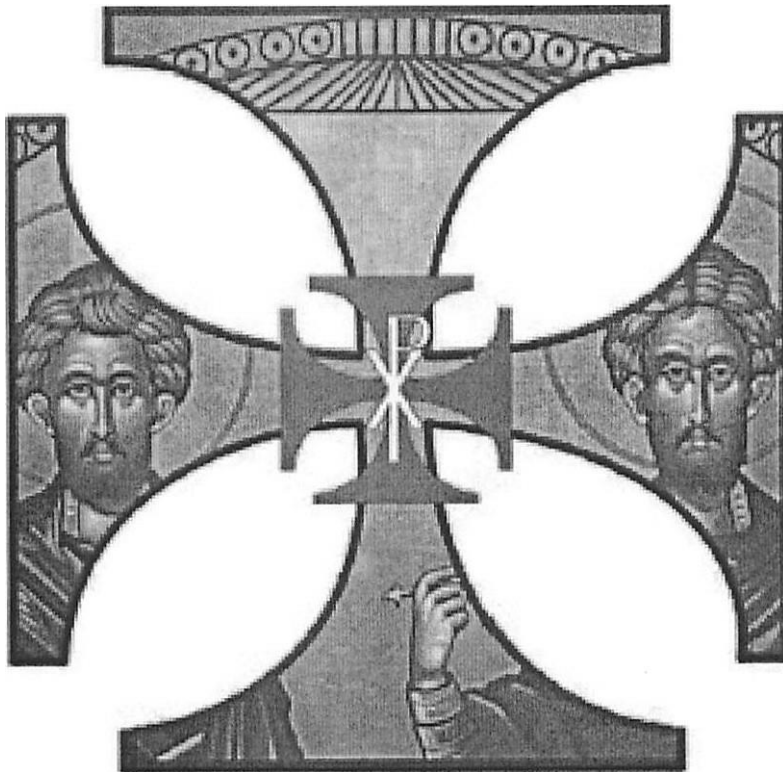


# Greek Orthodox Ladies Philoptochos Society, Inc.



## Social Services Guidelines and Procedures

Adopted by the National Philoptochos Executive Board on December 2016, Revised April 2017

## TABLE OF CONTENTS

I:	Mission of the Department of Social Services	3
II:	Social Worker	4
III:	Scope of Assistance	5
IV:	Provision of Services	7
V:	Additional Services Provided by the Department of Social Services	17
VI:	Conflict of Interest Policy	19

## I: MISSION OF THE DEPARTMENT OF SOCIAL SERVICES

- A. The mission of the Department of Social Services (hereinafter "the Department") of the Greek Orthodox Ladies Philoptochos Society, Inc., (hereinafter the "Society" or "Philoptochos") is to care for the least of Christ's brothers and sisters and to assist those in need in a way that maintains their dignity, self-determination and independence.
- B. The Department strives to give hope and rebuilds the lives of Orthodox Christian individuals and families in the United States, regardless of their immigration/citizenship status, whose lives are impacted by human suffering, including but not limited to poverty and income inadequacies; health, mental health, substance use disorders; hunger and food insecurity; inadequate housing and homelessness; intimate partner violence; family and older adult services.
- c. Our work is conducted confidentially and within a faith-based and culturally sensitive context.

## II: SOCIAL WORKER

- A. The work of the Department shall be conducted by a Masters Level Social Worker or Social Workers (hereinafter "the Social Worker") who shall be employees of the Society.
  
- B. The Social Worker shall be:
  - 1. A graduate of a Masters Degree program in Social Work (MSW/MSSW) from an institution accredited by the Commission on Accreditation of the Council on Social Work Education;
  
  - 2. Licensed by the State of New York or eligible for such licensing to be obtained within six (6) months from the date of employment, who fulfills all New York State requirements to maintain such licensing for the full term of employment; and
  
  - 3. Bi-lingual in Greek and English.
  
- C. The Social Worker shall be guided by the standards of the social work profession and shall adhere to the Code of Ethics of the National Association of Social Workers (NASW).
  
- D. The Social Worker shall act as the case manager for and custodian of all records pertaining to matters brought to the Department.
  
- E. The Social Worker shall, at her/his own expense, purchase professional liability insurance which may be supplemented by the Society.
  
- F. The Social Worker may be required to report to the National Philoptochos Board through the National President, the Executive Board, and/or the Social Services and/or Finance Committees.
  
- G. Daily administrative oversight and supervision of the Social Worker shall be provided by the Director.

### III: SCOPE OF ASSISTANCE

#### A. Cultural Sensitivity

Understanding the characteristics unique to our community and the role that language, culture, faith and spirituality can play in the helping process, services shall be provided in a manner that supports the attributes embedded in clients, including strengths and barriers stemming from their values, customs and traditions; gender roles; environmental, behavioral and psychological factors; family, social and community supports; decision-making processes; goals and expectations; and their perspectives on religion, faith and spirituality.

B. The delivery of confidential and professional services shall be guided by evidence-based practices informed by well-researched interventions, clinical/practical experience, and with consideration of client values, preferences and culture.

C. The Social Worker shall help individuals and families (hereinafter referred to as "client" or "clients"), address and resolve, as best as possible, the problems and concerns they face by increasing their capacity for problem solving, developing coping strategies, and obtaining needed resources.

D. Clients will be helped to increase their capacity for problem solving, develop coping strategies and obtain needed resources with the goal of ensuring, to the greatest extent possible, their ability to manage on their own in the future.

E. Services shall be delivered in consultation with the Co-chairs and designated members of the Social Services Committee.

#### F. Confidentiality

Philoptochos recognizes and supports the need for confidentiality between the Social Worker and clients. Nevertheless, it is understood that confidentiality is not absolute, a fact that must be explained to clients.

1. The identity of clients may be revealed to the Co-chairs of the Social Services Committee and the Director.
2. In cases of financial assistance, the identity of clients shall be known to the Social Services Committee members designated to review such requests, to the National President and Treasurer, or their designees who sign checks, and the Bookkeeper who prepares all checks.

## IV: PROVISION OF SERVICES

### A. Outreach

To ensure that our community and outside resources are informed of our services and capabilities, outreach shall be conducted both within and outside the Orthodox Christian community.

### B. Assessment

An assessment of the client's history and issues leading to their current situation shall be based upon a duly completed and signed Application for Assistance (Attachment A) and a Consent for Release of Information (Attachment B), documentation submitted, and interviews with primary and secondary sources. The evaluation may result in the delivery of one or more of the following services:

1. Supportive counseling;
2. Short-term interventions and interim case management;
3. Information about and referrals to local and broader resources such as non-profit and government agencies, advocacy assistance, as needed, to ensure they access the benefits and services to which they are entitled:
  - a. Referrals shall include but are not limited to local and broader resources, such as public benefits and social service agencies, public and non-profit shelters and housing programs, food pantries, soup kitchens, paratransit systems, and services for seniors, youth, families, and other client populations.
  - b. As negotiating and navigating complex service systems can be intimidating for many, especially those with cultural or language barriers, assistance will be offered with this process either directly, or through local chapters, Metropolis social services liaisons and/or other available resources.
4. Financial assistance (see below for criteria).

### C. Development of a Plan of Action

1. Interviews will be conducted with clients and with their permission other relevant parties to identify how clients define and perceive their problems and causal factors. To ascertain their readiness, willingness and ability to address needs and accept help, and to learn what assistance, if any, has been or is being sought from/provided by other resources both within and outside the Church community.
2. As needed and with clients' permission, the Social Worker may request local chapter and/or Metropolis Philoptochos Board assistance with the assessment process, including but not limited to conducting face-to-face interviews.
3. Based on this information, a plan of action will be developed with the client to ensure self-determination and informed decision making.

#### D. Collaboration with Local Chapters and Metropolis Philoptochos Boards

With clients' permission, services shall be provided in collaboration with the Local Chapters and/or Metropolis Philoptochos Boards.

#### E. Procedures for Awarding of Financial Assistance

1. All financial assistance transactions shall be conducted with transparency and accountability.
2. A copy of all financial assistance documents and transactions shall be placed in the relevant client's permanent case record.
3. Maximum allowable amounts
  - a. When warranted and based on the submission of required documentation, financial assistance shall be provided to a limit of a lifetime maximum of \$7,500.00 for any single applicant or incident.
  - b. Based on the compelling nature of a case, the maximum may be exceeded by review of and approval by the Finance Committee and/or the Executive Board.
4. Grant Recipients

Financial assistance is limited to Orthodox Christian individuals and families regardless of their citizenship status as long as the services rendered are payable to vendors within the United States (medical provider, funeral home/cemetery, landlord, etc.).

## 5. Grant Purposes

The purpose of financial grants shall include but not limited to preventing evictions, foreclosures, and utility shut-offs; relocating victims of domestic violence to a safe environment; contributions to uncovered medical costs including health insurance premiums, co-payments, COBRA benefits, medications, home care, and specialized services, authorizing emergency oil/other deliveries for those who have exhausted low income heating assistance through government and nonprofit resources; contributing to funerals of indigent members of our community to ensure a proper Orthodox Christian burial; providing "stop gap" assistance while clients await determination of public benefits; and, through coordination with local chapters, awarding gift cards to assist with the daily living needs of food, clothing, transportation and more.

## 6. During the interview process, clients shall be informed that:

- a. Grants are limited in scope and nature;
- b. Philoptochos does not have the capacity to provide on-going assistance;
- c. Documentation must be submitted (see below);
- d. Payments are generally made directly to providers of service (e.g. landlords, utility company, health care provider, another vendor, etc.)
- e. Philoptochos does not contribute to accounts of any kind whether an on-line/internet crowd-funding platform that allows people to raise money, an account established by a bank, a personal account established in the name of the client or other, etc.;
- f. The approval process may take between 2 to 4 weeks before a grant can be made;
- g. Clients may be referred to public or other agencies for long term help; and



- h. Clients may be required to submit documentation that they applied for such benefits and entitlements.

## 7. Documentation

Clients shall be required to submit documentation to verify their need for financial aid as follows:

- a. Household income and expense including but not limited to recent pay stubs or tax returns; government benefit awards/denial letter; copy of lease, rent receipt or mortgage bill; vendor produced notice of arrears; notice of court-ordered eviction or utility shut-off; invoices documenting unpaid or partially paid medical or funeral home expense(s), etc.
- b. If the request is for medical costs, documentation verifying illness, disability, condition, surgery; health insurance coverage, if any.
- C. The Social Worker shall complete a Check Request (Attachment C) and Summary Statement that provides
  - 1. Name and address of the client
  - 2. Amount of request
  - 3. To whom payment shall be made
  - 4. An overview of the nature of the case
  - 5. Copies of relevant documentation related to the financial assistance request
  - 6. Fund from which monies shall be drawn
    - a. In the event that reallocation of approved funding is required, it may only be done with written approval of the president and treasurer.
  - 7. Amount/date of any previous assistance from Philoptochos, if applicable
  - 8. Signature of the Social Worker and the date the check request was made

## 8. Allocation of Funds and Grant Purposes

- a. The Social Worker, in consultation with the Treasurer and/or Finance Committee, may allocate grants from available funds, including but not limited to, Social Services, Cancer/Other Major illnesses; General Medical Fund; Children's Medical Fund; 75<sup>th</sup> Anniversary Founders' Fund; Autism Assistance Fund.
- b. Grant purposes shall be characterized as Housing, food, Utility, Funeral, Medical, Transportation, Other (with specifics).

## 9. Review Process

- a. Financial assistance requests shall be reviewed by at least two of four designated members of the Social Services Committee, one of whom must be a Committee Co-chair, at a meeting or on a committee conference call.
  - 1. To facilitate their decision making, reviewers may request additional information;
  - 2. A reviewer who denies a request must provide the reason for their decision on the Application for Assistance form (Attachment A)
- b. Financial assistance requests shall be reviewed in person at the National Office; however, in the absence of one or more of the designate committee member's ability to conduct an on-site review, electronic evaluations shall be permitted provided that all relevant documents are scanned and submitted to the reviewers.
- c. A committee member's electronic approval or denial of a financial assistance request must be returned to the Department from her personal email.
- d. As soon as possible, but not later than two weeks following electronic authorization, one Committee Co-chair must appear in person to physically sign said Check Request (Attachment C) for the Society's records.

## 10. Generating Payments

Approved cases shall be submitted to the Society's Bookkeeper who upon certifying that the stated materials and approvals are present, shall

generate the check and submit it for signature to the National President and Treasurer or their designees for their review, approval or denial, or request additional information.

11. Distribution of Checks

- a. Upon return of the signed check to the Department, it will be mailed directly to the provider of service along with an explanatory cover letter. In certain situations, and although made payable to the vendor, checks may be mailed/given to the client to ensure the payment is properly credited.
- b. Clients or other relevant parties (e.g., family members of a deceased individual) shall be sent a copy of the letter along with a copy of the check for her/his records.
- c. Vendors shall be asked to confirm receipt of payments.

F. Emergency Financial Assistance

- 1. From time to time, emergencies arise that require payments sooner than possible given the established procedures, e.g., to prevent an imminent eviction or utility shut-off, provide emergency housing, provide a meal to a client, etc.
  - a. By telephone approval, one of the Social Service Committee Co-chairs may approve such payment via the Society's credit card.
  - b. The Director may approve up to \$1,000.00 in emergency funds, with such authorization subject to review by the Social Services Committee Co-Chairs within 5 days.
  - c. Chapters and/or Metropolis Boards may be asked to advance funds required, with the Society reimbursing them for such payments.
- 2. Following each of these situations, the Social Worker shall submit relevant forms and documentation for formal approval by two of the four designated members of the Social Services Committee.

### 3. Limited Cash Assistance

- a. When limited cash assistance, not to exceed \$50.00 per occurrence, is the most effective way to serve a client, e.g., an immediate meal/food, local transportation, the client shall sign a petty cash voucher, certifying receipt of such funds.
- b. The original petty cash form shall be given to and recorded by the Bookkeeper to document the expenditure.
- c. A copy of this voucher shall be placed in the client's permanent case record.

## G. Record Keeping

### 1. Individual Case Records

- a. A clear and legible confidential and up-to-date individual case record, including a chronological account of all contacts, correspondence and services provided shall be maintained for each client.
- b. Case records shall be kept in a locked file cabinet at the National Office and shall be maintained for a minimum of seven (7) years. Commencing January 2017, all new files opened shall be scanned and maintained electronically.
- c. Only the Social Worker, the National President, Treasurer, Committee Co-Chairs and the Director shall have access to case records.
- d. If an outside party seeks the release of confidential client materials, the request must be for specific information and will require written permission by the **client**.
- e. If client authorization is not or cannot be given, the request must be for specific information and will require written permission by the

client on the Consent for Release of Information form (Attachment B).

- f. If client consent is not obtained, disclosure may only be made upon order of a court or administrative tribunal.

## 2. Client and Financial Grant Database

- a. An Excel database shall be maintained with the following information about the client; dates of contact; name, age, location and Metropolis; presenting problem; case disposition.
- b. The Excel database shall also reflect the following information: dates and amounts of financial grants; client's name, location and Metropolis; funds from which monies were drawn; reasons for grants; payees; check dispositions (approved/mailed, etc.); check numbers.

## 3. Reports

- a. A semi-annual report shall be prepared and made available to the Director, the Social Services Committee and the National Philoptochos Board.

Such reports shall not disclose client identities but shall provide the following information: Metropolis in which the client resides/service were provided; sex; age and a statistical and qualitative analysis of services and financial grants provided.

- b. An annual report shall be prepared and distributed to local chapters and Metropolis Boards with the annual commitment letter.
- c. A biennial report shall be prepared for and distributed at the organization's biennial convention.
- d. Copies of such reports shall be posted on the Philoptochos website.

## V. ADDITIONAL SERVICES PROVIDED BY THE DEPARTMENT

### A. Resource Development

1. To inform our community of existing and/or emerging human service needs, the social worker shall develop and distribute faith-based and culturally sensitive resources including literature, fact sheets, informational manuals and other relevant materials to expand our reach and better serve our community.
2. Based on priorities established by the National Philoptochos Board, and as identified/recommended by the Social Services Committee, local Chapters, ministries of the Greek Orthodox Archdiocese of America, other organizations and relevant societal developments and trends, the Social Worker shall develop and present seminars, interactive webinars, workshops and programs on issues and topics of significance to the Orthodox Christian community.
3. Along with meeting human service needs, programs shall be developed to strengthen the social services capabilities of Philoptochos as a whole so that the social services provided by all levels of the Society are consistent and compassionate.
4. When possible, such materials and programs shall be bi-lingual in Greek and English.
5. As appropriate, such materials and programs shall be developed in collaboration with local and broader non-profit and public organizations and service providers.
6. Copies of such materials will be posted on the Philoptochos web site and distributed to local chapters.

### B. Research/Seek Outside Funding

In consultation with the Social Services Committee and as approved by the National Board and/or Executive Committee, outside funding and social services efforts may be sought from public, non-profit and private resources.

VI: CONFLICT OF INTEREST POLICY

The Conflict of Interest Policy adopted by the Society shall be applicable to all work and services provided by the Department.