EVALUATION SUMMARY

Catholic Charities, Archdiocese of San Antonio, Inc.
San Antonio, TX

Project Title: Catholic Charities Money Management Program

Grant Description: An operations grant to help fund a money management program for seniors and disabled persons needing assistance to be able to continue to live independently.

Grant Amount: $75,000  
Approved: October 7, 2014

Project Start Date: July 1, 2014  
Project End Date: June 30, 2015

Charitable Purpose: Health & Human Services\Elderly\Money Management

Grant Type: Project/Program Costs

Grant Objectives: Decrease the vulnerability for and incidence of financial exploitation for the elderly and disabled and to enable these individuals to maintain a level of independence.

Summary of Reported Findings:

During the period ending June 30, 2015, the Money Management Program (MMP) provided the following services to 98 low-income seniors:

- Bill payer services for 76 clients
  - 100% were assisted with preparing a budget, paying monthly bills, and balancing checkbooks
  - Clients were also assisted in obtaining in-home services at the most economical cost from AT&T, San Antonio Water Systems, CPS Energy, and securing in-home care through the Health and Human Services Commission
- Representative payee services to 22 clients
  - 100% had bills paid in a timely manner and clients were prevented from spending beyond their means while maintaining an independent way of life

Challenges reported by the MMP included:

- The program received more requests for service than could be managed – 14 requests were turned down in one month alone
- Awareness of other client needs such as major debt problem, significant medical issues, minor/major home repairs, plumbing repairs, food needs, utility assistance, prescription assistance, and medical equipment assistance

Success Story

“Mr. and Mrs. M have been in the Financial Wellness and Care program since September of 2014. The couple had more than $40,000 in credit card debt. The management team worked extensively to close all of the credit cards and bring the payments down to manageable payments. The couple has cooperated extensively and have been open to any suggestions FWC staff may have. The couple had a lot of stress in their life due to the large amount of debt and were facing foreclosure. Now the couple’s bills are up to date and The M’s have adjusted to their budget and are much happier and less stressed knowing their bills are paid and their house is safe. Both Mr. and Mrs. M have a small savings in the Frost Account that FWC manages, as well. Mrs. M saved enough that MMP staff were able to
successfully pay off the remaining balance of one of their credit cards. The M’s are very pleased and let us know every visit how appreciative they are with our services. Financial wellness and Care staff will continue to work with The M’s, in hopes that they may continue to live a stress free life.” -- *Catholic Charities staff*