



Society of St. Vincent de Paul

Home Visit Tips and Best Practices

MANAGE EXPECTATIONS

- Reassure client that everything you discuss is confidential, but ask them if it is okay for you to talk to other agencies and vendors (i.e.: apartment manager, water company, etc.) on their behalf. If yes, have them sign a Client Release form.
- Explain that you are volunteers. It is important the client understands that you are not employed by the Society.
- Explain that you are not a trained Social Worker.
- Explain that you are not authorized to promise any financial assistance at that time. You will explain their situation to the conference members via email and will find out within a day or so if any financial assistance can be made.
- Explain the financial assistance guidelines set by your Conference. (i.e.: "If we are able to help you this time to our maximum, we won't be able to provide financial assistance again for 12 months.")
- Tell them when they can expect to hear back from you and contact them when you say you will.

INTERVIEW TIPS

- Ask what caused them to get behind and be a willing listener
- Be friendly and respectful – don't interrogate!
- Do not ask if they are a US citizen but you can ask if they have access to governmental assistance such as food stamps.
- Ask how they intend to cover their expenses next month – make sure their game plan is feasible.
- If the situation deems it, help the client face reality. Try to offer options – do they have family they can move in with until their finances can be stabilized? Be compassionate and understanding of their crisis.