



**OFFICE HANDBOOK VOL. 1 of 2**

**Operations and Assistance Guidance**

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## **1. Mission Statement & Objectives:**

### **Mission Statement**

Inspired by Gospel values, the Society of St. Vincent de Paul is a Catholic Lay Organization. Members Join together to grow spiritually by offering person-to-person service to those who are needy and suffering. Members follow the traditions of its founder, Blessed Fredric Ozanam and our patron, St. Vincent de Paul.

We exist to help those in need in our local community

### **Objectives**

- To do spiritual good to our members through the exercise of charity, and
- To do spiritual and temporal good to needy friends and families in the name of Jesus Christ



## **2. Basic Operating Guidance:**

**SVDP will refer to those we help as friends** (avoid the use of the term clients)

**Friends should be in the St. Patrick's service area or be a St. Patrick parishioner.** (See Zip Code Map)

**Friends living at the same address will be treated as one family**, with one set of records and receive help accordingly.

**Food should be provided at any time.**

**Every friend must have an index card** that indicates previous visits and assistance received. If it is a first visit, prepare a new index card for them.

**Every friend must have a file folder that includes at a minimum:** Photo ID, copy of lease or proof of residence, currently completed FDA form, an interview form for each visit... Other pertinent documents may be included as needed.

**Enter Assistance given each friend in the Interview Log.**

**There should be a minimum of 30 days between appointments** for a friend.

**For Spanish speaking friends you can make an appointment for either Tuesday or Thursday.** Spanish speaking volunteers are available on those days.

**Volunteers are expected to use their 'best judgement' in meeting the needs of our friends.**

### **References:**

**Appendix A:** Guidelines for Interviewer

**Appendix B:** General Telephone and Office Guidelines



### **3. Contact Information**

Reference On-line based on Access



Reference On-line based on Access



Reference On-line based on Access



Reference On-line based on Access





#### 4. Primary Documentation:

**a. Appointment Book:** This Binder is maintained on the appointment desk. It's used to recording appointments. Walk-ins who receive any kind of service are also recorded in this book.

**b. Case Report (Interview Sheet):** This is a form our friends fill out with their personal information and the interviewer uses to record information. Every friend who gets assistance must fill out this form. This includes walk-ins and home visits. The Case Report includes notes, assistance provided and is kept in the Friend's Folder.

**c. Friend's Folder:** This is a manila folder, labeled with the friend's name. A copy of ID on inside cover. It holds all the paper documents we have for an individual friend.

**d. Folder File:** This file cabinet is where the Friend's Folders are filed Alphabetically by last name. These cabinets must be locked whenever the office is not open.

**e. Index Cards:** Every friend who gets assistance must have an index card. The index card has a record by date of assistance provided. If a new friend does not show for an appointment, an index card must be created recording the no-show. The index cards are maintained in a box on the appointment desk.

**f. Interview Log:** A log is maintained by the interviewer. It includes the date and assistance provided for each friend seen. Log data is used in reporting to North Texas Council and North Texas Food Bank.

**g. USDA Form:** Required by the North Texas Food Bank for any friend that receives food. It must be filled out once every fiscal year (Oct 1 through Sept 30) and placed in the Friend's Folder. The outside of the folder is stamped with the fiscal year the USDA Form was completed.



## **5. Food & Personal Items (PI) Assistance:**

Food assistance, primarily from our in house pantry, is a major part of our mission. The North Texas Food Bank is the source of most of our food at tremendously reduced cost. Some additional items are provide by individual donation and/or through purchase at a local food outlet.

**We will always provide food to those who ask!**

The guidelines for food assistance are as follows:

### **Help Available at Appointments:**

- 3 bags of food per families of 3 or less
- 4 bags of food per family of 4 or more
- Personal Items
- 1 per individual every other month
- 1 per family each month

### **Walk-ins normally receive:**

- 1 bag for a single
- 3 bags per families of 3 or less
- 4 bags per family of 4 or more
- Personal Items are not normally provided

**Homeless:** Homeless should be processed and recorded exactly like walk-ins. The only difference is the physical support provided if an interview is not done:

- #5 bag of food & can opener
- Personal Items are not normally provided

**Volunteers are expected to use their 'best judgement' in meeting the needs of our friends, and where assistance exceeds guidelines document accordingly.**

**Outside Resources:** Office Handbook Vol. 2, Section 2 Food



## **6. Rental & Housing Assistance:**

**Assisting our Friends who have shelter needs is a vital part of our mission.** Guidelines have been established to help determine the direct assistance to be provided and the documentation required. (See: Guidelines for Interviewers, Handbook Vol.1, Appendix A). **\$150.00 is the upper guideline for providing assistance.** This assistance is normally available for consideration annually. Care should be taken in providing assistance on a recurring, multi year basis. In such instances a home visit may be required

**The friend should provide a late and/or eviction notice if one has been issued.** Assistance without a notice can be considered based on the situation and 'best judgement' of the volunteer(s) involved in help the friend.

**Where assistance exceeds the guidelines, volunteers should obtain an officer's concurrence and document the friends file accordingly.**

**The SVDP (Multi Use) Voucher Form should be used to document our commitment** to the friend in need; and provide them with the original and we should retain a copy for the friend's file.

Payment of rental assistance should be made directly to the Apartment Management Office and/or Owner (Where usually business remittance is made.). The check writer should document payment on the friend's index card, file, interview log and the W-9 log.

Friends receiving rental assistance from Section 8 and a Municipal Housing Authority are not eligible for assistance normally. (DHA Apartments are Audelia Manor & Hidden Ridge).

SVDP does not normally assist with associate expenses. (Move-In, Down Payment, Late Charge(s), Storage, Maintenance, Remodel).

**Outside Resources:** Office Handbook Vol. 2 Section 3, Rental and Housing Assistance,



## **7. Utilities (TXU & Reliant): Assistance Guidelines**

**Assisting our Friends with utility needs is part of our mission.**

Guidelines have been established to help determine the direct assistance to be provided and the documentation required. (See: Guidelines for Interviewers, Handbook Vol.1, Appendix A). **\$100.00 is the upper guideline for providing assistance.** This assistance is normally available for consideration annually. Care should be taken in providing assistance on a recurring, multi year basis. In such instances a home visit may be required

**SVDP only provides assistance for friends using TXU or Reliant Energy.** Both companies have established third party assistance procedures for pledging, initiated by phone call and they allow payment by check, mailed to a specific remit to address.

The friend should provide a shut off and/or disconnect notice if one has been issued. Assistance without a notice can be considered based on the situation and 'best judgement' of the volunteer(s) involved in help the friend.

**Where assistance exceeds the guidelines, volunteers should obtain an officer's concurrence and document the friends file accordingly.**

The SVDP (Multi Use) Voucher Form should be used to document our commitment to the friend in need; and provide them with the original and we should retain a copy for the friend's file.

The check writer should document payment on the friend's index card, file and interview log.

SVDP does not normally assist with any associate expenses. Examples include: Late Charge(s).

**Outside Resources:** Office Handbook Vol. 2, Section 4 Utility Assistance

**SEE NEXT PAGE FOR TXU AND RELIANT PROCESS:**



## **TXU:**

TXU has a special department for dealing with Agencies furnishing assistance to TXU customers.

The contact telephone number is **1-800-645-4601** (call to make pledge). You may call, make a pledge, ask questions, confirm payment status and make payment arrangements. They will ask for the name of the agency as well as the individual. **Pledges will halt any disconnect or shut off.**

**Note:** SVDP has provided a list of names who are authorized to make a pledge. If a volunteer's name is not on the list, but needs to be, request the name addition to one of the officers.

TXU fax number is **1-800-556-6753**. Normally, no fax information is required to make a pledge or payment.

Checks should be made out to TXU and mailed to:

**TXU  
PO Box 650257  
Dallas, Texas 75265-0257**



## **Reliant Energy:**

Reliant Energy has a Special Services department to handle 3<sup>rd</sup> party pledges. Contact Numbers:

FAX	<b>713-488-5469</b>
Toll-Free FAX	<b>866-367-0343</b>
Telephone:	<b>713-488-5914</b>
Toll-Free	<b>888-363-3574</b>

Emergencies (shut off/disconnects) can use the toll-free number to make a pledge. Otherwise, they prefer the fax for notification. **Pledges stop shut downs and disconnects.**

**Our unique organization number is 1376**

Checks should be made out to Reliant Energy Retail Services Inc. and mailed to:

**Reliant Energy Retail Services, Inc.  
P.O. Box 1046  
Houston, Texas 77251-1046  
Attention: Special Services**



## **8. Script (Walmart Gift Card) Assistance:**

**Providing Walmart gift cards (i.e. Script) is intended as a form of food assistance primarily.** The North Texas Food Bank generally provides dry goods for our pantry and the script allows friends to buy fresh food items from Walmart.

**Caution should be observed when being ask to provide script for medications and/or gasoline.** Only provide script these cases for emergencies and document in the file. These should be 'one time' not recurring instances.

Script is not always offered and the guidelines for script assistance are as follows:

### **Help Available at Appointments:**

**1 per individual**

**2 per family of 2 or more**

### **Walk-ins normally do not receive Script**

**Homeless:** Homeless should be processed and recorded exactly like walk-ins. **Script is not normally provided**

**Volunteers are expected to use their 'best judgement' in meeting the needs of our friends and where assistance exceeds guidelines document accordingly.**

**Outside Resources:** Office Handbook Vol. 2, Section 1 Food; Section 5 Transportation; Section 6 Medical



## **9. Transportation (Bus Pass) Assistance:**

**Transportation assistance can be provided in some instances in the form of bus passes.**

**It is usually provided if the individual does not have another form of transportation and/or a critical need is determined.**

**Examples of 'critical need'** include doctor appointments or job interviews.

**Bus Passes:** In most cases 1 or 2 bus passes should be sufficient. Additional buses passes require an explanation in the case report.

**SVDP does not normally provide assistance for gasoline**

**Outside Resources:** Office Handbook Vol. 2, Section 5 Transportation





## **10. Clothing & Furniture: SVDP Thrift Store(s)**

The two Dallas area SVDP Thrift Stores are the primary source of clothing and furniture. Costs are minimal. **In some cases a voucher may be obtained through our Thrift Store coordinator Gene Meysenburg.** If a voucher seems needed, Gene must be contacted and given the friend's name and phone number for follow up. For friends who do not speak English, please indicate that when requesting voucher follow up. Vouchers are valid for 30 days and can be requested every 6 months if required. A request does not necessarily mean automatic voucher approval.

### **SVDP's two Thrift Store Locations:**

Mon – Sat 10:00am to 7:00pm

Sun 11:00am to 6:00pm

- 1) 3052 W. Northwest Highway, Dallas 75220**
- 2) 3305 N. Central Expy Suite #280, Plano 75023**

**Clothing-** There is a large selection of pre-owned clothing (adult and children) to select from in both locations. **Vouchers for clothing range from \$40 for an individual to \$60 for larger families (the Thrift Store Coordinator usually makes the final determination).**

**Beds and Large Furniture-** Furniture is very limited in the Thrift Store. **These should be issued for emergency need such as fire, bedbugs or re-settling from a homeless condition. Try to get a verification from the apartment in the case of bedbugs. The Thrift Store coordinator should be contacted and lead this kind of assistance. A home visit may be required.**

**Outside Resources:** Office Handbook Vol. 2, Section 10 Clothing



## **11. Title Loans or Pay Day Loans:**

We may be able to help with payday loans of \$500 to \$2500. In rare cases, we can cover up to \$4000.

**Emergency loans** are sometime available. **Turn name and phone number over to either Bob Loshelder or Gene Meysenburg for follow up.**

**Outside Resources:** Office Handbook Vol. 2, Section 9 Other Support Organizations



## 12. SVDP Prescription Assistance:

If a friend has **NO HEALTH INSURANCE COVERAGE:**

St. Vincent de Paul Pharmacy may be an option for medications.

Qualification Requirements:

- No health insurance coverage
- Family income below 200% of the Federal Poverty Line
- Live in one of the following counties: Dallas, Collin, Ellis, Fannin, Grayson, Hunt, kaufman, Navarro, Rockwall
- Have a prescription for the medicine(s) you need

Call to Schedule an appointment: **469-232-8802**

Address:

**5750 Pineland Drive, Suite 280,  
Dallas, Texas 75231**

**Outside Resources:** Office Handbook Vol. 2, Section 6 Medical



### 13. Walk-Ins:

**Volunteers at the window, desk and the interviewer should work together to assure the walk-in is provided the necessary attention and where help is given that proper documentation is done.** An interview may be done if the situation warrants it. If an emergency need exists that needs to be addressed outside normal office guidelines contact Bob Loshelder or Andy Anderson.

Walk-ins normally receive:

1 bag for a single

3 bags per families of 3 or less

4 bags per family of 4 or more

*Note: As a guideline, walk-ins who are not interviewed do not receive scrip, bus passes, detergent or personal items.*

The following documentation should normally be done:

Complete Interview Sheet (place in friend's folder)

Complete Index Card

Entry in Interview Log

**Outside Resources:** Office Handbook Vol. 2, Section 2 Food



#### **14. Homeless:**

Homeless should be processed and documented in a similar manner as walk-ins.

1. Complete a Case Report (Interview Sheet)
2. A friend's folder and index card must be created
3. Homeless can be provided: #5 bag of food and can opener
4. If the Homeless person wants more than a #5 bag, they must be interviewed.

The following documentation should normally be done:

- Complete Case Report (Interview Sheet) and place in friend's folder
- Complete Index Card
- Enter into Interview Log

Refer to Section 13: Walk ins

Refer to Section 15: Emergences

**Outside Resources:** Office Handbook Vol. 2, Section 2 Food; Section 3 Rental, Housing & Homeless pages 11-12



## **15. Emergencies:**

**If a friend walks in or calls needing immediate help (i.e. eviction or electrical shut off), and is in our area and/or a parishioner, schedule an appointment for the same day if possible. Otherwise, contact either Bob Loshelder or Andy Anderson for follow up.**

**If the friend is not in our area or a parishioner, provide the contact information for their conference.** Care should be taken with regard to the critical nature of the need and contact

**Volunteers should use their 'best judgement' in meeting the needs of our friends.**

The following documentation should normally be done:

Complete Case Report (place in friend's folder)

Complete Index Card

Entry in Interview Log

**Outside Resources:** Office Handbook Vol. 2... Sections as needed



## **16. Home Visits:**

**Home visits can be called for in a number of different situations.** The following are procedures that cover most of the home visits we do.

**Home visits are normally done in the friend's home.** In rare cases, the visit may be at a public place like McDonald's or even in our office waiting room. Doing the visit in the friend's home helps us to understand the situation the friend is in.

**The team must consist of 2 SVdP members.**

**Schedule a convenient time for the friend.** Be sure the friend understands the reason for the visit. Confirm the scheduled time with the friend a couple of hours before the appointment.

**Take a Case Report form and a clipboard. The friend will fill that out.** Take a budget worksheet which you may or may not use. Be sure you have the correct address. Get the gate code. Ask how you find the apartment once at the front gate.

**When in the home, explain again why you are there. Then let the friend do the talking.** How did the friend get in the present situation? What help is needed? Does the friend have a way to avoid the situation next month? Do the budget analysis if appropriate. What other things that affect the family do we need to know?

**Clearly explain to the friend what will happen. We may decide what to do at the home visit, or we may have to get back to the friend for our decision after returning to the SVdP office.** Document the visit on the card file and on the interview log. Indicate on the intake form that this was a home visit and place it in a folder in the folder file.

**Outside Resources:** Office Handbook Vol. 2, Sections as needed