheon and Plant delivery sign up. Added to May signup sheet.
5/8/2023	Chor, Patricia	PMIDURSKI	Phone Call	Re: Farmer's Market coupons: Enc to call NBCOA: Will CB after reading newsletter
5/8/2023	Lamontagne, June	APAZ	Phone Call	Re: Sign up for Plant delivery and Wamsutta luncheon. Added to May signup sheet.
5/8/2023	Ponte, Marion	APAZ	Phone Call	Re: signup for Pant delivery. Added to May signup sheet.
5/8/2023	DeSouza, Joanne	APAZ	Phone Call	Re: Luncheon, and Z tickets for Bernadette and With Love from Portugal. Added to May signup sheet.
5/8/2023	Okpara, Priscilia	PMIDURSKI	Phone Call	From son Felix: Comcast d/c: Family hasn't pd nor brought bill to ARAW: Son to pay & call to check billing address
5/8/2023	Fisher, Laura	APAZ	Phone Call	Re: Financially literacy workshop attendance. Laura will not be attending not feeling well.

Date	Beneficiary	Staff	Type	Notes
5/8/2023	Polek, Andrea	PMIDURSKI	Phone Call	Re: plant giveaway: To hand surgeon 5/8 re: carpal tunnel & extreme pain
5/8/2023	Delaney, Kathleen	APAZ	Phone Call	VM re: Sign up for Plant delivery. Added to May signup sheet.
5/8/2023	Collins, Donna	APAZ	Phone Call	Re: Sign up for Plant delivery. Added to May signup sheet.
5/8/2023	Letourneau, Diane	PMIDURSKI	Phone Call	To cancel Comcast @ OT: will use cell phone: BW Dart Rm 111: My Brothers Keeper to get furniture fr apt
5/8/2023	Lawrence, Gail	JCOSTA	Phone Call	To reg for plant pickup
5/8/2023	Furness, Betty	APAZ	Phone Call	Re: luncheon and Plant deliver signup. Added info to May sheet.
5/8/2023	Polek, Regina	PMIDURSKI	Phone Call	Re: Z tix and plant giveaway: To Boston 5/11 for follow up to CA
5/8/2023	Antunes, Joana	APAZ	Phone Call	LVM regarding annual update needed for rent increase effective June 2023 \$1,195.
5/8/2023	Curado, Alzira	PMIDURSKI	Phone Call	To Tina re: need for updated loan invoice w/accurate amount: Tina to contact bank b4 Thurs 5/11
5/8/2023	Cory, Frances	JCOSTA	Phone Call	To reg for Z show, plant delivery, TC to COA didn't know about Farmer's Market coupons, adv not till July
5/8/2023	DaRosa, Priscilla	PMIDURSKI	Phone Call	To reg for Z tix and plant giveaway: "TY so much. Plants make me happy!" ☺
5/8/2023	Greenwood, Dorothy	APAZ	Phone Call	Re: FCOA transportation tip. Reassured her no need to tip. Signed up for plant delivery 5/16.
5/8/2023	Tuite, Janice	APAZ	Phone Call	Re: Sign up for Plant delivery. Added to May signup sheet.
5/8/2023	Liberatore, Gertrude	APAZ	Phone Call	Re: Cancel Z show 5/13 One Funny Mother. EMM to admin. Updated May signup sheet.
5/8/2023	Monteith, Judith	PMIDURSKI	Phone Call	To reg for plant giveaway: Shared past experience w/farmer's market & SNAP/farmer's Market coupons
5/9/2023	Mello, Eleanor	PMIDURSKI	Phone Call	To cancel fin. Lit. mtg: "Not feeling well. Enroute to HMA" Declined offer for BB vouchers
5/9/2023	Costa, Barbara	CFOLEY	Phone Call	TC from Jeff "caregiver" Id'ed as "son" re: housing redirected to CES; TC to Gale to inform of protective filing
5/9/2023	Costa, Barbara	PMIDURSKI	Phone Call	Re: eviction: EM to GSSC: NBHA & CES filing protective: "I need to take care of BC & my dog. TY ARAW."
5/9/2023	Simpkin, Carol	PMIDURSKI	Office Visit	For Fin Lit program: Reg for plant giveaway
5/9/2023	Jenkins, Karen	PMIDURSKI	Office Visit	For financial literacy program
5/9/2023	Medeiros, Margaret	PMIDURSKI	Office Visit	For Fin. Lit program: Reg for 2 Z shows and for plant giveaway
5/9/2023	Guy, Nancy	JCOSTA	Phone Call	To reg for plant, unable to do luncheon d/t dr appt, asked about FM coupons, adv call COA in July
5/9/2023	Letourneau, Diane	PMIDURSKI	Phone Call	To report she has adequate TV and accessibility to phone at current time: Req to remain w/ARAW
5/9/2023	Ribeiro, Renay	PMIDURSKI	Phone Call	To reg for plant give away: DX w/pinched nerve: Can't participate in Salsa Creative Classroom @ Z
5/9/2023	Chytrus, Leslie	PMIDURSKI	Phone Call	To notify HV postponed by AP: Informed AP will call to reschedule: "TY for notifying me."
5/9/2023	Openshaw, Pauline	PMIDURSKI	Phone Call	From Ex: States he will pay Comcast balance Saturday and change billing address
5/9/2023	Enoksen, Charlotte	PMIDURSKI	Phone Call	To "THANK ARAW for computer. I LOVE it!!" Reg for plant giveaway: Req ARAW info for RSC @ CrossRoads
5/9/2023	Martinez-Colon, Nilda	PMIDURSKI	Phone Call	From Stan & Pauls: Nd phone# got delivery: #provided: Del either Fri or Mon
5/9/2023	Duarte, Patricia	PMIDURSKI	Office Visit	For financial literacy program
5/9/2023	Burke, Shauneen	PMIDURSKI	Phone Call	To reg for Z tix, plant delivery: Inquiring about vouchers for Z shows: EM to JC
5/9/2023	Smith, Debra	PMIDURSKI	Phone Call	VM left for AP re: AT&T bill: EM to AP to follow up upon her return to office
5/9/2023	Lopes, Carole	PMIDURSKI	Phone Call	To reg for plant delivery: "TY so much. I find joy in caring for my plants. TY"
5/9/2023	Vasques, Maria	PMIDURSKI	Phone Call	From A1 Home Improvement: to send estimate via email to ARAW for shower door & grab bar installation
5/9/2023	O'Keefe, Lindelle	APAZ	Phone Call	To dgt. Inundated with MD appt. Had visit w/ DCOA did not find helpful. Still working on Eversource Payment plan and RAFT.
5/10/2023	Bissonnette, Alice	APAZ	In Home Visit	Regarding selling car. Recommended she think about it and I will follow up 5/15
5/10/2023	DaRosa, Priscilla	APAZ	In Home Visit	Annual HV completed. Requesting continued support.
5/11/2023	Chytrus, Leslie	APAZ	Phone Call	Re: re-schedule annual HV for 5/17 at 10am.
5/11/2023	Jenkins, Karen	PMIDURSKI	Phone Call	Re: fin lit program: Constructive comments, learned new strategies, would like info re: wills, HCP, DNR
5/11/2023	Correia, Maria Luisa	APAZ	In Home Visit	Annual HV completed. Requested increase in rent support.
5/11/2023	Medeiros, Margaret	PMIDURSKI	Phone Call	To reg for luncheon & express concern re: budget: take out > freq d/t broken oven: Estimate pending
5/11/2023	Costa, Barbara	CFOLEY	Phone Call	2 TC re letter rec'd, apt situation & Pat Foster: TC fr. Sean BES PS

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5/11/2023	Pacheco, Deborah	PMIDURSKI	Phone Call	Reporting new phone #: d/c comcast: Internet only: will stream: Req assist w/OTC products
5/11/2023	Alves, Louise	APAZ	Phone Call	Re: updated on bed "I love it. Sleep like a baby. Thank you." Will stop by 5/11 to sign consent form
5/11/2023	Garceau, Beverly	APAZ	Phone Call	x4. Unable to schedule a new referral visit. Will send letter.
5/11/2023	Couto, Charlene	APAZ	Phone Call	New referral. Requesting support for Moxie Mobility services. Pending why? What? And cost
5/11/2023	Oliver, Sharon	APAZ	Phone Call	Re: non qualifying for ARAW support and follow up. Sharon thankful for all the assistance.
5/11/2023	Vasques, Maria	PMIDURSKI	Phone Call	From Matt @ Home Improvements: pros/cons/verbal quote: to call Maria directly
5/11/2023	Almeida, Marie	APAZ	Phone Call	x3. Unable to reach to schedule annual HV. Will send letter. Not in hospital.
5/11/2023	Metheny, Diane	APAZ	Phone Call	LVM x 3. Unable to schedule a new referral visit. Will send letter.
5/11/2023	Furtado, Fatima	APAZ	Phone Call	LVM with Sophia Prat of CES. Requested a call back regarding housing application update.
5/11/2023	Burke, Shauneen	PMIDURSKI	Phone Call	Re: BB vouchers: HV to del Z vouchers for 5/11 and 5/14 (NBAM) Rcvd vouchers for Tavares
5/12/2023	Rose, Patricia	PMIDURSKI	Phone Call	Re: S&S gift cards: Rcvd April & May cards: "TY for all your help!"
5/12/2023	Ingham, Nancy	PMIDURSKI	Phone Call	Req assist w/2 new tires: "I just had brakes done now I need tires" To obtain estimate & sched HV for update
5/12/2023	Thibodeau, Diane	PMIDURSKI	Phone Call	Re: assist w/auto/home insurance and dental bills: Update needed: DT to CB Mon 5/15 to sched a HV
5/12/2023	Sharples, Mary	PMIDURSKI	Phone Call	Re: Board approval for hearing aid repair: "TY so much!" SCENT notified of award.
5/12/2023	Couto, Charlene	APAZ	Phone Call	RC could not LVM re: Moxie Mobility services. Pending why? What? And cost
5/12/2023	(SCVNA), Sara	APAZ	Phone Call	From Sara at SCVNA re: new request. Will most likely no be eligible for ARAW support. Lives with 2 others.
5/12/2023	DeGrace, Carmen	PMIDURSKI	Phone Call	VM left re: Board approval for mattress & box spring: Worley's notified and JC to mail check
5/12/2023	DeGrace, Carmen	CFOLEY	Phone Call	RC beyond thrilled; checking on bedframe and removal of old; "god bless everyone!"
5/12/2023	Jesus, Elizabeth	PMIDURSKI	Phone Call	Re: FLO & trans. "TY." Attending FCOA SDC 2d/wk: EM to GSSC re: rechargeable hearing aids via Fallon
5/12/2023	Antunes, Joana	APAZ	Phone Call	LVM requesting rent increase documentation. Requested a call back.
5/12/2023	Curado, Alzira	PMIDURSKI	Phone Call	Re: Board decision: Comcast billing add to be changed: loan bal after May payment will be sent to ARAW
5/12/2023	Costa, Maria	APAZ	Phone Call	To Westport Apothecary to deliver Poise #4 Pads. LVMM with Maria re approval.
5/12/2023	Costa, Barbara	PMIDURSKI	Phone Call	Re: move: Encouraged to speak w/community agencies who contact her to help w/move
5/12/2023	Horne, Donna	APAZ	Phone Call	Re: Luncheon sign up. Added to spreadsheet.
5/12/2023	Gadomski, Marion	PMIDURSKI	Phone Call	To discuss reverse mortgage, transferred to CHF - adv private foundation, philosophy, etc.
5/12/2023	DeJesus, Eva	PMIDURSKI	Email	To grandgt re: Board approval w/rent assistance: "TY so much." RV in 6 months
5/12/2023	Lawrence, Gail	CFOLEY	Phone Call	AC in car not cold; rebuilt last year; will get estimate and circle back
5/12/2023	Parker, Delia	PMIDURSKI	Phone Call	To sched annual HV: Sched for Wed 5/17 @ 1pm
5/12/2023	Chor, Patricia	PMIDURSKI	Phone Call	Re: Board approval for mattress & box spring: "TY": Worley's notified & JC to mail check
5/15/2023	DeSouza, Joanne	PMIDURSKI	Phone Call	To reports landline not working: "It's the line. Repairman coming Tues." Cell phone working
5/15/2023	Larrabee, Regina	PMIDURSKI	Phone Call	Re: mediation court mtg 5/25 vis ZOOM & SE Housing Court June 16th: "I will live in my car w/my cat."
5/15/2023	Palazzo, Sharon	PMIDURSKI	Phone Call	Re: Auto Ins premium: Has not rcvd premium invoice: Hold HV
5/15/2023	Belanger, Elizabeth	PMIDURSKI	Phone Call	VM left to check on status of health
5/15/2023	Antunes, Joana	PMIDURSKI	Phone Call	RC fr. Cindy for AP: Req CB from AP on Tues 5/15 b/w 8am and 12pm: "I work in the afternoon."
5/15/2023	Cory, Frances	PMIDURSKI	Phone Call	To thank for cards
5/15/2023	Rocha, Margaret	APAZ	Phone Call	LVM to reschedule annual HV. Requested a call back.
5/15/2023	Lyons, Carol	PMIDURSKI	Phone Call	Re: Comcast: has not received a bill: States rcvd \$\$ to EBT SNAP card for food lost s/p broken fridge: TY
5/15/2023	Monteiro, Joan	PMIDURSKI	Phone Call	To resched HV: set for Wed 5/17 @ 11am
5/15/2023	Vieira, Nancy	PMIDURSKI	Phone Call	RC for AP: "have her call me in the early morning as I spend most of my day out." EMM to AP
5/15/2023	Medeiros, Patricia	PMIDURSKI	Phone Call	To Royal LTC: "I am as happy as I can be." Req to remain w/FLO: asked for plant delivery to "cheer up room."
5/16/2023	Chaput, Vanessa	PMIDURSKI	Phone Call	Re: plant del & Luncheon: "TY. The Tavares concert was a much needed distraction 4 MothersDay.TY"

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5/16/2023	Edwards, Diane	PMIDURSKI	Phone Call	VM left re: plant delivery
5/16/2023	Bissonnette, Alice	APAZ	Phone Call	LVM re: update on her decision to sell car.
5/16/2023	Zych, Joanne	APAZ	Phone Call	LVM re: Luncheon attendance. Requested a call back to confirm.
5/16/2023	Thibodeau, Diane	PMIDURSKI	Phone Call	RC re: New request for assist w/dental &/or auto insurance: HV sched for Fri 5/19 @ 8:15am
5/16/2023	Vieira, Nancy	APAZ	Phone Call	LVM per Nancy request today at 8am. Will try back tomorrow at 8am. Update FLO Record of Eligibility.
5/16/2023	Beauchamp, Jane	PMIDURSKI	Phone Call	To report she is sending car repair estimate via email
5/16/2023	Therault, Frances	APAZ	Phone Call	RC re: eligibility. Does not qualify due to over income. "Thank you and give my love to all."
5/16/2023	Harrison, Patricia	PMIDURSKI	Phone Call	Re: Bob's Furniture & their call to sched del date: PH will discuss w/son: "TY SO much. You are THE best!!"
5/16/2023	Murach, Barbara	PMIDURSKI	Phone Call	TC re: spotty wifi at WCALF: CES CM updated re: ARAW req & upcoming 6/8 Board mtg: BM aware of same
5/16/2023	Brightman, Pauline	APAZ	Phone Call	LVM re: Luncheon attendance. Requested a call back to confirm.
5/16/2023	Antunes, Joana	APAZ	Phone Call	LVM re: Rent increase documentation. Requested a call back.
5/16/2023	Rocha, Margaret	APAZ	Phone Call	LVM re: Cancel and reschedule 5/19 HV due to plant delivery
5/16/2023	Estrella, Louise	PMIDURSKI	Phone Call	Re: follow up fr. BM: Cardiac consult 5/18 in FR: Son attending:New req for grab bars: to send estimate
5/16/2023	DaRosa, Priscilla	APAZ	Phone Call	Re: Plant delivery. Is interested states she called and someone convinced her to participate. Del sched
5/16/2023	Greenwood, Dorothy	PMIDURSKI	Phone Call	To sched del of plant: "You folks are all so nice. TY for all you do. I look forward to a visit."
5/16/2023	Liberatore, Gertrude	APAZ	Phone Call	TC re: Luncheon attendance. Gert will be in attendance. "Thank you so much!"
5/16/2023	Medeiros, Margaret	APAZ	Phone Call	TC re: Luncheon attendance. Margaret will be in attendance. "Thank you so much!"
5/16/2023	DeMendonca, Theresa	PMIDURSKI	Phone Call	Re: Luncheon: Unable to attend d/t PCA present: "Apt inspection Friday. I have a lot of boxes. I ref. help."
5/16/2023	Horne, Donna	APAZ	Phone Call	Re: Luncheon attendance. Donna will be in attendance. "Thank you so much!"
5/16/2023	Bishop, Sarah	PMIDURSKI	Phone Call	For ROE: Req assist w/ car repair: Walking to therapist: Nds BB vouchers for MD appt: To CB office: HV 5/24
5/16/2023	Parquette, Mary Jane	APAZ	Phone Call	LVM re: new request. Requested a call back to schedule home visit.
5/16/2023	Cole, Carol	PMIDURSKI	Phone Call	Re: plant del & luncheon: "TY so much. Can you help w/a couch? Mine is broken." To obtain estimate
5/16/2023	Hoglund, Deborah	PMIDURSKI	Phone Call	Attempt ROE FLO: Phone blocked: EMM to CES> CM to ask DH to call ARAW
5/16/2023	Lamontagne, June	PMIDURSKI	Phone Call	Re: Luncheon: "TY. I need joy in my life. My mom is sick @ Alden Court."
5/17/2023	Barboza, Margaret	PMIDURSKI	Phone Call	VM left extending invitation to Luncheon 5/24
5/17/2023	Chytrus, Leslie	APAZ	In Home Visit	Annual HV completed. Requested continued support for SRTA 2 booklet per month.
5/17/2023	Ribeiro, Renay	PMIDURSKI	Phone Call	Re: Luncheon: "I would love to attend"
5/17/2023	Parker, Delia	PMIDURSKI	In Home Visit	For Annual update: Will HOLD until July mtg pending queries re: hearing aid status & follow up
5/17/2023	Carvalho, Patricia	PMIDURSKI	Phone Call	From NBCOA PF: PC appr for MassHealth: Decline SN med manag: Nds phone:CM to Assurance/SafefLink
5/17/2023	Curado, Alzira	PMIDURSKI	Email	Recvd w/auto loan: Need paper invoice: Tina notified and to call bank to mail invoice
5/17/2023	Pina, Antonia	APAZ	Phone Call	LVM re: new referral HV. Requested a call back Portuguese speaking only.
5/17/2023	Silva, Marina	PMIDURSKI	Phone Call	Re: eviction: Court decision 5/31 must be out: Tavares booked til 6/4: w/o place to move: To call other movers
5/17/2023	Monteiro, Joan	PMIDURSKI	In Home Visit	For New request w/rent balance or SS repayment
5/17/2023	Payan, Freda	PMIDURSKI	Email	From RSC: "TY so much for the mattress & chair. I am feeling so much relief. Blessings to you."
5/17/2023	Vieira, Nancy	APAZ	Phone Call	LVM x6. Sent letter. Nancy requested a call. No contact at this time. No further contact at this time. Inactive.
5/17/2023	Bissonnette, Alice	APAZ	Phone Call	RC re: new car shopping. Wil let me know what she decides. EMM to Adm with details.
5/17/2023	Levesque, Beatrice	PMIDURSKI	Phone Call	VM left extending invitation to Luncheon 5/24
5/17/2023	Ponte, Karyn	APAZ	Phone Call	Re: Plant delivery. Will be home.
5/18/2023	Letourneau, Diane	PMIDURSKI	Phone Call	Re: move to BWLTC: Apt is being cleaned by friend (PCA, her fiancé & brother) DL very happy: TY ARAW
5/18/2023	Zych, Joanne	PMIDURSKI	Email	Req assist with replacement car key: to get estimate: aware of 5/24 deadline
5/18/2023	Ingham, Nancy	PMIDURSKI	In Home Visit	Re: new req for tires: Update completed: May need assist w/car repair s/p hit & run MVA: to get estimate

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5/18/2023	Hamel, Charlotte	APAZ	Phone Call	Re: mail vaccination form to fill out mail back to ensure able to attend ARAW event.
5/18/2023	Murach, Barbara	PMIDURSKI	Email	Rcvd w/estimate for desktop computer: Aware Board meets 6/8 for decision
5/18/2023	Cory, Frances	PMIDURSKI	Phone Call	Re: plant del: "Multiple MD appts, a bit under the weather: Looking forward to a bit of sunshine w/plant del."
5/18/2023	Brightman, Pauline	PMIDURSKI	Phone Call	VM left 4 dgt re: 5/19 plant del and 5/24 Luncheon/ Req call back to discuss logistics
5/18/2023	Polek, Regina	PMIDURSKI	Phone Call	Re: plant delivery: will come to office alter Fri afternoon w/sister Andrea: MD appts
5/18/2023	Simpkin, Carol	PMIDURSKI	Phone Call	Re: plant pick up: Will be at 174 Union at 11:30am: "TY so much!!"
5/18/2023	Hoglund, Deborah	PMIDURSKI	Phone Call	For annual FLO ROE: denies financial need at present: Death of son & sister in 2022: Appreciates FLO news
5/18/2023	DeSouza, Joanne	PMIDURSKI	Phone Call	Re: plant del & Luncheon: Will attend Wamsutta & call DR: Phone line repaired
5/19/2023	Cole, Carol	PMIDURSKI	In Home Visit	For plant del. & NEW request for assist w/sofa: Finan. Update: "TY for all you ladies do for us!"
5/19/2023	Cory, Frances	PMIDURSKI	Phone Call	For plant del: spent nite in ER: Increased health issues: "This plant brightens my day. TY."
5/19/2023	Monteith, Judith	PMIDURSKI	Phone Call	Re: NB Womens Center # to inquire about emergency keychains for safety from intruders. TY for plant
5/19/2023	Greenwood, Dorothy	PMIDURSKI	In Home Visit	Fpr plant del: "TY for the beautiful plant."
5/19/2023	DaRosa, Priscilla	PMIDURSKI	In Home Visit	For plant del: "TY. This I lovely. The Z can accommodate my scooter. My dgt & I will attend B. Peters."
5/19/2023	Thibodeau, Diane	PMIDURSKI	In Home Visit	To complete NEW request for assist w/ dental & mattress: To get mattress estimate
5/19/2023	Edwards, Diane	PMIDURSKI	In Home Visit	For plant del:"TY so much" Talkative re: NBFHC and intergen. Program: Gaining >info re.fam & fishing industry
5/19/2023	Medeiros, Patricia	PMIDURSKI	In Home Visit	To The Royal of FHVN for plant delivery: PM sleeping: Nurse to bring plant to PM
5/19/2023	Chaput, Vanessa	PMIDURSKI	In Home Visit	Not home for plant del: Pant given to neighbor & friend: TC later to "Thank ARAW for nice plant."
5/22/2023	Almeida, Marie	PMIDURSKI	Phone Call	From Dgt: No contact letter rcvd: Agreeable to HV for annual update: EMM to AP for follow up
5/22/2023	Connors, Brenda	PMIDURSKI	Phone Call	Re: status of plant delivery: EM to AP for follow up
5/22/2023	Martinez-Colon, Nilda	PMIDURSKI	Email	To grandgt to confirm payment of Comcast w/EDDF 5/19
5/22/2023	Harrison, Patricia	PMIDURSKI	Phone Call	Re: bed frame & headboard: "TY SO much. I slept like a baby. I wanted to stay in bed all day. TY"
5/22/2023	Monteiro, Joan	PMIDURSKI	Phone Call	To report she will bring supp. Docs to ARAW office: Aware of 5/24 deadline
5/22/2023	Vasques, Maria	PMIDURSKI	Phone Call	To inform MV that supp. docs not rcvd: MV to connect w/carpenter and obtain docs by Wed 5/24 deadline
5/22/2023	Costa, Barbara	CFOLEY	Phone Call	Update re: situation; will d/c relationship with Jeff and caregivers upon move; many applications completed
5/22/2023	Palazzo, Sharon	PMIDURSKI	In Home Visit	For annual update: Was anxious about auto Ins & paid: Req assist w/Direct TV & WA OTC: "TY ARAW"
5/23/2023	Waite, Cynthia	JCOSTA	Phone Call	Did not receive WA order, EM to Dana to f/u, attempting again Wed 5/24, in need of compression socks
5/23/2023	Lima, Mary	JCOSTA	Phone Call	Went to Comcast to lower bill, thinks she is paying for it, confused, EM to AP to f/u
5/23/2023	Evora, Sandra	JCOSTA	Phone Call	Unable to get Aaron's estimate, still wants electric request, EM to PGM to f/u
5/23/2023	Pina, Antonia	APAZ	Phone Call	Re: Initial HV. Scheduled for 5/25/23 at 2pm
5/23/2023	Almeida, Marie	APAZ	Phone Call	Re: Annual HV. Scheduled 11am 5/24/23
5/24/2023	Pina, Teresa	APAZ	Phone Call	Unable to LVMM. Need to connect with her to get cable bill and address change.
5/24/2023	Bissonnette, Alice	APAZ	Phone Call	RC auto ins increased by \$181 a year. Requested she work with auto ins company.
5/24/2023	Thibodeau, Diane	CFOLEY	Phone Call	TNF call to explain & clarify mission, last resort phil & why req before procedure; MH will cover dental
5/24/2023	Lajoie, Elizabeth	PMIDURSKI	Phone Call	Re: Verizon: NO paper invoice rcvd by EL: VMMM left w/dgt req her to call Verizon req invoice to ARAW
5/24/2023	Todd, Kristine	PMIDURSKI	Phone Call	Re: new landlord Josh, Section8, Fresh Start: Enc to obtain amt 4 new rent: Septoplasty 5/22
5/24/2023	Almeida, Marie	APAZ	In Home Visit	Submitted continued support of BCBS Premium for July meeting.
5/24/2023	Evora, Sandra	PMIDURSKI	Phone Call	Re: request: Nd addtl info: HOLD until July Board mtg: PCA pending: NOT paying Eversource @ all.
5/24/2023	Monteiro, Joan	PMIDURSKI	Phone Call	Unable to contact JM re: addtl info for req: HOLD request until July Board mtg:
5/24/2023	Begnoche, Cecile	PMIDURSKI	Phone Call	TC: To "stay w/dgt in VA for indefinite time. D/C phone, TV & PERS" Dgt to call A1 to sched pick up
5/24/2023	Antunes, Joana	APAZ	Phone Call	LVM with Cindy for rent increase documentation. Deadline is today for June Board meeting
5/24/2023	Bizarro, Lucille	APAZ	Phone Call	Re: April SilverScript payment. Lucille paid afraid to lose coverage. EMM to adm with details

Date	Beneficiary	Staff	Type	Notes
5/24/2023	Furness, Betty	PMIDURSKI	Phone Call	To cancel attendance to luncheon due to ill health: "I am so sorry."
5/24/2023	Ribeiro, Renay	CFOLEY	Phone Call	Explained vax policy; assured when lifted can attend lunch; not happy
5/24/2023	Waite, Cynthia	PMIDURSKI	Phone Call	Re:WA>to del today: States SWH Esox "fell apart & didn't fit": In hosp 5/18: Req SN measure for Esox fr. ENOS
5/25/2023	DeMendonca, Theresa	PMIDURSKI	Phone Call	Re: status: Reports passed apt inspection: Another in Dec "So I need to maintain a clean apt.TY for concern"
5/25/2023	Grace, Barbara	PMIDURSKI	Phone Call	Re: annual update: HV sched for 6/7: "I have a lot going on. Not feeling well. TY for all you do"
5/25/2023	Guy, Nancy	APAZ	In Home Visit	Delivered plant
5/25/2023	DeMedeiros, Sharon	APAZ	Phone Call	Re: tickets to Bernadette Peters. Added to spreadsheet.
5/25/2023	Petrin, Joan	PMIDURSKI	Phone Call	To sched annual update HV: Req assist w/cost of eyeglasses: HV sched for 6/1
5/25/2023	Mota, Lina	PMIDURSKI	Phone Call	To dgt to sched annual update: HV sched for 6/8
5/25/2023	Rocha, Margaret	APAZ	Phone Call	Reschedule HV to 6/30 10am.
5/25/2023	Begnoche, Cecile	PMIDURSKI	Phone Call	Re: PERS unit: "I will try to get the unit to you b4 I leave Fri morning." PERS unit returned by dgt to office
5/25/2023	Couto, Charlene	APAZ	Phone Call	Re: schedule HV. Could not LVMM. Will try back tomorrow.
5/25/2023	Dobson, Sally	PMIDURSKI	Phone Call	Re: MH>Addl info needed: SNAP \$84/m: PACE will be in Fall '23: PGM to f/u in 2 weeks re: MH status
5/25/2023	Pina, Antonia	APAZ	In Home Visit	Did not qualify d/t 2 years in NB and no need.
5/25/2023	Enoksen, Charlotte	APAZ	In Home Visit	Attempted to deliver plant. Was not home will attempt 5/26
5/25/2023	Chaput, Vanessa	PMIDURSKI	Phone Call	To sched annual update: HV sched for 5/31; "The luncheon was wonderful. The food was so tasty. TY"
5/25/2023	Burke, Shauneen	PMIDURSKI	Phone Call	To sched annual update: "This is too many visits. I have too much going on." Education re: HV: Sched 6/13
5/25/2023	Lajoie, Elizabeth	APAZ	Phone Call	Re: Verizon bill. Will be mailed in June to 174 Union. EM to adm and PGM
5/25/2023	Dillon, Sherry	PMIDURSKI	Phone Call	Re: annual update: HV sched for 6/1: "I'm not doing well. Many tests>EEG, brain scan & MRI."
5/25/2023	Ingham, Nancy	PMIDURSKI	Phone Call	Re: EDDF tires: "TY so much": To sched appt & notify ARAW of date to obtain check for payment
5/25/2023	Pina, Teresa	APAZ	In Home Visit	Retrieved comcast bill and address change. Teresa is very thankful!
5/26/2023	Morgan, Sylvia	APAZ	Phone Call	LVM regarding eligibility. New referral
5/26/2023	Evora, Sandra	APAZ	Phone Call	Re electric bill status of approval. EMM to PGM to call her back next week.
5/26/2023	Couto, Charlene	APAZ	Phone Call	To sch HV. Will call ARAW back sister needs to be present.
5/26/2023	Waite, Cynthia	APAZ	Phone Call	From Steve at Nightingale VNA. EMM PGM to call back next week.
5/26/2023	Debrosse, Sezaltina	APAZ	Phone Call	For CESI elder service phone # regarding neighbor. Tina will be filing an elder at risk for her neighbor.
5/30/2023	Correia, Maria Luisa	APAZ	Email	Regarding increased rent. Submitted request.
5/30/2023	Rocha, Margaret	APAZ	In Home Visit	Requested continued support for cable/phone. Submitted
5/30/2023	Larrabee, Regina	PMIDURSKI	Phone Call	Re: Housing>Apt secured Tripp Tower: RL to call Tavares to sched move: EMM top Tavares to confirm approval
5/30/2023	Waite, Cynthia	PMIDURSKI	Phone Call	VM left 4 VNA RN: TC fr. CW re: increased edema, wgt which is being monitored by VNA
5/30/2023	Hennessy, Cheryl	PMIDURSKI	Phone Call	To sched annual update: No longer has auto: SRTA approved: HV sched for 6/12
5/30/2023	Jesus, Elizabeth	PMIDURSKI	Phone Call	From Fallon RN: Ins will cover rechargeable hearing aids: To confirm w/EJ desire to pursue process
5/30/2023	Monteiro, Joan	PMIDURSKI	Office Visit	To bring SE docs: Aware JM req on HOLD til July d/t lack of contact as w/o phone last week
5/30/2023	Vasques, Maria	PMIDURSKI	Phone Call	Req HOLD on req: "working w/atty & Bayberry management. I will let you know results."
5/30/2023	Evora, Sandra	PMIDURSKI	Phone Call	Rcvd laptop invoice: Aware on HOLD til July mtg d/t lack of docs b4 deadline
5/30/2023	DaSilva, Aida	PMIDURSKI	Phone Call	Re: speak to PGM regarding her situation. NEW ref: Housing: EMM to GSSC: Discuss w/CHF



May 2023: Beneficiary Advocate

Patricia Midurski

REFERRALS Received: 2

Sources of referrals: Coastline x 2

Requests submitted: 10

EDDF: 1

Updates submitted: 2

FLO updates submitted: 2

Referrals made to: City of NB OHCD, My Brother's Keeper, DEAF, Inc., RAFT (Neighbor Works), ACCS, CES, Buried Treasure Support Group

Pending: 10

Ineligible: 0

Withdrawn: 0

Inactive: 1

HOLD: 1

To Heaven: 0

TRENDS: This year, and especially in the past two months, I have noted a new trend. Two longtime ARAW beneficiaries provided inaccurate information over the years, and one is currently involved with protective services* unfortunately.

These situations were outliers in the past; however, this type of circumstance is becoming more prevalent. Complex psychosocial needs intertwined with intricate lifelong habits, diminished community resources and a scarcity of professionals' adept in case management has substantially increased the time required to obtain appropriate information.

For example, several referrals received in April & May continue to lack the complete data needed to provide a thorough application and request. The adage of an onion with many layers comes to mind. My recent referrals consist of younger women (65-70) who are well-versed regarding community services and have utilized many over their lifetime. I am witnessing a group of women who are savvy and share limited information to gain assistance, a learned behavior.

Unfortunately, this slows the progress of their request as I do my due diligence to gather necessary information often speaking with other partners of the beneficiary community team. As the onion layers are revealed, mistruths and incomplete information are unearthed. Clearly, this is a survival skill/adaptive behavior utilized by this new generation of women who have survived challenging lives.

I am submitting applications that may appear to be requesting a minimum, however this is due to additional work needing to be completed. As an advocate, I believe my role is to gather the facts to the best of my ability, collate the data and provide the Board with the best summary of the beneficiary given the facts I have ascertained from the beneficiary and her community team (CES, SCCLS, etc.) I agree that the women we are assisting in 2023 share the low-income status of those women helped since 1866.

However, the similarities end there. In my three-year tenure at ARAW, I have noted a distinct change in the newer referrals, not all but many. "not alms alone, but a friend" continues to resonate with me. With this new generation of women, are we empowering them or enabling them by providing ongoing financial support? My requests tentatively will reflect more short-term assistance with a follow-up to evaluate mindful changes in a current situation. The financial literacy program is a tool toward education to enhance empowerment.

*A second beneficiary (new referral) just called to report a protective worker from BES visited her yesterday.

EDUCATION: May is Older Adult mental Health Awareness month. Via Zoom, I participated in an ASA webinar that included topics such as Depression & Chronic Illness, Suicide in OA, and the Intergenerational programs.

Unfortunately, CES has opted to discontinue the FGP which several of our beneficiaries took part in. Not only will they lose a small stipend, but they are losing a sense of purpose, joy & community connection. An absolute disservice to our ladies and to the children & the schools with which they worked.

I am actively seeking education regarding housing, eviction, Section 8 and subsidized housing. A definite increase in evictions and unsustainable living situations is trending and I need to be more informed about these resources to refer accordingly. MLRI has literature available which I have begun to peruse. Limited resources and mentors are available in the Greater NB area. I am exploring Neighbor Works in Brockton as they cover the New Bedford area.



May 2023: Beneficiary Advocate

Ana Paz

REFERRALS RECEIVED: 5

REFERRAL SOURCES: 1 Moxi Mobility, 1 NB COA, 1 Coastline, 1 Nightingale VNA

REFERRALS MADE TO: 2 Coastal Neighbors Network, 1 City of NB, 1 Southcoast Grief Group

PENDING: 7 **INELIGIBLES:** 7 **WITHDRAWN:** 2 **INACTIVE:** 2

UPDATES SUBMITTED: 7

REQUESTS SUBMITTED: 2

FLO SUBMITTED: 1

TRENDS: This month I had two referrals that were remarkably similar. Both women were seeking assistance, however, were ineligible due to being over income and assets. They both were unwilling to see that the reason they were in financial constraints was that they were putting their loved ones needs first.

One woman refused to increase rent that would aid her in extra monthly income to be able to resolve her need. The other woman was not using her reversed mortgage or investment funds for current day-to-day needs as she was saving the funds for her son for when she passes.

While they were both grateful for this Advocates visit and information provided and understood the reason as to why they did not qualify, yet they both decided to remain putting their loved ones first and continue to struggle, and stress about their predicament.

As a Beneficiary Advocate it is hard in these types of situations to want to advocate as to how these women should manage their financial decisions yet know I can only support their decision.

EXPERIENCE: This month I had the unpleasant experience of having to listen to two Beneficiaries express their discontent with ARAW activities. It was very disheartening to know that some of these women feel ARAW is a Club Membership. I expressed my experience to Clare who explained the WCAP program that these women are referring to. I am now better able to understand their opinion and how to respond to future conversations with these women about this topic.

GRATITUDE: This month's gratitude was the ability to deliver plants to several of our Beneficiaries and spend time with them knowing how they too are so grateful to ARAW for putting a smile on their face and being available for them. It is so fulfilling to be able to meet Beneficiaries I have never met and would never meet if it were not for activities like this.

Below are the women I have not heard from and will be made inactive.

Carmen Azevedo: Many months of trying to connect. No contact letter sent 5/4/23. No response to date. INACTIVE

Nancy Vieira: Several VMM left. No contact letter sent 5/4/23. Called back LVMM x2, and no response to date. INACTIVE

Sharon Oliver: Over income. DNQ

Maria Victoria: Has only lived in New Bedford 2 years. Previously in Brockton. DNQ

Madelyn Gregory: Several attempt to get eligibility information. Rescheduled x3. Sent no contact letter 4/26. No response to date. WITHDRAWN

Frances Theriault: Over assets due to reverse mortgage and investments. DNQ

Maria Macedo: Only need was to repair front porch. Daughter called to withdraw referral. WITHDRAWN

Dalia Rego: Only 60-years-old. DNQ

Patricia Lafleur: Ceiling repair. Over income. DNQ

Diane Metheny: Left several VMM. No contact letter sent 5/15. No response to date. WITHDRAWN

Beverly Garceau: Several attempted calls. Could no LVMM. Sent no contact letter 5/15. No response to date. WITHDRAWN

ARAW June 2023 Activity Sheet

Date	Beneficiary	Staff	Type	Notes
6/1/2023	Almeida, Lorene	APAZ	Phone Call	Re: Schedule annual review for 6/7 at 11am
6/1/2023	Huezo-Mendoza, Sonia	PMIDURSKI	Phone Call	Re: S&S gift card: Informed mailed 5/26: "TY all so much. I love you!"
6/1/2023	Petrin, Joan	PMIDURSKI	In Home Visit	For annual update: Req cont of BCBS & reimbursement for eyeglasses: "Thanks for all you do!"
6/1/2023	Lada, Rosalie	PMIDURSKI	Phone Call	To Sacred Heart NH A. Pereira: Condolences offered: family or NH staff to return Comcast equip
6/1/2023	Mendes, Darlene	APAZ	Phone Call	Re: Board approval to continue support of Xfinity bill "Thank you so much for your help. I appreciate it."
6/1/2023	Bishop, Sarah	PMIDURSKI	In Home Visit	For annual update: Req taxi vouchers & assist w/auto repair: to obtain estimate
6/1/2023	Lamoureux, Ann	APAZ	Phone Call	Re: New referral. Did not qualify due to age. Heard about ARAW through Nancy Winterhalter at DCOA
6/1/2023	Connors, Brenda	APAZ	Phone Call	Re: newsletter. Signed up for luncheon & Queen at the Z
6/1/2023	Evora, Sandra	PMIDURSKI	Phone Call	Re: talk to PGM. EM to PGM to call Sandra back: Inquiring about status of req: Informed July Board mtg
6/1/2023	Couto, Charlene	APAZ	Phone Call	Re: new referral visit. Pending sister to be available. Will call back.
6/1/2023	DaSilva, Aida	PMIDURSKI	Phone Call	TC BES protective worker visited: Per ADS no assist w/housing: HV 6/5: Dgt compiling list of apps sub to housing
6/1/2023	Monteiro, Joan	PMIDURSKI	Phone Call	VM left requesting updated Eversource & rent balance for July Board meeting
6/1/2023	Quirini, Sandy	APAZ	Phone Call	LVM re: Board approval for continued Xfinity bill and SRTA booklets.
6/1/2023	Dillon, Sherry	PMIDURSKI	In Home Visit	For annual update: "You guys are the bomb! I appreciate all you do especially the Z shows!"
6/2/2023	Lewis, Barbara	APAZ	Phone Call	Re: EPERS unit. Requested help with electric bill. AP to mail Sr discount form.
6/2/2023	Gamboa, Carmen	APAZ	Phone Call	LVMM to call regarding her income and SSI per our recent TC. Discussed with ED
6/2/2023	Lajoie, Elizabeth	PMIDURSKI	Phone Call	Re: Verizon bill: Worried invoice has not been rcvd: No shut off notices: Will f/u next week
6/2/2023	Best, Jacqueline	APAZ	Phone Call	LVMM re: Xfinity bill not received for May. Requested Jacqueline call Xfinity to get ARAW a paper bill monthly.
6/2/2023	Alves, Judith	APAZ	Phone Call	LVM re: Update on how she is enjoying her recliner. Requested a call back.
6/2/2023	Bissonnette, Alice	APAZ	Phone Call	LVMM re: Newsletter and WCAP update. Requested a call back.
6/2/2023	DaSilva, Aida	PMIDURSKI	Phone Call	From BES PW: Case open: Rent & utilities not pd: PW to speak w/family & investigate
6/2/2023	Correia, Patricia	APAZ	Phone Call	Re: FLO record of eligibility. Requested a call back.
6/2/2023	Larrabee, Regina	APAZ	Phone Call	Re: Accepted to Tripp Tower apt#220. Pending call to Tavares Movers for move date. PGM notified.
6/2/2023	DaRosa, Priscilla	APAZ	Phone Call	Re: Board approval of BCBS and EPERS. "Thank you very much. I was so worried. It is so expensive."
6/2/2023	Bizarro, Lucille	APAZ	Phone Call	Re: recent fall. She is doing ok but might need more PT as it was ended 6/1/22. She was thankful for AP calls.
6/2/2023	Chytrus, Leslie	APAZ	Phone Call	Re: Board annual approval of SRTA booklets. "Thank you so much. I like to get out in this nice weather."
6/2/2023	Correia, Julia	APAZ	Phone Call	LVMM with Mario CESI CM. Requested a call back on Julia's NH status. Question long term placement.
6/2/2023	Cambra, Joan	APAZ	Phone Call	Re: update on recliner gifted in January. Joan is so appreciative. Health issues that keep her isolated at home.
6/5/2023	Monteith, Judith	APAZ	Phone Call	Re: Juneteenth holiday. Per Judith "I can't with LGBTQ+ its like WOKE." Referring it to transgenders.
6/5/2023	Almeida, Mildred	PMIDURSKI	Phone Call	To reg for Luncheon: To call Comcast re: monthly billing: "I am feeling much better."
6/5/2023	Almeida, Mildred	APAZ	Phone Call	Re: ARAW billing address. Address provided. She will be calling Xfinity for monthly billing.
6/5/2023	Tuite, Janice	APAZ	Phone Call	Re: Luncheon signup. Added to June signup sheet. "I really hope I get chosen. I don't go anywhere"
6/5/2023	DeMendonca, Theresa	APAZ	Phone Call	Re: sign up to luncheon. Added to June sign up sheet.
6/5/2023	Furness, Betty	APAZ	Phone Call	Re: luncheon sign up. Added to June signup sheet. "I really hope I can go. I need to be with people"
6/5/2023	Conway, Isidora	PMIDURSKI	Phone Call	To register for Luncheon & Z tix Queen: "TY I look forward to the monthly newsletter."
6/5/2023	Ponte, Karyn	APAZ	Phone Call	Re: inquiring is Xfinity applied \$10 credit to recent bill. Confirmed it was applied.
6/5/2023	DaSilva, Aida	PMIDURSKI	In Home Visit	To complete application: Numerous unanswered questions: BES PS involved: To discuss with ED

Date	Beneficiary	Staff	Type	Notes
6/5/2023	Vasques, Maria	PMIDURSKI	Phone Call	To report shower doors installed by Bayberry: "TY for all you have done to help me": Req w/drawn
6/5/2023	Walker, Bonnie	PMIDURSKI	Phone Call	From BM w/concern: VMM left for CES CM w/new findings
6/5/2023	Graybill, Holly	PMIDURSKI	Phone Call	Re: auto estimate being obtained today 6/5: EMM to AP
6/6/2023	Lammers, Edith	PMIDURSKI	Phone Call	To "THANK everyone at the ARAW. You all make me feel so good." Positive review of PACE food store Park St
6/6/2023	Graybill, Holly	APAZ	Phone Call	Re: auto estimate. AP to pick up at 2pmish today 6/6 and submit for approval.
6/6/2023	Gamboa, Carmen	APAZ	Phone Call	Re: application information details. Will call AP back today at 11:30
6/6/2023	Gamboa, Carmen	APAZ	Phone Call	RC re: income updated. Over income by \$576/month. Placed inactive. ARAW to pay last Xfinity bill for May.
6/6/2023	Dillon, Sherry	PMIDURSKI	Phone Call	To sign up for luncheon & Z tix: Medical testing continues: "TY ARAW for making me smile!"
6/6/2023	Sikorski, Barbara	APAZ	Phone Call	Re: Sandy Fogg award process. Friend Lisa to drop off CC bill to ARAW.
6/6/2023	Tripp, Teresa	APAZ	Phone Call	Re: will update. Provided phone # to SCCLS. She will call AP back with update.
6/6/2023	Walker, Bonnie	PMIDURSKI	Phone Call	From CES CM: Notified of BM findings: CM to notify CES RN & Boston Neuro team who follow BW
6/6/2023	Zych, Joanne	PMIDURSKI	Phone Call	To sign up for luncheon lottery: "TY so much. I enjoy being part of a group of intelligent women."
6/6/2023	Beverly, Donna	PMIDURSKI	Phone Call	New referral inquiry fr. Current beneficiary: Over income by \$500: Wanted to join FLO
6/6/2023	Horne, Donna	PMIDURSKI	Phone Call	To sign up for luncheon lottery and Z ticket for Queen;
6/6/2023	Chaput, Vanessa	PMIDURSKI	Phone Call	To sign up for luncheon: Inquiring about SCCLS: to discuss w/ ED
6/6/2023	Carter, Jessie	PMIDURSKI	Phone Call	To sign up for luncheon: "TY for putting the Farmer's Market info in newsletter. I go every week!"
6/6/2023	Medeiros, Margaret	PMIDURSKI	Phone Call	To update re: housing & applications: Sign up for luncheon & Z tix: No trans needed
6/6/2023	Bishop, Sarah	PMIDURSKI	Phone Call	From Therapist voicing concerns: To discuss w/ED:EDDF approval: SB aware of nd to seek alternate trans 4 future
6/6/2023	Whitehead, Marguerite	APAZ	Phone Call	LVM re: PERS unit update. Requested a call back.
6/6/2023	Roderiques, Bernadette	PMIDURSKI	Phone Call	To sign up for luncheon: Needs trans: "Feeling much better."
6/6/2023	Okpara, Priscilia	PMIDURSKI	Phone Call	From Son Chido to confirm Comcast bill was arriving at 174 Union: Confirmed and informed pd 5/22/2023: TY
6/7/2023	Cole, Carol	PMIDURSKI	Phone Call	To notify of Board approval of sofa: "OMG. It's the best day ever. I can't believe this. TY so much!" crying
6/7/2023	Parquette, Mary Jane	APAZ	Phone Call	Re: Luncheon & Bernadette Peters sign up. Added to sheet. She will also be emailing a picture of ARAW plant.
6/7/2023	Almeida, Lorene	APAZ	In Home Visit	Annual HV completed.
6/7/2023	Dias, Theresa	PMIDURSKI	Phone Call	To sign up for Z shows
6/7/2023	Carvalho, Patricia	PMIDURSKI	Phone Call	To NB SDC Marisol: No communication fr DEAF Inc: PC agreed and notified of BB Vouchers for S&S: TYSM
6/7/2023	Delaney, Kathleen	PMIDURSKI	Phone Call	To sign up for luncheon lottery: Will need transportation
6/7/2023	Laber, Lynn	PMIDURSKI	Phone Call	To sign up for Zeiterion tickets: Info gathered
6/7/2023	Grace, Barbara	PMIDURSKI	In Home Visit	HV attempted: Was at dental appointment according to WCALF staff: VMM left req CB to resched annual HV
6/7/2023	Palazzo, Sharon	PMIDURSKI	Phone Call	To notify of Board approval of Direct TV: "TY so much!! This will help immensely." To change billing address
6/7/2023	Beauchamp, Jane	PMIDURSKI	Phone Call	To notify of Board approval: "The rosary worked! I have been praying for help. TYSM!" to sched appt
6/7/2023	Oliver, Evelyn	PMIDURSKI	Phone Call	NEW referral: HV sched for 6/12:
6/7/2023	Taylor, MaryAnn	CFOLEY	Phone Call	Self-referral regarding move from WCALF d/t eviction; DNQ income \$2,750; referred to Fresh Start
6/7/2023	Murach, Barbara	PMIDURSKI	Phone Call	Re: Board approval: "OMG! This is life changing! These are tears of Joy."
6/7/2023	Morgan, Sylvia	APAZ	In Home Visit	New Referral visit on 6/6 completed and submitted today. Participation and FLO and referred to CNN
6/7/2023	Bramwell, Nancy	PMIDURSKI	Office Visit	To bring BCBS invoice: Working 20hr/wk @S&S: "Will they consider paying >6 months?" HV in Aug
6/7/2023	Michel, Loretta	PMIDURSKI	Phone Call	To notify of Board approval: "TY so much" Dgt to change billing address: Req mail be sent to dgt vs NH:EM to JC
6/8/2023	Paiva, Barbara	APAZ	Phone Call	NBPD Referral. Spoke with Natasha @ CES. Does not qualify d/t income. EMM to adm.
6/8/2023	Nunez, Maria	APAZ	Phone Call	New referral. No need. Preferred not to share financial information. EMM to adm.

Date	Beneficiary	Staff	Type	Notes
6/8/2023	Coughlin, Eileen	APAZ	Phone Call	LVM: NBPB Referral. Provided brief ARAW mission. Requested a call back if assistance needed.,
6/8/2023	Bardsley, Maureen	APAZ	Phone Call	NBPB Referral. No need. EMM to admin.
6/8/2023	Morgan, Sylvia	APAZ	Phone Call	Spoke about reason for a Will. She wants to leave her things to an animal foundation. Letter updated/submit
6/8/2023	Murach, Barbara	PMIDURSKI	Email	Sent re: computer & nd for UTD Comcast invoice: Agrees to Lenovo: To be del Sat 6/10
6/8/2023	Rapoza, Janet	PMIDURSKI	Phone Call	Re: Board approval for mattress set & frame: "TYSM. I am most grateful!" EM to Worley re: approval
6/8/2023	Silva, Marina	PMIDURSKI	Note to File	Reportedly "staying w/friends" Refusing HV or to provide address: MS req HOLD till move to Carriage House #4
6/8/2023	Pacheco, Deborah	PMIDURSKI	Phone Call	Re: Req approval: "I want Melatonin gummies too." Informed WA doesn't carry: HV in Aug: EMM to WA re: appr
6/8/2023	Thibodeau, Diane	PMIDURSKI	Phone Call	Re: Board approval for auto Ins: "I will send a TY card to ARAW. TY All." To mail 23/24 auto ins premium
6/8/2023	Paim, Nancy	APAZ	Phone Call	NBPB Referral. No need. Per Nancy, "No financial need at this time Thank god!" EMM to adm.
6/8/2023	Pires, Sheila	APAZ	Phone Call	RC: NBPB referral. No need. Per daughter "We live comfortably." EMM to admin.
6/8/2023	Silva, Shirley	APAZ	Phone Call	LVM: NBPB referral. Requested call back if assistance needed from ARAW and explained mission.
6/8/2023	Weeks, Cecelia	APAZ	Phone Call	NBPB referral. Not eligible due to income. EMM sent to adm. Referred to NBHA to hang up artwork.
6/8/2023	Medeiros, Janice	APAZ	Phone Call	LVM: NBPB Referral. Provided brief ARAW mission. Requested a call back if assistance needed.
6/8/2023	Oshea, Anne	APAZ	Phone Call	LVM: NBPB referral. Provided brief ARAW mission. Requested a call back if assistance needed.
6/8/2023	Baker, Claire	APAZ	Phone Call	RC: NBPB referral. In Hospital. Need is shower grab-bars. Coastline to purchase and landlord to install.
6/8/2023	Crook, Beth	APAZ	Phone Call	LVM: NBPB referral. Provided brief ARAW mission. Requested a call back if assistance needed.
6/8/2023	DaSilva, Aida	PMIDURSKI	Note to File	HOLD on referral pending BES & CES investigation: ED notified of situation
6/8/2023	Carvalho, Patricia	PMIDURSKI	Email	From DEAF Catarina: Initial contact w/PC @ SDC> Margarida return 6/14 and to contact PC to proceed
6/8/2023	Medeiros, Margaret	PMIDURSKI	Phone Call	W/choice of range: Opting for "middle of road" range Home Depot: "TY again. I appreciate ARAW." JC notified
6/8/2023	Pereira, Maria	APAZ	Phone Call	LVM: Schedule FLO ROE call. Requested a call back.
6/8/2023	Correia, Patricia	APAZ	Phone Call	LVM x2: Schedule FLO ROE call. Requested a call back.
6/8/2023	Lima, Mary	APAZ	Phone Call	Confused about HBO Max and other financial issues. Schedule HV 6/12 to assist and investigate.
6/8/2023	Charbonneau, Leila	APAZ	Phone Call	Car repair discussion. Pending CC statement and invoice. Once received submit for July board meeting.
6/8/2023	Mello, Eleanor	APAZ	Phone Call	Luncheon signup. "I would like to sign up, please give my spot to someone who hasn't been in a while if full."
6/8/2023	Mota, Lina	PMIDURSKI	In Home Visit	HV 4 Annual review: Req to attend Luncheon: Inquiry re: Spanish/Port Speaking: Discussion w/ED
6/8/2023	DeCosta, Cynthia	APAZ	In Home Visit	Annual HV completed. Requesting continued support of Xfinity bill and new request of 2023-2024 car ins.
6/8/2023	Cole, Carol	APAZ	Phone Call	Sign up for Queen and luncheon. Added to sign up sheet.
6/9/2023	Okpara, Priscilia	PMIDURSKI	Phone Call	To reg for Luncheon: will nd trans: TV working well: "TY for everything."
6/9/2023	DeMedeiros, Sharon	PMIDURSKI	Phone Call	To sign up for Z tix: Inquiring about vax status for Wamsutta: Informed of current status
6/9/2023	Silveira, Marie Lorraine	APAZ	In Home Visit	Attempted to deliver plant. No parking and did not have phone #. Will attempt next week after 3pm.
6/9/2023	Blais, Linda	PMIDURSKI	Note to File	#1 Letter mailed re: nd for FLO ROE update
6/9/2023	Drayton, Gail	APAZ	Phone Call	Annual home visit schedules for 6/13 at 11am.
6/9/2023	DeCosta, Cynthia	APAZ	Phone Call	EOMB questions. Will think about what is missing, per Cynthia "If they can't help me I will just struggle."
6/9/2023	Brightman, Pauline	APAZ	Phone Call	Luncheon signup. Her daughter will drive her. Entered in sheet. Placed on wait list.
6/9/2023	Conway, Isidora	PMIDURSKI	Phone Call	Re: understanding Spanish/Portuguese: Willing to help w/conversation @ luncheon
6/9/2023	Medeiros, Margaret	PMIDURSKI	Phone Call	Re: Check 4 Home Depot: JC notified of p/u today: Understands some Spanish & plans to attend luncheon
6/9/2023	Grace, Barbara	PMIDURSKI	Note to File	#1 Letter mailed re: nd to reschedule annual home visit for review & update
6/9/2023	Chaput, Vanessa	PMIDURSKI	Phone Call	Re: legal services for reported harassment: SCLS resources shared w/VC: "TY so much. I don't feel alone."
6/9/2023	David Martinez, Nilda	PMIDURSKI	Phone Call	To dgt to invite NDM to Luncheon: Spanish: Depressed & Going out may help: To Call back ARAW

Date	Beneficiary	Staff	Type	Notes
6/9/2023	Martinez, Nitza	APAZ	Phone Call	Attempted to call to see if she would attend luncheon. Nitza to call AP back per daughter.
6/12/2023	Ingham, Nancy	APAZ	Phone Call	Requesting PGM give her a return call tomorrow. No message left. EMM to PGM.
6/12/2023	Couto, Charlene	APAZ	Phone Call	Still pending sisters' availability to schedule initial HV. Charlene will call AP back.
6/12/2023	Martin, Joyce	APAZ	Phone Call	New referral. Schedule an initial visit for 6/15 10am. "I need help getting my finances in order."
6/12/2023	Pereira, Maria	APAZ	Note to File	Mailed card. Unable to reach to complete FLO record of eligibility.
6/12/2023	Correia, Patricia	APAZ	Note to File	Mailed card. Unable to reach to complete FLO record of eligibility.
6/12/2023	Almeida, Mildred	APAZ	Phone Call	She called Xfinity and gave ARAW billing address and ARAW should receive bills monthly. EMM to PGM
6/12/2023	Lima, Mary	APAZ	Phone Call	Confirm HV for today at 2pm. Will review finances and trouble shoot Xfinity HBO access.
6/12/2023	Bourgeois, Lucille	APAZ	Phone Call	Xfinity is emailing shut off notices. System shows 2 checks sent 6/8. EMM to PGM to call Lucille.
6/13/2023	DeCosta, Cynthia	APAZ	Phone Call	Re: EOMB review. Updated to reflect accurate expenses and resubmitted.
6/13/2023	Silveira, Marie Lorraine	APAZ	Phone Call	VM left for AP: "I will be home tomorrow. Blow the horn and I will come down." EMM to AP
6/13/2023	Sampson, Janet	PMIDURSKI	Phone Call	To clarify CC info: Confirmed 2 CC and balances accurate: "My son bought furniture so I never told ARAW."
6/13/2023	Bourgeois, Lucille	PMIDURSKI	Phone Call	Re: Comcast: Checks mailed, have not cleared per JC; LB informed to contact ARAW if shut off or addl calls
6/13/2023	Lima, Mary	APAZ	Phone Call	RC from CES CM. Cassidy was not aware of financial scam will conduct HV and file protective. Referral to CNN.
6/13/2023	Charbonneau, Leila	APAZ	Phone Call	Re: new auto repair request. Leila will submit information for the safety issue for exemption request.
6/13/2023	Drayton, Gail	APAZ	Phone Call	To reschedule HV to 6/22 at 11am. Needs more time to collect ppwrk d/t injured thumb.
6/13/2023	Burke, Shauneen	PMIDURSKI	Phone Call	For Annual update: "So what else can the ARAW give me? I need help w/my mortgage."
6/13/2023	David Martinez, Nilda	PMIDURSKI	Email	From dgt Leslie: NDM will attend luncheon: Needs transportation
6/13/2023	Letourneau, Diane	PMIDURSKI	Phone Call	From Brandon Woods: TY for newsletter. I would love to attend the luncheon." To check w/SW @ Nsg home
6/13/2023	Chaput, Vanessa	PMIDURSKI	Phone Call	Re: Justice Bridge: Added to pool 4 Atty to accept case: "TY for art classes. They melt my worries away!"
6/13/2023	Eisely, Geraldine	PMIDURSKI	Phone Call	Re: bladder work up for CA: To call CFC re: an AC unit for apartment
6/13/2023	Bishop, Sarah	PMIDURSKI	In Home Visit	To bring BB voucher & check for Village Garage for auto repairs: "TY ARAW so much. You R Lifesavers."
6/13/2023	Grace, Barbara	PMIDURSKI	Phone Call	VM left re: rescheduling annual home visit
6/13/2023	Hennessy, Cheryl	PMIDURSKI	Phone Call	To resched HV: "I am passing kidney stones." Resched HV to 6/21 @ 12:30pm
6/13/2023	Bishop, Sarah	PMIDURSKI	Phone Call	VM left re: auto repair check and BB vouchers: Req CB:
6/13/2023	Costa, Charlotte	PMIDURSKI	Phone Call	NEW referral: Over asset: Encouraged to contact NM Women's Center, FCOA and ACOA
6/13/2023	Crook, Beth	APAZ	Phone Call	LVM x2. NBPd referral. Requested call back if ARAW support needed.
6/13/2023	Medeiros, Janice	APAZ	Phone Call	LVM x2 w/ daughter Jen. Requested a call back if ARAW support needed.
6/13/2023	Oshea, Anne	APAZ	Phone Call	LVM x2 w/ daughter Trisha. Requested a call back if ARAW support needed.
6/13/2023	Dobson, Sally	PMIDURSKI	Phone Call	EM fr CES>MH app w/drawn by SD: "They asked too many ?'s about sale of my house. I have \$55K left."Over asset
6/13/2023	Murach, Barbara	PMIDURSKI	Email	Re: delivery of computer w/apology for "rude reaction to request for updated comcast invoice"
6/13/2023	Ingham, Nancy	PMIDURSKI	Phone Call	Req "assist w/auto repair. Can't drop off estimate as grdgt has car every day 4 work." Philosophy explained
6/13/2023	Thibodeau, Diane	PMIDURSKI	Phone Call	To sign up for Luncheon: Inquiry re: SE MA LGBTQ "I am calling them to volunteer. This is wonderful."
6/13/2023	Christensen, Carol	PMIDURSKI	Phone Call	For follow up re: Comcast: "TY. I am so grateful esp now. My 20yo cat died. I am lonely. Invited to ARAW events
6/14/2023	Oliver, Evelyn	PMIDURSKI	In Home Visit	For NEW referral: Legally blind: "I am bored. I need something to do." FEW MH app begun
6/14/2023	Hernandez, Olga	APAZ	Phone Call	SCCLS referral. Seeking assistance with over due rent. HV schedules 6/21 11am.
6/14/2023	Larrabee, Regina	PMIDURSKI	Phone Call	Re: relocation to Tripp Tower #220: "TYSM for the help w/Tavares Movers. They were so helpful. TY"
6/14/2023	Medeiros, Margaret	PMIDURSKI	Office Visit	Req assist w/Home Depot payment for range:ED approved CC payment as check not accepted at HomeDepot
6/14/2023	Burke, Shauneen	PMIDURSKI	Phone Call	Upset re: CC balances, court letters, collections: Refusing ACCS, SCCLS "I have been there b4.They R no help."

Date	Beneficiary	Staff	Type	Notes
6/14/2023	Chytrus, Leslie	APAZ	Phone Call	RC only has 3 SRTA vouchers left. Never received Mays vouchers. Will drop of booklet 6/15
6/14/2023	Correia, Julia	APAZ	Phone Call	CES CM Mario. Julia will be long term placement. EMM to adm to make inactive.
6/15/2023	Parquette, Mary Jane	PMIDURSKI	Phone Call	To confirm attendance to Luncheon: "I look forward to being with the group. TY"
6/15/2023	Mello, Eleanor	PMIDURSKI	Phone Call	Re: luncheon: "I will sched SRTA for a ride. I need to get out. 2 more deaths of close friends this month. TY"
6/15/2023	Grace, Barbara	PMIDURSKI	In Home Visit	For annual update: "I don't have enough \$\$ to get snacks. My rollator is broken. TY for all you do!"
6/15/2023	Eisely, Geraldine	PMIDURSKI	Phone Call	Re: AC unit: Spoke w/Jason @ CFC: Reportedly AC unit avial in AUGUST!: VMM to CFC to inquire about AC
6/15/2023	Conway, Isidora	APAZ	Phone Call	Confirmed attendance to luncheon. "Woo-hoo! I am so happy. I haven't attended and I look forward to it!"
6/15/2023	Zych, Joanne	PMIDURSKI	Phone Call	Confirmed luncheon attendance: Will be emailing dental estimate: Rent increased: "TY so ARAW"
6/15/2023	Beauchamp, Jane	PMIDURSKI	Office Visit	To get check for car repair: "TY all SO much!! This is so helpful." Brother provided trans & thanked ARAW.
6/15/2023	Connors, Brenda	APAZ	Phone Call	Confirmed attendance to luncheon. "Thank you. I am go grateful for ARAW. I am making good friends."
6/15/2023	Oliver, Evelyn	PMIDURSKI	Phone Call	W/dgt re: CC & FEWMH: "She won't qualify. She had a 2nd house. Sold in 2020. Seeking legal advice: HOLD
6/16/2023	Thibodeau, Diane	JCOSTA	Phone Call	Still waiting for insurance bill, will need to shut off auto pay, to CB Tuesday
6/16/2023	Thibodeau, Diane	PMIDURSKI	Phone Call	To confirm attendance to Luncheon: "I am so excited to attend. TYSM"
6/16/2023	Costa, Barbara	PMIDURSKI	Phone Call	TC re: New apt eff. July: Jeff in background stating, "Can they help us? Tell her we almost have RAFT." Barbara states she will be living alone w/dog: TC to BES PW who will f/u w/BC re: living arrangements; EMM to CES
6/16/2023	Brightman, Pauline	PMIDURSKI	Phone Call	To dgt Gail to confirm attendance to luncheon: Dgt to provide transportation.
6/16/2023	DeSouza, Joanne	PMIDURSKI	Phone Call	To confirm luncheon attendance: "I will be taking the city bus. TY"
6/16/2023	Hoglund, Deborah	JCOSTA	Phone Call	Received award letter, confused, exp FLO program & will continued to receive ARAW newsletter
6/20/2023	Bourgeois, Lucille	JCOSTA	Phone Call	Received EM Comcast overdue, ck sent but not cashed yet, EM to PGM
6/20/2023	Costa, Barbara	CFOLEY	Phone Call	VM left to reschedule HV w/PGM, CB adv PGM will call tomorrow to reschedule
6/20/2023	Chaput, Vanessa	JCOSTA	Phone Call	Exciting news to share with PGM – will CB this afternoon, wants to be added to luncheon waitlist, EM to PGM
6/20/2023	Palazzo, Sharon	JCOSTA	Phone Call	VM letting us know she was able to change DirecTV billing address
6/20/2023	Dillon, Sherry	JCOSTA	Phone Call	Looking for PGM, adv will be in tomorrow
6/21/2023	Dillon, Sherry	PMIDURSKI	Phone Call	To confirm Luncheon: Has SRTA 4 trans: "I have been dx w/parkinsons dz. I will get a scooter."
6/21/2023	DaSilva, Aida	PMIDURSKI	Phone Call	From BES PW: Update provided re: HV and HOLD on case as BES involved & need not identified: Conflicting info
6/21/2023	Hernandez, Olga	APAZ	In Home Visit	Does not qualify. Lives with a man & didn't provide accurate info. Pending call w/ CES CM Lesli for further info.
6/21/2023	Wood, Barbara	APAZ	Phone Call	CES CM Teresa called. Wanted to re-refer, however, Barbara is still over assets and income has increased.
6/21/2023	Chaput, Vanessa	PMIDURSKI	Phone Call	To report "case chosen from Justice Bridge pool. Atty to call VC today. I pray they help me."
6/21/2023	Waite, Cynthia	PMIDURSKI	Phone Call	Re: "Lift chair feeling bars in seat. Having difficulty getting E.Sox from SWH." HV 6/27
6/21/2023	Somers, Linda	PMIDURSKI	Phone Call	From CNN: LS reporting w/o NOK/HCP: Enc. To call SCCLS: CNN provided tablet to Linda
6/21/2023	Costa, Barbara	CFOLEY	Phone Call	Re: move & furniture need; referred to FS; new & apt info address given; FS move 7/3 (EDDF) & BR furn/bed
6/21/2023	DeCosta, Cynthia	APAZ	Phone Call	Cynthia will stop by to drop off her car ins bill 2023-2024.
6/21/2023	DeSouza, Joanne	PMIDURSKI	Phone Call	To confirm time of luncheon: JDS has arranged for SRTA Demand response for trans to luncheon
6/22/2023	Lima, Mary	APAZ	Phone Call	RC agreed to CNN visit. Will send referral to CNN to schedule HV to assist with HBO Max setup.
6/22/2023	Lima, Mary	APAZ	Phone Call	LVM requesting a call back regarding CNN referral to assist with HBO Max setup.
6/22/2023	Costa, Barbara	APAZ	Phone Call	VM from Barbara re new comcast acct #. Equipment moved to new address 7/3. EMM to adm to call her.
6/22/2023	Smith, Debra	JCOSTA	Phone Call	In need of car repair, adv to get estimate from repair shop & get to AP for request
6/22/2023	Dillon, Sherry	CFOLEY	Phone Call	To confirm Bob's estimate; she rec'ed voucher; headed to ER to determine if she had stroke

Date	Beneficiary	Staff	Type	Notes
6/22/2023	Sikorski, Barbara	APAZ	Phone Call	From Barbara's friend Lisa. Barbara has been managing her money effecting Sandy Fogg award. HV to be sch.
6/22/2023	Gamboia, Carmen	APAZ	Phone Call	Regarding comcast address change and wants to quit job/reduce hour to qualify for ARAW support again.
6/23/2023	Smith, Debra	APAZ	Office Visit	In office update and request completed for car repairs. EMM to adm
6/23/2023	Furness, Betty	APAZ	Phone Call	Cancel luncheon attendance. "Please, please don't take me off the list to attend. I know I cancel a lot due to my IBS, lack of sleep, and now Molly (cat). I really enjoy the luncheons because they lift me up."
6/23/2023	Somers, Linda	CFOLEY	Phone Call	CNN & Andy are wonderful; he took her to surgery appt – god send! Coming Thursday to help with tablet
6/26/2023	DaRosa, Priscilla	CFOLEY	Phone Call	From dgthr; PDR in rehab (Alden); cannot use Bernadette Peters tix
6/26/2023	Sampson, Janet	PMIDURSKI	Phone Call	Re: Discover CC: Has not recvd new statement: Request on HOLD pending supporting docs
6/26/2023	Hennessy, Cheryl	PMIDURSKI	Phone Call	Re: Auto insurance cancellation attempt: City of NB to send docs re: late real estate taxes
6/26/2023	Medeiros, Margaret	PMIDURSKI	Phone Call	Re: dgt moving into home w/2 children to "save money due to split w/partner." Unknown length of stay:
6/26/2023	Burke, Shauneen	PMIDURSKI	Phone Call	To resched OV to bring CC statements: "I am not feeling well and I would have to take the city bus." OV6/30
6/26/2023	Carvalho, Patricia	PMIDURSKI	Phone Call	Re: DEAF: Denies contact since 6/7: EMM to DEAF re: status of referral follow up: CHF aware
6/26/2023	Dillon, Sherry	PMIDURSKI	Phone Call	Re: 2.5 day hospitalization: W/OCVA: DX: Parkinsons dz: New estimate 4 table & chair: Scooter pending
6/27/2023	Zych, Joanne	PMIDURSKI	Phone Call	To sched HV for update re: NEW request for assist w/dental: HV 6/28
6/27/2023	Edwards, Diane	APAZ	Phone Call	LVM regarding recent knee surgery & to schedule annual HV due 5/2023.
6/27/2023	Lewis, Barbara	APAZ	Phone Call	Requesting asst with electric. Has been delinquent approx. \$250. Mailed Senior discount ppwrk to apply.
6/27/2023	Sikorski, Barbara	APAZ	Phone Call	To CES CM Carolyn Whalen regarding Fallon OTC/Food/Gifts cards. Also will be removing A1 EPERS to Fallon
6/27/2023	Sikorski, Barbara	APAZ	Phone Call	RC from Linda. She will be calling back to schedule a HV and update information for Sandy Fogg award.
6/27/2023	Rogers, Beverly	APAZ	Phone Call	Regarding home repair asst. Not an ARAW support. Will be calling back in ARAW assistance needed in future.
6/27/2023	Dillon, Sherry	APAZ	Phone Call	"Thank you to ARAW for all you do for me. I usually send a card but I can't at this time."
6/27/2023	Thibodeau, Diane	PMIDURSKI	Phone Call	Re: gift of auto insurance: Invoice to be mailed to ARAW upon receipt: "TY all so MUCH!!"
6/27/2023	Chaput, Vanessa	PMIDURSKI	Phone Call	Re: Justice Bridge atty: w/o call back: VC to call JB and inquire about next steps: Will update ARAW
6/27/2023	Medeiros, Margaret	PMIDURSKI	Phone Call	Re: change in home: Dgt & 2 children will be indefinitely staying: "I cant have her share \$ info w/you" INACTIVE
6/27/2023	Ramos, Maria	PMIDURSKI	Phone Call	From niece re: Insurance & lift chair: Changed to SWH fr CCA: Will f/u w/SWH and keep ARAW updated: TY
6/27/2023	Pereira, Maria	APAZ	Phone Call	TC from daughter. Scheduled FLO Eligibility call 6/30 1030am. Might have a need.
6/27/2023	Openshaw, Pauline	PMIDURSKI	Phone Call	VM left 4 James re: Comcast invoice which has NOT been rcvd
6/27/2023	Costa, Barbara	PMIDURSKI	Phone Call	Re: move: PCA is Julie Jeff's dgt: To change address for Comcast, SSI, SNAP: "They can't stay w/me. I will lose my Section 8 voucher. If Julie doesn' work out, I will call CES. I can block my # if Jeff bothers me."
6/27/2023	Prata, Adelia	APAZ	Phone Call	LVM w/ CES CM Ana Tinoco regarding SWH OTC and Food car amounts.
6/27/2023	Prata, Adelia	APAZ	Phone Call	LVM requested a call back. Would like to see how her SSI, Phone and medication concerns are per BM EMM.
6/28/2023	Costa, Barbara	PMIDURSKI	Phone Call	To confirm change to Comcast billing: Informed HV will occur mid July
6/28/2023	Christy, Maria	PMIDURSKI	Phone Call	Re: request for new cell phone: EMM to WCOA AL for follow up w/MC
6/28/2023	Openshaw, Pauline	PMIDURSKI	Phone Call	RC from James re: Comcast: "PO may go to NH. I will pay bill for now." EMM to GSSC & WCALF director
6/28/2023	Waite, Cynthia	PMIDURSKI	Phone Call	RC to sched HV for Thursday 6/29 re: chair
6/28/2023	Eisely, Geraldine	PMIDURSKI	Phone Call	2nd VMM CFC Jason re: AC unit: TC to GE> Procedure 7/5 Req HV 7/11 for update application NEW Request
6/28/2023	Chaput, Vanessa	PMIDURSKI	Phone Call	RC re: Justice Bridge: Allie to call Union St Atty and call VC in a few days for follow up
6/28/2023	Zych, Joanne	PMIDURSKI	In Home Visit	To update application for NEW request for assist w/dental: "I love ARAW. TY for everything."
6/28/2023	Dillon, Sherry	PMIDURSKI	Email	To GSSC re: Scooter: "IDK. SD needs to call her insurance."

Date	Beneficiary	Staff	Type	Notes
6/28/2023	Oliveira, Alice	PMIDURSKI	Phone Call	From WA: unable to reach AO: CES CM reports VNA involved: AO @ SLH for procedure return home 6/29: Best to call cell #: Updated info provided by CES CM
6/29/2023	Dillon, Sherry	PMIDURSKI	Phone Call	To report in-home PT reports Scooter request has been placed to Insurance co. Unknown ETA
6/29/2023	Walker, Bonnie	PMIDURSKI	Phone Call	Req # for SCCLS: Mislplaced paperwork: BW will call SCCLS next wk upon return from Visiting family in West MA
6/29/2023	Best, Jacqueline	APAZ	Phone Call	LVM requested a call back to discuss update on living situations. EMM to ED as FYI
6/29/2023	Westgate, Sandra	JCOSTA	Phone Call	Switching cable box & remote @Comcast next wk, concerned re: bill amt, reminder re: monthly bill, EM to AP
6/29/2023	Murach, Barbara	PMIDURSKI	Email	Re: Comcast install & payment; "I love the big screen. It makes my life better. TY"
6/29/2023	Beauchamp, Jane	PMIDURSKI	Email	"THANK you all for the car repairs. I feel safe in my car once again. TY from the bottom of my heart."
6/29/2023	Waite, Cynthia	PMIDURSKI	In Home Visit	Re: lift chair gifted 5/22: Metal bar frame in Seat causing pain: To call ENOS
6/29/2023	Pereira, Maria	APAZ	Phone Call	FLO update. A lot of financial changes. Seeking potential Cable support. No longer in need of CNN.
6/29/2023	Whitehead, Marguerite	APAZ	Phone Call	LVM to call back regarding PERS unit and hearing aids update.
6/29/2023	Monteith, Judith	PMIDURSKI	Phone Call	Re: Dart Farmers Mkt: Info provided: "My plant is growing so well. TY all."
6/30/2023	DeSouza, Joanne	PMIDURSKI	Phone Call	VM left re: Need to sched annual HV for update & review: Req CB
6/30/2023	Jenkins, Karen	PMIDURSKI	Phone Call	To sched Annual update & review: HV sched for 7/10
6/30/2023	Laber, Lynn	PMIDURSKI	Phone Call	VM left re: Need to sched annual HV for update & review: Req CB
6/30/2023	Burke, Shauneen	PMIDURSKI	Office Visit	To bring supporting docs for NEW request. Assist w/CC debt: For the August Board meeting
6/30/2023	Lajoie, Elizabeth	APAZ	Phone Call	To confirm Verizon invoice being mailed to ARAW: Confirmed: "TY all so much!"
6/30/2023	DePina, Pam	PMIDURSKI	Phone Call	To sched annual Update: "Its been a bad month. 2 Bad falls." HV sched 7/11



June 2023: Beneficiary Advocate

Patricia Midurski

REFERRALS Received: 4

Sources of referrals: South Coast Neurology, ARAW beneficiary x2, Coastline

Requests submitted: 6 **EDDF:** 1

Updates submitted: 4 **FLO updates submitted:** 2

Referrals made to: Fresh Start, SCCLS, Justice Bridge, SHINE, CES, SNAP/DTA, Eversource Senior Discount plan, PACE, Grandparents Raising Grandchildren

Pending: 6 **Ineligible:** 2 **Withdrawn:** 3 **Inactive:** 2 **HOLD:** 2 **To Heaven:** 1

TRENDS:

The ARAW has been a valuable resource in the area since 1866, however the significant role of the ARAW in the community is clearly being recognized by more organizations, agencies, and people within the Greater New Bedford area. With increased visibility, the assistance provided by ARAW is being sought by an increasing number of referral sources. Coastline case managers as well as Bristol Elder case managers are submitting referrals. Local COAs (Acushnet & Fairhaven) turn to the ARAW when they have a woman in need. ARAW beneficiaries are sharing their experiences with the ARAW and recommending their friends, neighbors or relatives call the ARAW.

The complexities of most referrals continue as the economic times worsen and psychosocial needs increase. Evictions, rent increases, harassment, mental health issues, loss of PEBT benefits, and discontinuation of the Foster Grandparent Program all contribute to creating significant challenges for our beneficiaries and new referrals. As noted in previous monthly reports, more time is needed to sift through multiple layers of concerns & findings to obtain the most accurate application. In early 2022, I seldom carried over requests from month to month. Currently, I have 6 being carried over to July as I gather needed information for the Board to make an informed decision.

Financial literacy education is a MUST. Where to find? Who can provide? How can this be implemented? Many of our beneficiaries lack the basic skills of budgeting and continue to struggle with finances. With limited incomes and soaring prices in groceries, fuel, rent etc. understanding how to maximize resources and minimize expenses is vital. Credit card debt is not uncommon and I foresee an increase in utilization by many women as the economy shifts.

Of interest: A current beneficiary who is a homeowner has struggled with her finances for years. Money management & debt consolidation as well as Judgment proof were all discussed with her. She began to consider a reverse mortgage but her family dissuaded her. She sought assistance from her COA Outreach Worker who once again suggested the CES Money Management Program. Except this time the program was introduced as Financial Advising. The beneficiary accepted the service and has a monthly meeting with a volunteer to work on her budget.

The power of words!! Going forward, I too will suggest a Financial Advisor from CES.



June 2023: Beneficiary Advocate

Ana Paz

REFERRALS RECEIVED: 17

REFERRAL SOURCES: 13 NBPD, 1 Previous Board Member, 1 NBCOA, 1 SCCLS, 1 BES

UPDATES SUBMITTED: 7

REQUESTS SUBMITTED: 4

FLO SUBMITTED: 0

REFERRALS MADE TO: 1 FCOA, 1 NBHA, 4 CNN, 1 IAC, 2 CES

PENDING: 8 INELIGIBLES: 5 WITHDRAWN: 12 INACTIVE: 2

I experienced a significant number of referrals this month that made me question if some of our community partners and agencies need education on ARAW mission and vision. As you can see, I handled (17) new referrals this month and only (1) qualified and was submitted.

Our new referrals, and existing Beneficiaries are getting more complex and require a lot of my time. I take these referrals very seriously because my goal is to ensure that I meet the needs the women in the communities we service to ensure they live well and with dignity.

Some examples of what I have encountered with new referrals:

- Need someone to hang up artwork.
- Tree trimming service request, but over \$10K in asset. *"I should have lied. Telling you the truth didn't help me."*
- No financial hardship and offended they were referred. *"I am doing better than ok. I am not comfortable you are asking me this."*
- No financial hardship but if ARAW is willing to support them, why not! *"If your agency is willing to help, I won't say no."*
- Needing Money Management and referred by agency who runs Money Management Program.
- Wanting a couch and a TV because they were told they can get these items though ARAW, however they have \$600+ end of the month balance that they are saving to visit children in Angola bi-annually.

Some examples of existing Beneficiaries with complex cases:

- Unsustainable living situations due to increased rent.
- Memory loss and being financially exploited.
- Withholding financial information for continued ARAW support.
- Financially stable, but believe they are entitled to receive ARAW support.
- Many women not recognizing want verses a need, and much time educating them about financially literacy.
- Impoverishing themselves to receive further ARAW support.
- Beneficiaries educating women in the community how to make themselves qualify for ARAW support.
- Increased confusion and mismanaging finances requiring multiple home visits and further investigation of greatest need.

- Non-English-speaking Beneficiaries require multiple home visit due to not being home during scheduled visits or to setup services or follow through with referrals to other agencies. (Cultural Barriers)

I love what I do for the women in our communities and our Beneficiaries. With ARAW work getting out referrals are only going to increase, be more complex, and all thoroughly vetted to ensure that not only are these women's needs met, but provide education, refer to appropriate agencies, and follow up to ensure their needs are met.

Every referral that crosses my desk is processed thoroughly and followed up as many times as necessary. I believe that providing education to our partners and community agencies will help these women connect to the appropriate help they need timely. I will continue to educate as I come across these situations.

New Referral (17):

- | | |
|--|--|
| <ul style="list-style-type: none"> • Julienne Antaya – Withdrawn • Claire Braker – Withdrawn • Maureen Bradley – Withdrawn • Eileen Coughlin – Withdrawn • Beth Cook – Withdrawn • Joyce Martin – Withdrawn • Janice Medeiros – Withdrawn • Maria Nunez – Withdrawn • Anne O'Shea – Withdrawn | <ul style="list-style-type: none"> • Nancy Paim – Withdrawn • Barbara Piava – DNQ d/t income • Sheila Pires – Withdrawn • Shirley Silva – Withdrawn • Ceceila Week – DNQ d/t income • Olga Hernandez – DNQ d/t lives with someone • Nicole Conner – DNQ d/t age • Carol Jones – DNQ d/t assets |
|--|--|

Pending (6):

- | | |
|--|--|
| <ul style="list-style-type: none"> • Patricia Correia – FLO • Maria Pereira – FLO • Charlene Couto – New Referral | <ul style="list-style-type: none"> • Diane Edwards – Update • Lindelle O'Keefe – New Referral • Barba Sikorski – Sandra Fog Award |
|--|--|

Inactive (2):

- Cameron Gamboa – DNQ d/t income
- Julia Correia – Long-term placement

Name	Birth Date	Age	Board Member
St. Ours, Mrs. Beatrice	7/17/1928	95	Diane Laflamme
Watkins, Elizabeth	7/24/1946	77	Mary Ellis
Hoglund, Deborah	7/25/1948	75	Angela Natho
Boudreau, Jeanne	7/30/1932	91	Diane Laflamme
Lopes, Doreen	8/12/1947	76	Rosemary Saber
Benoit, Ruth	8/15/1939	84	Gale Beaton
Cambra, Joan	8/18/1936	87	Leah Macomber
Lima, Mrs. Mary	8/18/1943	80	Leah Macomber
Drayton, Mrs. Gail	8/19/1946	77	Rosemary Saber
Carter, Jessie	8/20/1944	79	Angela Natho
Godinet, Muriel	8/21/1950	73	Gloria deSa
Tavares, Mrs. Marilyn	8/23/1940	83	Diane Laflamme
DeAndrade, June	8/24/1947	76	Mary Ellis
Furtado, Fatima	8/28/1948	75	Gloria deSa
Vincent, Mrs. Patricia	8/29/1938	85	Pam McKnight
Adesso, Mrs. Dolores	9/2/1930	93	Rosemary Saber
Miranda, Mrs. Maria	9/4/1945	78	Mary Ellis
Oliveira, Mrs. Alice	9/4/1934	89	Pam McKnight
Bonneau, Maria	9/11/1949	74	Mary Ellis
Mello, Janet	9/11/1945	78	Angela Natho
Flaherty, Mrs. Eileen	9/12/1934	89	Debbie Brooke
DeSouza, Joanne	9/13/1945	78	Cathy Mayall
Lawrence, Gail	9/13/1949	74	Cathy Mayall
McHale, Joyce	9/17/1947	76	Gloria deSa

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Lawrence, Gail	9/13/1949	74	Cathy Mayall
McHale, Joyce	9/17/1947	76	Gloria deSa

Name	Birth Date	Age	Board Member
DeGrace, Carmen	7/18/1955	68	To Be Assigned
Ventor, Mrs. Rosalie	7/29/1938	85	Jo-Ann Beaulieu
Arruda, Judith	7/30/1944	79	Do Not Contact
Fisher, Laura	7/30/1947	76	Do Not Contact
Powell, Charlotte	8/2/1946	77	To Be Assigned
Hennessy, Cheryl	8/3/1956	67	Do Not Contact
Medeiros, Patricia	8/4/1945	78	FLO
Eisely, Geraldine	8/5/1951	72	Do Not Contact
Kirklewski, Beatrice	8/9/1931	92	To Be Assigned
Connors, Brenda	8/10/1956	67	To Be Assigned
Carreiro, Aida	8/12/1938	85	Do Not Contact
Metivier, Claire	8/12/1930	93	FLO
O'Connor, Mrs. Shirley	8/12/1936	87	Do Not Contact
Oiestad, Susan	8/13/1957	66	To Be Assigned
Gassar, Mrs. Vera	8/14/1935	88	Shannon Bachman
Mello, Linda	8/14/1947	76	FLO
Chase, Mrs. Pauline	8/17/1928	95	Shannon Bachman
Sylvia, Debra	8/17/1954	69	To Be Assigned
Smith, Debra	8/19/1951	72	Do Not Contact
Waite, Cynthia	8/21/1942	81	To Be Assigned
Banville, Mildred	8/23/1936	87	To Be Assigned
DePina, Pam	8/23/1949	74	To Be Assigned
McNamara, Theresa	8/24/1932	91	Jo-Ann Beaulieu
Almeida, Marie	8/26/1941	82	To Be Assigned
Morin, Ms. Evangeline	8/26/1932	91	Roseanne O'Connell
Ingham, Ms. Linda	8/27/1946	77	Do Not Contact
Rapoza, Mrs. Mary Lou	8/28/1943	80	Roseanne O'Connell
Riley, Shirley	9/2/1929	94	Do Not Contact
DeJesus, Eva	9/13/1929	94	Do Not Contact

Finance Committee Meeting Minutes

May 16, 2023 9:30 AM

Present: D Laflamme (via Zoom), P McKnight, A Natho, C Foley, MCE.
Excused: C Mayall, R O'Connell, J Stankiewicz

Monthly Financial Report - Revised

The committee reviewed the new format of the Monthly Financial Report as revised by Clare. The previous format only included expenses (actual versus budget for the month and year to date). While developing the strategic plan, it was noted that income (month and year to date) was a critical component in understanding our total financial health in the present as well as into future years. This is done in conjunction with the monthly portfolio summary issued by Bank of America.

In navigating through the report's layout and formulae, we agreed that it will require us to have continued review sessions in the months to come. The committee will continue to meet monthly.

Quarterly Financial Report - New

Coming out of the new strategic plan, approval was given to have the committee present a financial report on a quarterly rather than monthly basis. Again, Clare has designed a document for this purpose. Ideally, this report would be presented at the board meeting following the joint quarterly portfolio performance review held with this committee, BofA and the IAC. Calendars will be consulted in light of BofA's review presentation dates and the board meetings (especially with the new reduction in the number of monthly meetings). Separately, Mary will contact BofA to determine a date for the Q1 review meeting.

Strategic Plan Action Steps

The committee reviewed those Action Steps in the strategic plan assigned to Finance and discussed in more detail what these steps might involve. As noted above, the quarterly financial review with the board (Governance Strategy 3, Step 2) will not commence as targeted for July 23 but in a subsequent month tbd. The other step (Sustainability, Strategy 1, Step 1) challenges the committee to develop a financial control policy by October 23. We are attempting to define the parameters of financial performance variance that will require board approval. More discussion and is definitely required on this.

Congratulations to the committee for beginning this new fiscal year with challenging topics and discussion. Off to a great start!

Next Meeting: Tuesday, June 20 at 9:30 AM

Mary Ellis, Treasurer
May 17, 2023

ARAW Finance Committee Meeting | June 20, 2023

Attending: Diane Laflamme, Pam McKnight, Angela Natho, Roseanne O'Connell, Jane Stankiewicz, Rosemary Saber (guest) & Clare Healy Foley (ED)

Excused: Mary Ellis (Chair) & Cathy Mayall

As Chair, Mary, was unable to attend, ED, Clare was asked to lead meeting in her absence. The committee continued its review of the monthly and year to date financials. Financial report for May and BOA Portfolio Account Summary had been distributed in advance of the meeting.

Elements of ARAW's income – contributions, investment income and realized gains – were discussed. Corresponding locations on BOA portfolio statement, where this information was pulled, was identified. This led to some questions around "Deposits" and "Distributions" totals on the portfolio summary statement. Further research, including reaching out to BOA is required to make sense of some of these numbers and transactions. It was noted that the "Fiscal YTD" total on the account summary is still reflecting calendar year. An additional request to change to our fiscal year will be made.

Expenses for May versus budget was reviewed. We reminded ourselves that line items in yellow under Direct Support and Administration reflect all elements of Direct Support and some elements of Administration, respectively. We spent some time understanding the *why* behind line items that were over budget (in red). Of note, staffing costs had been miscalculated on Excel spreadsheet, only one month of health insurance for Jenny was included. We also discussed some emerging trends and potential future spikes in certain categories – i.e. grocery gift cards as SNAP benefits decrease.

We revisited "UNSPENT FUNDS YTD" and the reason we were including – to gauge our spending against our income, sustainability, case for fundraising, etc. A suggestion to change "UNSPENT FUNDS YTD" to "Income vs Expenses YTD" to make it clearer what that number was. It was also noted that this number should be in red. We spent some time exploring ways that we would have control over this – decrease spending, fundraising, switch in investment strategy, etc. We agreed that this is a number to watch and that will change over time.

In addition to the change to "UNSPENT FUNDS YTD" other suggestions to revise the document were made:

- Add heading of "FY24: April 1, 2023 to March 31, 2024";
- Add "YTD= April thru May";
- Make all budgeted bold line-item cells consistently blue.

ED will resend document.

BOA Q1 review on Thursday, July 27th was discussed and the need to establish how and when we will communicate Q1 review to full board, given meeting will take place after July Board meeting and there is no August Board meeting. We will circle back to Mary.

DRAFT FY23 Financial Statements were distributed. Clare shared takeaways from the conversation she had with Burke & Lamb, our accountants:

- FY23 vs FY22 unrealized loss on expenses \$4,092,734 vs \$695,257
- FY23 investment income (interest and dividends) down 40% from FY22 – consult with IAC
- Page 13, Note A, section K – attention brought to lease as asset disclosure and B&L’s determination that this was immaterial to ARAW
- Page 17, Note H, Liquidity and impact on fundraising

Peter and Michelle from B&L are available to review for committee or entire board, at our request.

Discussion of Operating Foundation criteria and potential refund of FY23 taxes was discussed. Status changes annually and the one variable that would determine exemption for ARAW is if we meet the qualified distributions without borrowing from our carryover reserve in any given year. It seems we meet this in FY23. Criteria and tests for determination were reviewed. Our support of beneficiaries meet these qualifiers. Luckily, they also seem to align with the intentions behind our current Grants program. This guide will also be shared with the Grants Committee. We anticipate the return of our FY23 tax payment of: \$42,347.

A reminder of an opportunity to join in on June 22 at 4:00 pm for BOA’s virtual event, Nonprofit Investment Management – Balancing Short and Long Term Objectives was shared. To register follow link on email forwarded by Mary.

Meeting was adjourned at 10:36.

Respectfully submitted,

Clare Healy Foley, Executive Director

Executive Director's Discretionary Spending (EDDF)

APPROVED | December 2020

REVISED/APPROVED | November 2022

REVISED | May 2023

1. Purpose of the EDDF is to provide financial support to a beneficiary or ARAW eligible woman in between beneficiary committee meetings as stop gap or when a delay would be detrimental to the individual.
2. To be considered for support through the EDDF a full, updated 3-page application, with the appropriate supporting documentation, must be submitted.
3. The ED approves all EDDF requests with an eye to the beneficiary's current situation, trends, appropriate use of funds and/or past committee discussions/approvals.
4. If the ED has any questions or hesitation, she contacts the beneficiary committee chair for guidance. If chair is unavailable, current president is to be consulted.
5. Requests over \$1,600 require additional approval from beneficiary committee chair. If chair is unavailable, current president is to be consulted.
6. EDDF expenditures are reported monthly at the beneficiary committee meeting and are part of the financial report at the board meeting.

GOVERNANCE COMMITTEE MEETING MINUTES May 23, 2023

Members present: Beaton, Brooke, Ellis, Macomber (by zoom), McKnight

Member excused: Mayall

Also present: Stankiewicz, President and Healy Foley, Executive Director

We discussed the annual board member check-in specifics. Annual individual member surveys are due Thursday May 25th. After compilation of findings, Jane as President and Gale will coordinate annual check-ins. Clare, as Executive Director will also fill out a survey.

We also discussed, at length, the plan for internal board member bio's and a board matrix. The bio's will be helpful for current members and for new members to work on the goal to "Ensure that all Board members feel included and appreciated". For new members during the recruitment process, we'll ask that they provide us with a bio and we'll then share current board members bio's with them. Clare gave committee members a sample of her own personal and professional bio's. It was decided that committee members should create their own "personal bio". We reviewed a matrix that Clare put together. After discussion and edits, Clare will make the changes and email to committee members to test it out for themselves.

In addition, to support our goal to "Ensure that all Board members feel included and appreciated", Gale will host a social even on August 9th at 5:30pm.

The topic of committee chair and committee members time commitments was discussed. This information will be used for board recruitment and to examine current members' time commitments on specific committees. Decided that all board committee chairs and members will be asked to keep track of their time spent on committee work for the next three months.

We did an initial review of our ARAW handbooks. Clare will create a worksheet to send to all members for review of their handbooks providing updates as needed.

Respectfully submitted, Gale Beaton, Chair

GOVERNANCE COMMITTEE MEETING MINUTES June 27, 2023

Members present: Beaton, Brooke, Ellis, Laflamme, Macomber

Member excused: Mayall, McKnight

Also present: Stankiewicz, President and Healy Foley, Executive Director

- Rosemary contacted Gale and asked her to present to Governance committee names for possible Board recruitment: Sharon O'Malley's two sisters and Kathleen
- We discussed at length the results of the 2023 Annual ARAW Board Self-Evaluation.
 - We specifically reviewed each question for any "disagree", "not sure" and/or any "PLEASE EXPLAIN WHY" negative comments.
 - Most takeaways concern the by-laws, grants, and recruitment.
 - Determined questions referring to the Board should be modified to say for example: "As a Board member, I have sufficient knowledge about..." instead of "The Board".
 - Committees need to report to the board annually regarding their Committee performance measures.
 - Share with Board Clare's goals for the year
 - Survey results to go out to entire Board in July Board Meeting packet.
 - July Board meeting: Gale will review top takeaways from survey and highlight areas of improvement
 - Ask all Board members to review current by-laws and contact Gale with any questions.
- Bios:
 - Discussed using bios internally to be part of recruitment package to acquaint new Board members with existing Board members.
 - Committee members shared their "practice" bios.
 - Will share Committee members' "practice" bios with full board and discuss rationale for their use. Staff will also be asked to do same exercise. Discuss request for all member bios will be forthcoming.
- Matrix:
 - Began discussion of use of a Board matrix for recruitment and potential use for development
 - Further discussion to be delayed at this point until the Committee understands the purpose of the matrix

- Mary presented possible new Board member and discussed her background. Mary will offer to this possible new member the opportunity to meet with Mary and Gale, as Governance chair, to discuss ARAW and work through regular recruitment process
- The Committee will not meet in July unless necessary. At the August meeting, the Committee will discuss bios and any matters that occur after the Board hears the survey results.

Respectfully submitted, Gale Beaton, Chair

Q2 The mission statement clearly communicates the work of the ARAW.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	100.00% 13	0.00% 0	0.00% 0	13	5.00
	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	100.00% 11	0.00% 0	0.00% 0	11	5.00

#	PLEASE EXPLAIN WHY	DATE
1	Updated accordingly	5/25/2023 4:32 PM
2	And we keep looking at it!	5/24/2023 4:30 PM
3	It's what we do	5/24/2023 2:57 PM
4	"We furnish finance assistance, provide friendship, and promote the welfare and relief of elderly women" etc., perfectly clear	5/20/2023 10:25 AM
5	The statement has been reviewed extensively during the development of the last two strategic plans.	5/17/2023 12:37 PM
6	We recently tweaked the statement to meet our current mission	5/15/2023 9:25 AM
7	It's very straight forward..hasn't changed in over 150 years	5/12/2023 4:15 PM

Q3 There is an effective strategic plan in place for the implementation of the mission.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	92.31% 12	0.00% 0	7.69% 1	13	2.08
	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	100.00% 11	0.00% 0	0.00% 0	11	2.00

#	PLEASE EXPLAIN WHY	DATE
1	As of the May meeting there is!	5/25/2023 4:32 PM
2	The strategic plan that we implemented 3 years ago clearly guided our activities.	5/25/2023 10:55 AM
3	It's new and has just been completed	5/24/2023 2:57 PM
4	We recently completed the plan for the next three years	5/22/2023 8:02 AM
5	Yes. At our recent finance committee meeting Mary suggested we bring the Strategic Plan to every meeting which is a great help to me.	5/20/2023 10:25 AM
6	The board is proactive in keeping a current strategic plan in place.	5/19/2023 7:30 AM
7	I was not able to attend the stgc plan meeting nor read the results, due to illness.	5/18/2023 10:14 AM
8	Development of the plan was completed through the efforts and involvement of all board members.	5/17/2023 12:37 PM
9	The current plan has just been approved and we're ready to begin working on the goals	5/15/2023 9:25 AM
10	Lots of evolution/strategic moves over the last number of years	5/12/2023 4:15 PM

Q4 Board members are knowledgeable about ARAW's objectives and goals.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	100.00% 13	0.00% 0	0.00% 0	13	2.00

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	90.91% 10	0.00% 0	9.09% 1	11	2.09

#	PLEASE EXPLAIN WHY	DATE
1	Strategic Plan - prep and final - assures that	5/25/2023 4:32 PM
2	All members are involved in the adoption of goals and objectives	5/25/2023 10:55 AM
3	Certainly at this point in time they would be.	5/24/2023 4:30 PM
4	It's clearly stated and understood through orientation	5/24/2023 2:57 PM
5	The Strategic Plan offers an ongoing road map. As Board members we have to keep focused on that Plan. Sometimes it gets easy to get sidelined. The document is there for the needed reminder	5/22/2023 8:02 AM
6	They are clearly spelled out in the final Plan we received	5/20/2023 10:25 AM
7	It takes a while for new members to fully understand the workings of the organization and the process needed for accomplishing goals. I believe that support is available to newer board members as the learning curve takes place.	5/19/2023 7:30 AM
8	Discussion and decisions around objectives and goals are held at committee and board meetings.	5/17/2023 12:37 PM
9	I believe the plan and goals were well presented.	5/15/2023 9:25 AM
10	We see the goals in action through committee work	5/12/2023 4:15 PM

Q5 The board regularly measures performance in carrying out the mission.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	76.92% 10	0.00% 0	23.08% 3	13	2.23

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	72.73% 8	0.00% 0	27.27% 3	11	2.27

#	PLEASE EXPLAIN WHY	DATE
1	Case in point - this survey	5/25/2023 4:32 PM
2	Individual committees are focused achieving the goals.	5/25/2023 10:55 AM
3	I think we really excel here with our strategic plan and committee annual goals.	5/24/2023 4:30 PM
4	The recent preparation for the new Strategic Plan gave us opportunity to do that. Though in fact we are always looking at our performance.	5/22/2023 8:02 AM
5	I agree that by following the strategic plan this happens. As a board member who has not attended most other Committee meetings I am uncertain about "regularly measures". I don't recall at regular Board Meetings reviewing "performance measurements" and thus, on me to be more available (?)	5/20/2023 10:25 AM

2023 Annual ARAW Board Self-Evaluation

6	Metrics are available and used for concrete goals involving money. Friendship goals are less concrete.	5/17/2023 12:37 PM
7	The office has offered us wonderful measurement data when asked	5/15/2023 9:25 AM
8	We do this better now with valuation assistance from staff	5/12/2023 4:15 PM

Q6 The board understands the difference between board and staff functions and operates accordingly.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	84.62% 11	0.00% 0	15.38% 2	13	2.15
	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	63.64% 7	0.00% 0	36.36% 4	11	2.36

#	PLEASE EXPLAIN WHY	DATE
1	Progress is being made every year	5/25/2023 4:32 PM
2	I think that we have a better understanding than we did last year but it is a work in progress.	5/25/2023 10:55 AM
3	It has been a steep learning curve and I think both sides can make missteps at times but we have come so very far!!	5/24/2023 4:30 PM
4	I think the board is learning to	5/24/2023 2:57 PM
5	I think a lot of thought has gone into this over the last year and the roles are clear.	5/24/2023 5:50 AM
6	Yes. For me this was thoroughly reviewed and discussed over the past 2 years. I was confused about the roles and Clare worked closely with me and mentored me on the distinctions.	5/20/2023 10:25 AM
7	Although there may be some areas where there is still some confusion we have moved forward in this area.	5/19/2023 7:30 AM
8	Considerable effort has gone into making this difference clear.	5/17/2023 12:37 PM
9	I still believe this is a work in progress. I sometimes wonder when to ask the office and when not to. How much does the board still want control of certain activities	5/15/2023 9:25 AM

Q7 Board members are familiar with the ARAW by-laws.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	84.62% 11	0.00% 0	15.38% 2	13	2.15
	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	36.36% 4	27.27% 3	36.36% 4	11	2.64

#	PLEASE EXPLAIN WHY	DATE
1	Now that they have been revised and distributed there is an opportunity for everyone to become more familiar	5/25/2023 4:32 PM
2	I don't think we are as familiar with them as we should be.	5/25/2023 10:55 AM
3	The updated bylaws were distributed to each board member	5/24/2023 2:57 PM
4	Good job done by Governance in rewriting the by-laws.	5/24/2023 5:50 AM

2023 Annual ARAW Board Self-Evaluation

5	I think it would be valuable to get those who are interested in a review of the document.	5/22/2023 8:02 AM
6	I just read through them to "check my knowledge". I am "familiar". In the past I have only look at them when I had a question. I will add a yearly review to my to do list.	5/20/2023 10:25 AM
7	They are readily available if there are any questions.	5/19/2023 7:30 AM
8	Recent re-issue of the by-laws provided the opportunity to board members to re-familiarize with content.	5/17/2023 12:37 PM
9	Just updated and presented	5/15/2023 9:25 AM
10	The by-laws have been updated but it might be helpful to have a group review of them	5/12/2023 4:15 PM

Q8 Board members are in compliance with the ARAW by-laws.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	92.31%	0.00%	7.69%		
	12	0	1	13	2.08

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	63.64%	0.00%	36.36%		
	7	0	4	11	2.36

#	PLEASE EXPLAIN WHY	DATE
1	We all help to insure that we are and can now refer to the document	5/25/2023 4:32 PM
2	The board refers to the by-laws when making decisions.	5/25/2023 10:55 AM
3	I'll restate that it would be valuable to review the By-Laws as a group.	5/22/2023 8:02 AM
4	Have just read them I would say "yes", however, as stated above I need to review.	5/20/2023 10:25 AM
5	Self and peer checks are made regularly in meetings and discussions.	5/17/2023 12:37 PM

Q9 The board operates under a clear set of governance policies & procedures.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	100.00%	0.00%	0.00%		
	13	0	0	13	2.00

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	90.91%	0.00%	9.09%		
	10	0	1	11	2.09

#	PLEASE EXPLAIN WHY	DATE
1	The handbook is a wonderful compilation of this	5/25/2023 4:32 PM
2	Thanks to Debbie we have a clear set of governance policies and procedures to guide us.	5/25/2023 10:55 AM
3	It's in the handbook	5/24/2023 2:57 PM
4	There is always some evolution of policies and procedures but they are followed by the board.	5/24/2023 5:50 AM
5	Yes. The Board Member Handbook clearly lays out policies and procedures.	5/20/2023 10:25 AM
6	The governance committee has done a great deal of work to get current policies and procedures in place.	5/19/2023 7:30 AM
7	Over the past years, policies and procedures have been updated and communicated.	5/17/2023 12:37 PM
8	I believe so but I've been on governance so would like to know how non governance committee	5/15/2023 9:25 AM

board members feel.

9	We have established more policies and procedure which is excellent	5/12/2023 4:15 PM
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Q10 Board members avoid conflicts of interest and put ARAW's interests first in decision-making.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	100.00% 13	0.00% 0	0.00% 0	13	2.00

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	100.00% 11	0.00% 0	0.00% 0	11	2.00

#	PLEASE EXPLAIN WHY	DATE
1	All board members are heavily invested in what is best for ARAW and always put that first	5/25/2023 4:32 PM
2	I believe so. This is a very dedicated board	5/25/2023 10:55 AM
3	I see no evidence of a problem here. I hope I am correct.	5/24/2023 4:30 PM
4	I believe we are very clear on this. Also we sign the conflict of interest statement.	5/22/2023 8:02 AM
5	I'm at a loss to think of a conflict where I would put my interests above that of the Organization	5/20/2023 10:25 AM
6	As far as I'm aware	5/15/2023 9:25 AM

Q11 The board has sufficient knowledge about ARAW's grantee programs.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	61.54% 8	7.69% 1	30.77% 4	13	2.38

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	90.91% 10	0.00% 0	9.09% 1	11	2.09

#	PLEASE EXPLAIN WHY	DATE
1	Since the model has changed efforts have been made to do ensure everyone is knowledgeable - summary sheets, annual meeting presentations, newsletter, opportunities to attend community partner programming, community partner highlight by ED at each board meeting. Strategic plan also charges us to make sure everyone feels they are knowledgeable	5/25/2023 4:32 PM
2	I sometimes feel that the board should have a better grasp of these programs	5/25/2023 10:55 AM
3	I agree that sufficient info is available and we all have access to it, but speaking for myself, it does not tend to stay front of mind. I would appreciate hearing more about successes.	5/24/2023 4:30 PM
4	Grants Chair explains each program at board meetings and the annual meeting	5/24/2023 2:57 PM
5	As a member of the grants committee, I certainly had sufficient knowledge but some board members did not feel they had a good enough understanding of the merits of some grants, and thus were unsure if the money was being spent wisely.	5/24/2023 5:50 AM
6	I'd like to think the Board does but in truth the Grants Committee needs to make this information a monthly or so, update on what's happening with the grantees. I do think the dissemination of information has improved including the presentations at the Annual Meeting..	5/22/2023 8:02 AM
7	I have some knowledge of the workings of the grantee programs. I think sufficient but...?	5/20/2023 10:25 AM
8	The grants committee regularly reports on the status of grants and Clare keeps us updated	5/19/2023 7:30 AM

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regarding the challenges and successes of current grantees.

9	Work is currently being done to update, review and communicate all grantee programs at the board level.	5/17/2023 12:37 PM
10	The presentations at the annual board meeting by some of the grantees brought a full circle to my current understanding of the programs	5/15/2023 9:25 AM
11	Somewhat would be a good word as grants changed from aa few grants to many diverse ones	5/12/2023 4:15 PM

Q12 The board ensures operational practices are appropriate and current.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	92.31% 12	0.00% 0	7.69% 1	13	2.08

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	90.91% 10	0.00% 0	9.09% 1	11	2.09

#	PLEASE EXPLAIN WHY	DATE
1	Board provides sufficient oversight to operational practices	5/25/2023 4:32 PM
2	Thank you Clare.	5/24/2023 4:30 PM
3	In answering this question I immediately thought "Clare" does wonderfully ensuring operational practices are appropriate and current. This come from my work with her on the Personnel Committee. I think through each Committee and particularly Governance this takes place.	5/20/2023 10:25 AM
4	All board members support and encourage appropriate practices.	5/17/2023 12:37 PM
5	I believe so	5/15/2023 9:25 AM

Q13 The board functions as an effective decision making and governing body.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	100.00% 13	0.00% 0	0.00% 0	13	2.00

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	100.00% 11	0.00% 0	0.00% 0	11	2.00

#	PLEASE EXPLAIN WHY	DATE
1	Decision making and governance are taken very seriously	5/25/2023 4:32 PM
2	The board encourages discussion and active participation in the decision-making process.	5/25/2023 10:55 AM
3	I have been on other Boards and ARAW is by far the best in this regard.	5/20/2023 10:25 AM
4	This is the strength of the board with members feeling free to question, challenge and discuss topics/issues.	5/17/2023 12:37 PM
5	Yes, I continue to hope all feel comfortable being part of decision making	5/15/2023 9:25 AM
6	Everyone cares greatly about what makes the mission successful	5/12/2023 4:15 PM

Q14 The board periodically assess its performance as a board.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	92.31% 12	0.00% 0	7.69% 1	13	2.08
	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	81.82% 9	0.00% 0	18.18% 2	11	2.18
#	PLEASE EXPLAIN WHY				DATE
1	Case in point - this survey				5/25/2023 4:32 PM
2	We do that yearly.				5/25/2023 10:55 AM
3	Does it? I don't know				5/24/2023 2:57 PM
4	I think we do this ongoing				5/22/2023 8:02 AM
5	Doing that right now!!! Thanks				5/20/2023 10:25 AM
6	In progress.				5/17/2023 12:37 PM

Q15 Board members serve as effective ambassadors for ARAW

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	92.31% 12	0.00% 0	7.69% 1	13	2.08
	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	70.00% 7	0.00% 0	30.00% 3	10	2.30
#	PLEASE EXPLAIN WHY				DATE
1	Yes. And this will become more important when we embark on fundraising efforts				5/25/2023 4:32 PM
2	I believe that all board members are proud of the work that we do at ARAW and serve as effective ambassadors for our foundation.				5/25/2023 10:55 AM
3	I really have no idea except about a few members who certainly are.				5/24/2023 4:30 PM
4	Board members talk about their ARAW work; attend FLO luncheons; "visit" beneficiaries				5/24/2023 2:57 PM
5	Absolutely				5/22/2023 8:02 AM
6	Commitment of board members to ARAW and what it stands for provides basis for this.				5/17/2023 12:37 PM
7	Every year I believe we are getting better and better sharing the story				5/15/2023 9:25 AM

Q16 Board members are generous with their time and work hard for ARAW.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	100.00% 13	0.00% 0	0.00% 0	13	2.00
	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	100.00% 11	0.00% 0	0.00% 0	11	2.00
#	PLEASE EXPLAIN WHY				DATE
1	100%				5/25/2023 4:32 PM

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2	Board members are committed to the work of the foundation and work hard to support our ladies.	5/25/2023 10:55 AM
3	I think the amount of time we all spend is much more that we realize. I will be interested in the next step of documenting time spent.	5/24/2023 4:30 PM
4	ARAW board members spend hours on various committee work, "visiting" beneficiaries, preparing for board meetings	5/24/2023 2:57 PM
5	Again, absolutely	5/22/2023 8:02 AM
6	There is a serious time commitment and this Board is hard-working	5/20/2023 10:25 AM
7	It would be difficult to serve on the board without this generosity.	5/17/2023 12:37 PM
8	Absolutely	5/15/2023 9:25 AM
9	More than generous..a very passionate work ethic	5/12/2023 4:15 PM

Q17 Board members actively support the Executive Director.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	91.67%	0.00%	8.33%	12	2.08
	11	0	1		

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	90.91%	0.00%	9.09%	11	2.09
	10	0	1		

#	PLEASE EXPLAIN WHY	DATE
1	Indeed.	5/25/2023 4:32 PM
2	It appears to be a good working relationship	5/24/2023 2:57 PM
3	Yes and that is why so much has been accomplished in the past four years. It's a combined effort	5/22/2023 8:02 AM
4	I could not perform what is expected of me without Clare's expertise and assistance. Sometimes I feel I could be more supportive.	5/20/2023 10:25 AM
5	We love Clare!	5/19/2023 7:30 AM
6	The strength of the Board - ED relationship provides success.	5/17/2023 12:37 PM
7	I believe so but would like Clare's perspective also.	5/15/2023 9:25 AM

Q18 As part of the Executive Director's annual evaluation, the ED works with the board to develop realistic goals for the coming year.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	69.23%	7.69%	23.08%	13	2.31
	9	1	3		

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	81.82%	0.00%	18.18%	11	2.18
	9	0	2		

#	PLEASE EXPLAIN WHY	DATE
1	Goals are typically set with the President or a smaller group (Executive, Governance or Personnel - or rep from one of those committees, it has changed each year) and have then been brought to the board for review and feedback. Although, I am not sure they were brought to the board this year	5/25/2023 4:32 PM

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2	I have always assumed that the ED and the Board President develop the goals. I trust that process and do not feel I have been involved except when I was President.	5/24/2023 4:30 PM
3	Very important partnership because the ED is dealing with the organization on a daily basis as well as relating with the the staff as they encounter challenges	5/22/2023 8:02 AM
4	Embarrassed to say I'm unsure of ED working with the Bd to develop goals	5/20/2023 10:25 AM
5	This is mainly done with the President, Executive Committee and committee chairs as needed.	5/17/2023 12:37 PM

Q19 Mutual trust and respect exist between the board & Executive Director.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	100.00% 13	0.00% 0	0.00% 0	13	2.00

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	90.91% 10	0.00% 0	9.09% 1	11	2.09

#	PLEASE EXPLAIN WHY	DATE
1	I hope so!	5/25/2023 4:32 PM
2	The board recognizes Clare's skills and appreciates her guidance and direction.	5/25/2023 10:55 AM
3	See #17	5/24/2023 2:57 PM
4	It's an excellent partnership	5/22/2023 8:02 AM
5	I think this is evident by all Board and Committee discussions I have been involved with. Clare is an outstanding ED and in my opinion has the trust and respect of Board	5/20/2023 10:25 AM
6	See #17 comment.	5/17/2023 12:37 PM
7	I believe so but again would like Clare's perspective	5/15/2023 9:25 AM
8	Better together	5/12/2023 4:15 PM

Q20 The board reviews and approves the annual budget.

	AGREES	DISAGREES	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	100.00% 13	0.00% 0	0.00% 0	13	2.00

	AGREES	DISAGREES	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	100.00% 11	0.00% 0	0.00% 0	11	2.00

#	PLEASE EXPLAIN WHY	DATE
1	Yes. Getting better at every year.	5/25/2023 4:32 PM
2	The budget is presented and discussed at a board meeting	5/24/2023 2:57 PM
3	the Board does this with the informed guidance of the Finance Committee and the support system that has been developed with IAC and BOA. Excellent Fin. Com. Chair	5/22/2023 8:02 AM
4	Yes, and, going forward I will strive to actively participate	5/20/2023 10:25 AM
5	This has become a required practice.	5/17/2023 12:37 PM

Q21 The board receives timely and regular financial reports.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	100.00% 13	0.00% 0	0.00% 0	13	2.00

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	100.00% 10	0.00% 0	0.00% 0	10	2.00

#	PLEASE EXPLAIN WHY	DATE
1	Depends on the month. Sometimes the Board meeting occurred too early in the month to allow for reports.	5/25/2023 4:32 PM
2	Treasurer does a great job presenting necessary reports	5/24/2023 2:57 PM
3	The Board has received on going informational sessions. Finance Chair has offered repeated info sessions.	5/22/2023 8:02 AM
4	I think that the financial goals outlined in the strategic plan will assist in my understanding of the reports	5/20/2023 10:25 AM
5	Monthly reports are distributed and discussed at board meetings.	5/17/2023 12:37 PM

Q22 Board members understand financial statements.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	46.15% 6	7.69% 1	46.15% 6	13	2.54

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	45.45% 5	0.00% 0	54.55% 6	11	2.55

#	PLEASE EXPLAIN WHY	DATE
1	Committee members and the executive director are very good at explaining the reports.	5/27/2023 1:18 AM
2	Work in progress.	5/25/2023 4:32 PM
3	This is a work in progress and Mary has done an excellent job in helping us to understand the financial statements. Members have varying degrees of comfort with finances.	5/25/2023 10:55 AM
4	I really am not sure, but Mary has worked hard to move us along that learning curve.	5/24/2023 4:30 PM
5	I'm not sure that everyone grasps the financial information presented	5/24/2023 2:57 PM
6	Mary has put a great deal of effort into educating the board about the financial statements and performance.	5/24/2023 5:50 AM
7	If anyone doesn't all they need to do is ask.	5/22/2023 8:02 AM
8	I am only in the past month able to say I am taking a comprehensive review of the statements	5/20/2023 10:25 AM
9	This is a work in process and Mary is great at talking about elements of the financial report.	5/19/2023 7:30 AM
10	Education continues and understanding has improved significantly.	5/17/2023 12:37 PM
11	I believe we're all getting better and better	5/15/2023 9:25 AM
12	I think we've moved to ensuring members understand basic and some of the more complicated financial statements.omplicated	5/12/2023 4:15 PM

Q23 The board monitors financial performance and takes the necessary steps to insure the operations of the organization are sound.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	91.67% 11	8.33% 1	0.00% 0	12	2.08
	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	81.82% 9	0.00% 0	18.18% 2	11	2.18
#	PLEASE EXPLAIN WHY				DATE
1	IAC has helped with this.				5/25/2023 4:32 PM
2	The addition of the advisory team has helped us to understand our financial performance and, I believe, has given us greater confidence in the financial operations of ARAW.				5/25/2023 10:55 AM
3	Carefully monitored through committee work and financial reports,				5/24/2023 2:57 PM
4	The IAC has been instrumental in helping the board understand and feel confident in the financial performance and spending plan.				5/24/2023 5:50 AM
5	The support of IAC to the Finance Committee and the close relationship people to people has reinforced this				5/22/2023 8:02 AM
6	I have deferred to the judgement of Finance and ED. As stated above, I think the finance goals in the SP will assist.				5/20/2023 10:25 AM
7	The creation of the IAC was instrumental in aiding us to monitor performance.				5/19/2023 7:30 AM
8	A formal board review process is being developed.				5/17/2023 12:37 PM
9	I trust the finance committee to do this				5/15/2023 9:25 AM

Q24 Board meetings are frequent enough to ensure effective governance.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	92.31% 12	0.00% 0	7.69% 1	13	2.08
	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	100.00% 11	0.00% 0	0.00% 0	11	2.00
#	PLEASE EXPLAIN WHY				DATE
1	More frequent than is probably necessary. The outcome of upcoming decrease will be interesting				5/25/2023 4:32 PM
2	Monthly meetings				5/24/2023 2:57 PM
3	With the transition to 9 meetings per year we'll see if this will be sufficient. On paper it looks to be a good plan.				5/22/2023 8:02 AM
4	Yes, and I think the reduced Board meetings will benefit Committee meetings				5/20/2023 10:25 AM
5	A trial reducing frequency in the upcoming fiscal year will underscore this.				5/17/2023 12:37 PM

Q25 Board members are diligent about attending board meetings.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	100.00% 13	0.00% 0	0.00% 0	13	2.00
	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	100.00% 11	0.00% 0	0.00% 0	11	2.00
#	PLEASE EXPLAIN WHY				DATE
1	Yes. I think everyone does there best to attend. Quite a commitment when they occur every month. Unusual.				5/25/2023 4:32 PM
2	I'd say for the most part that is true.				5/22/2023 8:02 AM
3	We have dedicated and committed members.				5/17/2023 12:37 PM

Q26 Board members receive written reports sufficiently in advance of meetings to allow time for review.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	100.00% 13	0.00% 0	0.00% 0	13	2.00
	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	81.82% 9	0.00% 0	18.18% 2	11	2.18
#	PLEASE EXPLAIN WHY				DATE
1	Most of the time.				5/25/2023 4:32 PM
2	Most of the time.				5/24/2023 4:30 PM
3	Generally, reports are received with enough time to prepare				5/24/2023 2:57 PM
4	The Board packet is well prepared and in a timely fashion				5/22/2023 8:02 AM
5	Materials are distributed. It is up to the member to review in a timely manner.				5/17/2023 12:37 PM

Q27 Board members come to meetings prepared.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	84.62% 11	0.00% 0	15.38% 2	13	2.15
	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	90.91% 10	0.00% 0	9.09% 1	11	2.09
#	PLEASE EXPLAIN WHY				DATE
1	I think so.				5/25/2023 4:32 PM
2	I am not sure that we are all as prepared as we should be for every board meeting but I think we have made progress since I first joined the group.				5/25/2023 10:55 AM
3	It appears that each member is prepared				5/24/2023 2:57 PM
4	I could be more prepared with finance info and since I'm now on the finance committee this will happen				5/20/2023 10:25 AM
5	It is evident at meetings that the materials to be presented and discussed have been reviewed.				5/17/2023 12:37 PM
6	Much better since email, etc. When I started and received in the mail, some were not as diligent.				5/15/2023 9:25 AM

Q28 The agenda at the board meetings is well planned to insure completion of all board business.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	92.31% 12	0.00% 0	7.69% 1	13	2.08

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	90.91% 10	0.00% 0	9.09% 1	11	2.09

#	PLEASE EXPLAIN WHY	DATE
1	Most work is done in committee making the board meeting an opportunity for review, discussion and sharing.	5/25/2023 4:32 PM
2	I think the agenda is well planned and meetings do not run overly long. I do think we need to talk about time allotment and the balance of committee reports with new business with operational news and updates etc.	5/24/2023 4:30 PM
3	Seems to be a well-oiled machine	5/24/2023 2:57 PM
4	Very well prepared	5/22/2023 8:02 AM
5	Clare, as usual, does outstanding job	5/20/2023 10:25 AM
6	Agendas are thorough and clear.	5/17/2023 12:37 PM

Q29 All board members speak freely and actively participate in meetings.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	92.31% 12	0.00% 0	7.69% 1	13	2.08

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	54.55% 6	9.09% 1	36.36% 4	11	2.45

#	PLEASE EXPLAIN WHY	DATE
1	Discussion are key. I am sometimes surprised at what sparks conversation and what does not.	5/25/2023 4:32 PM
2	I agree and it varies based on personality and which committees they serve on. But certainly this is better since COVID.	5/24/2023 4:30 PM
3	I have been hesitant on financial issues... this will change	5/20/2023 10:25 AM
4	I believe that the culture of the board is to encourage open discussion especially if there are competing views.	5/19/2023 7:30 AM
5	The board welcomes discussion and differing opinions.	5/17/2023 12:37 PM
6	The meetings aren't short so I wonder if people are afraid to speak up and slow things down.	5/15/2023 9:25 AM
7	There's a respect for others ideas and opinions	5/12/2023 4:15 PM

Q30 Board meetings allow for strategic discussion and decision making.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	61.54% 8	0.00% 0	38.46% 5	13	2.38

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	40.00% 4	10.00% 1	50.00% 5	10	2.60

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#	PLEASE EXPLAIN WHY	DATE
1	I think there is more strategic discussion happening at the board meeting then we realize	5/25/2023 4:32 PM
2	Board meetings allow time for discussion and decision making but it is dependent on board preparation.	5/25/2023 10:55 AM
3	I agree in general, but I always feel the meetings get compressed at the end because we don't parse out our time evenly.	5/24/2023 4:30 PM
4	Sometimes, strategic discussion seems to be limited in an effort to get through the agenda	5/24/2023 2:57 PM
5	Most strategic discussion occurs at the committee level-- in part due to time constraints as well as our committee-centric structure.	5/24/2023 5:50 AM
6	I think we have had enough time for this. It'll be interesting to see how newer members feel.	5/22/2023 8:02 AM
7	I found the mini retreats extremely helpful for strategic discussions	5/20/2023 10:25 AM
8	Time management at meetings has improved and has brought awareness to strategic discussion.	5/17/2023 12:37 PM
9	Sometimes	5/12/2023 4:15 PM

Q31 The board does a good job encouraging & accepting different points of view

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	100.00% 13	0.00% 0	0.00% 0	13	2.00

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	72.73% 8	0.00% 0	27.27% 3	11	2.27

#	PLEASE EXPLAIN WHY	DATE
1	Well balanced group	5/25/2023 4:32 PM
2	I think that board members feel comfortable expressing differing points of view.	5/25/2023 10:55 AM
3	This happens at the committee level	5/24/2023 2:57 PM
4	Again, i agree but would be interested in how newer members feel	5/22/2023 8:02 AM
5	I find this true particularly at committee level	5/20/2023 10:25 AM
6	The board welcomes discussion and differing opinions.	5/17/2023 12:37 PM
7	I've always felt comfortable. Not sure about others.	5/15/2023 9:25 AM

Q32 Board members are aware of ARAW's grant funded programs and opportunities to engage in volunteer opportunities.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	84.62% 11	7.69% 1	7.69% 1	13	2.15

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	63.64% 7	0.00% 0	36.36% 4	11	2.36

2023 Annual ARAW Board Self-Evaluation

#	PLEASE EXPLAIN WHY	DATE
1	These are highlighted at every board meeting and volunteer opportunities reinforced in follow up emails.	5/25/2023 4:32 PM
2	Don't understand "opportunities to engage in volunteer opportunities"	5/24/2023 2:57 PM
3	Between discussion at Board meetings and information in the FLO newsletter ample opportunity if members want to participate	5/22/2023 8:02 AM
4		5/20/2023 10:25 AM
5	More explicit education is needed for board members.	5/17/2023 12:37 PM
6	As said above, I liked learning from grantees about their programs	5/15/2023 9:25 AM

Q33 The qualifications and experience of current board members provide the board with the expertise it needs.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	61.54% 8	7.69% 1	30.77% 4	13	2.38

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	90.00% 9	10.00% 1	0.00% 0	10	2.10

#	PLEASE EXPLAIN WHY	DATE
1	Room for improvement and steps already underway	5/25/2023 4:32 PM
2	I think we need to examine this more closely.	5/25/2023 10:55 AM
3	Yes, at this point in time. But we do need more members.	5/24/2023 4:30 PM
4	There are holes that could be filled in the areas of law, community engagement, finance to mention a few	5/24/2023 2:57 PM
5	We are down to 11 members so there is an opportunity to fill vacancies with new perspectives	5/22/2023 8:02 AM
6	I agree with the above statement, unless we are also considering diversity/language abilities	5/20/2023 10:25 AM
7	Moving forward we will assess the expertise of our current board members and recruit new board members with expertise we might not currently have. This will hopefully create a board with a diversity of skills.	5/19/2023 7:30 AM
8	We continue to look to expand into areas of needed expertise to be identified through the board matrix being developed.	5/17/2023 12:37 PM
9	Hopefully with bios and a matrix we will work on areas to improve	5/15/2023 9:25 AM
10	Could always use more members.	5/12/2023 4:15 PM

Q34 New board members receive sufficient orientation to fully understand their roles and responsibilities.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	69.23% 9	0.00% 0	30.77% 4	13	2.31

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	54.55% 6	9.09% 1	36.36% 4	11	2.45

2023 Annual ARAW Board Self-Evaluation

#	PLEASE EXPLAIN WHY	DATE
1	Hope so. But there is always room for improvement and everyone "learns" differently	5/25/2023 4:32 PM
2	We have had several new members resign because they were not prepared to commit the necessary time to the organization.	5/25/2023 10:55 AM
3	The orientation and mentorship activities are very helpful.	5/24/2023 2:57 PM
4	Again, a lot of work has been put into this!	5/24/2023 5:50 AM
5	I think every effort is made to do this. This is a question for new members	5/22/2023 8:02 AM
6	That was my experience and Clare continues to offer her time if I have questions or concerns	5/20/2023 10:25 AM
7	The orientation/on-boarding procedures are now robust and thorough.	5/17/2023 12:37 PM
8	I hope so. This is better answered by newer members than me	5/15/2023 9:25 AM

Q35 The current committee structure is appropriate to undertake the work of the board.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	92.31% 12	7.69% 1	0.00% 0	13	2.08
	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	90.91% 10	0.00% 0	9.09% 1	11	2.09

#	PLEASE EXPLAIN WHY	DATE
1	ARAW's committee-centric structure seems to be very successful. I am glad we are looking at all the committees with an eye to streamlining	5/25/2023 4:32 PM
2	The committee structure works well and the board is kept abreast of ongoing activities at the monthly meetings.	5/25/2023 10:55 AM
3	The committees are actively do the bulk of the board's work	5/24/2023 2:57 PM
4	Yes i think this has worked well.	5/22/2023 8:02 AM
5	I think the strategic plan recommendations achieved appropriate structure for committees	5/20/2023 10:25 AM
6	The strategic plan has identified some areas of streamlining committee structure.	5/17/2023 12:37 PM
7	Work in progress - task forces, etc	5/15/2023 9:25 AM

Q36 The board channels its work through active and effective committees/task forces whose responsibilities are clearly articulated.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	100.00% 13	0.00% 0	0.00% 0	13	2.00
	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	90.91% 10	0.00% 0	9.09% 1	11	2.09

2023 Annual ARAW Board Self-Evaluation

#	PLEASE EXPLAIN WHY	DATE
1	100%	5/25/2023 4:32 PM
2	The support of the ED and her staff is the backbone of the Committee structure	5/22/2023 8:02 AM
3	The updated descriptions in the handbook are clearly articulated and we have very active and effective committees	5/20/2023 10:25 AM
4	Effective committees are the workhorses of the board.	5/17/2023 12:37 PM
5	Work in progress - task forces, etc	5/15/2023 9:25 AM

Q37 Board members are diligent about fulfilling their committee roles and assignments.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	100.00% 13	0.00% 0	0.00% 0	13	2.00

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2022	90.91% 10	0.00% 0	9.09% 1	11	2.09

#	PLEASE EXPLAIN WHY	DATE
1	100%	5/25/2023 4:32 PM
2	This is a conscientious group of women who are committed to the work. Members resign from the board if they do not feel that they can no longer fulfill their responsibilities for whatever reason	5/25/2023 10:55 AM
3	Regularly scheduled committee meetings	5/24/2023 2:57 PM
4	I think we are but also are able to with the excellent assistance of our ED and her staff.	5/22/2023 8:02 AM
5	This has been my experience	5/20/2023 10:25 AM
6	Board members choose which committees they wish to serve on, knowing and accepting the associated responsibilities.	5/17/2023 12:37 PM

Q38 The following committees have operated effectively:

2023	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
Executive Committee	100.00% 12	0.00% 0	0.00% 0	12	1.00
Governance	100.00% 13	0.00% 0	0.00% 0	13	1.00
Finance	100.00% 13	0.00% 0	0.00% 0	13	1.00
Beneficiary	100.00% 13	0.00% 0	0.00% 0	13	1.00
Grants	100.00% 13	0.00% 0	0.00% 0	13	1.00
Visiting	50.00% 6	16.67% 2	33.33% 4	12	1.83
Legacy	84.62% 11	0.00% 0	15.38% 2	13	1.31
Personnel	100.00% 13	0.00% 0	0.00% 0	13	1.00
Beneficiary Task Force	92.31% 12	0.00% 0	7.69% 1	13	1.15
Investment Advisory Committee	100.00% 13	0.00% 0	0.00% 0	13	1.00

2023 Annual ARAW Board Self-Evaluation

2022	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
Executive Committee	100.00% 11	0.00% 0	0.00% 0	11	1.00
Governance	100.00% 10	0.00% 0	0.00% 0	10	1.00
Finance	100.00% 10	0.00% 0	0.00% 0	10	1.00
Beneficiary	100.00% 10	0.00% 0	0.00% 0	10	1.00
Grants	100.00% 10	0.00% 0	0.00% 0	10	1.00
Visiting	70.00% 7	0.00% 0	30.00% 3	10	1.60
Legacy	70.00% 7	0.00% 0	30.00% 3	10	1.60
Personnel	90.00% 9	0.00% 0	10.00% 1	10	1.20
Beneficiary Task Force	90.00% 9	0.00% 0	10.00% 1	10	1.20
Investment Advisory Committee	90.00% 9	0.00% 0	10.00% 1	10	1.20

Q39 The board President effectively and appropriately leads and facilitates board meetings and the policy and governance work of the board.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	100.00% 13	0.00% 0	0.00% 0	13	2.00
2022	100.00% 11	0.00% 0	0.00% 0	11	2.00

#	PLEASE EXPLAIN WHY	DATE
1	Jane does a great job keeping us on track while still allowing for valuable discussion	5/25/2023 4:32 PM
2	The Vice President has contributed to this responsibility freely and effectively as well	5/22/2023 8:02 AM
3	Absolutely. My experience, both at Board and Committee meetings, is that Jane listens, reflects, questions and guides always with collaboration.	5/20/2023 10:25 AM
4	The strength and skills of the President have led the board through an active year.	5/17/2023 12:37 PM
5	Excellent!	5/15/2023 9:25 AM

Q40 I find serving on the board to be a satisfying & rewarding experience.

	AGREE	DISAGREE	NOT SURE	TOTAL	WEIGHTED AVERAGE
2023	100.00% 13	0.00% 0	0.00% 0	13	2.00
2022	100.00% 11	0.00% 0	0.00% 0	11	2.00

2023 Annual ARAW Board Self-Evaluation

#	PLEASE EXPLAIN WHY	DATE
1	The ARAW is a job. But it is very fulfilling job.	5/25/2023 4:32 PM
2	The work that we do is important and I enjoy working with intelligent and committed women.	5/25/2023 10:55 AM
3	I enjoy the committee work and working with diligent committed individuals	5/24/2023 2:57 PM
4	Yes for what we do for the beneficiaries and also for the relationships we have with one another	5/22/2023 8:02 AM
5	I will be forever grateful to Rosemary for recommending me to be on the Board. I initially told her I did not see how I could assist the organization until she explained the Visiting Committee. I knew I could "be a friend" to aged women. Little did I know the joy I would receive from the beneficiaries and I had no idea I would become a part of a women's group that has help me remain active intellectually, professionally, and yes, spiritually.	5/20/2023 10:25 AM
6	the mission, the engaging work (challenges and successes), the gift of friendships.	5/12/2023 4:15 PM

Q41 Please list up to three areas on which the board needs to focus in order to improve its performance and to be a more effective board.

#	RESPONSES	DATE
1	1. Diversity 2. Time commitment	5/27/2023 1:18 AM
2	Expectations of being a board member - does it have to be such a big job? Board recruitment - which is connected to the first point. how do we continue to attract board members Fundraising education - understanding the board's role and not being scared	5/25/2023 4:32 PM
3	1. Recruitment 2. Volunteer opportunities	5/25/2023 10:55 AM
4	Continue discussion about diversity and recruitment. Take a good look at the overall way time is used during Board Meetings.	5/24/2023 4:30 PM
5	Recruiting board members with diverse backgrounds and skills. Recruiting board members who better reflect the community ARAW serves. Board training opportunities.	5/24/2023 2:57 PM
6	1. Continue to recruit new board members--our numbers are small and that puts more pressure on current board members. 2. Continue to work on the Grants program to ensure a good return on investment. 3. Focus on the friendship aspect of the mission-- move ahead on plans to create a volunteer program.	5/24/2023 5:50 AM
7	*At this time the most important challenge is recruitment of appropriate board members. We have lost stalwart long tenured members. These were women who were always ready to step up when needed. *Work on the Committees that are in transition	5/22/2023 8:02 AM
8	diversity	5/20/2023 10:25 AM
9	We need to recruit more board members following the guidelines set in the strategic plan. We need to continue to fine tune meeting schedules with an eye toward streamlining if possible. We need to continue our education in finance and other areas.	5/19/2023 7:30 AM
10	The strategic plan has captured the key areas that will require focus of the board for improvement as a board and an organization.	5/17/2023 12:37 PM
11	I believe the strategic plan covers all the areas that I think need to be worked on.	5/15/2023 9:25 AM

Q42 Please list up to three things the ARAW Board does best.

#	RESPONSES	DATE
1	1. Respect for all 2. Information sharing 3. Dedication and commitment to ARAWs mission	5/27/2023 1:18 AM
2	Compassion - just read the letters - what a difference ARAW makes in so many women's lives Commitment - every board member works hard and truly, deeply cares Honoring our history - we stay true to our 1866 mission while adapting to world of 2023	5/25/2023 4:32 PM
3	1. Support of older women 2. Commitment to the foundation 3. Willingness to learn and adapt to new situations.	5/25/2023 10:55 AM
4	We adhere to our mission We manage our finances with an eye to sustainability We genuinely care about our work, each other and the women we serve.	5/24/2023 4:30 PM
5	Well organized board meetings; meeting the needs of the beneficiaries; actively involved board members; closely monitoring financials with an eye to the future.	5/24/2023 2:57 PM
6	Provides essential financial support that is not available elsewhere to low income elderly women in our community. Reduces loneliness and isolation in our population through the FLO program, relationships with the BA and staff and friendships with board members.	5/24/2023 5:50 AM
7	Appreciates the staff that are there on a daily basis to provide support and assistance to the ladies. Works well as a united body to get things done. Takes its role very seriously	5/22/2023 8:02 AM
8	- women helping women "not alms alone, but a friend" - consistently working to improve when and if needed - Strategic planning	5/20/2023 10:25 AM
9	Women caring for women. Friendship Committee work	5/19/2023 7:30 AM
10	- Provides support, loyalty and commitment to each other, staff and beneficiaries. - Provides opportunities to exchange ideas and grow without fear of judgement or threat.	5/17/2023 12:37 PM
11	We do help with the lives of so many low income elderly women. We work together as a cohesive hardworking group of board members. And now have an office that works like a machine to help us on our mission.	5/15/2023 9:25 AM
12	Makes decisions that help many women Evaluates decisions Members work together for best outcomes	5/12/2023 4:15 PM

Q43 Any other comments?

#	RESPONSES	DATE
1	No	5/27/2023 1:18 AM
2	ARAW provides what no other organization does. How lucky are we all to be a part of the incredible 150 year plus legacy of women helping women?	5/25/2023 4:32 PM
3	I am proud to be a member of this board.	5/25/2023 10:55 AM
4	Thanks for this opportunity.	5/24/2023 4:30 PM
5	I think all of the Committees have functioned well or have at least evaluated their role. Some are strong and secure in their purpose, others are in a state of transition. This is an area that will important to monitor this coming year. Reevaluation is always good. I think it's always valuable to look at our own role in the organization so I'm doing personal evaluation as well. This is a good exercise	5/22/2023 8:02 AM
6	It is an honor to be part of this remarkable group of women	5/20/2023 10:25 AM
7	It is a very rewarding experience to serve on this board. The board is a group of competent caring women who care deeply about the mission of the organization. The staff is such an impressive group of women who live the mission every day!	5/19/2023 7:30 AM
8	It is a rewarding and fulfilling experience to serve on this board of exceptional women.	5/17/2023 12:37 PM
9	I will always treasure the people and the experiences. I appreciate that the Association has taken so many steps to ensure the stability and sustainability of its work. A LOT has been accomplished.... and compassion and friendship prevail. For me, It's been a remarkable fifteen years!	5/12/2023 4:15 PM

PERSONAL BIOS

Personal bios are a useful tool for Boards. They can be used in a variety of ways. The ARAW Governance Committee has identified the need to get to know our fellow Board members and staff as an incentive to create bios *for internal use*. These bios will be included in the Board member handbook and will also serve as a helpful resource for new Board members as they get to know the ARAW organization and its key players.

Sample bios from members of the Governance Committee follow. Please use these as a guide to create your own. When creating your bio think, “what do I want someone to know if I am sitting across from them at a table telling them about myself and my connection to ARAW?”

Some things you might consider including: current role and tenure, why are you involved with ARAW, experience and knowledge, unique skills and experience and personal facts you are willing to share could include: hometown, family, hobbies/pastimes.

Make it your own!

Gale Nicholson Beaton

Gale grew up in Dartmouth, MA. After graduating from UVM where she focused on public health. Subsequently, she became a public health nurse in urban and rural settings throughout Virginia. During the final 25 years of her nursing career, she was a middle school nurse and worked at The Pine Street Inn homeless shelter health clinic one evening per week.

After spending most of her adult life in the Greater Boston area, Gale and her husband, Tom, returned to Dartmouth in 2017. Shortly thereafter, Gale proudly followed in her mother’s footsteps as an ARAW board member. Today, Gale is also the volunteer school nurse at Our Sisters’ School in New Bedford, a board member of Community Nurse Home Care, and works on the Mobile Ministry food and clothing truck one day a week. Gale and Tom have two children and three grandchildren.

Jane Stankiewicz

Although born in Portland Oregon, Jane moved across country to New England when she was six and has ingrained herself in all things community since.

She has a BS in Nursing from Lowell State College (now UMASS Lowell) and her MS in Health Services Management from Leslie University. Early in her career Jane worked as a staff and ICU nurse and New England Medical Center in Boston. Locally she was introduced to home care at St Luke’s VNA and home care became her passion.

She was CEO of Community Nurse Home Care for 33 years. During her tenure the agency evolved from a small VNA serving Fairhaven and Mattapoisett to a comprehensive home care agency fifteen towns in our community and employing over 200 people. In addition to offering home care, hospice and private care services, programs in psychiatric care, dementia care and chronic disease management were developed.

Jane lives in Marion with her family and in her spare time enjoys golf, boating, traveling and knitting but her greatest joy is her 8 grandchildren.

Mary Ellis

Born and raised in Brockton with her six sisters, she left for college for a degree in Food Science and Nutrition. She then began what was to become a multi-faceted food-based career across many varied locations from Pittsburgh to Australia to Manhattan with a retirement in South Dartmouth.

The close relationship with family has always been important to her. Because she was physically unable to spend time visiting her great-aunt in a nursing home in Brockton, she made it a point to be a surrogate to others in each of the 7-plus cities in which she lived.

The M.O. was always the same: reach out to an elderly nursing home resident who lacked any family or outside companions and befriend them with regular weekly visits. Sitting and listening to these people provided an insight for the richness of their lives as well as a history of 'days past' in these new adopted cities.

Introduction to the ARAW by friends and neighbors, combined with adjustment of many other volunteer activities, has provided the reconnection to learning from and about others in their later years.

Deborah Persons Brooke

Debbie was born and raised in New Bedford and Dartmouth. She grew up in an environment of philanthropy and service to others. Her mother was a very active member of ARAW for many of Debbie's formative years, and her mother's work and the inspiring stories she told left an indelible and moving impression on her.

Debbie received a degree in Occupational Therapy from the University of Pennsylvania and raised her family in Connecticut where she enjoyed challenging, rewarding work as an Occupational Therapist in the public schools and nursing homes in the East Lyme - Old Lyme area for 30 years.

When she returned to Dartmouth about 10 years ago to live with and assist her aging father, she was favored by an invitation to join ARAW and happily reconnected to an organization that continues to hearten and energize her.

She has experience on public and private school boards, non-profit boards and in community service. She has 2 sons and 3 grandchildren and enjoys gardening, traveling and spending time with family.

Leah M. Macomber

Leah grew up in Massachusetts and New York State, eventually landing in Rhode Island, where she spent most of her adult years. A graduate of Rhode Island College with a focus on urban studies, Leah chose to enter the nonprofit sector. With an interest in philanthropy, she rose through the ranks of fund development professionals.

Through determination, successful fundraising and advanced course work, she achieved the “Certified Fundraising Executive” (CFRE) accreditation. During her final professional years, she provided consultant services to Rhode Island area nonprofits focused on health issues, elder care, and the homeless population.

In 2011, Leah and her husband, Jack moved to South Dartmouth after discovering the beautiful South Coast of Massachusetts. A lifelong volunteer, Leah became involved in her church’s Social Concerns Ministry, the Solanus Casey Food Pantry, and served on the board of the Friends of the Dartmouth Library for eight years.

Leah enjoys reading, sewing, gardening and spending time with her grandchildren. Leah and Jack have two children and three grandchildren.

Pamela McKnight

Pamela joined the ARAW Board in 2019 and currently serves as the Beneficiary Committee Chair. She is also a member of the Finance, Governance and Personnel Committees.

Pam grew up in Massachusetts and during her high school years, she took a job at a local rest home providing personal care to frail elders. It was a surprisingly transformative experience. She not only enjoyed the company and rich life stories of the elderly residents but also learned the importance of providing care with respect and dignity.

After attending Brown University, she went on to graduate from University of Massachusetts Medical School and then returned to Brown to train as a neurologist.

Pam and her husband, Michael, have lived in Dartmouth for over 30 years where they happily raised their four children. They are now officially “empty nesters”.

Over the years Pam has volunteered in the Dartmouth Public Schools. In addition to ARAW, Pam volunteers at St. Mary’s Church Social Concerns Ministry and Casey Solanus food pantry.

Diane Laflamme

Diane was born and raised in New Bedford and is a strong supporter of New Bedford’s many revivals. Diane is a life-long learner and continually seeks opportunities to open her world and to expand her knowledge through learning and travel. She has taken courses ranging from theology to woodworking and is looking forward to a trip to Egypt.

Diane was introduced to ARAW by a friend and was immediately attracted to its mission. She is committed to community service and has volunteered at Father Bill’s homeless shelter in Brockton, My Sister School, Nativity Prep, My Brother’s Keeper and served on the Foundation Board of UMass Dartmouth.

A meeting of the Grants Committee was held on June 2, 2023.

Present : Diane Laflamme, Mary Ellis, Rosemary Saber, Clare Healy Foley

Absent: Leah Macomber had a scheduling conflict.

Clare provided us with the fourth quarter reports from the grant recipients. She indicated that there was improvement in some of the reporting and some partners were still not fully meeting their reporting responsibility.

She prepared an excellent document, **ARAW Community Partner Grants FY 23 Status report** which summarized the standing of all of the partners, the programs, their accomplishments or lack thereof and the financial status of their grant.

We also reviewed the foundational plans for the 23-24 grantees.

There was brief discussion of the value of a scoring rubric to be used to measure grant success for the 23-24 partners. This will be revisited at a later date.

Clare brought the committee up to date on the difficulty the New Bedford Art Museum was having in implementing the return of their unspent 22-23 funds. The Committee approved giving the Museum until October 2023 to return the funds, \$3541.00. This would have to be completed before the distribution of the next quarter appropriation for 23-24.

Discussion focused on the need for information regarding grants be readily available to all members of the ARAW board. Clare saw to this immediately following our meeting and all documents related to grants are on the ARAW website. Along with this information is encouragement to all board members to take advantage and attend programs offered by the partners.

We will focus on Grants at the July 13, 2023 board meeting to be sure everyone understands the availability of all related documents and to ask any questions that come to mind. It's important that all members are confident in the granting process and its value.

Thank you,
Rosemary Saber, Chair

HOW DO I LEARN ABOUT COMMUNITY PARTNER GRANTS?!!?!?

In response to an expressed desire from some Board members to know and understand more about our Community Partner grants and the impact of the investment ARAW makes, we have compiled a list of ways to learn more about our Community Partners and their grant funded programs.

- 🔗 **Annual Meeting** – all CPs are invited to attend the Annual Meeting and share their plans for the coming year
- 🔗 **Newsletter** – many of the CPs submit an announcement of program activities in the monthly newsletter
- 🔗 **Attend** – you are always welcome to attend a program or event that is shared in the newsletter (also a great way to interact with your Beneficiary friend is to invite them to attend with you)
- 🔗 **Join** – all board members are welcome to audit a Grants Committee meeting or even join the committee
- 🔗 **Documents** – CP summary, evaluation tools, summarized reports will be consistently shared with the full Board throughout the year (all will be reviewed at the July 2023 Board meeting)
- 🔗 **Handbook** – these documents should be part of your handbook in the “Community Partners” section
- 🔗 **Website** – all of the Grants Committee documentation is available on the Board only website (<http://www.arawofnb.org/araw-board-site/> password: ARAW1866)
- 🔗 **Board Meeting** – ED shares an operational update on specific CP or CPs at each Board meeting
- 🔗 **Ask** – if you have specific questions, please reach out to the Grants chair, anyone on the Grants Committee or the ED at anytime

Applicant	Program	Award	Activities	Goals	Success Indicators	Measurement Tools
<p>Cape Verdean Association in New Bedford</p>	<p><i>Outreach Social Gatherings for Elderly Cape Verdean Women Living in NB Housing</i></p>	<p>\$12,000</p>	<p>Weekly socials with Cape Verdean women aged 65 and over</p> <p>Cape Verdean women engage in cultural and social activities</p> <p>Act as referral conduit for social service needs</p>	<p>Maintain attendance and participation of original group of women.</p> <p>Poll participants to identify desired activities</p> <p>Remain in conversation with participants to gauge well-being and satisfaction.</p>	<p>Success is measured in ongoing regular attendance</p> <p>Success is measured by surveys and anecdotal conversation.</p> <p>Success is measured by participants expressing lessened isolation and increased belonging.</p>	<p>Facilitator takes attendance and follows up with non attending participants</p> <p>Feed-back about satisfaction with the program and well-being is solicited regularly</p> <p>Qualitative Feed-back is ongoing through conversation and discussion</p>
<p>Coastal Neighbors Network</p>	<p><i>Enhance Quality of Life and Promote Independence for Aging Women in Dartmouth & Westport</i></p>	<p>\$20,000</p>	<p>Reinforce the idea that transportation services are available to any location not just to ARAW events thru testimonials, phone conversations & ARAW</p> <p>Focus on more daytime activities, ask ARAW members to bring friends, use testimonials, flyers to boost attendance</p> <p>Natural bridges with volunteers. Members and volunteers in close proximity encouraged to connect.</p> <p>We will use testimonials, direct phone calls, flyers and ARAW to increase awareness of provided services</p>	<p>75% of enrolled ARAW Members will use our transportation services.</p> <p>80% of enrolled ARAW Members will have attended 2 or more events</p> <p>80% of enrolled ARAW Members will receive social outreach from a Social Buddy or Neighborhood Friend</p> <p>30% of enrolled ARAW Members will use our home maintenance services</p>	<p>Increased access to transportation services</p> <p>Increased access to social events</p> <p>Increased access to social outreach and connection</p> <p>Increased access to home maintenance services</p>	<p>Data Report Produced</p> <p>Data Report Produced</p> <p>Data Report Produced</p> <p>Data Report Produced</p>

Applicant	Program	Award	Activities	Goals	Success Indicators	Measurement Tools
Coastal Neighbors Network	<i>Technology Addendum</i>	\$2,760	<p>Purchasing & delivering tablets to 12 ARAW members over the year</p> <p>Provide each recipient w/ required training - to access email & internet as desired</p>	<p>100% of the women who want will receive</p> <p>90% of the recipients will use their tablets</p>	<p>Delivery of tablets</p> <p>Tablet Training</p> <p>Positive Member Feedback</p>	<p>Data Report Produced</p> <p>Data Report Produced</p> <p>Surveys and/or Narrative</p>
DEAF Inc.	<i>Advocacy, Resources and Education for Older Adults: connecting Deaf and Hard of Hearing Older Women to financial assistance and social interaction</i>	\$20,000	<p>Identify outreach opportunities in region</p> <p>Respond to request for information & referral from community</p> <p>Outreach Activities - exhibit tables, presentations to older adults, connections w/ service providers.</p> <p>Intake & Needs Assessment – 1:1 to ID unmet financial, technological, safety, housing, health, etc. needs. (annual re-assessment)</p> <p>Create service plan delineating unmet needs & status. Document service notes for each contact</p> <p>Identify funding options for needed financial supports, assistive technology/hearing aids & support application</p> <p>Design, advertise & Host events on topics of interest to older Deaf &</p>	<p>Provide outreach activities</p> <p>Provide Information and Referral</p> <p>Identify older adults who need additional supports</p> <p>Identify older women who need financial supports and/or assistive technology</p> <p>Identify older women who need financial supports and/or assistive technology. Identify if older women are ARAW eligible</p> <p>Older women receive support services to resolve unmet needs</p> <p>Referrals as needed for additional supports.</p> <p>Older women in need receive needed financial support</p> <p>Increase social engagement of older adult women</p>	<p>Outreach Activities</p> <p>Respond to request for information and referral from community</p> <p>Intake and Needs Assessments</p> <p>Identification of older women who need financial support(s) and/or assistive technology(s)</p> <p>Older women to remain safety at home and stability at home.</p> <p>Promotion of Financial Stability and Life Strategies</p> <p>Engagement of ARAW/Older Women in Social Engagement opportunities to reduce loneliness and isolation.</p>	<p># attending older adults/ older women</p> <p># of requests</p> <p># of older women receiving intake and needs assessment.</p> <p># of women identify unmet needs</p> <p># of unmet needs of older women.</p> <p># of older/ARAW eligible, engaged</p> <p># of older /ARAW eligible women – complete applications</p> <p># of older women/ARAW eligible women - receive financial support</p> <p># of older/ARAW eligible women – receive assistive technology</p> <p># of attendees/ ARAW eligible women - attending events</p>

Applicant	Program	Award	Activities	Goals	Success Indicators	Measurement Tools
			HOH adults w/social component w/ communication access			
New Bedford Art Museum	<i>Creative Care Program</i>	\$20,000	Not received	Not received	Not received	Not received
New Bedford Fishing Heritage Center	<i>Herstory</i>	\$20,000	<p>Outreach to Senior Housing and other community partners</p> <p>Provide announcements of upcoming FHC activities to in monthly ARAW Going with the Flo newsletter</p> <p>Plan and present special programs for existing ARAW beneficiaries</p> <p>Programs presented at senior housing facilities and/or other community organizations that serve older adults</p> <p>Visits to Fishing Heritage Center</p> <p>HS and College Students recruited</p> <p>Oral History & Aging Workshop for HS and College Students</p> <p>Oral History Interviews conducted, participating women photographed</p> <p>Digital Profiles Created</p>	<p>Introduce project to low-income seniors</p> <p>Increase awareness encourage attendance</p> <p>Engage participants with the story of commercial fishing, create oopt'y for new friendships</p> <p>Identify older women w/ties to the fishing; provide appropriate referrals; share ARAW brochure; determine interest an interview</p> <p>Provide social engagement; id women to participate in oral history project; id ARAW eligible women</p> <p>Identify a cohort of 6-8 young women local high schools/colleges to participate in oral history</p> <p>Provide training in oral history methodology, recording equipment, and benefits</p> <p>Conduct at least 10</p>	<p>Present 5 special programs for ARAW beneficiaries</p> <p>Provide 12 electronic flyers for ARAW newsletter</p> <p>Introductory programs presented at 2 sites: women who attend are engaged and participate in discussion</p> <p>Women visit Fishing Heritage Center to explore exhibits, participate in programs, share stories: women are engaged, and participate in discussion</p> <p>Trust established and preliminary determination of ARAW eligibility made</p> <p>Young women trained; oral history interviews conducted. Older women share family photos and documents. Older women seem less lonely and exhibit pride in past accomplishments</p>	<p>Attendance, documentation, anecdotal feedback from participants</p> <p>Flyers included in Going with the Flo every month</p> <p>Participant surveys, program documentation, observations of program presenters, desire of women to participate in FHC visits</p> <p>Participant surveys, program documentation, observations of program presenters; willingness of women to participate in oral history project</p> <p>Number of women referred to ARAW</p> <p>Number of young women trained; Number of oral history interviews conducted; Number of older women who share family photos and documents; Observations of program participants and housing</p>

Applicant	Program	Award	Activities	Goals	Success Indicators	Measurement Tools
			Culminating Reception Held	<p>interviews</p> <p>Create digital profiles of the women who have been interviewed (a mini-online exhibit)</p> <p>Share project at an event honoring the participants; Recruit FHC volunteers</p>	10 Digital profiles created and shared; Reception held; Lasting engagement fostered	<p>staff/extended family</p> <p>Number of profiles created; Number of women who attend reception; Number of women who express an interested in volunteering at FHC</p>
<p>South Coastal Counties Legal Services</p>	<p><i>The Rachel Howland Advocate for Older Adults</i></p>	<p>\$45,000</p>	<p>Provide direct representation in administrative proceedings.</p> <p>Provide legal advice, information, and referrals.</p> <p>Conduct community legal presentations.</p> <p>Update legal information materials.</p>	<p>25 total financially or socially disadvantaged elders will receive legal assistance (counsel and advice, brief service and/or full representation).</p> <p>Completion of 4 events.</p> <p>Distribution of updated materials.</p>	<p>Promote financial stability and improve life strategies.</p> <p>Establish safety and stability to foster optimal health and well-being.</p> <p>Trusted sources of knowledgeable advocates in community who will identify and connect ARAW to women in need.</p>	<p>Number of clients maintained in LegalFiles case management system.</p> <p>Provide legal assistance such as by seeking reasonable modifications to an apartment or a transfer due to a situation of elder abuse.</p> <p>Completion of updating materials; record of distribution locations.</p> <p>Community educational events held and number of participants.</p>
<p>South Coast LGBTQ+</p>	<p><i>Aging Well</i></p>	<p>\$20,000</p>	<p>Continue to connect with area organizations and develop partnerships with elder serving organizations across the ARAW service area through phone calls, drop in hours, distribution of flyers, emails and social media posts.</p> <p>Introduce monthly Breakfast Club in New Bedford</p>	<p>Increase awareness of the Program in Acushnet, Dartmouth, Fairhaven, New Bedford, Westport</p> <p>Increase opportunities for engagement in social activities</p> <p>Increase opportunity for connection to youth and young adults</p> <p>opportunity and accessibility to attend diverse events a</p>	<p>Engagement of aging women in social activities to reduce isolation and loneliness</p> <p>Increased participation in wellness activities for aging women</p> <p>Engagement of LGBTQ+ aging women in case management supports with LGBTQ+ serving case manager/friendly visitor.</p>	<p>Number of Aging well participants reporting an increase in opportunity and attendance at social events/community events and other activities</p> <p>Variety of programming offered to support individuals engaging in ways that are comfortable. Number of participants.</p> <p>Number of individuals</p>

Applicant	Program	Award	Activities	Goals	Success Indicators	Measurement Tools
			<p>Host weekly social groups/activities across the SC MA</p> <p>Host intergenerational activities</p> <p>Create space at Pride events for LGBTQ+ aging individuals</p> <p>Provide technology support on an individual and/or group setting</p> <p>Provide case management service</p> <p>Provide friendly visitor support services</p> <p>Engage ARAW in joint open house opportunities</p> <p>Provide LGBTQ inclusivity training to elder serving organizations</p> <p>Implement 6 week intergenerational walking group</p>	<p>Increase ability to engage in activities, telehealth using technology</p> <p>Participants will have access to support to ensure safety while living independently.</p> <p>Access to in home support, transportation to complete errands and engage in social activities.</p> <p>Increase both The South Coast LGBTQ+ Network and ARAW awareness of the services/supports each provides.</p> <p>Increase LGBTQ+ elders feeling welcoming when engaging with elder serving organizations</p> <p>Increase engagement in wellness activities for aging women</p>	<p>Aging well participants will have access to affordable transportation to promote connection to community, family and social activities.</p> <p>Participants have access to resources to provide financial stability.</p> <p>LGBTQ+ individuals have access to needed case management services that are affirming, inclusive and respectful</p>	<p>engaged in case management/friendly visitor services</p> <p>Number of participants who request and are provided with transportation.</p> <p>Percentage of women engaged in program who are financially stable.</p> <p>Number of participants who are referred/self-refer and engage with case management services</p>
Westport COA	Community Outreach Project	\$38,750	<p>SNAP benefit Informational Session due changes farmers market coupon distribution); Partner with Future Healthy Farms</p> <p>Strategic Planning Committee meetings, survey seniors in Westport age 55+, collect/evaluate data</p> <p>Informational Sessions at local housing, Attend</p>	<p>Inform clients of resource changes in SNAP benefits – Assist with food insecurity and nutrition information, provide free local produce</p> <p>February – September 2023 – Recruit residents and ARAW recipients in future planning of the center, evaluate needs of the community, review and develop a plan to</p>	<p>Participation in ARAW and WCOA activities/events supportive Day Program or Outreach Services</p> <p>Increase in the number of ARAW referrals and the number of referral sources</p>	<p>Activity/event/ attendance counts from My Senior Center</p> <p>Monthly ARAW reports</p>

Applicant	Program	Award	Activities	Goals	Success Indicators	Measurement Tools
			<p>Health Fairs; Call on banks, local businesses, and local medical centers for quick introductory meetings.</p> <p>Provide AARP Tax Preparation by individual appointment; Medicare Open Enrollment</p> <p>Summer picnic and music events 2023 TBD</p> <p>Offer technology 1:1 and classes to educate seniors on technology use, loan tablets or iPad to seniors to explore the use of technology</p> <p>Hold a 2nd Technology Fair at the senior center</p>	<p>identify and support needy women in Westport</p> <p>Educate the community of the services and activities provided by the Westport Council on Aging, increase visibility in the local community</p> <p>Provide residents with free tax and Medicare assistance as needed.</p> <p>Provide free or low cost social and recreational activities/events, educate seniors on technology in our new Technology Café, offer equipment loans to seniors at no cost</p>		
<p>Zeiterion Performing Arts Center</p>	<p><i>Mobile Creative Classroom</i></p>	<p>\$8,489</p>	<p>Meet with New Bedford Housing Authority</p> <p>Meet with current Creative Classroom teachers</p> <p>Social media posts for Meet with Arts for the Aging</p> <p>Create & distribute materials</p> <p>Host Taste of our Mobile Creative Classroom performances at each of the housing projects and at ARAW's monthly meeting</p> <p>Plan workshop series at</p>	<p>to analyze survey results to determine interest in a particular workshop and whether the workshop should be a one-off at the next monthly meeting or a recurring Creative Classroom</p> <p>to gain expertise working with the elderly population</p> <p>to market to residents at each of the housing projects</p> <p>to have at least 10 residents and 10 ARAW members participate in each workshop series we</p>	<p>At least 40 eligible residents and 20 ARAW members come to each performance</p> <p>At least 10 eligible residents & 10 ARAW members participate in each workshop series</p> <p>Majority of residents who choose to participate in our workshop series rate the class and instructor(s) on a 1-5 scale & assess if their mental, physical, and social health have improved at the end of the class</p> <p>Refer at least 20 women</p>	<p>Analyze the # surveys completed by both residents and ARAW members</p> <p>Analyze # of residents who register/class.</p> <p>will collect feedback from residents after workshop series via a physical survey - rate class/instructor on a scale from 1-5, answer questions about if/ how their mental, physical, and social health have changed due to their participation in the workshop, and leave</p>

Applicant	Program	Award	Activities	Goals	Success Indicators	Measurement Tools
			<p>NB Housing Authority</p> <p>Host virtual training for our teaching artists</p> <p>Create and distribute materials to market workshop series</p> <p>Fall workshop series (September-November)</p> <p>Review feedback in advance of Winter offerings</p> <p>Winter workshop series (January- March)</p> <p>Collect feedback on the impact of the workshop and make referrals to ARAW</p>	<p>offer</p> <p>to ensure that our Winter Creative Classroom offerings align with residents/ members interests</p> <p>to have at least 10 residents and 10 ARAW members participate in each workshop series we offer</p> <p>To improve upon the Mobile Create Classroom experience curating the classes based on the eligible residents and ARAW members interests</p>	<p>to ARAW through the 2 sessions of our Mobile Creative Classroom</p> <p>Refer at least 10 women to ARAW through our free tickets and transportation posts.</p> <p>Give at least 50 low-income, elderly women free tickets & transportation</p> <p>Train at least 10 teaching artists in how to create/lead performing arts workshops for the elderly.</p>	<p>open-ended feedback about how this program has impacted them and what they hope to see change/stay the same moving forward</p> <p># of participants and referral forms</p> <p># of participants and referral forms</p> <p># of ARAW members that attend shows through The Z and number of cab invoices</p> <p># of teaching artist(s) that attend training workshop</p>

SCORING RUBRIC FOR 2023 – 2024 COMMUNITY PARTNER GRANT PROPOSALS

Community Partner:

	Excellent (7-9 PTS)	Adequate (4-6 PTS)	Marginal (1-3 PTS)	Missing (0 PTS)	SCORE	COMMENTS
Project	Provides a clear and thorough explanation of project, connection to targeted funding areas and success indicators.	Provides an adequate explanation of project, connection to targeted funding areas and success indicators.	Provides an unorganized explanation of project, connection to targeted funding areas and success indicators.	Explanation of project, connection to targeted funding areas and success indicator are missing.		
Goals and Outcomes	Provides clear goals and outcomes.	Provides goals and outcomes that are only somewhat clear.	Goals and outcomes that are not aligned with targeted funding areas and success indicators.	Goals and outcomes not provided.		
Addresses our intentions to establish, refer and receive referrals	Provides a clear and thorough explanation how they will address our 3 intentions.	Provides an adequate explanation how they will address our 3 intentions.	Provides an unorganized explanation how they will address our 3 intentions.	Explanation of how they will address our 3 intentions is missing.		
Methodology	Provides a clear explanation of method and process.	Provides an adequate explanation of method and process.	Provides an unorganized explanation of method and process.	Explanation of method and process is missing.		

SCORING RUBRIC FOR 2023 – 2024 COMMUNITY PARTNER GRANT PROPOSALS

Community Partner:

	Excellent (7-9 PTS)	Adequate (4-6 PTS)	Marginal (1-3 PTS)	Missing (0 PTS)	SCORE	COMMENTS
Budget	Provides a clear explanation of the major budget items and how they would be used.	Provides an adequate explanation of the major budget items and how they would be used.	Provides an unorganized explanation of the major budget items and how they would be used.	The grant is missing a budget.		
Funding diversity & sustainability	Clearly addresses funding diversity & sustainability.	Adequately addresses funding diversity & sustainability.	Provides an unclear vision for funding diversity & sustainability.	Funding diversity & sustainability is not addressed.		
Evaluation	Presents clear method to evaluate progress towards outcomes	Presents an adequate method to evaluate progress towards outcomes	Presents an unorganized explanation of method to evaluate progress towards outcomes	Method to evaluate progress towards outcomes is missing.		
Implementation	Provides clear explanation of plan for and elements of implementation.	Provides adequate explanation of plan for and elements of implementation.	Provides unorganized explanation of plan for and elements of implementation.	No plan for and elements of implementation shared.		
Timeline	Provides a clear timeline of grant implementation.	Provides adequate timeline of grant implementation.	Provides unorganized timeline of grant implementation.	Timeline is missing.		
TOTAL SCORE (MAX SCORE = 81)						

SCORING RUBRIC FOR 2023 – 2024 COMMUNITY PARTNER GRANT PROPOSALS

Community Partner:

What questions do you have for the Community Partner (if any?)

Personnel Committee Minutes, June 16, 2023

Present: Mary Ellis, Cathy Mayall, Pam McKnight, Rosemary Saber, Angela Natho and Clare Healy Foley

We reviewed different pay categories, including Cost of Living Adjustments (COLA), Bonuses (holiday gift), Merit Pay and Longevity Pay, together with timelines.

Recommendations for increases or bonuses are not guaranteed in any particular year and are based on the financial security of the organization. If increases are recommended, they would be presented to the Board as part of the overall budget at our March Board meeting. Specifics and questions would be addressed in executive session. Draft recommendations would be submitted to the Finance Committee in January.

We discussed determining increases through the use of a numeric formula as part of the evaluation process. We will discuss this further at our upcoming meeting. Clare will send us a metric example for performance evaluation which includes staff specific job descriptions, task, responsibilities and annual goals.

Discussion around the need for or consideration of longevity pay/benefits will be discussed further down the road.

We discussed aligning the Executive Director's performance evaluation with that of the rest of the staff in early March.

Regarding bonuses, Clare will provide us with a history of past holiday gifts. Our goal is to present recommendations for bonuses to the Board, in executive session, at our December meeting since there is no November meeting this year.

Salary ranges were prepared last year for staff positions. A salary range needs to be recommended for the Executive Director's position. Clare will send us information to review including samples of ranges.

There will be no committee meeting in July. The next committee meeting will be Friday, August 18 at 9:30 AM.

Respectively submitted

Angela Natho

Personnel Committee Minutes
May 19, 2023

Members in attendance: Pamela McKnight, Angela Natho and Clare Foley
Members excused: Mary Ellis, Cathy Mayall, Rosemary Saber

We reviewed the information received from Attorney Peterson regarding clarification of types of positions and work schedules. Our questions were answered, and we are in compliance with employment law.

We reviewed various paid time off categories. We discussed various salary changes such as, cost-of-living adjustments, gifts, bonuses, longevity, merit pay. We also discussed timeline for performance evaluations.

Our intention is to review and coordinate the above in conjunction with the President and Finance Committee.

Respectfully submitted,

Angela Natho