**Ozanam Initiative**

**Formation**

* Individuals working this initiative will be volunteers from existing church conferences. These volunteers will makeup this diocese-wide subcommittee of the BR Council.
* The President of the Baton Rouge Council will appoint an Ozanam Initiative committee chair. The OI committee chair will appoint members to supporting roles as may be necessary.
* The OI committee chair will be the point of contact for referrals taken from parish conferences and from the SVdP Special Works staff. A referral form will need to be completed.
* The OI committee chair or a designee will make an initial review of the referral form and directly contact the neighbor. When appropriate, the OI committee chair will assign a Vincentian team to call the neighbor, make the home visit and submit a recommendation.

**Finances**

* The finances of the Committee will be maintained as a unique income statement within the budget of the BR Council. Checks will be written on the BR Council account. Money to support the Conference will be money restricted to this use by the donor with additional funding supplied from 5% paid to the upper Council.
* Once operational, the BR Council President will review conference disbursements monthly and give appropriate guidance to the OI Committee Chair concerning future disbursements.

**Guidelines**

* The Ozanam Initiative will serve residents of church parishes of the Diocese where no current SVDP church conference exists and no emergency assistance is available from the church parish.
* Neighbors will be assisted only once per 12-month period.
* The suggested maximum assistance per visit is $300.
* Do not pay deposits on apartments or utilities.
* Do not pay for stays in hotels/motels.
* Do not provide transportation (this potentially creates insurance concerns).
* Target neighbors are the working poor who are truly in a financial emergency situation due to extraordinary circumstances and where the allowed limits above will alleviate the financial emergency situation. The neighbor’s income on a monthly basis should be sufficient to meet the monthly expenses.
* If the Vincentians assigned to the visit feel unsafe making the visit, the Neighbor can be asked to meet at a neutral site in the area.

**Areas of Service**

* The Ozanam Initiative initially will serve the following parishes of the Diocese of Baton Rouge that do not have a SVdP conference: St. Agnes, St. Gerard, St. Pius X, and St. Anthony
* SVDP church conferences can petition the BR Council to include specific areas in the Ozanam Initiative service area.

**Referrals**

* Neighbors residing in parishes that have a SVdP conference, should be referred to that conference for assistance if the conference provides the assistance needed by the Neighbor. (See the attached Church Referral List.)
* Neighbors residing in parishes that do not have a SVDP conference but provide the assistance requested by the Neighbor through other parish ministries, should be referred to that church parish. (Again see the attached Church Referral List for the referral numbers.)
* Neighbors that reside in all other areas of the Diocese can be referred to the OI. A referral form will need to be completed by the conference taking the initial call or the SVdP Main Office.

**Referral Procedures**

* Calls taken from church conferences
* The church conference receiving the call determines the parish the neighbor resides in and completes a preliminary assessment of need. The Conference Referral Form should be completed. On this form, pertinent information can be logged such as name, address, phone number, last 4 digits of SSN, detailed information on all sources of income and all expenses. At the bottom of the form, the requested need, money needed to cover the need and what has occurred recently to cause the need can be listed.
* If the preliminary assessment determines the Neighbor could be assisted by the Ozanam Initiative, the conference making the determination should send the completed Conference Referral Form to Kim Boudreaux ([boudro@aol.com](mailto:boudro@aol.com)) and Martha Cedotal ([mcedotal@gmail.com](mailto:mcedotal@gmail.com)).
* Calls taken from the SVdP Special Works staff
* The SVDP Office Referral Form will be completed and sent to Kim and Martha.

**Ozanam Initiative Procedures Review**

* The Ozanam committee chair or designee reviews the referral form. The Chair determines based upon the available referral information, if the case is appropriate for the Ozanam Initiative considering available funds. The Ozanam Chair assigns Vincentians to make the home visit if appropriate. Proximity to the location of the home visit should be considered when making the assignments.
* Visiting Ozanam Vincentians recommend (on the Home Visit form) to the Ozanam Chair the amount and type of assistance to be provided to the Neighbor along with any additional information obtained during the home visit.
* The Ozanam Chair will add the neighbor’s information, home visit information, if assistance was given and all other pertinent information to the on-line TeamDesk database.
* If the Ozanam Chair agrees with the recommendation, the Ozanam Chair sends an email to Judy Holsten ([Jholston@svdpbr.com](mailto:Jholston@svdpbr.com)) and Kim Boudreaux ([boudro@aol.com](mailto:boudro@aol.com)) providing the details of the check that should be written.
* Judy will provide back to the Ozanam Chair the details of the payment made, this is entered in the TeamDesk database.
* The payment will be made by mail unless extenuating circumstances make this impractical.

**Furniture Only**

* Neighbors requesting furniture only will be interviewed by telephone only; a referral form will be completed; no home visit will be made. Once the need is confirmed, the telephone interviewer will prepare a voucher for the warehouse and submit the form to essential [needs@svdpbr.com](mailto:needs@svdpbr.com) and [dprather@svdpbr.com](mailto:dprather@svdpbr.com). Use the Conference Authorization Number of ???? on the form.