



**ASSOCIATION FOR THE RELIEF OF AGED WOMEN**  
**Board Meeting | September 14, 2023 | 9:30 am**  
174 Union Street, 4W | New Bedford | Zoom option

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

*July Minutes; July & August BA Report; July & August activity sheet;  
September Beneficiary Recommendations; Committees: Executive, Finance*

- 🕒 Call to Order: President Jane Stankiewicz
- 🕒 Roll Call: Clerk Gloria DeSa
- 🕒 Moment of Silence
  - ♥ Beatrice St. Ours
  - ♥ Mary Ellis
- 🕒 Reflective Moment: Leah Macomber
- 🕒 Clerk's report
  - ✓ **Recommendation to approve July 2023 Board meeting minutes, as distributed – VOTE**
- 🕒 President's Report: Jane Stankiewicz – *see packet*
  - Executive Committee meeting
- 🕒 Executive Director's Update: Clare Healy Foley – *see packet*
  - Activity sheet & BA report
  - Financial Empowerment Workshops
  - Farm visit & Luncheon hostess opportunities
  - Memorial donations for Mary
  - Community Engagement update
  - Staffing update
  - Beneficiary highlight
- 🕒 Committee Reports
  - Finance Committee: *see packet*
    - FinComm/B&L meeting minutes 7/11/23
    - BOA/IAC/FinComm Q1 review minutes 7/26
  - Visiting: *see packet for upcoming birthdays*
    - September Visiting reports – 3 minutes each
      - Pam McKnight
    - Reporting in October: New sign-up sheet
  - Beneficiary: Chair Pam McKnight – *see packet*
    - ✓ **Recommendation to accept decisions of beneficiary committee, as distributed – VOTE**
    - Highlight a new beneficiary

- Governance: Chair Gale Beaton
  - ✓ **Recommendation for Cathy Mayall to assume the role of Treasurer – VOTE**
  - ✓ **Recommendation to invite Linda Garibaldi to join the ARAW board – VOTE**
- Grants: Chair Rosemary Saber
  - Committee meeting update 9/12
- Personnel: Chair Angela Natho
  - Committee meeting scheduled for 9/15
- Friendship Task Force: Chair Debbie Brooke
  - Nothing to report
- Legacy Task Force: Chair Diane Laflamme
  - Nothing to report
- 🌐 Other business to be brought before the Board
- 🌐 Executive Session, if needed

#### **ANNOUNCEMENTS/MEETINGS:**

**Tuesday, September 12<sup>th</sup> | Grants Committee Meeting**

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

**Friday, September 15<sup>th</sup> | Personnel Committee | 174 Union/Zoom | 9:30 am**

**Tuesday, September 19<sup>th</sup> | Finance Committee | 174 Union/Zoom | 9:30 am**

**Friday, September 22<sup>nd</sup> | FLO Lunch w/LGBTQ+ | Wamsutta Club | 12:30 pm**

**Tuesday, September 26<sup>th</sup> | Governance Committee | 174 Union/Zoom | 9:30 am**

**Thursday, September 28<sup>th</sup> | Farm Visit | Blazing Saddles, Fairhaven | 10:00 am**

**Wednesday, October 4<sup>th</sup> | Beneficiary Committee | 174 Union/Zoom | 9:30 am**

**Monday, October 9<sup>th</sup> | Columbus/Indigenous People's Day | Office Closed**

**Thursday, October 12<sup>th</sup> | Board Meeting | 174 Union/Zoom | 9:30 am**

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

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

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

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

**Members excused:** All present.

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

1. Marilyn Mortensen (85) Fairhaven
  - a. Part of ARAW family since 2021
  - b. ARAW provided EPERS, cable and hearing aids
  - c. Supportive family and partner of over 40 years
2. Mariette Menard (88) Westport
  - a. Part of ARAW family since 2022
  - b. ARAW provided 2 years of car insurance
3. Rosalie Lada (103) New Bedford
  - a. Part of ARAW family since 2017
  - b. ARAW provided cable (enjoyed watching baseball & game shows)
  - c. ARAW named in obituary
  - d. Polish translator during WWII
  - e. ARAW beneficiary Barbara Murach wrote email – learned Polish from Rosalie
4. Lillian Pacheco (89) Fairhaven
  - a. Part of ARAW family since 2010
  - b. ARAW provided EPERS & BCBS
  - c. Went into LTC, became inactive with ARAW in early 2023

**Reflective Moment:** Jane Stankiewicz shared finding a reflective moment is not her strong suit and so shared a brief humorous quote by Eleanor Roosevelt:

*A woman is like a tea bag; you never know how strong it is until it's in hot water.*

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

1. The minutes of the May 11, 2023 board meeting were approved as distributed.

**SO VOTED**

2. Motion to approve creation of Friendship Task Force, purpose and timeline as distributed. SO VOTED
3. Volunteers needed for membership in Friendship and Legacy Task Force (chairs needed as well) – reach out to Jane or Clare
4. Board Member Check-Ins:
  - a. Jane and Diane will be reaching out to schedule one on ones
  - b. Time to discuss likes, dislikes, frustrations, achievements/celebrations, ideas/suggestions, etc.
5. ED Goals - distributed
  - a. In line with Strategic Plan goals
  - b. Clarification given on fundraising, culture of philanthropy, development plan
6. Reminder: No August Board Meeting
7. Summer Soiree August 9<sup>th</sup> – please RSVP and sign up for dish

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

1. FLO Newsletter
  - a. Ice Cream Social at The Bucket in lieu of luncheon
    - i. Open invited to all board members to attend
    - ii. Feedback about missing variety in outings from a few beneficiaries
    - iii. Selling points to The Bucket – handicap accessible, pavilion, plenty of parking, nice breeze
  - b. Future newsletter to have brief history of ARAW
2. BA Reports
  - a. Two reports are similar – very telling
  - b. Trust but verify - BAs given license to ask to see documentation when in doubt, i.e., bank statements, receipts, etc.
  - c. Office now having weekly “Brain Trust” meetings – sharing stories, challenges, BlackBaud training
3. Community Engagement
  - a. In June Clare met with Christine Monska, new ED of Women’s Fund
    - i. Very accomplished, established as advocate in women’s issues
    - ii. Christine having series of get-to-know-you meetings – has heard about ARAW repeatedly
    - iii. Women’s fund in the past with ARAW – no follow through, hopeful with new ED
    - iv. Potential collaboration for financial literacy/economic empowerment
  - b. Rosemary attended Cape Verdean Association’s Island Park groundbreaking
    - i. Architect Kathryn Duff

- ii. Garden will be sustainable, no maintenance required
- iii. Speakers acknowledged long time efforts to make happen

#### 4. Staffing Update

- a. Pat going part time officially in September (using PMFL now)
  - i. Encyclopedia of resources, breadth of knowledge
  - ii. Committed to helping find and train next BA
  - iii. After retirement – still interested in consulting position
- b. ARAW still has capacity to grow
  - i. Clare and Jenny have made adjustments to assist BAs
  - ii. “Assess and refer” philosophy being used as much as possible

#### 5. Reminder to send in needs for Board Member Handbooks (may also come into office to go over)

#### 6. Beneficiary Highlight

- a. Barbara Sikorski
  - i. Sandra Fogg Award recipient – to be used for debt relief & video cameras
  - ii. Used tax rebate to pay credit card – now unable to pay property taxes & medical supplies
  - iii. Motion made to approve payment of property taxes & medical supplies. SO VOTED

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

1. Motion made to approve 1<sup>st</sup> Quarter financials, as distributed. SO VOTED
  - a. Finance Committee reviewing finances monthly, Board will review quarterly
  - b. Financial reports now include income (previously only expenses reported)
2. Motion made to accept FY23 Financial Review/Statements, as distributed. SO VOTED
  - a. Finance Committee met with Peter and Michelle from Burke & Lamb – discussion of financials to give greater understanding to committee
  - b. Discussion of programmatic vs operational expenses
3. Committee meeting with Bank of America and IAC on 7/26 – to review 1<sup>st</sup> quarter performance

#### **Report of Visiting Committee:**

1. Visiting reports: Jane Stankiewicz
  - a. Jacqueline (Jackie) Morin
    - i. Lives at Presidential Terrace in Acushnet – recently moved to first floor apartment
    - ii. Rough couple of years – heart surgery, broken hip

- iii. Always positive but also realistic
  - iv. Talks herself out of depression
  - v. Impressive woman
- 2. Visiting Reports: Angela Natho
  - a. Laura Almeida
    - i. FLO participant
    - ii. Very active with church, Dartmouth COA, Coastal Neighbors Network
    - iii. Describes many health issues – comes with age
    - iv. Has one son and grandson who live in Connecticut – cannot see because of daughter-in-law
    - v. One of 8 siblings – last one left
- 3. Reporting in September – Pam McKnight
- 4. Visiting Reports due July 31<sup>st</sup>

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

- 1. A motion was made to revise the Executive Director Discretionary Fund (EDDF) policy, as distributed. SO VOTED
  - a. Going from \$800 to \$1,600
  - b. Based on raising costs of average emergency situations, i.e., water heaters
- 2. A motion was made to accept recommendations from the Beneficiary Committee as distributed. SO VOTED
  - a. 20 requests (5 new, 2 EDDF), 8 updates (2 inactive)
- 3. New Beneficiary Highlight – Joan Monteiro
  - a. Custody of 18 year old grandson since he was 4 years old – was receiving welfare stipend but has now ended
  - b. Behind on rent and electric
  - c. Social Security being reduced by \$100 – worked while receiving SS and needs to pay back
  - d. Filed bankruptcy – no current credit cards
  - e. Applied for RAFT – may not qualify

**Report of Governance Committee:** Chair Gale Beaton reported:

- 1. Continue to keep track of time spent on duties (Jun, Jul, Aug) – helpful for recruiting
- 2. Please submit bios – helpful for onboarding
- 3. Survey results – appreciate hard work
  - a. Comparison to last year – improvements have been made
  - b. Areas identified were same as those identified in Strategic Plan
  - c. Gale will be connecting with committee chairs

- d. Next year – committee will work on wording of survey questions for clarification
- 4. Bylaws
  - a. To be used as resource
  - b. Instead of meeting, reach out to Clare or Gale with questions
- 5. New Board Member Candidate – Linda Garibaldi
  - a. Initial meeting with Gale and Mary
  - b. Full of energy, low-key, intelligent
  - c. Whole life has been involved in philanthropy
  - d. Received law degree as an adult - Helped in set up of legal advocates being in Boston hospitals (worked with SCCLS)
  - e. Very interested in joining ARAW – loves mission, reviewed website
  - f. Next steps:
    - i. One week for committee members to bring concerns to Gale
    - ii. Meeting with members of Governance Committee and Clare
    - iii. Motion to approve a virtual vote to add Linda as board member due to not having a board meeting in August. SO VOTED

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

- 1. Board Survey showed uncertainty surrounding Grants
  - a. Sent list of opportunities to learn more about grants
  - b. Any questions or concerns can be brought to the committee
- 2. Community Partner update
  - a. New Bedford Art Museum (NBAM)
    - i. Remedial work to obtain foundational documents
  - b. South Coastal Counties Legal Services (SCCLS)
    - i. Housing issues – ARAW has no one to refer to
    - ii. Sent list of questions to SCCLS
    - iii. Education session to be given to ARAW staff by SCCLS
  - c. 1<sup>st</sup> Quarter Reports (Apr, May, Jun) due July 15<sup>th</sup>

**Report of Legacy Committee:** Chair Diane Laflamme reported:

- 1. Diane and Debbie continued to go through boxes at beginning of June
- 2. Diane met with Roseanne – Roseanne wants to write history from Zelinda’s to now

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

- 1. No meeting in July
- 2. Meeting August 18<sup>th</sup> – tighten up policies

**Other Business:**

- 1. Building update – more tenants
  - a. Seeing more foot traffic during day – may affect elevator and parking

- b. Other fourth floor unit reportedly being rented
  - i. As early as September move in
  - ii. Considerable construction to be done

The meeting was adjourned at 11:26 am.

Recorded by,  
Jenny Costa, Office Administrator

Approved by,  
Gloria deSa, Clerk



**Association for the Relief of Aged Women  
Minutes of the Executive Committee Meeting  
August 11, 2023**

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

**Members in Attendance:** de Sá, Laflamme, and Stankiewicz.

Executive Director Clare Healy Foley and the Chair of the Governance Committee, Gale Beaton, were also present.

The meeting was called due to the untimely passing of Treasurer Mary C. Ellis on August 6, 2023.

According to the ARAW's by-law's Contingency Plan for Officer Succession, in the case of an unexpected "permanent vacancy of an officer of the Board . . . prior to her full term is satisfied," the "position left vacant will be filled by a member of the Executive Committee." . . . "In the event that no member of the Executive Committee is willing to serve in the vacant Officer position, per ARAW Bylaws, such vacancy may be filled by any of the Directors. The Governance Committee shall propose prospective Officers to the Board of Directors at a meeting at least one month prior to the meeting at which the election is to take place."

Given that every member of the Executive Committee declined to serve as Treasurer, Director and Finance Committee member Cathy Mayall has expressed her willingness to serve as ARAW Treasurer. Gale Beaton will present this information to all members of the Governance Committee for approval and formal nomination.

Jane Stankiewicz made a motion to propose Cathy Mayall for the office of Treasurer, pending a formal nomination by the Governance Committee. Second by Diane LaFlamme. All in favor.

The meeting adjourned at 10:10 AM.

Respectfully submitted by  
M. Gloria de Sá, clerk  
August 11, 2023

**ARAW July 2023 Activity Sheet**

<b>Due Date</b>	<b>With</b>	<b>Staff</b>	<b>Type</b>	<b>Notes</b>
7/3/2023	Tavares, Marilyn	PMIDURSKI	Note to File	Unable to reach via phone: Note card mailed for FLO ROE req CB
7/3/2023	Blais, Linda	PMIDURSKI	Note to File	Receiving hospice services in-home: per ED hold FLO ROE: Cont to mail newsletter
7/3/2023	DeSouza, Joanne	PMIDURSKI	Phone Call	To sched annual update & HV: Appointment sched for 7/12: "TY ARAW for all you do for me."
7/3/2023	Parker, Delia	PMIDURSKI	Phone Call	Re: SCENT Appt Sept'23: EM to Healthier @ SCENT re: Sept appt: Vaca until 7/8: req CB
7/3/2023	Okpara, Priscilia	PMIDURSKI	Phone Call	From Son Chido inquiring about Wifi : Will obtain estimate
7/3/2023	Beaubian, Joan	PMIDURSKI	Phone Call	VM & EM left re: need to sched annual update HV: Req Call back
7/3/2023	Begnoche, Cecile	PMIDURSKI	Phone Call	Re: Annual update: in VA x 5 wks: to return 8/24 for MD appt: CB will notify ARAW of return: HOLD
7/3/2023	Edwards, Diane	APAZ	Phone Call	LVM x2. Requested a call back to schedule annual HV and update from Diane's recent knee surgery.
7/3/2023	Espejo, Sharon	PMIDURSKI	Phone Call	Follow up: new apt w/lower rent: Approved for MH Sr. Buy In: Prefers to withdraw request: will call if needed
7/3/2023	Lawrence, Gail	APAZ	Phone Call	Needs car A/C repaired d/t severe COPD. Will call once she gets the quote.
7/5/2023	Delaney, Kathleen	PMIDURSKI	Phone Call	Re: FLO ROE: Spouse in LTC died 3/23: KD to FL x one month return 8/6: "TY for all you do!"
7/5/2023	Burke, Shauneen	PMIDURSKI	Phone Call	Req Cab vouchers for NBAM classes: Clarify expenditures: EMM to CES GSSC re: plan of care
7/5/2023	Smith, Debra	APAZ	Phone Call	Re: Eversource assistance. Mailed Sr. Discount application. She can not apply for PACE d/t where she lives.
7/5/2023	Couto, Charlene	APAZ	Phone Call	To schedule initial HV. She forgot and will connect w/ sister and call back. Sister handles all finances.
7/5/2023	Morgan, Sylvia	APAZ	Phone Call	Re: CNN contact information. Sylvia will be calling Andy for legal asst., transportation, and socialization.
7/5/2023	O'Keefe, Lindelle	APAZ	Phone Call	LVM w/ Penny dgt. Requested a call back for updated and more information.
7/5/2023	Dillon, Sherry	APAZ	Phone Call	Re: Farmers Market voucher. Referred her to NBCOA.
7/5/2023	Morin, Evangeline	PMIDURSKI	Phone Call	To sign up for Ice Cream Social: "I haven't been to an ARAW function since Ruth died. I need to get out."
7/5/2023	Graybill, Holly	APAZ	Phone Call	LVM regarding Board approval and process for car repairs.
7/5/2023	Edwards, Diane	APAZ	Phone Call	To SLH Diane is not admitted. Unable to reach her for 2 weeks. Will call CES CM Cassidy Martin 7/6.
7/5/2023	Huezo-Mendoza, Sonia	APAZ	Phone Call	Unable to LVMM. Phone not accepting calls at this time. Will try back later today. Need to schedule AHV.
7/5/2023	Lima, Mary	APAZ	Phone Call	Re: Inform Mary to cancel HBO Max through Xfinity. She will call. "Thank you for all ARAW has done for me. You have done a lot. I have HBO Max now & it's sucks."
7/5/2023	Rocha, Margaret	APAZ	Phone Call	Re: Board decision to deny continued support for Cable/Phone. "Ok. It was a lady that did my insurance that said you could pay it."
7/5/2023	Anastasi, Wilhelmina	APAZ	Phone Call	To complete FLO ROE. Requesting ARAW support for Pure wick system. HV scheduled 7/7 at 11am.
7/5/2023	Waite, Cynthia	PMIDURSKI	Phone Call	VM left at Enos Oxygen re: lift chair condition & ?? of warranty??: Awaiting CB
7/5/2023	Almeida, Lorene	APAZ	Phone Call	Inform us about mistake billing to Xfinity. She resolved it. If ARAW sees a \$19.99 charge please call Lorene.
7/5/2023	Bramwell, Nancy	PMIDURSKI	Office Visit	To bring BCBS invoice: "I wish you would pay for my BCBS forever!"
7/6/2023	Christy, Maria	PMIDURSKI	Note to File	Met @ Verizon ND to purchase Apple Iphone: "TY ARAW for helping me."
7/6/2023	Waite, Cynthia	PMIDURSKI	Phone Call	Re: f/u fr. SWH manager tara: w/o call: CW reports sheis w/o Inc supplies: To discuss w/ED
7/6/2023	Christy, Maria	PMIDURSKI	Phone Call	To sched meet up @ Verizon to purchase cell phone: Appt 7/7 @ 10am
7/6/2023	Beaubian, Joan	PMIDURSKI	Phone Call	VM left re: sched annual HV for update: Awaiting CB
7/6/2023	Silveira, Marie Lorraine	APAZ	Phone Call	To sign up for Ice cream social: Excited about resurrection of FGP program: EM to AP re: lack of auto AC
7/6/2023	Silveira, Marie Lorraine	APAZ	Phone Call	Re: air conditioner free on can. Son will help with the cost approximately \$70.
7/6/2023	Roderiques, Bernadette	PMIDURSKI	Phone Call	To THANK BM Jane for Happy Birthday Wishes
7/6/2023	Burke, Shauneen	PMIDURSKI	In Home Visit	To drop off BB taxi vouchers for NBAM 7/9
7/6/2023	Bouchard, Martha	APAZ	Phone Call	RC re: New referral request for CNN membership. Question Commission for the blind support.

Due Date	With	Staff	Type	Notes
7/6/2023	Charpentier, Lea	APAZ	Phone Call	Re: Pace awarded \$200 for water bill Jun/Jul/Aug. "Lea is so grateful and is happy that ARAW has a few months of no payments too. Thank you for everything."
7/6/2023	Laber, Lynn	PMIDURSKI	Phone Call	Re: Annual update: @MGH w/dgt: will call to sched HV: "TY for the Queen tix. ARAW is wonderful!"
7/6/2023	Horne, Donna	PMIDURSKI	Phone Call	Re: Get the Led Out: One tix request: Informed of lottery
7/6/2023	Chaput, Vanessa	PMIDURSKI	Phone Call	Re: Legal Services via Justice Bridge: Atty to send estimate to ARAW: "TY for helping me."
7/7/2023	Anastasi, Wilhelmina	APAZ	In Home Visit	Inquiring on insurance coverage of external urinary cath b/f ARAW can support request.
7/7/2023	Sikorski, Barbara	APAZ	In Home Visit	To obtain current need for Sandra Fogg award.
7/7/2023	Duarte, Bernice	PMIDURSKI	Phone Call	VM left @ Home: Remains at Sippican rehab: Was sent home but could not get out of chair> Rehab
7/7/2023	Conway, Isidora	PMIDURSKI	Phone Call	To sign up for Ice Cream Social: To call NBAM for Painting: Hosp x3days w/Trigeminal Neuralgia
7/7/2023	Waite, Cynthia	PMIDURSKI	Phone Call	VM Tara SWH RN: TC w/Ebony @ Enos: Warranty expired>Will ask DME supervisor Tammy to call ARAW
7/7/2023	Beaubian, Joan	PMIDURSKI	Note to File	Letter mailed re: Annual Update : Unable to leave VMM due to full mailboxes
7/10/2023	Okpara, Priscilia	PMIDURSKI	Phone Call	From son re: request for internet: HV sched for 7/24 for annual update & new request
7/10/2023	Parker, Delia	PMIDURSKI	Phone Call	W/ Sandra SW re: hearing aids, need for assistance and cont/ w/ARAW: W/o need & wishes to stayw/ARAW
7/10/2023	Boudreau, Jeanne	PMIDURSKI	Phone Call	Continues to receive rehab @ The Royal of Fhvn: Note card mailed req call back for FLO ROE update
7/10/2023	Simpkin, Carol	PMIDURSKI	Phone Call	To sched annual update: HV sched for 7/17: "I feel so much better since my back surgery."
7/10/2023	Eisely, Geraldine	PMIDURSKI	Phone Call	To remind of HV Tues 7/11: "All test have been negative: Waiting for the cystoscopy 7/19"
7/10/2023	Benoit, Susan	PMIDURSKI	Phone Call	To sched annual update: HV sched for Mon 7/17: "I am doing better. TY for all the help from ARAW."
7/10/2023	Sikorski, Barbara	APAZ	Phone Call	LVM for Lisa and Carolyn re: camera info and sleep apnea and EPERS set up.
7/10/2023	Ambra, Patricia	PMIDURSKI	Phone Call	VM left re: Annual Update & review: Request call back
7/10/2023	Tavares, Marilyn	PMIDURSKI	Phone Call	No answer @ phone in her room @ Hathaway Manor: VMM left for dgt Donna req CB for update:
7/10/2023	O'Keefe, Lindelle	APAZ	Phone Call	Re: HV for LAE. Visit scheduled 7/12. Church gifted \$1K for CNN services.
7/10/2023	Jenkins, Karen	PMIDURSKI	In Home Visit	To complete annual update: New Health Ins: Part C w/trans, OTC card benefit: RX options for PAD
7/11/2023	Eisely, Geraldine	PMIDURSKI	In Home Visit	New Req: AC unit: EDDF approved: Stan & Pauls to deliver 7/14: "I love you ARAW. TY so much!"
7/11/2023	Bouchard, Martha	APAZ	In Home Visit	Requesting CNN membership to organize ppwrk. Martha ais legally blind.
7/11/2023	Bouchard, Martha	APAZ	Phone Call	New referral request for lift chair. Over income by \$59. HV schedules 7/14. EMM to adm
7/11/2023	Laber, Lynn	PMIDURSKI	Phone Call	To sched HV for annual update & review: Sched for 7/18
7/11/2023	DeSouza, Joanne	PMIDURSKI	Phone Call	To confirm HV Wed 7/12: JDS will be home and has gathered info for review
7/11/2023	Azevedo, Carmen	APAZ	Phone Call	From Danny GSSC @ CES. Informed him Mrs. is not active with ARAW effective 5/23.
7/11/2023	Burke, Shauneen	PMIDURSKI	Phone Call	Re: Howland Fund: States she spoke w/rep: Will complete app : Waiting list
7/11/2023	Beaubian, Joan	PMIDURSKI	Phone Call	To sched annual update/review: HV sched for 7/18
7/12/2023	Waite, Cynthia	PMIDURSKI	Phone Call	Re: lift chair and f/u from Enos: No response at this time: "TY for the gift of depends and chux."
7/12/2023	Conway, Isidora	PMIDURSKI	Phone Call	Re: dgt's mother-in-law as ARAW referral: resides in Freetown
7/12/2023	Christy, Maria	PMIDURSKI	Phone Call	To req Verizon receipt: MC to bring to WCOA: EMM to AL BA to scan & email to admin
7/12/2023	Cory, Frances	PMIDURSKI	Phone Call	TC for update: Dx w/pneumonia: Grandson & family evicted: Living temp w/FC: Looking to relocate asap
7/12/2023	Costa, Barbara	PMIDURSKI	Phone Call	To sched Annual HV: Inquiring about cont of Comcast: HV sched for 7/21
7/12/2023	Lima, Mary	PMIDURSKI	Phone Call	To report Comcast billing address changed: "Things are done. TY so much!!"
7/12/2023	DeCosta, Cynthia	PMIDURSKI	Phone Call	Req to speak with AP: EMM sent to AP for follow up
7/12/2023	DeCosta, Cynthia	APAZ	Phone Call	Re: Heart attack on 6/24. Doing ok but scared. AP will call 7/13 w/ Board decision on car ins. EMM to adm.
7/12/2023	Sampson, Louise	PMIDURSKI	Phone Call	Re: cash adv on CC invoices: Capt 1 used by son to buy 2nd hand furniture: Discover JS for gas, groceries
7/12/2023	Lajoie, Elizabeth	PMIDURSKI	Phone Call	VM left re: Verizon bill & old address: Req EL to change billing address to Union St once again!

Due Date	With	Staff	Type	Notes
7/12/2023	Openshaw, Pauline	PMIDURSKI	Phone Call	From James stating "poor care @ WCALF. Getting State involved. To d/c PO to LTC unit." James to pay Comcast
7/12/2023	DeSouza, Joanne	PMIDURSKI	In Home Visit	For annual update: Numerous CC> Willing to speak w/ACCS: Referral made to ACCS
7/13/2023	Jesus, Elizabeth	PMIDURSKI	Phone Call	Re: HOH status: to audiologist today for eval: Consent provided for referral to DEAF Inc: Submitted
7/13/2023	Westgate, Sandra	APAZ	Phone Call	Re: Xfinity bill needing to be monthly. Will go to Xfinity today. Requesting car repair. Will provide estimate.
7/13/2023	Miranda, Barbara	PMIDURSKI	Phone Call	VM left re: FLO ROE update: Req call back
7/13/2023	Tavares, Marilyn	PMIDURSKI	Phone Call	To son>DIL will check w/MT re: cont w/FLO: Incorrect phone #: MT req cont w/FLO & calls from BM: TYSM
7/13/2023	Messier, Ellen	APAZ	In Home Visit	Annual HV not completed. Was not home. LVMM to reschedule.
7/13/2023	Hennessy, Cheryl	PMIDURSKI	Phone Call	Re: supp docs from City of NB: Mailed 7/10: Niece to visit fr CA 8/11 to cancel Car Reg & Auto Ins
7/13/2023	Furness, Betty	APAZ	Phone Call	Did not received SSI deposit. Provided telephone for SS office. Betty will call back with update.
7/13/2023	Elgar, Marcia	PMIDURSKI	Phone Call	Re: FLO ROE: Denies need: Rq cont w/FLO: "I am beginning to get out again. TY for the hearing aids."
7/13/2023	Couto, Charlene	APAZ	Phone Call	LVM inquiring about sister's availability to schedule an initial HV. Requested a call back.
7/13/2023	Roderick, Anita	PMIDURSKI	Phone Call	To Son DPOA re: FLO ROE: Assists AR financially & both visit: "TY for all the help over the years."
7/13/2023	Waite, Cynthia	PMIDURSKI	Phone Call	VMM left @ Enos DEM re: lift chair and seat
7/14/2023	Simpkin, Carol	PMIDURSKI	Phone Call	Reminder for HV on Mon 7/17: Appt confirmed
7/14/2023	Mota, Lina	PMIDURSKI	Phone Call	To notify of award: "TY so much. This helps me and I don't worry as much. TY for the nice meal/luncheon"
7/14/2023	Sampson, Janet	PMIDURSKI	Phone Call	Re: HOLD: "I can get more info if you need. I am not hiding anything. My son used my CC but he paid his part."
7/14/2023	Hotte, Eileen	PMIDURSKI	Phone Call	To cancel AP HV: AP to call Monday to reschedule
7/14/2023	Petrin, Joan	PMIDURSKI	Phone Call	To inform of HOLD to Aug: "I save my \$ as it is mine. How much can I have?"
7/14/2023	Roderick, Anita	PMIDURSKI	Phone Call	From son DPOA re: finances: Update completed: "TY ARAW for all you do for Mom."
7/14/2023	Ambra, Patricia	PMIDURSKI	Phone Call	VM req CB to sched annual update: #2 VMM
7/14/2023	Evora, Sandra	PMIDURSKI	Phone Call	Re: Award: "Why can't they pay my electric bill? That's more important to me." To send elec. Bill New Req
7/14/2023	Chaput, Vanessa	PMIDURSKI	Phone Call	Re: legal services: Atty needs payment b4 services rendered: Atty to deliver invoice: EDDF request to ED
7/14/2023	Ribeiro, Renay	PMIDURSKI	Phone Call	To sched annual update: Appt for HV sched for Fri 7/28
7/14/2023	Carvalho, Patricia	PMIDURSKI	Phone Call	To NB SDC: PC states DEAF Inc rep completed HV: to receive new cell phone, red lights for doorbell notification & ??hearing aids: f/u visit by Margarida on 7/20
7/14/2023	Hennessy, Cheryl	PMIDURSKI	Phone Call	VM req CB re: tax docs: ??Balance fr early 2023??
7/14/2023	Benoit, Susan	PMIDURSKI	Phone Call	Reminder for HV on Mon 7/17: Appt confirmed
7/14/2023	Gomes, Mariana	PMIDURSKI	Phone Call	To cancel AP HV: MG will notify her dgt of same: AP to call Monday to resched HV
7/14/2023	Monteiro, Joan	PMIDURSKI	Phone Call	To notify of HOLD to Aug: "I have my new electric bill which I will bring to you. I have not made a payment"
7/14/2023	Zych, Joanne	PMIDURSKI	Phone Call	To notify of award: "I am thrilled beyond words. Please tell the Board TY for me. I am so grateful."
7/14/2023	Dillon, Sherry	PMIDURSKI	Phone Call	Phone not working: EMM to RSC: Not inpatient @ SLH
7/17/2023	Edwards, Diane	APAZ	In Home Visit	HV completed. Requesting continued support for cable and phone.
7/17/2023	Gomes, Mariana	APAZ	Phone Call	RC visit rescheduled for Tuesday, July 18th at 9am.
7/17/2023	DePina, Pam	PMIDURSKI	In Home Visit	For annual update: "TYSM for all your help" Referred to SHINE FCOA for MSP
7/17/2023	Benoit, Susan	PMIDURSKI	In Home Visit	For annual update: Working w/MMP: Improvement noted in spending habits: "I made changes"
7/17/2023	Simpkin, Carol	PMIDURSKI	In Home Visit	For annual update: Much improvement since back surgery: App submitted to Annie Maxim House
7/17/2023	Sikorski, Barbara	APAZ	Phone Call	LVM regarding camera purchase return and bought on ARAW or Barbara credit card instead.
7/17/2023	Walker, Bonnie	PMIDURSKI	Phone Call	Re: housing situation: BW reports she spoke w/Raquel @ SCCLS re: lack of functioning doorbell: HV 7/19/19
7/17/2023	Vieira, Germaine	APAZ	Phone Call	Regarding standard time renewal. Germaine will call Standard Times today and cancel her subscription.
7/17/2023	Charbonneau, Leila	APAZ	Phone Call	Multiple TC & EM. Leila didn't follow process we discussed. Working on alt plan to present to board in Aug.

Due Date	With	Staff	Type	Notes
7/17/2023	Belanger, Elizabeth	PMIDURSKI	Phone Call	Req trans to NBFHC for Herstory interview: EMM req to ED
7/17/2023	Antunes, Joana	APAZ	Phone Call	LVM with Cindy (assists Joana with bills). Regarding Board approval of increased rent. Request a call back.
7/17/2023	Hotte, Eileen	APAZ	Phone Call	To reschedule annual HV for Wednesday, July 19th at 11am.
7/17/2023	DeCosta, Cynthia	APAZ	Phone Call	Re: Board approval of Xfinity and car ins. "Thank you so much. I would have had to take my car off the road"
7/17/2023	Almeida, Lorene	APAZ	Phone Call	Re: Board continuation of cab/int "Thank God for your foundation it allows me to buy things like more food"
7/17/2023	Auger, Diane	APAZ	Phone Call	Re: Pilgrim mailing address change. Provided number to call. They have been paying.
7/18/2023	Chytrus, Leslie	APAZ	Phone Call	Re: SRTA booklet not received. Will deliver today. She now has SNAP \$229/monthly since May 2023.
7/18/2023	Waite, Cynthia	PMIDURSKI	Phone Call	From ENOS>Chair warranty expired: No thick pads available: CW notified: to call My Brother's Keeper 4 pad
7/18/2023	Charbonneau, Leila	APAZ	Phone Call	LVM with update and requested a call back to ensure she understands process and need.
7/18/2023	Chaput, Vanessa	PMIDURSKI	Phone Call	To notify of EDDF approval: THANK YOU ALL so much. This is a relief. You don't know how much this means."
7/18/2023	Dean, Amy	APAZ	Phone Call	Re: ROE. Not doing too well. "I really enjoy your newsletter it is so interesting & your call brightened my day."
7/18/2023	Ambra, Patricia	PMIDURSKI	Phone Call	Re: sched annual update: "Yes, I want to continue with ARAW. TY for all your help." HV sched 8/1
7/18/2023	O'Keefe, Lindelle	APAZ	Phone Call	Re: Frail elder Waiver assessment. It is pending. Will call back next week for an update.
7/18/2023	Beaubian, Joan	PMIDURSKI	In Home Visit	For annual update: Exploring alternative housing: Receiving VNA services(PT)
7/18/2023	Laber, Lynn	PMIDURSKI	In Home Visit	For annual update: "TY so much for your assistance w/my BCBS. I love going to the Z also. TY"
7/18/2023	Gomes, Mariana	APAZ	In Home Visit	Initial HV completed. Working with Coastline on lift chair cost.
7/19/2023	Dillon, Sherry	PMIDURSKI	Phone Call	Re: Board approval for dining room set: Check mailed to Bob's: SD will sched delivery: TY all so much!
7/19/2023	Evora, Sandra	PMIDURSKI	Phone Call	To report she contacted Aarons & they are mailing laptop invoice to her: She will send to ARAW upon receipt
7/19/2023	Burke, Shauneen	PMIDURSKI	Phone Call	TC re: req for assist w/CC debt: Instructed to cont paying: Mtg 8/10: "I am very depressed & sad."
7/19/2023	Gadomski, Marion	PMIDURSKI	Phone Call	Req fin assist: "I am not touching the reverse mort. \$\$ That's for my family."
7/19/2023	Chaput, Vanessa	PMIDURSKI	Phone Call	Re: court date of 7/31: To meet Atty then proceed to court: "TY so much!! This is a lifesaver."
7/19/2023	Polek, Regina	PMIDURSKI	Phone Call	To sched annual update: HV sched for 7/27
7/20/2023	Guy, Nancy	APAZ	Phone Call	To schedule annual HV. Scheduled for 7/25 at 2:30pm.
7/20/2023	Anastasi, Wilhelmina	APAZ	Phone Call	LVM with Paula Simple at Coastline. Requesting a call back regarding SHINE.
7/20/2023	Huezo-Mendoza, Sonia	APAZ	Phone Call	To schedule annual HV on 7/27 at 9am.
7/20/2023	Gassar, Vera	APAZ	Phone Call	Regarding ice cream social. Will attending calling CNN on 7/24 to set up transportation.
7/20/2023	DeMedeiros, Sharon	APAZ	Phone Call	LVM to inform Sharon that vaccination for COVID is required to attend ice cream social.
7/20/2023	Kyle, Susan	APAZ	Phone Call	LVM to schedule new referral visit for Friday 7/28 anytime.
7/20/2023	Couto, Charlene	APAZ	Phone Call	Still pending visit w/ sister. Requesting weekend. Will call her back 7/24. EMM to admin.
7/20/2023	Morgan, Sylvia	APAZ	Phone Call	To invite to ice cream social. Not sure if she is linked with CNN yet. Will require YWV transportation.
7/20/2023	Baptista, Doris	APAZ	Phone Call	To invite to ice cream social. Cannot attend. "I have been doing the art classes. I love going!"
7/20/2023	Westgate, Sandra	APAZ	Phone Call	Regarding update on car estimate. Has appointment 7/27 at M&M auto.
7/20/2023	Bissonnette, Alice	APAZ	Phone Call	LVM requesting a call back to invite to ice cream social. She has her own car.
7/20/2023	Enoksen, Charlotte	APAZ	Phone Call	To invite to ice cream social. Will attend. Also has CNN flyer and would like support. EMM to Andy.
7/20/2023	Verissimo, Dalia	APAZ	Phone Call	LVM requesting a call back to schedule FLO ROE call.
7/20/2023	Messier, Ellen	APAZ	Phone Call	Reschedule missed HV for 7/24 at 2:00pm. She will be home this time.
7/20/2023	Pettie, Charlene	APAZ	Phone Call	To schedule new referral HV on 7/27 at 10:30am
7/20/2023	Graybill, Holly	APAZ	In Home Visit	To dropoff check for M&M auto.
7/20/2023	Walker, Bonnie	PMIDURSKI	In Home Visit	For new request: AC Unit: BW has reconnected w/SCCLS re: tenant issues: BW spoke w/Raquel
7/20/2023	Chytrus, Leslie	APAZ	In Home Visit	To drop off SRTA booklets.

Due Date	With	Staff	Type	Notes
7/21/2023	Michel, Loretta	PMIDURSKI	Phone Call	From sister re: Comcast: to mail invoice: Attempting to change name on acct: May cancel and open new acct
7/21/2023	Monteiro, Joan	PMIDURSKI	Phone Call	Re: grandson status and available fin. Resources: SNAP \$506: No other benefits: Studying for service exam
7/21/2023	Walker, Bonnie	PMIDURSKI	Phone Call	VM left re: req for AC unit: Nd to obtain specifics fr; property manager: EMM to CES CM re: BW status
7/21/2023	Carvalho, Patricia	PMIDURSKI	Phone Call	W/NBSDC Karen: PC hosp? unknown DX? To return home w/services: DAEF Inc was sched for HV 7/20
7/21/2023	Hennessy, Cheryl	PMIDURSKI	Phone Call	Re: overdue RE tax balance: Invoice to be emailed to Admin @araw by City of NB Assessors Office
7/21/2023	Conway, Isidora	PMIDURSKI	Phone Call	To confirm attendance @ Ice Cream Social; New medical issues: "The ice cream will make me better!"
7/24/2023	Gomes, Virginia	APAZ	Phone Call	LVM with son Joe. Requesting a call back to schedule annual HV next week.
7/24/2023	Anastasi, Wilhelmina	APAZ	Phone Call	LVM with Coastline CM Sophia Reis. Requested a referral for SHINE counseling HV.
7/24/2023	Ponte, Karyn	APAZ	Phone Call	Regarding Comcast credit. AP sent EMM to adm and PGM.
7/24/2023	Smith, Debra	APAZ	Phone Call	Regarding Annual HV in August, Could not leave message. Will call back this week.
7/24/2023	Kyle, Susan	APAZ	Phone Call	RC schedule initial home visit for Friday, July 28th 11am.
7/24/2023	Furness, Betty	APAZ	Phone Call	Received VMM for Betty. Her cat Molly passed away Saturday, July 22. Will send card.
7/24/2023	Lopes, Doreen	APAZ	Phone Call	Requesting ARAW support for SRTA on demand. HV scheduled for Tuesday, July 25th 1:30pm.
7/24/2023	Messier, Ellen	APAZ	Phone Call	Annual HV completed. Ellen was very confused and loss of memory. LVMM for Coastline CM to discuss case.
7/24/2023	Gomes, Janice	APAZ	Phone Call	To reschedule HV to Friday, July 28th at 2pm.
7/24/2023	O'Keefe, Lindelle	APAZ	Phone Call	Regarding Frail Elder Waiver visit being scheduled. Referred to CNN for attorney to assist with Will/Trust
7/24/2023	Gomes, Mariana	APAZ	Phone Call	LVM x2 with Coastline CM Jennifer DeCouto. Requesting call back to work on lift chair.
7/24/2023	Edwards, Diane	APAZ	Phone Call	LVM to confirm I submitted her annual review. Comcast bill is \$130/monthly.
7/24/2023	Verissimo, Dalia	APAZ	Phone Call	LVM x2. Requesting a call back to conduct a FLO ROE call.
7/25/2023	Messier, Ellen	JCOSTA	Phone Call	From Alyssa @Coastline, requesting CB from AP, EM for f/u. AP returned call. Eileen has Sr. Buy in and Tufts
7/25/2023	Carella, Maria	APAZ	In Home Visit	Initial HV completed. Complex situation. Requesting 1 month rent asst due no later than 8/5. Will submit req.
7/25/2023	Guy, Nancy	APAZ	In Home Visit	Annual review HV completed.
7/25/2023	Lopes, Doreen	APAZ	In Home Visit	New Request HV for SRTA booklet completed.
7/25/2023	Palazzo, Sharon	JCOSTA	Phone Call	To confirm DirectTV bill made it to office, confirmed address change correct & paid in July
7/25/2023	Evora, Sandra	APAZ	Phone Call	From Sandra. Seeking to speak with PGM. Did not leave message will call back.
7/25/2023	Martinez, Nitza	JCOSTA	Phone Call	Looking for Ana, update on taxes, HV Friday, EM to AP for f/u. RC no need. Request to make inactive.
7/25/2023	Mello, Eleanor	JCOSTA	Phone Call	For SWH phone #, received bill that should have been covered.
7/26/2023	Fragata, Maria	APAZ	Phone Call	Called to request ARAW support of dental cleaning and Xray. Will submit.
7/26/2023	Lopes, Doreen	APAZ	Phone Call	To inform her that I will submit SRTA request for September board meeting,
7/26/2023	Carella, Maria	APAZ	Phone Call	LVM. Requesting a call back on application information to be able to submit application today.
7/27/2023	Polek, Andrea	PMIDURSKI	In Home Visit	"Life is good. I use my rollator and I am walking more. MassHealth is paying for my dental & Hearing aids."
7/27/2023	Polek, Regina	PMIDURSKI	In Home Visit	For annual update: "Please tell everyone TY. I am appreciative for all they do for me."
7/27/2023	Huezo-Mendoza, Sonia	APAZ	In Home Visit	Annual HV completed. She is very grateful for ARAW support. Placing a referral to IAC for SHINE.
7/27/2023	Carella, Maria	APAZ	Phone Call	LVMM. Requesting call back regarding pension balance and plans.
7/27/2023	Pettie, Charlene	APAZ	In Home Visit	Was not home for my initial HV. LVMM to call me back to reschedule.
7/27/2023	Morin, Evangeline	PMIDURSKI	Phone Call	Re: Del of Ice cram d/t trns mix up: VM upset: Declined del: "IDK flavors & I won't be home tomorrow"
7/27/2023	Burke, Shauneen	PMIDURSKI	Phone Call	Re: NBAM class & Vouchers: EMM to JC & ED re: 8/5 voucher& possible use of 7/30 voucher for chapel
7/27/2023	Powell, Charlotte	PMIDURSKI	Phone Call	Requesting Direct TV invoice: CP to cal Direct TV and request: JC & ED notified
7/27/2023	Morgan, Sylvia	APAZ	Phone Call	RC mix up with CNN trans. Excited for visit and ice cream. Requesting chocolate flavor.
7/27/2023	Harrington, Diane	APAZ	Phone Call	LVMM. Requesting a call regarding permission to share her photo of ice cream social

Due Date	With	Staff	Type	Notes
7/27/2023	Estrella, Louise	PMIDURSKI	Phone Call	Re: estimate for auto repair: Sched for cardiac OR 7/28: Hosp x 5 days then rehab:
7/27/2023	Tuite, Janice	APAZ	Phone Call	Re ice cream delivery due to trans mix up. Excited for visit and ice cream. Requesting coffee flavor.
7/27/2023	Petrin, Joan	APAZ	Phone Call	LVMM. Requesting a call regarding permission to share her photo of ice cream social
7/27/2023	Anastasi, Wilhelmina	APAZ	Phone Call	Re electric wheelchair battery replacement. Referred to Medicare. AP LVMM w/ CES CM.
7/27/2023	Hennessy, Cheryl	PMIDURSKI	Phone Call	To NB Clerk re: Balance overdue taxes: Invoice received and to be paid in full by ARAW
7/27/2023	Brightman, Pauline	PMIDURSKI	Phone Call	Re: Del of Ice Cream due to trans mix up: Will not be home Friday: Informed of Aug NBAM class @ TM
7/28/2023	Lada, Rosalie	PMIDURSKI	Phone Call	VMM left for nephew Mark re: Xfinity refund card: Req CB
7/28/2023	Openshaw, Pauline	PMIDURSKI	Phone Call	Update: At SLH ER w/CHF, afib, leg wound: Family will update
7/28/2023	Lopes, Barbara	PMIDURSKI	Phone Call	New Referral: Ineligible < 1 year: CES purchasing AC unit>BL will check w/CES re: installation: I can pay the \$100
7/28/2023	Burke, Shauneen	PMIDURSKI	Phone Call	VMM left re: BB vouchers: Approved to utilize 7/30 for Chapel: Mail NBAM voucher for 8/5
7/28/2023	Pacheco, Deborah	PMIDURSKI	Phone Call	VMM left re: SNAP: DTA Sr#, DTA NB office, Med expense form mailed: PACE pantry, HIP, GBFB reviewed
7/28/2023	Ribeiro, Renay	PMIDURSKI	In Home Visit	For annual update: Req assist w/pd auto repair: Reminded to call b4 work completed
7/31/2023	Silveira, Marie Lorraine	APAZ	In Home Visit	To pick up estimate. Reviewed with ED. Will process request only if AC system breaks.
7/31/2023	Westgate, Sandra	APAZ	In Home Visit	To pick up estimate. Spoke w/ Denise from M&M auto. He will email revised estimate.
7/31/2023	Roy, Roza	PMIDURSKI	Phone Call	NEW referral from Olympia Tower Wellness Ctr: Req assist w/rent, finances
7/31/2023	St. Jean, Jeanne	PMIDURSKI	Phone Call	New referral inquiry: Ref from DCOA: Over asset \$96K: Req assist w/BCBS &/or paying off hearing aids
7/31/2023	Pettie, Charlene	APAZ	Phone Call	Unable to LVMM with CES Case mgr. Casssidy. To discuss Coastline little necessity fund options.
7/31/2023	Gomes, Mariana	APAZ	Phone Call	To CES CM Jennifer DeCouto. Re lift chair process. Pending call back.
7/31/2023	DePina, Pam	PMIDURSKI	Phone Call	VM left re: HV on Mon 7/17: Req call back if need to cancel/reschedule
7/31/2023	Woods, Janice	PMIDURSKI	Phone Call	VMM #1 left re: Annual update: Request call back to schedule
7/31/2023	DeSouza, Joanne	PMIDURSKI	Phone Call	W/ACCS re: budget assessment: JDS has plan to decrease CC debt: ACCS & PGM to f/u in 4 m: ED notified
7/31/2023	O'Bara, Teresa	PMIDURSKI	Phone Call	VMM #1 left re: Annual update: req Call back to schedule. Teresa called back. Will call PGM tomorrow.
7/31/2023	Okpara, Priscilia	PMIDURSKI	Phone Call	To son Chido to sched annual update: HV sched for 8/7 @ 9am
7/31/2023	Verissimo, Dalia	APAZ	Note to File	Mailed no contact letter. FLO ROE passed due since May 2023. No return call from Dalia.

**ARAW August 2023 Activity Sheet**

Due Date	With	Staff	Type	Notes
8/1/2023	Todd, Kristine	PMIDURSKI	Phone Call	Re: housing: Section 8 voucher rcvd: Apt to be inspected 4 Sect 8: Will call FS re: boxes/equip in basement
8/1/2023	Bourgeois, Lucille	PMIDURSKI	Phone Call	Re: Comcast billing: LB to contact Comcast & rq billing be mailed monthly
8/1/2023	Hennessy, Cheryl	APAZ	Phone Call	From Cheryl, "I massively grateful for ARAW support of SRTA booklet and Taxes. Thank you!" EMM adm/PGM
8/1/2023	Lada, Rosalie	PMIDURSKI	Phone Call	Re: Xfinity refund card: To mail refund card to Mark today: "TY for helping my Aunt."
8/1/2023	Belanger, Elizabeth	PMIDURSKI	Phone Call	Re: follow up to NBFHC interview: "I had so much fun telling my story of the Scallop Queen. TY"
8/1/2023	Fragata, Maria	APAZ	Phone Call	Re: EDDF approval of dental cleaning and Xrays. Maria will be making a SHINE appt. for SNAP and dental ins.
8/1/2023	Almeida, Mildred	PMIDURSKI	Phone Call	VMM left req she call Comcast to change billing to monthly
8/1/2023	Carella, Maria	APAZ	Phone Call	LVM requesting return call and difference from 46 vs 65 monthly pension income.
8/1/2023	Roy, Roza	APAZ	Phone Call	Could not LVMM. Will try again tomorrow.
8/1/2023	Ventor, Rosalie	APAZ	Phone Call	To schedule annual HV for 8/8 at 11am.
8/1/2023	Pettie, Charlene	APAZ	Phone Call	Reschedule HV. Is in Boston. Requesting a call on Thursday 8/3.
8/1/2023	Ambra, Patricia	PMIDURSKI	In Home Visit	For annual review: Medical debt>SHINE appt enc. EMM to FCOA SHINE:EM to WApothecary
8/1/2023	Bissonnette, Alice	APAZ	Phone Call	LVMM. Requesting call back to schedule annual HV week of 8/7.
8/2/2023	Bissonnette, Alice	PMIDURSKI	Phone Call	Re: clarification re: annual update & medication: Informed OOP cost needed not names/dosages of meds
8/2/2023	Woods, Janice	PMIDURSKI	Phone Call	To sched annual update & review: had arm surgery>receiving OT> Available for HV 8/9
8/2/2023	Bramwell, Nancy	PMIDURSKI	Office Visit	To bring BCBS invoice: Appt sched for 6 month update: HV sched for 8/3
8/2/2023	Evora, Sandra	PMIDURSKI	Phone Call	To report Aaron's & Eversource invoice to be delivered to ARAW office today: TY
8/2/2023	Morin, Evangeline	PMIDURSKI	Phone Call	Re: delivery of ice cream: Will CB as Nbfd in apt d/t CO2 monitor alarming
8/2/2023	Carella, Maria	PMIDURSKI	Phone Call	Follow up re: pension> Call transferred to ED
8/2/2023	Roy, Roza	PMIDURSKI	Phone Call	From Olympia Towers. Roza scheduled HV for 8/9 at noon.
8/2/2023	Jordan, Nadeen	PMIDURSKI	Phone Call	From SCVNA SW: Req assist w/ balance d/t Medicare> \$1000:
8/2/2023	Anastasi, Wilhelmina	PMIDURSKI	Phone Call	From CES CM Sopia req CB from AP: EMM to AP
8/2/2023	O'Bara, Teresa	PMIDURSKI	Phone Call	To sched annual update & review: HV sched for 8/4
8/2/2023	Todd, Kristine	PMIDURSKI	Phone Call	To obtain contact info for Fresh Start: "I erased their # when they told me they couldn't help me."
8/2/2023	Ponte, Karyn	PMIDURSKI	Phone Call	Re: expected refund from Xfinity for phone problems: "I want to make sure you get the refund."
8/2/2023	Burke, Shauneen	PMIDURSKI	Phone Call	To clarify CC stmt: Very upset & verbally abusive: "You are supposed to help me not be condescending w/?'s"
8/3/2023	Levesque, Beatrice	PMIDURSKI	Phone Call	VMM left re: NBAM classes @ Taber & to confirm receipt of BB vouchers: req Call back
8/3/2023	Quirini, Sandy	PMIDURSKI	Phone Call	VMM left re: upcoming NBAM classes @ Taber Mill
8/3/2023	Edwards, Diane	PMIDURSKI	Phone Call	Re: NBFH Soiree: Stated she can't attend d/t recent surgery: Enc to call NBFHC and speak w/Laura
8/3/2023	Bramwell, Nancy	PMIDURSKI	In Home Visit	For 6 month follow up: Info provided re: ACCS & enc to call:
8/3/2023	Letourneau, Diane	PMIDURSKI	Phone Call	Re: Xfinity refund card: HV sched for 8/4 to deliver card: TY so much!!
8/3/2023	Barboza, Margaret	PMIDURSKI	Phone Call	Re: NBAM classes @ Taber: "I go out for the day. Plus my vision is getting worse." Info re: Comm 4 Blind
8/3/2023	Debrosse, Sezaltina	APAZ	In Home Visit	Annual HV completed. Requesting continued support for Xfinity and cab vouchers.
8/3/2023	Brightman, Pauline	PMIDURSKI	Phone Call	Re: NBAM classes: "I spend day w/my son." Inquired about Ice Cream Social8/30: "I will be on vacation."
8/3/2023	Duarte, Patricia	PMIDURSKI	Phone Call	Re: book recommendation: "This is a wonderful idea. I love to read. My challenge is 36 books this year."
8/4/2023	Morin, Evangeline	PMIDURSKI	Phone Call	Re: Ice Cream delivery: Sched for Wed 8/9: Issues w/appt plumbing & CO2 detector
8/4/2023	Gomes, Mariana	APAZ	Phone Call	LVM with Jennifer DeCouto DES CM regarding life chair request.
8/4/2023	O'Keefe, Lindelle	APAZ	Phone Call	From CES. Lindelle was approved for Frail Elder Waiver.



Due Date	With	Staff	Type	Notes
8/4/2023	Costa, Barbara	PMIDURSKI	Phone Call	From BM GB: BC called to req new mattress, bed frame and internet: ARAW paying 4 internet: To sched HV
8/4/2023	Silva, Mary Theresa	PMIDURSKI	Phone Call	To sign up for Ice Cream Social & Wamsutta Luncheon: Will need trans w/YWV
8/4/2023	Livesley, Virginia	PMIDURSKI	Phone Call	Req assist w/bills: HV sched for 8/8; Asked to gather supporting docs prior to visit
8/4/2023	Roderiques, Bernadette	PMIDURSKI	Phone Call	To sign up for Ice Cream Social & Wamsutta Luncheon: Will need trans w/YWV
8/4/2023	DeMendonca, Theresa	PMIDURSKI	Phone Call	Re: FLO> Wamsutta Luncheon & Ice Cream Social: Will call Dem Resp>"I am doing better. TY"
8/4/2023	Letourneau, Diane	PMIDURSKI	In Home Visit	To del Xfinity refund: "Perfect. I need new shoes!" Req assist w/landline & shoes
8/4/2023	Levesque, Beatrice	PMIDURSKI	Phone Call	Re: BB vouchers: Is rcving & utilizing: "TYSM": Upcoming cataract surgery: Not avail 4 NBAM or FLO events
8/7/2023	Waite, Cynthia	PMIDURSKI	Phone Call	Re: SNAP: Info provided re: Senior DTA line: Medical OOP form mailed: To call Ombuds Line w/complaint
8/7/2023	Gadomski, Marion	PMIDURSKI	Phone Call	From her friend inquiring about ARAW status: Enc to discuss directly w/MG
8/7/2023	Okpara, Priscilia	PMIDURSKI	In Home Visit	For annual update: Son Chido present: Req internet for communication w/family: "TYSM"
8/7/2023	Fields, Beverly	APAZ	Phone Call	Re: schedule annual HV. HV to be completed 2pm 8/10/23.
8/7/2023	Belanger, Elizabeth	PMIDURSKI	Phone Call	VMM left to sign up for Ice Cream Social: Will need trans YWV
8/7/2023	Morgan, Sylvia	APAZ	Phone Call	Re: "Thank you for the ice cream it was delicious" Signed up for ice cream social and luncheon. CNN trans.
8/7/2023	Ingham, Nancy	APAZ	Phone Call	Re: Elder Abuse reporting info for a family member. Provided her with BES #. PGM made aware.
8/7/2023	Zych, Joanne	PMIDURSKI	Phone Call	To "THANK ARAW for dental work assistance": Sign up for Ice Cream Social
8/7/2023	Montour, Gertrude	APAZ	Phone Call	RC re new referral. Per CES CM insurance denied the rail d/t other adaptive equipment.
8/7/2023	Simas, Patricia	PMIDURSKI	Phone Call	New referral: CES: Req assist w/rent: OverIncome by \$369/month
8/7/2023	Gomes, Mariana	APAZ	Email	To CES CM regarding Fallon insurance Lift chair coverage. TC to dgt re update.
8/8/2023	Montour, Gertrude	APAZ	Phone Call	Setup HV. Railing bought might have additional needs. HV schedule for 8/9/23 at 2pm.
8/8/2023	Woods, Janice	APAZ	Phone Call	To cancel HV sched for 8/9 d/t MD appt: HV for annual review resched to 8/23
8/8/2023	Jesus, Elizabeth	PMIDURSKI	Phone Call	To check status of referral to DEAF Inc: EJ states DEAF rep present in apartment
8/8/2023	Livesley, Virginia	PMIDURSKI	In Home Visit	For NEW request to help w/overdue bills: Poor financial management: Declined ACCS/MMP
8/8/2023	Drayton, Gail	APAZ	Phone Call	LVMM re: mailing her renters insurance statement. No need for call back.
8/8/2023	Almeida, Mildred	PMIDURSKI	Phone Call	To signup for Ice cream social & Wamsutta luncheon: Info 4 Comcast mailed to update billing to monthly
8/8/2023	Cole, Carol	PMIDURSKI	Phone Call	Re: Board Member Mary Ellis: "She was so nice to talk with. I will miss her."
8/8/2023	Duarte, Bernice	PMIDURSKI	Phone Call	VMM x2 left requesting call back
8/8/2023	Tavares, Maria	PMIDURSKI	Phone Call	Re: SNAP/DTA: Senior Assist line # & Ombuds # provided: Will f/u and CB Monday w/status update
8/8/2023	Bramwell, Nancy	PMIDURSKI	Phone Call	To ACCS Mark> Denies call from NB
8/8/2023	Quirini, Sandy	APAZ	Phone Call	LVMM requested a call back. Did not explain why but it was to inform her about Mary Ellis.
8/8/2023	Sikorski, Barbara	APAZ	Phone Call	Re camera CC statement. Not yet received. Cameras installed. We call once statement received.
8/8/2023	Ponte, Karyn	PMIDURSKI	Phone Call	Re: Board Member Mary Ellis: "I am sorry to her of her passing. I enjoyed our talks."
8/8/2023	Harrington, Diane	APAZ	Phone Call	To inform her of Mary Ellis. Diane is sad and will miss her talks as they spoke often. EMM to adm.
8/8/2023	Watkins, Elizabeth	PMIDURSKI	Phone Call	Re: Board Member Mary Ellis: "She will 4ever be in my heart. Such an incredible woman."
8/8/2023	Almeida, Lorene	APAZ	Phone Call	RC to inform her about Mary Ellis. She was in shock and expressed such beautiful memories. EMM to adm.
8/8/2023	Bonneau, Maria	PMIDURSKI	Phone Call	VMM x 2 left requesting CB
8/9/2023	Messier, Ellen	APAZ	Phone Call	LVMM w/ CES CM. requested a call back regarding money management.
8/9/2023	Roy, Roza	APAZ	Phone Call	LM for Carol MacaFee. Was not able to contact or meeting with Rosa at 12pm today. Need info.
8/10/2023	DeSouza, Joanne	PMIDURSKI	Phone Call	To sign up for Ice Cream Social & Wamsutta luncheon: Will provide own trans: TO CB w/balance of WalmartCC
8/10/2023	Bourgeois, Lucille	PMIDURSKI	Phone Call	Re: 2nd notice Comcast shut off d/t non payment: Assured bill pd 8/1: LB did call to req monthly billing to ARAW
8/10/2023	Parker, Delia	PMIDURSKI	Email	To SC MSW re: hearing aide utilization & DEAF Inc referral status
8/10/2023	Jenkins, Karen	PMIDURSKI	Email	To CES CM re: Dem Resp: CM has discussed in past & will remind KJ of resource.

Due Date	With	Staff	Type	Notes
8/10/2023	Laber, Lynn	PMIDURSKI	Phone Call	To notify of award; "Please tell the Board TY." Info provided re: Sr Assist line @ DTA to increase SNAP
8/10/2023	Letourneau, Diane	PMIDURSKI	Email	From Harves w/estimate for shoes: "TY so much for trying to help me."
8/10/2023	Grace, Barbara	PMIDURSKI	Phone Call	To notify of award: "TYSM. Now I can get healthy snacks." In St. Anne's: DX pneumonia: Card mailed
8/10/2023	Benoit, Susan	PMIDURSKI	Phone Call	To notify of award: "OMG. I am thrilled. This will help so much." Roof with leak d/t heavy rains
8/10/2023	Walker, Bonnie	PMIDURSKI	Phone Call	Re: AC unit: Informed of needed info: BTU allowed @ Carriage House & Installation by Maintenance or is a private vendor allowed: BW to check with "office" and share info w/ARAW
8/10/2023	Todd, Kristine	PMIDURSKI	Phone Call	Stating "SCCLS lawyer told me to call ARAW 4 a dumpster." Unable to identify atty: redirected to call City of NB& speak w/landlord about removal of treadmill & exercise bikes: She is NOT cleaning out apartment
8/10/2023	Bramwell, Nancy	PMIDURSKI	Phone Call	VM left req CB to discuss new request
8/10/2023	Simpkin, Carol	PMIDURSKI	Phone Call	To sign up for Wamsutta luncheon: "Not interested in Ice Cream social & has not read any good books"
8/10/2023	Tavares, Maria	PMIDURSKI	Phone Call	Re: SNAP & DTA: Agreed to speak w/WCOA SNAP worker: Letter & PSI mailed : EMM to CK @ WCOA
8/10/2023	Silveira, Marie Lorraine	PMIDURSKI	Phone Call	To confirm she spoke w/Krystal @ SCCLS: Intake completed: Expected to hear from Atty w/in 7 days
8/10/2023	Watkins, Elizabeth	PMIDURSKI	Phone Call	Re: funeral arrangements: Mentioned challenges w/phone not charging: Note sent offering potential assistance
8/10/2023	Greenwood, Dorothy	PMIDURSKI	Phone Call	From FCOA OW: Req assist w/lighted magnifier:Comm4Blind eval: RV in 3 months w/approved items:APaware
8/10/2023	Costa, Barbara	PMIDURSKI	Phone Call	To sched HV: Bank statement received: HV sched for Friday 8/11
8/10/2023	Beaubian, Joan	PMIDURSKI	Phone Call	To notify of award: TYSM: Plans to remain in home: Exploring options for future
8/10/2023	Sampson, Janet	PMIDURSKI	Phone Call	VM left requesting call back to discuss Board decision
8/10/2023	Monteiro, Joan	PMIDURSKI	Phone Call	Re: Board decision: "OK I guess." Should situation change, encouraged to call ARAW
8/10/2023	Jesus, Elizabeth	PMIDURSKI	Phone Call	Re: f/u DEAF visit: Declined assist devices: To sched appt w/audiologist for hearing aids: SCO should cover cost
8/10/2023	DePina, Pam	PMIDURSKI	Phone Call	To notify of award: "TYSM" Met w/FCOA SHINE & MSP app submitted& Part D plan review completed
8/11/2023	Davis, Anita	APAZ	Phone Call	To schedule initial HV. Will call back tomorrow to confirm 8/16 at 1:30pm
8/11/2023	Bramwell, Nancy	PMIDURSKI	Phone Call	Second VMM left req call back as follow up to application
8/11/2023	Payan, Freda	PMIDURSKI	Email	Report from RSC that FP mattress in poor condition after 7 months use: EMM to Worley Bed re: warranty
8/11/2023	Gomes, Mariana	APAZ	Email	Received from CES CM. She emailed request to Fallon to inquire about recliner motor approval.
8/11/2023	Harrison, Patricia	PMIDURSKI	Phone Call	3 month f/u gift bedframe/headboard: "TY. I can sleep in my bed again! Fell week ago: no broken bones"
8/11/2023	Costa, Barbara	PMIDURSKI	In Home Visit	For annual update: Relocated to new apt: "The head of Sect 8 told me I will lose my voucher if Jeff stays here. I cannot afford to lose my Section 8 voucher."
8/11/2023	Watkins, Elizabeth	PMIDURSKI	Phone Call	To report granddaughter purchased a new cell phone for EW: "TY for offering to help"
8/11/2023	Sampson, Janet	PMIDURSKI	Phone Call	Re: Board request for 6 month CC statements: "I haven't used them. How about my car Insurance? You always pay that." JS asked to w/draw CC request and "return to last year request"
8/11/2023	Petrin, Joan	PMIDURSKI	Phone Call	Re: Board decision: Will change BCBS billing address: "It's not fair that I worked since I was 16. Now I am penalized for having money. I should not have worked." Offered options re: f/u re: financial review
8/11/2023	Dillon, Sherry	PMIDURSKI	Phone Call	Sign up for Luncheon & Ice Cream Social: "My health is worsening. Slurred speech & walking aren't better."Dining room set to e delivered 8/19
8/11/2023	Burke, Shauneen	PMIDURSKI	Phone Call	Re: Board decision: "You tell them that I expect money for the interest while I waited for you to decide. I would have gotten a loan or borrowed \$\$ . I will take the classes & vouchers but I will not ask for CC help except for the interest you owe me. I will NOT go to ACCS or any credit counseling." ED notified of discussion
8/11/2023	DeSouza, Joanne	PMIDURSKI	Phone Call	Re: Award: Informed of Board decision: Will follow ACCS plan: RV in 4 month: "TYSM I will try not to spend."
8/14/2023	Burke, Shauneen	PMIDURSKI	Phone Call	To apologize for rude behavior: Req assist w/CC interest: HV sched 8/16 to obtain copies of CC

Due Date	With	Staff	Type	Notes
8/14/2023	Walker, Bonnie	PMIDURSKI	Email	From CES CM: Carriage House apts have central AC: no need for window unit: BW apt AC is functioning
8/14/2023	Bramwell, Nancy	PMIDURSKI	Phone Call	"Taking referrals as realtor as I need money: Sold house \$360k: 4%commission split w/agent & office: 2021 tax return wrong according to my accountant: ACCS is calling me back" ACCS to call NB today according to Mark
8/14/2023	Chor, Patricia	APAZ	Phone Call	Pat is seeking ARAW support for transportation to MD appt. EMM to PGM
8/14/2023	Greenwood, Dorothy	APAZ	Phone Call	Spoke with Dot about magnifier to read mail. Commission for the Blind will be visiting in 3 months. If they do not cover I told Dot I would try and see if ARAW would if she cannot afford herself.
8/14/2023	Ambra, Patricia	PMIDURSKI	Phone Call	Re: SHINE: MSP Sr. Buy In approved 9/22>SLH & Action Collection reviewing invoices: PA to change Supplement w/assist of SHINE counselor: CES to visit tomorrow to eval 4 laundry & PERS unit
8/14/2023	Jordan, Nadeen	APAZ	Phone Call	New request for Part B back payment support. Referred to SHINE first and will call is ARAW support needed.
8/14/2023	Correia, Elaine	PMIDURSKI	Phone Call	NEW referral: Req assist w/monthly bills: Limited income w/escalating costs
8/14/2023	Stafford, Mary	APAZ	In Home Visit	Requesting Lift chair. Working with CES to see if MassHealth will pay. LVMM w/ Emily CES CM
8/15/2023	Messier, Ellen	APAZ	Phone Call	LVM w/ CES CM Alyssa re: Money Management discussion update.
8/15/2023	Gomes, Janice	APAZ	Phone Call	W/ daughter Robin. ARAW support pending CFC decision in October. Requested ARAW application be withdrawn. EMM to adm. Referred to HEARTWAP.
8/15/2023	Davis, Anita	APAZ	In Home Visit	Unsustainable living situation. Asked to Leave. Req. withdrawn. Referral source and adm aware.
8/15/2023	Bouchard, Martha	APAZ	Phone Call	LVM requested call back to discuss Board decision of CNN and exception to income.
8/15/2023	Livesley, Virginia	PMIDURSKI	Phone Call	From FCOA OW: She will visit VL to discuss ACCS/MMP, Chore services & SDC/lunches @ FCOA
8/15/2023	Costa, Barbara	PMIDURSKI	Phone Call	Re: laptop: Informed CES will be expanding technology program w/equipment & classes
8/15/2023	Charbonneau, Leila	APAZ	Phone Call	LVM. Requested a call back for Board decision and discussion of future requests.
8/15/2023	Okpara, Priscilia	PMIDURSKI	Phone Call	W/son Chido re: MEB \$275: "Put the request to Board and see what happens."
8/15/2023	Hotte, Eileen	APAZ	Phone Call	RC from Eileen. Explain Board decision on non-support going forward. She understands and is appreciative for all the support she has received from ARAW. EMM to WA to cancel delivery effective September 2023.
8/15/2023	Anastasi, Wilhelmina	APAZ	Phone Call	W/ CES CM Sophie. Wilhemina is now SWH w/ new CM. EMM to adm to update BB.
8/15/2023	Chor, Patricia	PMIDURSKI	Email	EDDF request for one time BB voucher for MD appt: Approved by ED: HV to deliver vouchers for 8/16 appt
8/15/2023	Edwards, Diane	APAZ	Phone Call	LVM requested call back to discuss Board decision of continued Xfinity support and ? FCOA need.
8/15/2023	Edwards, Diane	PMIDURSKI	Phone Call	RC to AP: Not feeling well today d/t arthritis: Req Call Back from AP tomorrow Wed 8/16
8/15/2023	Lopes, Doreen	APAZ	Phone Call	Re: Board approval of SRTA Demand Response. "thank you, such a great help. I have so many MD appts."
8/15/2023	Desautels, Louise	APAZ	Phone Call	To cancel luncheon and ice cream social per MD orders d/t water retention.
8/15/2023	Ribeiro, Renay	PMIDURSKI	Phone Call	To clarify reason for not contacting ARAW prior to auto repair: "Just did what needed to be done."
8/16/2023	DeMendonca, Theresa	PMIDURSKI	Phone Call	Re: FLO> "You made my day. Now I have something to look forward to. It means so much to me. TY"
8/16/2023	DeSouza, Joanne	PMIDURSKI	Phone Call	Re: FLO events: to sched own transportation: " TYSM for all the ARAW does for me"
8/16/2023	Chaput, Vanessa	PMIDURSKI	Phone Call	Re: FLO events: "TY ARAW: You are a lifesaver: So many nice women: I need the positive in my life."
8/16/2023	Burke, Shauneen	PMIDURSKI	Phone Call	To cancel HV d/t RN visit: "I will get papers copied and call you." Aware of deadline 8/25
8/16/2023	Edwards, Diane	PMIDURSKI	Phone Call	Re: Board decision: Req call back from AP: EMM to AP
8/16/2023	Livesley, Virginia	PMIDURSKI	Phone Call	Re: expenses: Discussion re: FCOA activities, SDC, ARAW FLO events> Depression r/t social isolation
8/16/2023	Correia, Elaine	PMIDURSKI	Phone Call	NEW referral: Learned of ARAW @ meeting: 87 yo homeowner req assist w/bills: to admin & AP
8/16/2023	Stafford, Mary	PMIDURSKI	Phone Call	From Dgt re: reverse mort> No monies are available: EMM to AP
8/17/2023	Okpara, Priscilia	PMIDURSKI	Phone Call	Attempts X 2 to reach son Felix to discuss finances: CB from son w/clarification of finances
8/17/2023	Monteith, Judith	PMIDURSKI	Phone Call	To share recent experience w/landlord & foul odor in home: Not a gas leak; Feels safe and in No danger
8/17/2023	Livesley, Virginia	PMIDURSKI	Phone Call	From FCOA OW who will visit VL to discuss Profishant, Warranty Co expenditures as well as MMP

Due Date	With	Staff	Type	Notes
8/17/2023	Letourneau, Diane	PMIDURSKI	Note to File	Delivery of payment to Harves Shoe box for shoes: DL notified shoes are in & paid for.
8/18/2023	Pereira, Maria	APAZ	In Home Visit	Requesting car repair and Xfinity bill.
8/18/2023	Larrabee, Regina	PMIDURSKI	Phone Call	Re: move to Tripp Towers: "Its not good. We have bugs & mice. Apts are being fumigated. It is horrible"
8/18/2023	Parker, Delia	PMIDURSKI	Email	From SW: DP wearing SCENT hearing aids: DP Not interested in DEAF Inc referral at this time
8/18/2023	Ribeiro, Renay	PMIDURSKI	Phone Call	VM left re: updated CC invoice & clarification re: Life Insurance policies
8/18/2023	Grace, Barbara	PMIDURSKI	Phone Call	To reg for Ice cream Social: Will ride w/DH: BG has been hosp w/pneumonia: "Feeling much better"
8/18/2023	Estrella, Louise	PMIDURSKI	Phone Call	VM left @ home #: Notified estimate was not rcvd for auto repair: "Get Well wishes from ARAW"
8/18/2023	Ingham, Linda	PMIDURSKI	Phone Call	VM left for sister re: status of rechargeable hearing aids: req call back
8/18/2023	Boudreau, Jeanne	PMIDURSKI	Phone Call	VM left & card mailed: Remains at The Royal of Fhvn
8/18/2023	Duarte, Bernice	PMIDURSKI	Phone Call	VM left req CB & card mailed: Remains at Sippican
8/18/2023	Correia, Elaine	APAZ	In Home Visit	Not fully completed. Rescheduled for 8/23 at 10am when more information will be available.
8/18/2023	Correia, Elaine	PMIDURSKI	Phone Call	VMM req CB fr. AP re; HV sched for 8/18: EMMM to AP
8/18/2023	Adesso, Dolores	PMIDURSKI	Email	To CNHC MSW for update: Notecard mailed to DA from ARAW
8/18/2023	DeGrace, Carmen	PMIDURSKI	Phone Call	3 month f/u after gift of mattress: "It is beautiful and so comfortable. TY" Sched for surgery end of Aug
8/21/2023	Kyle, Susan	PMIDURSKI	Phone Call	To speak w/AP "about status of interview." EMM to AP for follow up
8/21/2023	Ambra, Patricia	PMIDURSKI	Email	From CES: PA to receive PERS unit & biweekly laundry services: CM: Alyssa DeSorcy
8/21/2023	Bissonnette, Alice	PMIDURSKI	Phone Call	Req call back from AP on Tuesday 8/22: EMMM to AP
8/21/2023	Morgan, Sylvia	PMIDURSKI	Phone Call	To sign up for Ice Cream Social: Cancelled d/t MD appt: "Maybe I will go to luncheon in October"
8/21/2023	Adesso, Dolores	PMIDURSKI	Email	From CNHC SW: Unable to visit d/t Covid: DA "failing" Not leaving NH any longer
8/21/2023	Carvalho, Pamela	PMIDURSKI	Phone Call	NEW referral fr. SouthCoast navigator & CNN: Req one year membership to CNN
8/21/2023	Kenney, Maryellen	PMIDURSKI	Phone Call	NEW ref. fr. LGBTQ: Limited income>Food & transportation can be challenge: Would like to teach leather tooling
8/21/2023	Tavares, Marilyn	PMIDURSKI	Phone Call	From BM DL: Correct phone # provided and address confirmed
8/21/2023	Openshaw, Pauline	PMIDURSKI	Phone Call	From Ex: States PO memory is failing: He is supplying groceries & paper products & paying for Comcast
8/21/2023	Rosa, Zulmira	PMIDURSKI	Phone Call	Req to speak with AP: EMM to AP to follow up when returns to office
8/21/2023	Costa, Barbara	PMIDURSKI	Phone Call	Re: laptop: PGM exploring resources (CES, FCOA, ACP)
8/21/2023	Belanger, Elizabeth	PMIDURSKI	Phone Call	To "Thank ARAW for BB vouchers for Ice Cream Social." Informed YWV for Luncheon 8/23
8/21/2023	Sampson, Janet	PMIDURSKI	Phone Call	As reminder of need for CC statements: "I called and I haven't rcvd yet." Sick w/ cold
8/21/2023	Lyons, Carol	PMIDURSKI	Phone Call	VM left for CES CM re: req for AC unit: CL states AC unit was bought 7/2021by ARAW
8/21/2023	Bramwell, Nancy	PMIDURSKI	Phone Call	VM left re; need for supporting docs as requested
8/21/2023	Dillon, Sherry	PMIDURSKI	Phone Call	To "THANK ARAW for lovely table & chairs. I will see you at eh Luncheon on Wednesday. TYSM"
8/21/2023	Burke, Shauneen	PMIDURSKI	Phone Call	Re: supporting docs: Hurt back: cannot leave home: Sched HV 8/22 @ 9am to pick up docs
8/21/2023	Collins, Donna	PMIDURSKI	Phone Call	Re: "concern for Port. speaking neighbor" Recommend neighbor call AP on Tues 8/22 when home from SDC
8/21/2023	Ribeiro, Renay	PMIDURSKI	Office Visit	To deliver CC statement and to clarify life insurance policies
8/21/2023	Waite, Cynthia	PMIDURSKI	Phone Call	Re: WA: Missed Fri del: EM to WA: CW inquiring about CHUX: "SWH provides poor quality chux."
8/22/2023	Smith, Debra	APAZ	Phone Call	LVM requesting a call back regarding due auto insurance policy and annual HV
8/22/2023	Burke, Shauneen	PMIDURSKI	In Home Visit	To obtain supporting docs for request and will be delivered back to home
8/22/2023	Bramwell, Nancy	PMIDURSKI	Phone Call	To report she is obtaining supp docs and will bring to ARAW asap
8/22/2023	Rosa, Zulmira	APAZ	Phone Call	RC LVMM. Requested a call back. Not sure reason for the call.
8/22/2023	Rosa, Zulmira	APAZ	Phone Call	RC LVMM x3. Requested a call back.
8/22/2023	Hotte, Eileen	JCOSTA	Phone Call	Re: BCBS phone #, timing of billing & amount quarterly, she will be calling to change address
8/22/2023	Whitehead, Marguerite	APAZ	Phone Call	Requesting hearing aid support from ARAW. Will call back with estimate.

Due Date	With	Staff	Type	Notes
8/22/2023	Smith, Cynthia	APAZ	In Home Visit	Requesting auto repair support. Pending estimate and referred to multiple resources.
8/22/2023	Bissonnette, Alice	APAZ	Phone Call	RC spoke with Alice. She is very worried ARAW will no longer support BCBS. I told her that I would call her once I had Board decision in September.
8/23/2023	Kyle, Susan	APAZ	Phone Call	LVM to inform her of FLO request review date of 9/14/2023.
8/23/2023	Amaral (Fallon), Sandra	PMIDURSKI	Email	New England Medical Advisors: Inquiry re: potential referral: Out of area: Brochure & referral form EMM
8/23/2023	Smith, Cynthia	APAZ	Phone Call	LVMM about ACCS contact and M&M auto estimate.
8/23/2023	Carvalho, Pamela	JCOSTA	Phone Call	From Andy @CNN, making referral, adv already had info & AP will reach out
8/23/2023	Correia, Elaine	APAZ	In Home Visit	2nd HV completed. Obtained all needed information. Need to review case with ED.
8/23/2023	Roderiques, Elaine	APAZ	Phone Call	LVM with elaine's son Christopher. Need to schedule an even HV as son works & is money manager for mom.
8/23/2023	Vieira, Germaine	APAZ	Phone Call	Seeking a plumber. Hot water tank broke yesterday. Referred to PACE.
8/23/2023	Watkins, Elizabeth	PMIDURSKI	Phone Call	Re: Mary Ellis Memorial mass details: EW to sched Demand Response trans
8/23/2023	Rosa, Zulmira	APAZ	Phone Call	VM from Zulmira. I will call her today. Unsure of reason for call.
8/23/2023	Lyons, Carol	PMIDURSKI	Email	To CES CM reporting AC unit is functioning per HHA
8/23/2023	Tavares, Maria	PMIDURSKI	Email	SNAP counselor WCOA> Increased SNAP benefit to \$84/month from \$23/month
8/23/2023	Smith, Debra	APAZ	Phone Call	VM from Deb. She is requesting I call her back today at my convenience.
8/24/2023	Cory, Frances	PMIDURSKI	Phone Call	Update: Hosp & rehab x3 wks DX Pneumonia: Home Fri 8/25 w/VNA
8/24/2023	Bramwell, Nancy	PMIDURSKI	Phone Call	From ACCS VP Mark> VMM x2 left for NB: No return calls to ACCS
8/25/2023	Alers, Maria	APAZ	Phone Call	Re: new referral. Unsustainable living situation. Need to speak with ED before HV. ? CES, fresh Start, MBK
8/25/2023	Correia, Elaine	APAZ	Note to File	Mailed information on FGP, PACE, ACCS. Request follow up once Elaine reaches out to resources.
8/25/2023	Carvalho, Pamela	APAZ	Phone Call	Resche HV. Pam very anxious about process time. Needs CNN now. LVMM w/ Andy Pollock
8/25/2023	Bissonnette, Alice	APAZ	Phone Call	VM from Alice. She has a question and will call back later today.
8/25/2023	Cambra, Joan	APAZ	Phone Call	AC broke. Referred her to CES for AC grant. If doesn't not qualify ARAW will process for review & approval.
8/25/2023	Letourneau, Diane	APAZ	Phone Call	To thank ARAW for shoes. "Thank you so much for the shoes. I am so appreciative of all your help."
8/28/2023	Furness, Betty	APAZ	Phone Call	Re: unable to attend Mary Ellis' memorial today. Not feeling well. "Mary is in my prayers"
8/28/2023	Sikorski, Barbara	APAZ	Phone Call	LVM with Lisa to inform her Xfinity bill needs to be monthly. Request she call Xfinity to correct this issue.
8/28/2023	Rosa, Zulmira	APAZ	Phone Call	LVM provided PACE telephone to call for assistance with heating system.
8/28/2023	Gomes, Mariana	APAZ	Email	To CES CM Jennifer DeCouto for an update on insurance coverage of lift chair motor.
8/28/2023	Alers, Maria	APAZ	Phone Call	Referred to My brothers keeper, Walt's Mobile closet, fresh star & Coastline. Will call if support still needed.
8/29/2023	Silveira, Marie Lorraine	APAZ	In Home Visit	Annual HV completed. Requesting FLO program participation.
8/29/2023	DeSouza, Joanne	JCOSTA	Phone Call	For WA phone #, did not receive delivery, also notified of ice cream social cancellation
8/29/2023	Ramos, Maria	PMIDURSKI	Phone Call	Wellness check d/t returned mail: OT nurse reports MR eating brkfst in WC: Doing well: EM to Admin
8/30/2023	Fletcher, Sally	APAZ	Phone Call	Scheduled annual HV for Friday, September 8th 11am
8/30/2023	Marshall, Edith	APAZ	Phone Call	LVMM with daughter Diane. Requested call back to schedule annual HV next week.
8/30/2023	Jordan, Nadeen	APAZ	Phone Call	From RN at SCVNA with update. Referred her to Diane Perkins SHINE counselor. For MC Part B info
8/31/2023	Waite, Cynthia	APAZ	Phone Call	TC x2 to review DTA medical expense sheet. Provided information. She will mail out form.



## July 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

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### 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.



## July 2023: Beneficiary Advocate

Ana Paz

**REFERRALS RECEIVED: 9**

**REFERRAL SOURCES:** 1 SCCLS, 1 Wellsense SCO, 1 PACE, 2 Beneficiaries, 1 Olympia Towers, 1 Self, 1 CNN

**UPDATES SUBMITTED: 5**

**REQUESTS SUBMITTED: 5**

**FLO SUBMITTED: 6**

**REFERRALS MADE TO:** 1 Fairhaven COA, 1 Immigrants Assistance Center, 1 Coastline

**PENDING: 7 INELIGIBLE: 0 WITHDRAWN: 0 INACTIVE: 5**

**CHALLENGE(S):** I worked on a case involving one of my Beneficiaries that highlighted how difficult it is to navigate the healthcare system. The Beneficiary had requested support from ARAW to purchase a PureWick External Catheter system. She had just been discharged from the hospital and during her hospital stay she was able to use this system which provided her with many restful nights' sleeps. She has had urinary incontinence since the birth of her son approximately fifty years ago.

Unfortunately, the system is expensive, and the monthly catheters alone are \$200 (30 per month). I informed her that she would have to do some research herself and find out if her insurance would cover the system and catheters. She then also mentioned that she doesn't understand why she has such little PCA hours given her poor health. I again encouraged her to contact her Case Manager and find out what could be done.

After a few weeks, she called me very frustrated because no one was getting back to her with answers. I told her I would assist her and call her case manager and see if I can assist in getting her needs resolved. While my interaction with her case manager was pleasant, I could tell the case manager wasn't seeing her situation as a priority. So, I decided to do some digging.

1. Her health insurance was switched from Senior Whole Health (SWH) to United Health Care (UHC) due to her PCP no longer contracting with SWH. This happened in 2022 and caused her PCA hours to be drastically reduced.
2. The PureWick system is not covered by UHC, however, it is not only covered by SWH, SWH also provides a much higher increase of hours for her PCA services. Additionally, she needed to find a new PCP that contracted with SWH.
3. She was able to find a doctor (Dr. Dirician) who makes home visits and would be willing to work with her on getting the PureWick system processed and paid for through SWH.
4. I connected her with a SHINE counselor through Coastline and effective August 1<sup>st</sup> she will not only be enrolled in SWH, but she will also have increased PCA hours and most likely the PureWick system covered as soon as she books her initial PCP home visit.

I am sharing this story to show that there are times when we must do so much more than we report to the Board. While I cannot do this for everyone on a regular basis, in special circumstances like this one it requires more effort to advocate when no one else would or maybe could or want to.

### New referrals:

- Susan Kyle
- Charlene Pettie
- Mariana Gomes
- Janice Gomes
- Maria Carella
- Martha Bouchard
- Mary Stafford
- Roza Roy

### Pending:

- Lindelle O'Keefe
- Charlene Couto
- Dalia Verissimo
- Barbara Sikorski

### Inactive:

- Patricia Correia
- Margaret Rocha
- Julia Correia
- Nitza Martinez
- Maria Pereira



## August 2023: Beneficiary Advocate

Patricia Midurski

**REFERRALS Received:** 2

**Sources of referrals:** CES, City of NB Office of Housing & Community Development

**Requests submitted:** 3                      **EDDF:** 1

**Updates submitted:** 3                      **FLO updates submitted:** 0

**Referrals made to:** DEAF Inc, ACCS, FCOA SHINE

**Pending:** 0   **Ineligible:** 2   **Withdrawn:** 0   **Inactive:** 3   **HOLD:** 1

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**TRENDS:** This month the importance of FLO and the Partnerships came to light. In speaking with several beneficiaries in the past weeks, the significant impact that these programs bring to the table was highlighted. I would like to share two positive experiences with you.

VC was guarded with her personal information when we first met in November of 2021. Gradually, as a trusting rapport developed, VC began to share more details of her life including the deaths of both her children. During a recent home visit, VC shared that she was being harassed by a male tenant in the complex. She had reported these ongoing incidents to the property manager as well as to the Acushnet PD who recommended she obtain a restraining order. VC admitted to being afraid to pursue this legal action. SCCLS was discussed as an option for VC and she called them the following day. Due to a conflict of interest, SCCLS could not represent VC but did provide her with 3 resources. A call to the Justice Bridge connected Vanessa to an attorney who assisted VC through the court proceedings. Unfortunately, the second judge did not grant the restraining order. Rather, he verbally instructed the male to “*stay away from Ms. C.*” VC told the judge that “*clearly the judicial system’s method of treating women had not changed in the past 30 years!*” VC shared she needed protection from a former spouse years ago and the system had failed her as they did once again in her eyes. She now sits at her window to watch when this individual leaves the premises. It is at this time, she will venture out to the gazebo, to get her mail, to do her laundry. And yes, he has continued with making his presence known to her. She has filed once again with the Acushnet PD. VC states that “*the saving grace in all this has been my friends and the NBAM art classes on Sundays! I can’t begin to tell you how the art classes take me away, out of my head and into my imagination. For a few hours, I relax and breathe. Thank you SO much for everything. I am looking forward to the Harbor tour. I have always been afraid to go anywhere by myself, but I am learning that the ARAW women are like me, alone and in need of companionship. Plus, everyone I have met is so nice. I can ever thank you enough.*”

TDM has struggled with mental health issues for most of her life. A bitter divorce from an abusive spouse, dysfunctional relationships with her family, and alienation from her children leave TDM with minimal social support. “*I haven’t had it easy in life. But I look forward to the Wamsutta Luncheons with the ladies. It is a chance for me to be with other women, to laugh, to forget about my problems. I love getting dressed up. It makes me feel special. I have missed outings due to my health, but I am determined to attend this month! Thank you All.*”

**Gratitude:** I would be remiss if I did not take an opportunity to address the void felt in our community with the recent loss of our beloved Mary Ellis. Mary displayed her kindness and compassion by always making time to say Hello to me before a meeting. I will always remember her beautiful sparkling eyes which I believe displayed a bit of mischief!! My only regret is that I did not get to know her better and to introduce her to my menagerie of animals on my Farm... Due to the recent birth of my Grandson, I was unable to attend Mary’s service which I understand displayed an outpouring of love and admiration for a remarkable woman.





## August 2023: Beneficiary Advocate

Ana Paz

**REFERRALS RECEIVED: 12**

**REFERRAL SOURCES:** Coastline 2, ARAW Beneficiary 3, NBCOA 1, ACOA 1, Southcoast VNA 1, Southcoast 1, M&M Auto 1, LGBTQ+ 1, CNN 1.

**UPDATES SUBMITTED: 8**

**REQUESTS SUBMITTED: 4**

**FLO SUBMITTED: 0**

**REFERRALS MADE TO:** Walt's Mobile Closet 3, PACE 2, NB Art Museum 1, My Brother's Keeper 1, Fresh Start 2, SCCLS 3, M&M Auto 1, Cost-Co 1, IAC 1, American Credit Counsel Solutions (ACCS) 3, Coastline 1.

**PENDING: 10 INELIGIBLE: 1 WITHDRAWN: 7 INACTIVE: 2**

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This month I have taken on a total of (12) referrals and the one trend I noticed is that many of the referral sources have referred to ARAW this month as more of a provider of resources. There is no clear need, however, they refer to ARAW to link people to appropriate community resources.

Here are some of this month's referral requests:

- **Support for bed rails:** This is covered by insurance through the assistance of a physical therapist and the primary care physician.
- **Support for appliances and linens:** There are other community resources they should be aware of, such as, My Brother's Keeper, Fresh Start, and Walt's Mobile Closet, Coastline's Little Necessities and Discretionary funds.
- **Hoarding concerns:** Fresh Start has a hoarding Workshop in Fairhaven and New Bedford.
- **Medicare Part B assistance:** SHINE counselors are located at all COAs are the experts to assist in these matters. SCCLS can potentially assist in reduction or distribution of the late sign on fees.
- **Start up Funding for Art Classes:** I referred to NB Art Museum and it was declined. No other financial hardship identified.

Another noted trend is as word is getting out about ARAW, women who have never asked for help before are reaching out and in unsustainable financial hardship for years. I have three very similar complex cases with thousands of dollars in credit card debt, unable to make monthly expenses or pay mortgage, property taxes or insurance without cashing out life insurance policies or placing these expenses on credit cards.

I will say that two out of the three women are diligently working with the resources I provided them, such as, ACCS, SNAP, PACE, Foster Grandparent Program, SCCLS, and Walt's Mobile Closet. The other kindly kicked me out because ARAW wouldn't just pay her outstanding mortgage so she doesn't go into foreclosure, and she would figure out her unsustainable situation a day at a time going forward.

I will say, on a positive note, these cases are teaching me what not to do, and the resources that are available should I find myself in a similar situation. I am very grateful to be able to help these women, especially the ones that are so appreciative of the help. I am confident that most will find themselves in a manageable situation soon.

Ana NEW REFERRALS (12)	Ana PENDING (10)	Ana INACTIVE (10)
Elaine Roderiques - NBCOA Gertrude Montour - Coastline Anita Davis - ACOA Nadeen Jordan - SCVNA Maria Pereira - Self Cynthia Smith – M&M Auto Elaine Correia – ARAW Beneficiary (Unknown at ACOA) Pamela Carvalho - Southcoast Mary Ellen Kenney – LGBTQ+ Odette Botelho – ARAW Beneficiary (Donna Collins) Rosemary Arruda - CNN Maria Alers - Coastline	Mary Stafford – Lift Chair Mariana Gomes – Lift Chair Virginia Gomes – annual Review Elaine Roderiques – Social Day Costs Nadeen Jordan – Part B premium fees ~\$1000 Elaine Correia – Credit Card Debt Relief Maria Alers – Appliances and Linens Odette Botelho – Dentures/Dental work Margarite Whitehead – Hearing Aids Rosemary Arruda - Unknown	Gertrude Montour – Ineligible Janice Gomes – Withdrawn Anita Davis – Withdrawn Roza Roy – Withdrawn Charlene Couto – Withdrawn Lindell O’Keefe – Withdrawn Pamela Carvalho – Withdrawn Mary Ellen Kenney – Withdrawn Dalia Verissimo – Inactive Patricia Correia – Inactive

Name	Birth Date	Age	Board Member
Thibault, Cecile	9/18/1944	79	Diane Laflamme
O'Bara, Teresa	9/21/1954	69	Office
Mota, Lina	9/23/1946	77	Office
Sampson, Louise	9/24/1940	83	Office
Whitehead, Marguerite	9/24/1942	81	Angela Natho
Conway, Isidora	9/26/1941	82	Angela Natho
Horne, Donna	9/26/1948	75	Leah Macomber
Quirini, Sandy	9/26/1943	80	Office
Woods, Janice	9/28/1947	76	Office
Begnoche, Cecile	9/29/1933	90	Jane Stankiewicz
Martins, Louise	9/29/1953	70	Office
Sampson, Janet	9/29/1945	78	Pam McKnight
Ramos, Maria	10/1/1934	89	Office
Bramwell, Nancy	10/2/1942	81	Office
Bishop, Sarah	10/4/1953	70	Office
Laber, Lynn	10/5/1947	76	Office
Bissonnette, Alice	10/9/1941	82	Office
Harrison, Delphina	10/10/1940	83	Cathy Mayall
DaCosta, Maria	10/12/1924	99	Office
Camara, Mary	10/14/1943	80	Office
Alves, Judith	10/15/1952	71	Office
Eleuterio, Sofia	10/15/1936	87	Debbie Brooke

# ARAW BENEFICIARY REQUEST: SUMMARY

SEPTEMBER 2023 | VER 9/8/23

Beneficiary	Biggest Concern	Notes	Specific Request	Questions/Comments
<p><b>New BENE#</b></p> <p><b>Kyle, Susan</b> 74 y/o; 5/27/1949 <b>Income: \$1,274 sub</b></p> <p><b>ARAW support: New</b></p> <p><b>MEB: \$264</b></p> <p>ARAW: Ana</p>	<p>“My car is what is worrying me the most. I need my independence to get out &amp; socialize, grocery shopping, etc.”</p> <p>Susan’s car is needing some repairs. Her ex-husband &amp; daughter Jenny have been helping out with the cost of tires &amp; repairs but she is very ashamed to keep asking them for help.</p>	<p><i>Oxford Terrace</i> Ref: CES</p> <p>Anxiety due to childhood trauma – addressing</p> <p>Seeks socialization to combat feelings of isolation; particularly likes arts and crafts</p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Participation in FLO</li> </ul>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Participation in FLO</li> </ul>
<p><b>New BENE#</b></p> <p><b>Smith, Cynthia</b> 87 y/o; 6/27/1936 <b>Income: \$1,689 H</b></p> <p><b>ARAW support: New</b></p> <p><b>MEB: -\$575</b></p> <p>ARAW: Ana</p>	<p>Her credit card debt worries her the most &amp; the inability to pay for needed car repairs.</p>	<p><i>Referred by mechanic</i></p> <p>Very private and proud; embarrassed by current financial situation; referred to ACCS for financial advice; has been too ashamed to apply for SNAP; most expenses being placed on credit cards</p> <p>Car needs brakes replaced; relies on car; will not entertain idea of public transportation</p> <p>Stymied by ego</p>	<p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ <b>Estimate</b> Car repair (brakes) \$1540.90 from M&amp;M Auto</li> </ul>	<p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ <b>Estimate</b> Car repair (brakes) \$1540.90 from M&amp;M Auto</li> </ul>

## ARAW BENEFICIARY REQUEST: SUMMARY

SEPTEMBER 2023 | VER 9/8/23

Beneficiary	Biggest Concern	Notes	Specific Request	Questions/Comments
<p><b>BENE# 22/18G</b></p> <p><b>Ribeiro, Renay</b> 74 y/o; 3/15/1949 <b>Income: \$1,755   sub</b></p> <p><b>ARAW support \$5,311:</b> <b>Gifts:</b> CC \$3,500 '21 &amp; \$548 '22, Personal loan \$927 '22, Holiday \$150 '21-22 <b>FLO:</b> Plant, Luncheons, Soup, Gift card, Lottery</p> <p><b>MEB: \$266</b></p> <p>ARAW: Pat</p>	<p>"I am blessed &amp; I put all my trust &amp; faith to God. My Church family is good to me &amp; I am managing to make ends meet most months. My daughter works at the PACE grocery store so I get food there. In addition, I frequent food pantries, Farmers Markets &amp; use HIP &amp; Coupons. I needed a new muffler system so I charged to my Discover card. Might the ARAW help me? Thanks to the ARAW for helping me last year."</p>	<p>Olympia Tower</p> <p>Charged car repair to her credit card; use car for MD appts, shopping, errands, transp for family; muffler rotted – needed new system</p>	<p><b>Exception:</b></p> <ul style="list-style-type: none"> <li>▪ Continuation of income exception (over \$105)</li> </ul> <p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ <b>Statement</b> Car repair to be paid to Discover credit card \$1,307.57</li> </ul>	<p><b>Exception:</b></p> <ul style="list-style-type: none"> <li>▪ Continuation of income exception (over \$105)</li> </ul> <p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ <b>Statement</b> Car repair to be paid to Discover credit card \$1,307.57</li> </ul> <p><i>In the future, please make request before service is completed</i></p>
<p><b>BENE# 22-23/34</b></p> <p><b>Letourneau, Diane</b> 80 y/o; 7/12/1943 <b>Income: \$1,144   sub</b></p> <p><b>ARAW support \$1,287:</b> <b>Reoccurring:</b> Cable/phone/internet \$165 '23 <b>Gifts:</b> CC \$957 '23 <b>FLO:</b> Soup, Gift Card, Luncheons, Lottery, Holiday</p> <p><b>MEB: \$5</b></p> <p>ARAW: Pat</p>	<p>"I only get \$72/month &amp; I need to pay for my haircuts, underwear, magazines &amp; snacks. That doesn't leave me with much money unfortunately. If I want to speak with my family or friends, I have to get the one phone from the nurse's station. I would love to have my own telephone in my room so I can call whoever I want when I want. But I cannot afford that."</p>	<p>Brandon Woods – LTC</p> <p>Settling in at BW – improved wellbeing; recent support of new shoes (EDDF)</p> <p>Limited discretionary \$; cannot afford phone to keep in touch with ppl whenever she wants; has to go to nurses station to use phone now</p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Landline phone \$58.99 (plus taxes)</li> </ul> <p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ Phone \$26.99 from Best Buy</li> </ul>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Landline phone \$58.99 (plus taxes)</li> </ul> <p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ Phone \$26.99 from Best Buy</li> </ul>

## ARAW BENEFICIARY REQUEST: SUMMARY

SEPTEMBER 2023 | VER 9/8/23

Beneficiary	Biggest Concern	Notes	Specific Request	Questions/Comments
<p><b>BENE# 21/20G</b></p> <p><b>Godinet, Muriel</b> 72 y/o; 8/21/1950 <b>Income: \$1,124   sub</b></p> <p><b>ARAW support \$1,479:</b> <b>Gifts:</b> Glasses \$231 '22, Moving costs \$350 '22, AC \$299 '21, TV \$299 '21, Holiday \$150 '21-22</p> <p><b>MEB: \$125</b></p> <p><i>WCOA: Susan</i></p>	<p>Muriel worries most about her health &amp; “the future of her car it has a lot of rust &amp; needs a new tire.”</p>	<p>No changes in financial status since March</p> <p>How car used? Why important?</p>	<p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ <b>Estimate</b> (2) Tires \$250 from Joe’s Auto Repair</li> </ul>	<p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ <b>Estimate</b> (2) Tires \$250 from Joe’s Auto Repair</li> </ul>
<p><b>BENE# 23/17G</b></p> <p><b>Ambra, Patricia</b> 76 y/o; 6/24/1947 <b>Income: \$1,627   sub</b></p> <p><b>ARAW support \$947: Gifts:</b> Car repair \$797 '22, Holiday \$150 '22</p> <p><b>MEB: \$34</b></p> <p><i>ARAW: Pat</i></p>	<p>“I worry that I will be a burden on my children. I already told them to put me in a nursing home but my oldest daughter moved back to the area to take care of me when I had my last surgery. I told her not to but she is the oldest plus the nurse in the family. I think she feels obligated to be my caregiver. I am independent however I have begun to experience unexpected fainting spells.”</p>	<p>Bayberry</p> <p>Daughters are her support; does not want to be a burden “put me in a nursing home!”</p> <p>SHINE consult scheduled d/t accumulation of medical debt</p> <p>Part of cc debt is \$60/mnth for incont supplies</p>	<p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ Depends briefs, 3 packages, \$59.97 per month for 4 months</li> </ul>	<p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ Depends briefs, 3 packages, \$59.97 per month for 4 months</li> </ul>

## ARAW BENEFICIARY REQUEST: SUMMARY

SEPTEMBER 2023 | VER 9/8/23

Beneficiary	Biggest Concern	Notes	Specific Request	Questions/Comments
<p><b>BENE# 21-22/25</b></p> <p><b>Smith, Debra</b> 72 y/o; 8/19/1951 <b>Income: \$861 sub</b></p> <p><b>ARAW support \$3,038:</b> <b>Reoccurring:</b> Phone \$89 '21 <b>Gifts:</b> Car ins \$952 '22, Car repair \$207 '23, Holiday \$150 '22 <b>FLO:</b> Puzzle, Lottery</p> <p><b>MEB: \$220</b></p> <p>ARAW: Ana</p>	<p>Debra actively in chemo and her cell, tablet and car are her number one priorities. She does not have a home phone. Her tablet is what keeps her entertained during her chemo treatments and her car is her outlet to independence.</p>	<p>Solemar</p> <p>Ovarian cancer; formerly part of FGP</p> <p>Car and tablet are her lifeline – esp during chemo</p> <p>Insurance increased – paid in full 9/10; w/o insurance payment MEB would be \$95</p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Continuation of phone/tablet service \$90</li> </ul> <p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ Invoice 23-24 Car insurance \$933.30 from Geico</li> </ul>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Continuation of phone/tablet service \$90</li> </ul> <p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ Invoice 23-24 Car insurance \$933.30 from Geico</li> </ul>
<p><b>BENE# 18-19/24</b></p> <p><b>Sampson, Janet</b> 77 y/o; 9/29/1945 <b>Income: \$1,056 sub</b></p> <p><b>ARAW support \$15,407:</b> <b>Reoccurring:</b> Cable/phone/internet \$147 '19, Electric \$25 '22 <b>Gifts:</b> AAA \$98 '20 &amp; 22, Car ins \$1,200 '20-22, Car repair \$1,265 '22 &amp; \$1,407 '21, Glasses \$218 '21, Holiday \$150 '19-22 <b>FLO:</b> Gift card <b>Discontinued:</b> Food card \$50 '18-20</p> <p><b>MEB: \$89</b></p> <p>ARAW: Pat</p>	<p>"Everything is so expensive. I cannot believe the prices. I am grateful for the help provided by the ARAW. My highlight of the week is babysitting the 2 boys who are so delightful. And yes, I watch them for free as I love the entertainment."</p>	<p>Bayberry</p> <p>Helps family b/c it gives her a sense of purpose; difficult childhood in orphanage</p> <p>Health improving; sells yarn she makes</p> <p>2 credit cards of \$4k+ each; only one disclosed at last visit; one mainly for gifts for family</p> <p>Cash advance/ question as to whether son has paid off sofa purchase</p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Continuation of cable/phone/internet \$146</li> </ul> <p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ Statement Balance of Discover card \$3,987.92</li> </ul>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Continuation of cable/phone/internet \$146</li> </ul> <p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ Statement Balance of credit card \$4,285</li> </ul> <p style="text-align: center;"><i>Participation in the Financial Empowerment Workshops and financial counseling strongly encouraged</i></p>

## ARAW BENEFICIARY REQUEST: SUMMARY

SEPTEMBER 2023 | VER 9/8/23

Beneficiary	Biggest Concern	Notes	Specific Request	Questions/Comments
<p><b>BENE# 15-16/05</b></p> <p><b>Fragata, Maria</b> 87 y/o; 10/30/1934 <b>Income: \$1,576 H</b></p> <p><b>ARAW support \$29.997:</b> <b>Reoccurring:</b> BCBS \$226.29 '15, EPERS \$51.95 '19 <b>Gifts:</b> Glasses \$690.77 '21 &amp; \$470.40 '18, Water bill \$559 '18-19, Dental \$5,714 '17-23, Holiday \$100-150 '15-22</p> <p><b>MEB: \$203</b></p> <p>ARAW: Ana</p>	<p>Per Maria, she cannot afford to pay for her dental cleaning and x-rays.</p>	<p>Increased memory loss – no longer drives; has not yet applied for SNAP – will contact FCOA; will look into dental insurance with help of FCOA SHINE</p>	<p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ <b>Estimate</b> Dental \$180 (appt 8/7/23)</li> </ul>	<p>Approved EDDF</p>
<p><b>BENE# 22-23/34</b></p> <p><b>Letourneau, Diane</b> 80 y/o; 7/12/1943 <b>Income: \$1,144 sub</b></p> <p><b>ARAW support \$1,287:</b> <b>Reoccurring:</b> Cable/phone/internet \$165 '23 <b>Gifts:</b> CC \$957 '23 <b>FLO:</b> Soup, Gift Card, Luncheons, Lottery, Holiday</p> <p><b>MEB: \$5</b></p> <p>ARAW: Pat</p>	<p>"I need shoes with a Velcro closure. The laces have become too difficult for me. I bought my last pair of shoes from Harves but I cannot afford those prices any longer. I only get \$72/month &amp; I need to pay for my haircuts, underwear, magazines &amp; snacks. That doesn't leave me with much money unfortunately."</p>	<p>Brandon Woods, Dartmouth</p> <p>Made conscious decision to move to BW after stay for rehab – increased falls, anxiety and mental physical concerns</p> <p>Only \$72 available to her each month – cannot afford replacement shoes</p>	<p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ <b>Estimate</b> Shoes \$129 from Harves</li> </ul>	<p>Approved EDDF</p>



# ARAW BENEFICIARY REQUEST: SUMMARY

SEPTEMBER 2023 | VER 9/8/23

Beneficiary	Biggest Concern	Notes	Specific Request	Questions/Comments
<p><b>BENE# 24/08G</b></p> <p><b>Evora, Sandra</b> 65 y/o; 3/15/1958 <b>Income: \$1,129 sub</b></p> <p><b>ARAW support \$429.14:</b> <b>Gift:</b> Laptop \$429.14 '23</p> <p><b>MEB: \$206</b></p> <p>ARAW: Pat</p>	<p>"My electric bill is through the roof. I've been on continuous oxygen for a year &amp; my bill is out of control. I went on a budget plan before I was hospitalized &amp; I missed a payment. Now I'm on the NewStart program &amp; the electric company wants \$210/month. I can't afford that. I will never catch up so I don't send any money as the amount just keeps increasing. PACE told me not to worry about the balance as I can't be shut off. But I do worry."</p>	<p>Unable to ambulate or perform basic ADLs w/o exhaustion; Oxygen 24/7</p> <p>Refuses EPERS b/c son is NYPD; daughter is RN</p> <p>Electric cannot be shut off; is not paying bill – does not see point</p> <p>MEB explained by need to buy things</p> <p>LTC recommended by medical team but refused</p>	<p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ <b>Bill</b> Outstanding electric balance \$1,859.51</li> </ul>	<p><i>The Committee chose not to approve this request. As there is no risk that the electricity would be shut off, it was not deemed a necessity. If anything were to change (at risk of shut off or faced with a move), please return to us with a request.</i></p>
<p><b>BENE# 22-23/11</b></p> <p><b>Burke, Shauneen</b> 66 y/o; 10/22/1956 <b>Income: \$1,407 H</b></p> <p><b>ARAW support \$1,407:</b> <b>Reoccurring:</b> Demand Response \$50 '22 <b>Gifts:</b> Dental \$600 '22, Holiday \$150 '22 <b>FLO:</b> Plant, Soup, Lottery, Tickets, Gift Card</p> <p><b>MEB: \$114</b></p> <p>ARAW: Pat</p>	<p>"I have to stop using my credit cards. The interest rates are ridiculous. I used my stimulus &amp; circuit breaker checks on my credit card balances but I still have to charge every month. Thank goodness for my son who helps me every month. I think about selling my house but I will lose my MassHealth &amp; furthermore, where will I go? I know that apartments are hard to come by these days. I am stuck."</p>	<p>Not happy w/ Board's decision; multiple convos with BA &amp; ED; appealing &amp; requests payment of interest; submitted letter on her behalf with inaccuracies: "does 1x CC debt", "too many requests", Pat told her "pay minimum" &amp; therefore incurred interest... after decision paid over \$1000 in credit debt (&amp; put another \$1238 on her cards). Where did that \$\$\$ come from?</p>	<p><b>Gift:</b></p> <ul style="list-style-type: none"> <li>▪ <b>Statements</b> Credit card interest, 3 cards for 2 months, total \$116.20</li> </ul>	<p><i>The committee chose not to approve this request. An approval is never a guarantee and we always tell beneficiaries they need to proceed in their own best interest. Also, given that there was a substantial payment made after the decision was conveyed gives the impression that there are funds available and/or other resources available. Financial counsel is again recommended.</i></p>

## ARAW BENEFICIARY REQUEST: SUMMARY

SEPTEMBER 2023 | VER 9/8/23

Beneficiary	Biggest Concern	Notes	Specific Request	Questions/Comments
<p><b>BENE# FLO-23E</b></p> <p><b>Pereira, Maria</b> 76 y/o; 3/22/1947 <i>Income: \$1,585   sub</i></p> <p><b>ARAW support \$3,099:</b> <b>Gift:</b> Dental \$1,615 '21, Fridge \$716 '21, Glasses \$468 '20, Holiday \$150 '20-21 <b>FLO:</b> Holiday</p> <p><b>MEB: \$226</b></p> <p>ARAW: Ana</p>	<p>Recent car repairs &amp; knowing she might not have a car in a few years. She cannot afford a car payment &amp; has been isolated at home. Her television is her entertainment &amp; has recently had to down grade plan as she could not afford plan she had.</p>	<p>Portuguese speaking</p> <p>Not interested in CES; worries about everything; car repairs have depleted her funds – car is her independence; not eligible for SRTA DR and scared of public trans</p> <p>D/c cable be/c of cost – loves Hallmark channel</p>	<p><b>Monthly:</b> Cable/phone/internet \$200</p>	<p><i>The committee chose not to approve this request as there appears to be ample funds at the end of the month. We would like to revisit the situation in 4-6 months.</i></p>

# ARAW BENEFICIARY UPDATE: SUMMARY

SEPTEMBER 2023 | VER 9/8/23

Beneficiary	Biggest Concern	Notes	Current Support	Questions/Concerns
<p><b>BENE# 21-22/08</b></p> <p><b>Guy, Nancy</b> 86 y/o; 4/11/1937 <b>Income: \$1,568  sub</b></p> <p><b>ARAW support \$2,792:</b> <b>Reoccurring:</b> Cable/phone/internet \$275 '23, EPERS \$51.95 '22, Demand Response \$25 '21 <b>Gifts:</b> Holiday \$150 '22 <b>FLO:</b> Plant, Luncheon, Gift cards, Lottery, Ice cream, Holiday</p> <p><b>MEB: \$279</b></p> <p>ARAW: Ana</p>	<p>“Right now my kids are my worry, other than that if you are asking financially, ARAW support allows me to not worry and for that I am grateful.”</p>	<p>Melville Towers</p> <p>Former FLO/WCAP</p> <p>Questions around high credit card bill (BOA) – “ok” with high balance, pays what she can</p> <p>How is MEB used?</p> <p>Daughter in hospital; getting out and about and entertainment at home very important to her; EPERS provides safety while on her own.</p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ SRTA Demand Response, 1 book \$25</li> <li>▪ EPERS \$51.95</li> <li>▪ Cable/phone/internet \$275</li> </ul> <p>Monthly total: \$351.95</p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ SRTA Demand Response, 1 book \$25</li> <li>▪ EPERS \$51.95</li> <li>▪ Cable/phone/internet \$275</li> </ul>
<p><b>BENE# 19-20/31</b></p> <p><b>Huezo-Mendoza, Sonia</b> 83 y/o; 2/17/1940 <b>Income: \$367  sub</b></p> <p><b>ARAW support \$7,490:</b> <b>Reoccurring:</b> Cable \$91 '20, Food GC \$120 '19, Charlie Card \$20 '19 <b>Gifts:</b> Rent \$118 '21, Holiday \$150 '2022 <b>FLO:</b> Gift card</p> <p><b>MEB: \$55</b></p> <p>ARAW: Ana</p>	<p>“Not have the right insurance to see my doctor &amp; having to pay co-pay of \$50 for a specialist &amp; I cannot afford it.”</p>	<p>Tripp Towers (Spanish speaking)</p> <p>SCCLS could not extend work visa; Referral to IAC for SHINE (MH no longer active); not eligible for SNAP “cannot survive on my own”</p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ SRTA Charlie Card \$20</li> <li>▪ Stop &amp; Shop gift card \$120</li> <li>▪ Cable \$91</li> </ul> <p>Monthly total: \$231</p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ SRTA Charlie Card \$20</li> <li>▪ Stop &amp; Shop gift card \$120</li> <li>▪ Cable \$91</li> </ul> <p><i>Encouraged to contact CEDC for SHINE (Spanish speakers)</i></p>

## ARAW BENEFICIARY UPDATE: SUMMARY

SEPTEMBER 2023 | VER 9/8/23

Beneficiary	Biggest Concern	Notes	Current Support	Questions/Concerns
<p><b>BENE# 19-20/05</b></p> <p><b>Polek, Regina</b> 72 y/o; 12/26/1950 <b>Income: \$1,115 H</b></p> <p><b>ARAW support \$15,842:</b> <b>Reoccurring:</b> BCBS health \$695 '19, BCBS dental 116 '19 <b>Gifts:</b> Couch \$919 '19, Car repair \$1,108 '19, Rx Ins \$34 '19, Holiday \$150 '19-22 <b>FLO:</b> Gift cards, Soup, Lottery, Umbrella</p> <p><b>MEB: \$207</b></p> <p>ARAW: Pat</p>	<p>"I am most grateful to the ARAW for paying my BCBS premium. This eases my mind tremendously, especially in light of my diagnosis of cancer in the past. I am provided with peace of mind. Thank you."</p>	<p>Lives with sister in order to get by; history of cancer – health insurance particularly comforting</p>	<p><b>Exception:</b></p> <ul style="list-style-type: none"> <li>▪ Continuation to living alone guideline</li> </ul> <p><b>Quarterly:</b></p> <ul style="list-style-type: none"> <li>▪ BCBS Health insurance \$695.19</li> <li>▪ BCBS Dental insurance \$116.16</li> </ul> <p>Monthly total: \$270.45</p>	<p><b>Exception:</b></p> <ul style="list-style-type: none"> <li>▪ Continuation to living alone guideline</li> </ul> <p><b>Quarterly:</b></p> <ul style="list-style-type: none"> <li>▪ BCBS Health insurance \$695.19</li> <li>▪ BCBS Dental insurance \$116.16</li> </ul>
<p><b>BENE# 21-22/10</b></p> <p><b>DeBrosse, Sezaltina</b> 75 y/o; 3/19/1948 <b>Income: \$1,000 sub</b></p> <p><b>ARAW support \$2,345:</b> <b>Reoccurring:</b> Cable/phone/internet \$193 '22 <b>Gifts:</b> Movers \$300 '20, Holiday \$150 '20 &amp; 22 <b>FLO:</b> Holiday</p> <p><b>MEB: \$351</b></p> <p>ARAW: Ana</p>	<p>"I worry I am not safe in my apartment. I have my son who is schizophrenic &amp; bipolar &amp; off his meds who comes by to put me down &amp; make me feel unsafe. Then there is my guy friend who moved in a street over who has been stalking me."</p>	<p>Had to purchase new tv when son took her tv; considerable credit card debt – working to pay off</p> <p>No longer has rides to grocery store – goes to shop with best sales</p> <p>TV her companion now that she is at home most of the time</p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Taxi voucher, 1 round trip to Stop &amp; Shop, Shaw's or Walmart \$30</li> <li>▪ Cable/phone/internet \$193</li> </ul> <p>Monthly total: \$223</p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Taxi voucher, 1 round trip to Stop &amp; Shop, Shaw's or Walmart \$30</li> <li>▪ Cable/phone/internet \$193</li> </ul> <p><i>We want to ensure she feels safe in her home. Please let us know if there is anything we can do to help her feel safe.</i></p>

# ARAW BENEFICIARY UPDATE: SUMMARY

SEPTEMBER 2023 | VER 9/8/23

Beneficiary	Biggest Concern	Notes	Current Support	Questions/Concerns
<p><b>BENE# 06-07/03</b></p> <p><b>Bissonnette, Alice</b> 81 y/o; 10/9/1941 <b>Income: \$1,625   sub</b></p> <p><b>ARAW support \$59,742:</b> <b>Reoccurring:</b> BCBS 687.21 '06 <b>Gifts:</b> Car loan \$1,625 '22, Car repair \$1,254 '21, \$661 '20, 225 '19 &amp; \$725 '18, CC \$725 '12, Dental \$1,505 '16, \$1,600 '11, \$1,760 '10, \$700 '09 &amp; \$1,000 '08, Hearing aids \$4,200 '21, Holiday \$100-150 '07-22 <b>FLO:</b> Soup, Gift Card</p> <p><b>MEB: \$207</b></p> <p>ARAW: Ana</p>	<p>“What worries me the most is the ARAW won’t pay for my health insurance anymore. I am getting older &amp; I need good insurance.”</p>	<p>McGann Terrace</p> <p>Feels she needs new car</p> <p>Thinks building maintenance is coming into apt and car and stealing things; working with FPD</p> <p>Purchased new tires on CC; open MMP classes; high food</p> <p>EPERS thru insurance</p>	<p><b>Quarterly:</b></p> <ul style="list-style-type: none"> <li>▪ BCBS \$687.21</li> </ul> <p>Monthly total: \$229.07</p>	<p><b>Quarterly:</b></p> <ul style="list-style-type: none"> <li>▪ BCBS \$687.21</li> </ul>
<p><b>BENE# 12-13/18</b></p> <p><b>Ventor, Rosalie</b> 85 y/o; 7/29/1938 <b>Income: \$1,472   H</b></p> <p><b>ARAW support \$32,960:</b> <b>Reoccurring:</b> BCBS \$687.21 '12 <b>Gifts:</b> Hearing aids \$3,600 '19, Dentist \$2,800 '14, Holiday \$100-150 '13-22 <b>FLO:</b> Survey, Gift card</p> <p><b>MEB: \$241</b></p> <p>ARAW: Ana</p>	<p>“I don’t have any additional needs. ARAW support of my insurance premium gives me relief and is such a help for me. I do worry a lot about being lonely all the time.”</p>	<p>Spends 4 months of the year in FLA with son – monthly costs are based on 8 months of expenses</p> <p>Confusion of last year cleared up – past medication issues</p> <p>Savings and Reverse mort \$ for emergencies</p> <p>2 lots – only one with a home</p> <p>Lonely – BM friend?</p>	<p><b>Quarterly:</b></p> <ul style="list-style-type: none"> <li>▪ BCBS \$687.21</li> </ul> <p>Monthly total: \$229.07</p>	<p><b>Quarterly:</b></p> <ul style="list-style-type: none"> <li>▪ BCBS \$687.21</li> </ul>

# ARAW BENEFICIARY UPDATE: SUMMARY

SEPTEMBER 2023 | VER 9/8/23

Beneficiary	Biggest Concern	Notes	Current Support	Questions/Concerns
<p><b>BENE# 14-15/03</b></p> <p><b>Fields, Beverly</b> 81 y/o; 1/24/1942 <b>Income: \$1,253   sub</b></p> <p><b>ARAW support \$16,713.81:</b> <b>Reoccurring:</b> Personal care \$60-200 '14 <b>Gifts:</b> AC \$324 '20, Groceries \$53 '20, Car repairs \$702 '18 &amp; \$500 '15, CC \$311 '14, Shoes \$165 '13, Holiday \$100-150 '14-22</p> <p><b>MEB: \$354</b></p> <p><i>ARAW: Ana</i></p>	<p>"Nothing worries me right now except not waking up in the morning." Appreciates continued support with personal care products from ARAW.</p>	<p>Taber Mills</p> <p>Reduction in savings d/t car repair and credit card payoff - \$6,200+ in checking last year</p> <p>Very involved socially at Taber Mill; has lost a considerable amount of weight – not sure why; supportive family</p> <p>EPERS provided thru CES</p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Personal care products up to \$170 from Westport Apothecary</li> </ul> <p>Monthly total: \$170</p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Personal care products up to \$170 from Westport Apothecary</li> </ul>
<p><b>BENE# 17-18/22</b></p> <p><b>Costa, Barbara</b> 76 y/o; 7/10/1947 <b>Income: \$1,043   sub</b></p> <p><b>ARAW support \$10,291:</b> <b>Reoccurring:</b> Taxi \$50 '18, Cable/phone/internet \$215 '20 <b>Gifts:</b> Moving \$150 '23, Clothing \$46 '20, Holiday \$150 '18-22 <b>FLO:</b> Gift cards</p> <p><b>MEB: \$118</b></p> <p><i>ARAW: Pat</i></p>	<p>"I am getting used to my new apartment. I have more unpacking to do &amp; my PCA is supposed to be helping me. I had to get new stuff to hang my clothes &amp; to organize my bathroom. As you can see, there is little closet space. But, I love the neighborhood &amp; Seline loves the fenced in yard. The head of Section 8 told me if Jeff ever stays here I will lose my Section 8 voucher. I cannot afford to lose that so Jeff is not welcome here except for short visits. His daughter Julie is my PCA &amp; she lives right up the street."</p>	<p>Relocated in July; switch in PCA d/t complex situation BEPS involved – seems to be resolved</p> <p>MB for grocery shopping and cable for engagement and entertainment</p> <p>Fresh Start helping supply furniture and CES helping with tech needs</p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Cable/phone/internet \$216</li> <li>▪ Taxi vouchers, 2 round trips to Market Basket \$50</li> </ul> <p>Monthly total: \$266</p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ Cable/phone/internet \$216</li> <li>▪ Taxi vouchers, 2 round trips to Market Basket \$50</li> </ul>

## ARAW BENEFICIARY UPDATE: SUMMARY

SEPTEMBER 2023 | VER 9/8/23

Beneficiary	Biggest Concern	Notes	Current Support	Questions/Concerns
<p><b>BENE# 22-23/19</b></p> <p><b>Sampson, Louise</b> 82 y/o; 9/24/1940 <b>Income: \$2,277   H</b></p> <p><b>ARAW support \$1,590:</b> <b>Reoccurring:</b> Social day \$80-180 '22 <b>Gifts:</b> Holiday \$150 '22</p> <p><b>MEB: \$202</b></p> <p>WCOA: Susan</p>	<p>Mrs. Sampson is most worried about having to make repairs to the house. "I don't have the money." Mrs. Sampson says what would be most helpful is "I would love to keep going to school (Social Day Program) if I can, if the tuition is still available."</p>	<p>Lives with daughter and grandson; legally blind; daughter assists with all</p> <p>Daughter has no income has filed for disability; unable to work since March 2023</p> <p>Phone therapy for depression</p> <p>Son? Age? Job? Contributions?</p>	<p><b>Exception:</b></p> <ul style="list-style-type: none"> <li>▪ Continuation to living alone guideline</li> </ul> <p><b>Weekly:</b></p> <ul style="list-style-type: none"> <li>▪ Social day, 2 days, \$40/wk</li> </ul> <p>Monthly total: \$160-200</p>	<p><b>Exception:</b></p> <ul style="list-style-type: none"> <li>▪ Continuation to living alone guideline</li> </ul> <p><b>Weekly:</b></p> <ul style="list-style-type: none"> <li>▪ Social day, 2 days, up to \$70/week to cover decrease in WCOA scholarship</li> </ul>
<p><b>BENE# 21/09EDDF</b></p> <p><b>O'Bara, Teresa</b> 68 y/o; 9/21/1954 <b>Income: \$1,260   R</b></p> <p><b>ARAW support \$1,183:</b> <b>Gifts:</b> AAA \$84 '22, Car repair \$240 '22, Mattress \$559 '21, Holiday \$150 '21-22</p> <p><b>MEB: \$90</b></p> <p>ARAW: Pat</p>	<p>"I am managing at this time. I am so grateful that the ARAW helped with my car repairs. Thank you."</p>	<p>Estranged from most of family</p> <p>High credit card balance – lower than reported last year – perhaps discrepancy; encouraged to call ES for payment plan \$1k overdue</p> <p>Wants to take part in FLO events; enjoyed Z show</p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ FLO participation</li> </ul>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ FLO participation</li> </ul>

## ARAW BENEFICIARY UPDATE: SUMMARY

SEPTEMBER 2023 | VER 9/8/23

Beneficiary	Biggest Concern	Notes	Current Support	Questions/Concerns
<p><b>BENE# 19/12G</b></p> <p><b>Silveira, Marie Lorraine</b> 82 y/o; 12/23/1940 <i>Income: \$1,127 sub</i></p> <p><b>ARAW support \$3,231:</b> <b>Gifts:</b> Car repair \$195 '23, GC \$50 '23, Recliner \$650 '22, Clothes \$200 '21, Gas &amp; Electric \$1,830 '19, Holiday \$150 '21-22 <b>FLO:</b> Luncheons, Lottery, Gift Card, Umbrella, Puzzle</p> <p><b>MEB: \$304</b></p> <p><i>ARAW: Ana</i></p>	<p>“My worry is getting back the money the DOR took from my account earlier this month.” Lorraine is working with SCCLS to see if she can get her money back from DOR. She said it was approximately \$600.</p>	<p>Accounts frozen d/t son’s overdue tax situation; working to rectify – in meantime no access to funds; SCCLS working to get fuds back</p> <p>FGP program brings much joy to her life</p> <p>Son couch surfing but put her S8 at risk; told need to find a home</p> <p>Loves art classes and FLO activities when FGP schedule allows her to attend</p>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ FLO participation</li> </ul>	<p><b>Monthly:</b></p> <ul style="list-style-type: none"> <li>▪ FLO participation</li> </ul>
<p><b>BENE# FLO-23E</b></p> <p><b>Miranda, Barbara</b> 82 y/o; 4/17/1941 <i>Income: \$990 ('22) sub</i></p> <p><b>ARAW support \$422: Gifts:</b> Cable/internet \$272 '21, Holiday \$150 '21 <b>FLO:</b> Plant, Lottery, Puzzle, Soup, Holiday</p> <p><b>MEB: Unknown</b></p> <p><i>ARAW: Pat</i></p>	<p>N/A</p>	<p>No needs and not interested in FLO</p>	<p>Make inactive</p>	<p>Make inactive</p>



## ARAW BENEFICIARY UPDATE: SUMMARY

SEPTEMBER 2023 | VER 9/8/23

Beneficiary	Biggest Concern	Notes	Current Support	Questions/Concerns
<p><b>BENE# FLO-23N</b></p> <p><b>Verissimo, Dalia</b> 71 y/o; 2/1/1951 <b>Income: \$901 ('22) sub</b></p> <p><b>ARAW support: FLO:</b> Holiday</p> <p><b>MEB: Unknown</b></p> <p>ARAW: Ana</p>	N/A	Unable to contact, letter sent 7/31/23	Make inactive	Make inactive
<p><b>BENE# FLO-23E-V</b></p> <p><b>Duarte, Bernice</b> 75 y/o; 2/7/1948 <b>Income: \$920 ('22) sub</b></p> <p><b>ARAW support \$3,438:</b> <b>Gifts:</b> Lift chair \$1,182 '22, TV \$95 '20, Furniture \$1,822 '19, Holiday \$150 '20-21 <b>FLO:</b> Gift card, Lottery, Puzzle, Holiday</p> <p><b>MEB: Unknown</b></p> <p>ARAW: Pat</p>	N/A	Multiple SLH and rehab stays, no call back since July, no needs	Make inactive	Make inactive

## ARAW BENEFICIARY UPDATE: SUMMARY

SEPTEMBER 2023 | VER 9/8/23

Beneficiary	Biggest Concern	Notes	Current Support	Questions/Concerns
<p><b>BENE# FLO-20E</b></p> <p><b>Correia, Patricia</b> 81 y/o; 12/9/1941 <i>Income: \$1,468 ('22) sub</i></p> <p><b>ARAW support: FLO:</b> Luncheon, Tickets, Holiday</p> <p><b>MEB: Unknown</b></p> <p><i>ARAW: Ana</i></p>	N/A	Unable to contact, letter sent 6/27/23 - no response	Make inactive	Make inactive
<p><b>BENE# FLO-22-E-V</b></p> <p><b>Boudreau, Jeanne</b> 91 y/o; 7/30/1932 <i>Income: \$1,496 ('22) NH</i></p> <p><b>ARAW support \$2,522:</b> <b>Gifts:</b> RE Taxes \$2,515.68 '19 <b>FLO:</b> Holiday</p> <p><b>MEB: Unknown</b></p> <p><i>ARAW: Pat</i></p>	N/A	Long term at The Royal in Fairhaven – no need	Make inactive	Make inactive

**ARAW Finance Committee Meeting | July 11, 2023**

**12:30 PM, ARAW Offices**

**Attending:** Cathy Mayall (Zoom), Pam McKnight, Angela Natho, Mary Ellis (Zoom), Clare Healy Foley (ED)

Guests: Jenny Costa, Peter Lamb (B&L), Michelle Driscoll (B&L)

**Excused:** D Laflamme, J Stankiewicz

This meeting was held at the request of the Finance Committee in order to have a presentation, review and discussion of the 2023 Financial Statement Draft as prepared by our accountants, Burke and Lamb.

As noted at the last meeting, some of the specifics and highlights are included in the Statement. In order to gain a greater insight into how the accountants developed details (unrealized loss, investment income, liquidity as it may affect fundraising) committee members had the opportunity to ask questions for clarity and greater understanding.

The Finance Committee agreed we are prepared to present the Draft 2023 Financial Statement to the entire board for a vote to approve and accept. This will be done at the July 13, 2023 meeting.

As a wrap-up discussion with the accountants, we discussed why we are currently not required to have full financial audits. Our recent and current financial stability and performance would not require an audit. It would be a costly and time-consuming process when a Financial Statement meets regulatory requirements. Changes that could move us to audit mode might include ED/major staff changes; large gifts; revenue greater than \$500,000; any decision to pursue obtaining a grant(s); or plans for a capital fundraising campaign. As long as we are aware of these possibilities as future triggers, we can continue with plans laid out in our most recent Strategic Plan.

Sincere thanks to all who were able to add this unscheduled meeting to their calendars. And a special thanks to Peter and Michelle for their time and insight. It is always helpful to meet in person with our knowledgeable vendors.

Meeting was adjourned at 1:36PM

Next Meeting: First Quarter Financial Review with BofA and IAC, Wednesday, July 26 at 9:30 AM.

Respectfully submitted,

Mary Ellis, Treasurer 7/14/23

## FINANCE COMMITTEE MEETING MINUTES

### JOINT MEETING WITH B OF A AND INVESTMENT ADVISORY COMMITTEE

JULY 26, 2023 | 9:30 AM

**Present:** D Laflamme (via Zoom), C Mayall, C Foley, P McKnight, A Natho

**Guest:** R Saber

**Excused:** M Ellis, J Stankiewicz

**Investment Advisory Committee:** K McQuiggan, H Ziegler, K O'Connell (via Zoom)

**Bank of America:** M Bennett, E Greene, S Clark

Per our goal established last year, this meeting was in-person with our Finance Committee, Investment Advisory Committee, and Bank of America portfolio management team. Its purpose was to review portfolio performance of the first quarter of our fiscal year (and second quarter of the calendar year).

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

Sarah (BOA) reviewed the key points of the portfolio review – highlighting individual performance, global performance, and expectations of future markets. Value of our holdings as of 6/30/23 is \$19,651,080 with a 4.3% quarterly return, and a 12.66% return for the year (net of fees), with both outperforming the benchmarks. The distribution is equities 69%, Fixed 15%, Hedge 13% and cash 3%

The primary drive of growth and profits was artificial intelligence, with energy, lab science, health care innovation and robotics. The “Magnificent 7” was responsible for 73% of the growth. Magnificent 7 = Apple, Microsoft, NVIDIA (artificial intelligence), Amazon, Tesla, Meta and Alphabet (essentially google).

#### **Looking Ahead**

The expectation is of a mild recession to begin at the mid-half of 2024. Feds are expected to increase rates again on 7/26/23, and follow with one more increase. Once the rate hikes stop, the interest rates may come down, but market volatility is expected.

Sarah discussed the effects of inflation. Homeowners have been in a good position, as not affected by increasing interest rates, yet “renters” have watched their rental rates rise significantly. Travel is booming. Consumers are still spending. However, how long will that last...student loans will again need to be paid, baby boomers will be selling houses at higher interest rates, etc. Tech companies have “hoarded cash” and have strong balance sheets, but will their earnings keep up with inflation? Flat growth is the expectation of 2024.

Our current portfolio is well diversified. The opportunities will come via long-term strategies. The US is the preferred equity region due to volatility, though geopolitics will play a significant role in the markets – the upcoming US elections, Taiwan, China, Ukraine.

The recommendation was to make no significant changes at this time.

**Other Issues-**

Clare brought up the issue of inconsistency between the documented investment income between 3/30/22 and 3/30/23- \$760,696 and \$462,325. The IAC was surprised by the \$760,696 of 2022. This issue will be analyzed further, and the results will be reported back to the committee.

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

Next Meeting: TBD at 174 Union Street

Next Finance Committee Meeting: Tuesday, September 19<sup>th</sup>

Respectfully submitted,

Cathy Mayall

Assistant Chair, Finance Committee