

**Society of St. Vincent de Paul**  
Toronto Central Council



**Serving**  
Longer-Term Clients

March 28/2005

# Serving Longer-Term Clients

## Person-to-person encounter

- The Rule and writings of Frederic Ozanam make it clear that he and his followers (then and now) were committed to giving much more than just **material goods** (perhaps food and coal in those days, vouchers, etc. now). He was calling them and us to a **dialogue** and **relationship** with the poor.
- He called them and us to give of our time, our gifts, our presence, and our spirit.
- Simply distributing vouchers would be much **easier and more efficient** but that's only part of what the work of Vincentians and the Society is about.
- Giving of one's time, gifts, concern, and hope can be:
  - exhausting
  - frustrating
  - disappointing
  - heartbreaking
  - time-consuming
  - seemingly useless, at times
  - challenging
  - anxiety producing
  - confusing
  - overwhelming
  - unsatisfying

That's why we consider our work as a **vocation** and not a hobby.

*"In the beginning, in Ozanam's time, it was expressed as "the visitation of poor people in their homes", which is regarded as the prototype of Vincentian activity. The sense of this must now be translated into more modern language. It is not simply a matter of being content with "almsgiving"; it is necessary to reach personal dialogue with those who suffer (no matter what the suffering is) without the slightest trace of paternalism, in an attitude of mutual trust, with respect for people and that sacred place, their home, with a sharing of friendship and reciprocity of service, with all the delicacy of love." (The Rule)*

**“Commentaries:** - *Sharing does not consist merely in the distribution of material goods; it also implies that all our personal resources and potential of mind and heart, of time and influence, are placed at the service of others.*

*Sharing means taking part in the joys and the sorrows, in the worries and the hope of others; it equally involves a readiness to accept help, suggestions, advice, encouragement and collaboration, however slight or ineffectual they may be.*

*Sharing means being willing to be disturbed. It is a sign of a true spirit of charity to be ready to share ideas and even to accept giving in on one of our own.”*

*“A ‘vocation’ is, in the wide sense, a call of the conscience enlightened by the grace of the Holy Spirit. To find oneself one day wanting to make the effort to become a "brother" (or "sister") of St. Vincent de Paul, or a "Vincentian" (however it is put according to place and language) is to translate into action a consequence of our Christian faith. It is not just the absolutely universal call of Christ to the spirit of charity. The specific characteristic of this call is the intimate desire personally and directly to participate in the service of the poor, by a contract between man and man, by a personal gift of the heart and friendship, and to do this in a brotherly community of lay people inspired by the same vocation.”*

*(The Rule)*

## Responding to the need

- The fact that “no work of charity is foreign to the Society” (Ozanam) is both an opportunity for us and a difficult challenge. It means:
  - We need to be able to assess different forms of need (physical, spiritual, psychological, mental);
  - We need to be creative in the nature and amount of the assistance we provide;
  - We have few set rules or procedures that tell us what’s appropriate in each situation;
  - There may be some discrepancy from conference to conference and client to client as to how a request is handled;
  - As individual Vincentians and as a Council, we must be open to new ways of serving those in need;
  - Our Society will serve those in need in a variety of ways, including home visits, shelters and homes (Special Works), stores and camp.
  - We’ll always be struggling with the question of whether we are giving too much or too little;
  - We need to improve our knowledge and skills on a regular basis so that we improve our ability to provide appropriate and effective assistance and support.

*“No work of charity is foreign to the Society. Its work, through a person to-person contact, encompasses every form of aid that alleviates suffering and promotes the dignity and integrity of mankind. The Society strives not only to alleviate need but also to discover and redress the situations which cause it. It serves everyone, regardless of creed, opinion, colour, origin or caste.”(The Rule, Schema 1, Art.4)*

- *“Study of the needs of those requiring assistance. This is done, not for the purpose of revealing or judging the failing or errors of persons assisted, but to seek out the best ways of helping them.” (The Rule – one item on the sample conference agenda)*

Effective encounter with those suffering in so many different ways is not only a question of thinking things out. There is also the need for training, knowledge, technique in social problems, the psychology of those who suffer frustration, and experience of direct contact with the unhappy. The Society of St. Vincent de Paul has a mission to develop this technique and, like all parts of the Church, to make itself and its members available wherever they can serve. (Pre-amble to the Rule)

## Assessing the need

- Although it becomes easy (but generally not helpful or just) to group all of our clients into **two or three categories**, the reality is that each client presents us with a unique life story, and with a one-of-a-kind set of values, beliefs, hopes, gifts, challenges, joys and sorrows, and baggage (stuff from their past that's slowing them down).
- If we respond to a client as a member of one of the two or three categories we've set up, then it becomes fairly easy to decide how to respond. Those that are "really in need" or "making an effort" get the assistance they ask for and need. Those that "are just working the system" or "who aren't doing a thing to improve their situation" get little or nothing. "Cut off" is a term one hears.
- Dealing with the client as an individual and as a person worthy of my respect, time and best efforts **requires that I:**
  - Empathize with their situation; that is, that I feel some of the pain or hopelessness or shame or depression or anger that they are feeling;
  - Get to know them a bit, so I can make well-informed judgments about how best to assist them; (making **judgments** is much different than being **judgmental**)
  - Learn about the programs and services and resources available in the community so I can give them information they want and need;
  - Ask God for the faith, hope, charity, strength and ability to serve them well.

How appropriately and effectively I assess a client's needs depends on a number of things, but none more than my mind set – that is, the beliefs and biases I bring to the challenge. For many Vincentians, this is especially challenging when working with **longer-term clients**.

# Longer-term Clients: Two Perspectives

## In Which Box Do You Feel Most at Home-Most of the Time?

### Perspective 1

- They've worked us into their budget;
- We're just another component of the government's Social Assistance;
- They don't seem to be making any effort to improve their circumstances;
- They sure know how to work the system – they know all the angles;
- They aren't even grateful for what I give them each month – they just want to grab the voucher and slam the door;
- Some people are never going to change. They are who they are. There's no point try to get them to improve;
- Some of the stuff they've got is better than what I have – how is that fair?
- I come from a country where there's **real** poverty - these people don't know how good they've got it;
- I thought we were supposed to be serving emergency needs – not long-term assistance;
- He actually lied to me – I can't stand a liar. He's cut off;
- It's too bad she didn't think about how tough it would be when she was busy getting pregnant 3 times with 3 different men;
- They've got it a little rough, but I had it rough too. Through determination and hard work, I did something with my life. I didn't get any free ride;
- Anybody in this country can make it – if they just get off their ass and apply themselves;
- They are obviously very content with their situation – otherwise they would do something about it;
- I can't continue to give handouts to these people and still feel like a good steward of the donated funds.

**X✓X✓X✓X✓X✓**

**OR**

**X✓X✓X✓X✓X✓**

## Perspective 2

- No matter how you slice it, they have very little left each month after the rent, food, and other essentials;
- People can't possibly live even a minimally decent life on what the government provides – we are filling a real gap in service;
- The depression and general sense of hopelessness and powerlessness that often is a part of poverty must make it very difficult to try to change things or to believe that you can;
- I was fortunate to grow up in a family where there was love, respect and hope. I can't imagine the abuse and neglect and discouragement that many of our clients must have experienced as they grew up;
- I believe everyone can make changes in their life – they just need the **right person** to offer the **right support and assistance** at the **right time** ;
- I see the voucher as entry ticket or as a conversation starter. I firmly believe that the love, respect and hope (and information, if appropriate) I bring to the client is far more important and more appreciated than the voucher (even though it may not always seem like it);
- Being there for the person (in spite of their lack of appreciation or seeming lack of effort) is why I became and remain a Vincentian. UPS can deliver vouchers;
- There will always be those that find it harder to cope with life's demands (because of upbringing, abuse, circumstances, abilities or addictions). We can look down on them and criticize them **or** see them as Christ would, acting on our faith and beliefs.
- I can continue to appropriately support and assist many of our longer-term clients and be confident I'm a good steward of the funds.

### **What's in the middle (the Xs & ✓s) that can either hinder us from moving from one box to the other or that can facilitate that move???**

#### **Some thoughts on the above chart:**

1. Those who feel right at home in the first box would probably not consider becoming a Vincentian in the first place;
2. The factors that help a Vincentian from moving from the second box to the first likely are:
  - Humility
  - Empathy
  - Compassion
  - Person-to-person experience with poverty and the poor
  - Faith
  - Hope
  - Charity
  - Prayer

**Would it be fair to say that a good Vincentian needs to feel most comfortable in the second box most of the time or should look for a different ministry?**

## Appropriate Limits

Traditionally, Conferences have used a great deal of discretion on deciding the amount and form of assistance in each case. Through prayer, experience, discussion and awareness of available resources (and, when appropriate, consultation with the Particular Council), the Vincentians and Conferences decide whether Mrs. Watson will get \$50 in vouchers for herself and her two young children; whether it is reasonable to cover Mr. Washington's Utility bills for one month; whether the O'Reilly's really need two new beds; whether the Conference should continue indefinitely to give Mrs. Cane a \$40 voucher each month.

Vincentians across TCC have been asking for some guidelines in this regard. Vincentians have indicated that they want some assistance in:

- Deciding how much is fair and reasonable for a single person, for families with young children, for singles unemployed due to addictions or other handicaps, and so on.
- Deciding when it is reasonable and appropriate to deny a request (e.g. paying a months rent of \$900 when it's clear that this will only delay the inevitable eviction that will come a month later).
- Deciding not to be more generous with support just because the conference has a lot of funds and few requests for assistance; being reminded that those funds are greatly needed in other conferences and in the Special Works.
- Determining whether and when it might be appropriate to reduce or eliminate material assistance to a long-term client.

## Short and Longer-term Clients

Clients who are seeking **longer-term assistance** raise a few important and difficult questions for Vincentians.

1. Should I/we be continuing to provide support to a client who seems to have written us into their budget and doesn't appear to be making efforts to become less dependent on us?
2. How much client information should I be collecting so I can make appropriate decisions about and recommendations to the client, and be accountable for the funds?

Although the first question has to do with who we are and the second is about record keeping, the two issues are closely linked and should be considered together.

It seems clear from the quotes from Ozanam and Society leaders who wrote the Commentaries to the Rule that they believed that:

- we are called to meaningful, person-to-person contact with those who are suffering;
- merely distributing material goods is not enough;
- we are to help the person to retain/regain their sense of dignity and to improve their circumstances.

It seems equally clear that dropping off vouchers or providing vouchers or other financial assistance to a client on a regular basis, without a concerted effort to help them to be less dependent on charity, **is not consistent with the call of Christ or the example of Ozanam.** So let's see what this might mean to our service to clients.

Service	Type/amount	Record Keeping
<p><b>1<sup>st</sup> Visit:</b></p> <ul style="list-style-type: none"> <li>Unless we have reason to think otherwise, we assume this is an emergency situation and a one-time call. We will generally give what the person is asking for, within the limits set by our conference, and give the client every benefit of the doubt.</li> <li>We briefly explain that the funds are contributed by parishioners of the local Catholic parish and that we have a responsibility to ensure they get to those most in need.</li> </ul> <p><b>2<sup>nd</sup> Visit:</b> If the client requests assistance soon after, it may be that they are seeking help on a longer-term basis. We explain:</p> <ul style="list-style-type: none"> <li>that our purpose is to help people through a difficult period in their life or through a difficult circumstance. It would not be in their best interests or would not be good stewardship of the funds to merely give them vouchers on a long-term basis.</li> <li>We are prepared, however, to provide some financial assistance as we assist them to deal with some of the challenges in their life. Within the limits of our time, experience and knowledge, we may be able to assist them in areas</li> </ul>	<ul style="list-style-type: none"> <li>Conferences generally agree that a \$50 voucher for a single person and \$10 for each additional child is appropriate;</li> <li>A bed and/or other furniture, if deemed needed/appropriate;</li> <li>More substantial assistance in special cases after consultation with Conference (and, perhaps, the Particular Council)</li> </ul> <ul style="list-style-type: none"> <li>Depending on circumstances, the response of the Vincentians might be very similar to the first visit – giving what is requested and needed, within appropriate limits;</li> <li>It might be clear at this point that the client’s circumstances justify ongoing assistance at this level for a number of months.</li> </ul> <p>If special needs arise and require additional or unusual assistance (e.g. paying rent or textbooks), a decision will be taken at the Conference (after consultation with the Particular Council in exceptional cases)</p>	<p>Very little information required:</p> <ul style="list-style-type: none"> <li>name</li> <li>address</li> <li>phone number</li> <li>reason for call</li> <li>amount and type of assistance given.</li> </ul> <p>We now need more information in order to be able to:</p> <ul style="list-style-type: none"> <li>make informed decisions about the type and amount of assistance that’s appropriate;</li> <li>make informed decisions about the types of other assistance the person may require;</li> <li>provide other Vincentians who may be visiting the client with the information they will require.</li> <li>be accountable.</li> </ul>

<p>such as:</p> <ul style="list-style-type: none"> <li>○ Budgeting/money management</li> <li>○ Accessing government services</li> <li>○ Locating re-training courses</li> <li>○ Seeking health services, including counseling;</li> <li>○ Etc.</li> </ul> <p><b>3<sup>rd</sup> &amp; subsequent visits:</b> We make it clear to the client (in a respectful, caring, and humble manner) that we will assist them as long as they are prepared to work with us through this time or situation. We help them to understand that it would not be helpful to them or responsible of us to merely make them dependent on the Society’s assistance. We are not attempting to control their lives in any way or to force our wills on them. We are merely helping them to understand the conditions under which we provide longer-term assistance.</p>	<ul style="list-style-type: none"> <li>● Whether we continue to provide assistance and the amount and form of that assistance will be determined by the Vincentians and the Conference;</li> <li>● The following guiding principles may be helpful: <ol style="list-style-type: none"> <li>1. Is it clear that the client requires this assistance in order to meet basic needs (since little is left each month after reasonable expenses)?</li> <li>2. Does the client understand the source of our funds and our responsibility to manage the funds carefully?</li> <li>3. Is the client able and willing to work with the Vincentians in terms of working toward some objective meaningful to them?</li> </ol> </li> </ul> <p><b>Note:</b> The issue of whether resources re available should not be the deciding factor since conferences with excess funds are sending them to the PC to be sent up or redistributed to needy conferences.</p>	<p>We will not, however, collect information merely to make the client to “jump through hoops”. If the information will not be helpful to us in assessing their situation and making recommendations and offering assistance, we will not collect it.</p> <p>We will continue to build the file, focusing mainly on the efforts we and the client have made to improve their circumstances. Success and failures will be noted as a guide to us and other Vincentians who may visit the client.</p>
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## Warning signs

If we are beginning to resent the time required to serve a particular client or feel we and the Society are being “ripped off” or feel the client is using the system or is making no effort to improve their situation, it could indicate:

1. The client’s case needs to be carefully reviewed by the conference to ensure that the current approach to the client continues to be reasonable and appropriate, and in the long-term interests of the client.

OR

2. I’m starting to become judgmental, and perhaps a little critical and cynical. (i.e. I’m starting to feel too comfortable in the first mindset box above).

## A Test

If you are unsure about whether you and the conference are doing the right thing in continuing to give vouchers to someone who does not appear to be making any effort on their own behalf, **try this test**.

Picture yourself sitting down over a coffee with someone from your parish. This is a kind, caring, thoughtful person who donates regularly to the Poor Box. Picture yourself telling this person all about the client that you are losing patience with. Give the person a real good understanding of the client’s situation, behaviour and attitude and what the Society has been doing for the client. If you believe this kind, caring, thoughtful, generous person would feel the conference is doing the right thing, then they probably are. If the person would likely be upset or concerned, it’s probably a sign that a plan for this client needs to be developed.

## Planning For and With Your Client

As you work with a client for many months or even years, there is only one way to be confident that you and your conference are acting in the best long-term interests of your client **and** being good stewards of the donated funds – by **developing a plan with and for your client**.

An appropriate, effective plan has a few important components:

- The client’s expressed objectives and hopes and ideas;
- A knowledge of the client’s circumstances, strengths, and challenges, hopefully gained by more than two Vincentians (since each of us bring different experience and perspective to our assessment of situations);
- An awareness of the relevant programs, services, and opportunities within the community;

- ❑ The collective wisdom of the conference as they ask for God’s help in bringing their faith, hope, compassion, and commitment to bear on the challenge of serving the client in the most appropriate, effective way.
- ❑ If appropriate, the advice/assistance of the particular council president or central office staff.

## Outcomes of Planning

Offering to work with a client to develop a plan could have a number of possible outcomes.

1. The client is willing to work with you to try to improve their situation and a plan is worked out (and then modified, as required); **or**
2. It is determined (after discussing with the client and consulting with the conference members) that continuing to provide vouchers and moral support is the best plan and will continue; **or**
3. The client is not willing to plan or discuss their situation – they simply want the vouchers to continue indefinitely. After consulting with the conference, the Vincentians might inform the client that they have a responsibility to serve those most in need and that they will no longer be able to provide vouchers on a regular basis.

In all three cases the Vincentians can feel okay about the outcome, confident that they have been working in the best long-term interests of the client and have been good stewards of donated funds. If the decision is made (as in # 3 above) to no longer give regular service to a client, the Vincentians can take comfort in the realization that it was for the client and the Society – and not because they were fed up with the client or were racked with frustration, doubt, and negative judgments. The client was not “cut off”. A thoughtful, prayerful, informed decision was made by committed, caring Vincentians trying their best to serve those in need. If the decision to discontinue or significantly reduce service to a client is made for the right reasons, **it should feel right**. As in the “test” above, the caring donor would likely agree with the decision.

## The Plan

Planning with a client must be very flexible and be respectful of their time, strengths and shortcomings, and wishes. It must take into account some realities.

1. Vincentians are not social workers or psychologists. Our commitment to serve God and those in need makes us caring and respectful of those we serve and makes us good listeners. It makes us want to bring hope and comfort to the client. However, it doesn’t make us experts in finding solutions to long-standing problems. We need to accept that fact and, with God’s help, be the best we can be for the client.
2. Many clients feel so beaten down, discouraged, and even hopeless that they see little point in trying to change things. This may appear to us as if they are happy with their

lot and have no interest in making any changes. Perhaps our greatest gift to them is the gift of hope.

3. Regardless of what we want for the client, the client has to make the decision to make changes. We can't force them and shouldn't do it for them. We can help them, though, to identify one area where, with some support and assistance, they could bring about a desired change (e.g. learning how to budget limited funds a little more satisfyingly).
4. Although we don't have the expertise to help solve complicated problems, we can refer clients to programs and services where appropriate help is available. This requires, of course, that, as individual Vincentians and conferences, we become knowledgeable of the programs and services available locally.

As we work with our fellow Vincentians to develop a plan for a long-term client, we need to:

1. be realistic about the resources (both human and financial) available in the conference. If the plan is going to be helpful to the client, it has to be realistic – it has to be do-able (for the client and Vincentians);
2. pull together all the relevant info i.e. information about the client from any of the Vincentians who have served them, the clients hopes and wishes and realities, and info about available programs and services;
3. ensure that the client is a full partner in the development of the plan.

Note: Some might argue that we don't have the time, expertise or resources to come up with a sophisticated plan for a number of clients. Consider though:

1. Is it better for the client, the Vincentians, and the Society that you have **no plan**?
2. Would having a simple, appropriate plan for just the few clients that cause the most frustration, discouragement, or distress be better than just continuing to regularly hand these clients vouchers - even though you feel it's in no ones best interests?

**Challenge:** Ask your conference to choose one long-term client for whom developing a simple plan might make sense.

- Chose one where you are likely to have some success. This will give the conference experience and confidence to take on more difficult plans.
- Use available resource:- the parish priest, neighbouring conferences, the particular council, central office, the 211 web site (available as a link from the Society web site – [www.svdptoronto.org](http://www.svdptoronto.org)), contacts that members may have in social services or related fields, as well as directors of our various homes and shelters.

**Let's start small, but let's start.**