

**The Portuguese American Citizenship Project**  
**A non-partisan initiative to promote citizenship and civic involvement**

LUSO-AMERICAN  
FOUNDATION

September 20, 2008  
940 Veterans Memorial Parkway  
East Providence, RI 02915

Dr. Rui C. de Machete  
President – Executive Council  
Luso-American Development Foundation  
Lisbon, Portugal

Dear Dr. Machete,

This report for the period July 1, 2008 through September 20, 2008 is submitted in accordance with Paragraph 6 of “The Agreement for Services to the Citizenship Action Program”, with the Luso-American Foundation. A redacted copy of this report will be sent to the members of the Board of Directors of the Portuguese American Citizenship Project, Incorporated.

**Part 1** is a summary of the activity and progress arising during the thirty-ninth quarter of the program implementation and my third quarter of participation as Project Advisor.

**Part 2** is in accordance with the November 2007 agreement between the Luso-American Foundation and me, this final report along with the reports submitted by me to you on April 8, 2008 and July 30, 2008 represent my requirement to assess and opine on the present status and future of the Portuguese American Citizenship Project.

**Part 3** (included only in the report to the Foundation) provides a breakdown of revenue and expenditures for both the administrative and travel budgets entrusted to me.

Our initial mutual objective was to plan for and implement the transfer of leadership of the *Project* from James McGlinchey to me in January of 2009. This transfer was contingent upon the agreement of all the parties at the end of 2008.

During the last several months, it became apparent that financial concerns were becoming a significant concern to the immediate and long term future of the *Project*. This coupled with the fact that I was presented with a very attractive opportunity to return to the government sector caused me to reassess my position. As a result, it is in my and my family’s best interest for me to return to government service, which I shall do commencing October 1, 2008.

(continued)

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I wish to take this opportunity to thank and commend you and the Luso American Foundation for your long and unwavering commitment to this *Project* and for the residual benefits it has brought to the Portuguese American communities the United States. Regardless of what direction this *Project* shall take in the future, you, the Foundation and all the participants can take great pride and satisfaction in the *Projects* accomplishments and successful ten year history.

In addition to the enclosed analysis, I have enclosed a financial report of all income and expenditures as it relates to funds advanced by the Foundation for travel and administrative expenses. Also enclosed is a check in the amount of \_\_\_\_\_, which represent the return of all unused funds.

Although our November 2007 agreement called for a 12 month term and related salary, (January, 2008 through December, 2008) said service and salary will terminate as of September 30, 2008.

I wish to thank you and the Foundation for all the courtesies extended to me during this period and to wish you much success with this *Project* and in all your future endeavors. If ever you feel that I can be of any service to you, please do not hesitate to contact me.

Sincerely,

Paul J. Tavares

Copies to:

Mr. Charles A. Buchanan Jr.

Mr. Mario Mesquita

Mr. Antonio Vicente

Mr. James McGlinchey

# **The Portuguese American Citizenship Project**

## **Part 1**

### **SUMMARY**

**July, 8, 2008,** I met with David Andrade, President of the Portuguese American Citizens Committee to discuss that organizations continued involvement with the *Project*.

**July 28, 2008,** I met with Father Robert Perrone of Sacred Heart Church in Pawtucket, RI. Father indicated that the percentage of Portuguese who attended and were registered at that church was now estimated at less than 10%. It was left that we would give it some thought and evaluate the continuation of the Project at that parish.

**July 31 2008,** I met with Father Joseph Escobar, Pastor of our Lady of the Rosary Church in Providence, Rhode Island, He reaffirmed that his parish would continue to participate and we made arrangement to get updated parish data. We assisted in transferring hard copy data to an Excel file.

**August 1 2008,** I met with Father Jose Rocha, newly named pastor of St. Anthony's Church in Pawtucket, Rhode Island. I explained the Citizenship Project to him and asked for the parishes continued participation. He wanted to speak to other pastors and we would see if they could participate for the November elections.

**August 5<sup>th</sup> through the 8<sup>th</sup>,** I was in McLean, VA with Jim McGlinchey, working on the data processing, voter reminder card preparation and other related work. We discussed at length the financial challenges facing the Foundation and thus the Project.

**August 15, 2008,** I met with Al Araujo and George Carvalho, Board Member and Legal Counsel, to discuss the Project in general but future challenges in particular.

# **The Portuguese American Citizenship Project**

## **Part 1**

### **SUMMARY**

**August 22, 2008,** I met with Portuguese Ambassador, Joao de Vallera and Mr. Jose Galaz. We discussed the future *Citizenship Project* and other general topics of interest. The Ambassador reaffirmed his commitment and support.

**September 2, 2008,** I and Jim McGlinchey met with Alda Petite and Fernando Rosa, both Board members of PALCUS. Mr. Rosa is also a member of the Citizenship Project Board and Ms. Petite is a former member. We discussed the possibility, benefits and challenges of merging the Citizenship Project with PALCUS. It was left that there were numerous details that would need to be resolved but that discussions should continue.

**September 3 & 4, 2008,** We prepared and mailed over 5000 voter reminder cards to Rhode Island voters for the September 9<sup>th</sup> Rhode Island primary election. They were for the following organizations: Saint Francis Xavier Church, Our Lady of the Rosary Church, Clube Amigos da Terceira, Portuguese Social Club and Clube Juventude Lusitana.

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**PART 2 - ANALYSIS**

HISTORY

In 1999, I first met with Mr. James McGlinchey who presented the concept and objectives of the newly created Portuguese American Citizenship Project, (*Project*). He solicited my support and direct participation. Due to my newly assumed duties in the State of Rhode Island I was unable to volunteer as a direct participant but I did indicate my interest and pledged my support. At that time, I offered that George Carvalho, who was serving as Legal Counsel to my office, continue to work with the *Project*. This led to recruiting Mr. Humberto (Al) Araujo, then president of the Portuguese American Citizen's Committee to become active in the *Project*. It should be noted that Mr. Araujo continues to serve on the *Project's* Board of Directors and Mr. Carvalho is still affiliated with the *Project* as Legal Counsel. Through these two Rhode Island representatives and from various visits with Jim McGlinchey, I was able to observe the continued progress and success of the *Project*.

In July of 2007, in an initial chance meeting with Jim McGlinchey, the thought of my becoming involved with the transition of *Project* was explored. This led to various additional conversations and ultimately to the following meeting in Lisbon.

In November of 2007, James McGlinchey and I met with the Executive Committee of the Luso-American Foundation to discuss a proposed transition and continuation plan for the Portuguese American Citizenship Project. This meeting concluded with the passage of the Foundation's "ACTA #568" and supporting Aide Memoire, (see addendums). In summary the plan called for a twelve month evaluation and transition period with the ultimate goal, subject to agreement by all parties, for a transition of the Project Coordinator's position from Jim McGlinchey to me in January 2009. It was also proposed that Jim McGlinchey would continue after January 2009, for a period, up to six months, as a paid Project Advisor.

During the last several months, it became apparent that financial concerns were becoming a significant concern to the immediate and long term future of the *Project*. This coupled with the fact that I was presented with a very attractive opportunity to return to the government sector caused me to reassess my position. As a result, I will not take the position of Project Coordinator and will leave the *Project* as of September 30, 2008.

As part of the transition plan, I was to evaluate and report my findings and opinions to the Executive Committee by November of 2008. The following represents said report.

### REPORT

The Portuguese American Citizenship Project is fast approaching its tenth year anniversary, February 1999 to February 2009. Thus, it is most appropriate that this milestone be used to assess the *Project's* past and consider its future. The fact that the *Project's* Coordinator wishes to retire and the fact that the financial obligations of the *Project* need to be evaluated with a goal and objective to be less financially dependent on the Luso American Foundation add to the timeliness and urgency of this analysis. The history, statistical activity and success of the *Project* have been well documented in previous reports by the Project Coordinator and therefore will not be repeated in this report.

### Commitment

The future of the *Project* is totally dependent upon the desires and level of commitment of all the stakeholders, both financially and other. The following evaluates present commitment, elements of the existing *Project* and suggested course of action.

### Stakeholders

Luso-American Foundation, Portuguese American Citizenship Project Board of Directors, Project Coordinator, Participating Organizations and the Community at large.

### Luso-American Foundation

The Luso-American's Foundation's ten year moral and financial support of this *Project* is a testament of their level of commitment. Their support has been both unquestionable

and unwavering from the very beginning. The success of this *Project* is a direct result of their initiative and continued sponsorship. Discussions with the Foundation's Executive Committee in November of 2007 indicated a need to lessen their financial support from the near 100% to somewhere in the 25% to 30% range. More recent perceptions of financial concerns have become a significant concern to the immediate and long term future of the *Project*.

**ACTION:** Clarification of the Foundation's over all financial commitment and position is required to establish any and all future course of action. An appropriate and reasonable time table to reach the financial objectives should be determined along with an assessment of the availability of financial support during the interim period. As the major financial stakeholder of this project, it is most appropriate to seek the Foundation's advice as to their vision of the *Project's* scope in the future.

#### PACP Board of Directors

The Board of Directors consists of a collection of highly regarded community activists who are committed to their respective communities and have a reputation and track record of being doers. The fact that they were all recruited to participate and agreed to do so is a credit to the *Project's* Coordinator. Their continued participation also speaks to the longevity and success of the *Project*. As with the Foundation, their advice and support is required and essential to the future success of the *Project*.

**ACTION:** At this time, the Board members need to candidly share their individual opinions and to indicate their future level of commitment to the *Project*. They also need to give an assessment of their individual community, including that community's appreciation of the *Project* and desire to continue to participate and financially support this *Project* in the future. With this information, along with direction from the Foundation, the Board can then collectively analyze, discuss and decide future actions.

#### Project Coordinator

The Portuguese American Citizenship Project is the brain child and last ten year passion of James McGlinchey. His individual commitment, hard work and enthusiasm are the *Project*. He solely possesses the institutional and technical knowledge along with the

experience that has evolved over the past ten years. Any continuation of the *Project*, with elements of its present activity, will require his participation as offered by him in his quarterly report to the Foundation dated August 30, 2008, (see addendum). This would address the short term needs of the *Project* but still leave the long term in question.

The near complete vesting of a *Project*, such as this one, in one individual can be a doubled edged sword. One side of the sword represents the success and longevity of the *Project*, rightfully attributed to the contributions of that individual, the other side is the challenge that the *Project* faces in continuing without that individual.

**ACTION:** A serious discussion is needed to evaluate the feasibility and probability of recruiting an individual who possesses the required skill set and attributes to take this *Project* forward. Those skills include, but are not limited to, advanced computer proficiency, knowledge of the Portuguese-American community, enthusiasm for the goals and objectives of the *Project* along with the ability to manage ongoing fundraising efforts.

#### Participating Organizations

The more than fifty religious, fraternal and community organizations located in five States are the participating organizations of the *Project*. Their individual knowledge and actual involvement in the workings of the *Project* vary greatly. At one end, you have organizations that truly understand and appreciate the value of the *Project*. At the other end you have organizations that are unknowing beneficiaries whose levels of knowledge and appreciation are questionable.

**ACTION:** An evaluation of each organization is necessary to determine their continued participation and to assess their level of support, both financial and other. Participating organizations should be requested to and should be willing to shoulder some if not all of their related expenses.

#### Community at large

As with the participating organizations, the knowledge and appreciation of this *Project* varies greatly in the community at large. A *Project* such as this requires constant media attention with public information and public relations efforts.



**ACTION:** A very significant public information and relations effort will be required should the *Project* continue. As stated in previous quarterly reports, the advantages of an ongoing and aggressive media campaign are as follows:

- It informs the community at large of the *Project* and its success
- Publicity will acknowledge all the participants and their contributions
- It may encourage other communities and organizations to participate
- It will reinforce with the elected and political community the impact of the *Project* and the value and political strength of the Portuguese American community
- It will assist in the ability to raise funds for the support of the *Project*

#### Data Processing

As stated in previous quarterly reports, presently there is a total dependency on centralized computer data processing. Voter identification, community and organization member identification, voter reminder cards, voter turnout and final election analysis are the functions presently processed centrally. The Project Coordinator, with much experience, has established an efficient system to process these high volumes of work. Presently to complete the data processing there is an extensive use of and the need for proficiency with *Microsoft Excel*, *Microsoft Access* and the unique software created for this *Project*, “Data Fixer”. Data from the participating organizations come in all forms, from hard copy paper lists to computerized data. Knowledge of how to convert and capture this information is required to facilitate the data processing.

#### Voter Reminder Cards

A central theme and function of the “Data Processing” is the producing and mailing of “Voter Reminder Cards” to the individual and household members of participating organizations that are registered to vote. Years of historical experience and measurement within the *Project* indicates that when this activity occurs those participating organizations have a higher voter turnout rate than the community at large. This increased voter participation should equate to greater political strength, especially if this information is well known to the elected officials and the political community. The results of “Voter Reminder Cards” can and should be measured from time to time by test

mailings and non mailings. A desired result would be that increased voter turnout would be ingrained in this community and continue even without reminder cards.

The “Data Processing” and “Voter Reminder Cards” have a dual function. In addition to increasing voter participation, it presently serves as the primary link and foundation of the *Citizenship Project* with the member organizations and the various constituencies. It is from this function that the relationship is established and future activity can be added.

Centralized data processing has both positive and negative aspects which are as follows:

#### Positive

- Efficient processing of high volumes of work
- Centralized computer knowledge and access
- Consistent and accurate work product
- Safe guarding of participants data
- Integrity of analysis

#### Negative

- Project dependency on one individual
- Labor and financial requirements born by *Project* vs. Participants
- Disengagement of participating organizations

**ACTION:** Considerable attention is necessary to guarantee the efficient continuation of this service and to avoid future interruptions. Various options should be explored as how best to proceed and transition in this area taking into consideration the above mentioned concerns.

#### Fund Raising

It is always a challenge to change long standing practice. Such is the case in currently raising funds to support or defray the costs of this *Project*. For almost ten years, the lion’s share of financial support has come from the Luso-American Foundation with little or no demands made to the participating organizations or beneficiaries of the *Project*. On the contrary financial grants were used as a method to entice participation. In addition, the knowledge and appreciation of the *Project’s* work varies greatly in the prospective donor community. This impacts the present ability to solicit financial support. It should be noted that in a recent attempt to solicit financial support from a Portuguese American

businessman and known philanthropist we were flatly denied. Disheartening with that denial was the fact that this gentleman was the owner of a major communication outlet, a Portuguese language radio station. He seemed to possess little if any knowledge of the *Project*, which reinforces the above mentioned concern.

**ACTION:** Once the future and future scope of the *Project* is determined, a fund raising plan can and should be established and implemented. Success of the plan will depend greatly on the perceived value of the *Project*, the overall public awareness of the *Project* and involvement of the *Project's* Board of Directors. Elements of the fund raising plan must be incorporated with a media and public relations initiative and should include some or all of the following:

- Cost sharing by participating organizations, payment of postage or other in-kind services.
- Solicitation of political entities who are beneficiaries of larger voter turnout.
- Creation of a national data bank of individuals and entities that would be interested in the work of the *Project*.
- Creation of a newsletter which can serve to both inform and to also solicit financial support, utilizing the above mentioned data bank.
- Locally sponsored fund raising events and sponsorships
- Identification and solicitation of grants and or sponsorships from foundations, civic minded corporations, businesses and organizations.

#### OPTIONS

The future of the *Project* is totally dependent upon the desires and level of commitment of all the stakeholders, both financially and other. Several options should be debated and considered, consensus reached and then a plan of action devised and implemented. The following are just a few options and are listed in no particular order. All of these are contingent upon an interim plan which would require the participation of the present Project Coordinator, James McGlinchey.

#### Project Continuation

The *Project* could continue with interim participation by Jim McGlinchey as suggested by him in his August 30, 2008 quarterly report to the Foundation, (see addendum). A new Project Coordinator could be recruited and hired and a transition plan can be devised and implemented. All the stake holders need to be in agreement as to what the *Project* should look like going forward. It will be required to establish goals and objectives and define the future scope of the *Project*. Attention to financial matters is essential to address the Luso-American Foundation's need to lessen their financial support from the near 100% to somewhere in the 25% to 30% range.

In continuing the *Project* these two basic issues or challenges need to be addressed and resolved:

1. To address the financial concerns of the Luso-American Foundation, in addition to the Foundation's projected financial support, the *Project* will need to raise in excess of \$100,000.00 annually. Is this doable?
2. What is the feasibility and probability of recruiting an individual who possesses the required skill set and attributes to take this *Project* forward? Those skills include, but are not limited to, advanced computer proficiency, knowledge of the Portuguese-American community, enthusiasm for the goals and objectives of the *Project* along with the ability to manage ongoing fundraising efforts.

#### Project Merger

Exploration could be made into the value and viability of merging the *Project* with another organization. I give as examples, the Portuguese American Leadership Council (PALCUS) or the Portuguese Continental Union (PCU). Both organizations have national memberships and audiences and there may be some synergies in a merger. This is to be considered for a long term solution as it could take some time to analyze and implement the details of such a merger.

#### Project Conclusion

The Portuguese American Citizenship Project has enjoyed a remarkable ten year run. During that time it has engaged thousands of Portuguese Americans across five states in

the civic and electoral process. It has dispelled the notion that Portuguese don't vote and it has established a very efficient process to identify and contact voters in particular geographic areas who are affiliated with particular organizations. In addition, this data processing ability is the product of a computer program "Data Fixer" designed for and the unique property of the *Project*. With reaching this milestone, along with the fact that the *Project's* Coordinator wishes to retire, it would be an appropriate time to celebrate the *Project's* success and bring it to a close.

#### Project Independence

Upon bringing the *Project* to conclusion as mentioned above, all participating regions or organizations should be welcome and encouraged to continue with the *Project* independently. A transition and support plan could be devised to assist in this area. Consideration of creating information or instructive manuals and materials could be a one time initiative with a long lasting result. Those participants that chose to continue are those who appreciate the value of the *Project* and will be willing to make the commitment to make it work.

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