

# Communities United in Faith: Case Studies

## 1. Yusuf, Tom and Ahmed

Yusuf is 80 years old and has been a widower for five years. Yusuf has three adult children and numerous grandchildren; his closest relatives live about five hours away from him. Yusuf has strong ties to his community and is able to live relatively independently so has been reluctant to move-in with family members. Yusuf has recently hired a company to provide him with housekeeping services. The company typically sends Tom to do light cleaning, organizing and meal preparation for Yusuf.

Tom had been working with Yusuf for about three months when Yusuf noticed his prescription medication didn't seem to be working. Tom had been "borrowing" Yusuf's prescription medications, replacing them with similar-looking aspirin. Tom intends to replace the medications, but hasn't done so. When Yusuf confronted Tom about his suspicions regarding the medication theft, Tom denied taking Yusuf's prescriptions. Tom said: "Yusuf, you're confused. Next time you're at the doctor you should get a memory test." However, Yusuf felt certain that something wasn't right. When Yusuf broached the subject with Tom again a few days later, Tom intimidated Yusuf by standing very close to Yusuf and raising his fist. Tom hollered at Yusuf: "You don't know what you're talking about! Without me, you're going to a nursing home! Your kids don't want you!"

Yusuf has a friend, Ahmed, that he has known for 20 years. They worship together at the Mosque, and frequently socialize together in same circle of friends. Yusuf confides his concerns to Ahmed, sharing that he suspects Tom may be stealing from him, and also sharing his fear that without Tom's assistance, he may not be able to remain at home. Yusuf expresses concerns in the context of his faith as well, seeing Ahmed as a fellow believer: "God has sent this man to test me, Ahmed," Yusuf confides. He tells Ahmed that he feels alone, and doesn't know what to do next.

## 2. Miriam, James and William

Miriam and James have been married for 40 years. Both are in their early seventies, and both are in relatively good physical health. However, James has been emotionally abusive to Miriam for many years. Recently, Miriam confided in James that she was feeling forgetful; she had misplaced her car keys again. "You idiot!" James said to her, "You can't keep track of anything.

You must have Alzheimer’s disease.” Then James shoved Miriam out of his way to leave the room. When James shoved Miriam she fell and her hand was injured.

Later that same day, Miriam confronted James about her concerns about his violence, anger and her safety; and James erupted, hollering at her and slapping her face. Miriam retreated to another room, locked the door, and waited for James to leave. She knew she had had enough, but wasn’t certain about what to do. She decided to confide in her Rabbi.

Rabbi William met with Miriam at his office. They discussed her goals and safety concerns. Rabbi William helped Miriam contact an advocate to create a current safety plan, and offered to help her identify other resources. Miriam was concerned about her religious faith and commitments. She asked Rabbi William: “Won’t I break my marriage covenant if I leave James?” She suggests that “I always do something to set James off; maybe if I wasn’t so absent-minded... I wish he would just come with me to services; or at least not stop me from trying to come.” Miriam looks to Rabbi William for guidance in her situation and answers to these questions concerning her faith-life.

### 3. Luisa and Christine

Luisa is an active 85-year-old woman who has never married. She is devoted to her church, and is active in the lives of her adult nieces and nephews and their children, though she doesn’t see them as often as she’d like. Most of her nieces, nephews and grand-nieces and –nephews live in California; Luisa’s home state.

Luisa has recently connected with the Caring Hearts Serving Seniors group at her church. Luisa appreciates the weekly companionship and practical assistance the group provides. Caring Hearts sends a volunteer from the congregation to visit Luisa once or twice a week to help with basic house and yard work as well as to provide company and read a weekly devotional together. Luisa has become especially attached to one particular volunteer: Christine. Christine and Luisa share some common interests – they both enjoy mystery novels and gardening, and both love to play bingo at their church and in other local settings.

Over the past few months, Christine has taken a more active role in Luisa’s financial life. Initially, Luisa requested assistance from Christine in a weekly bank errand. Christine would drive Luisa to the bank, and in recent weeks has offered to accompany Luisa to the teller-window to assist with her banking. Luisa hasn’t felt the need for this level of assistance, but appreciated Christine’s willingness to help and saw no harm in giving Christine some preliminary information about her finances. At the same time, she was uncomfortable because she has always been private regarding her financial situation; she also suspects Christine may gamble

beyond their occasional bingo outing. Christine has frequently referenced her casino trips in her conversations with Luisa.

Yesterday, during their weekly visit, Christine proposed that Luisa complete a Power of Attorney document allowing Christine to access Luisa's accounts "in the event that anything happened to you, and you need help." Luisa was glad to have someone in place locally to help her if necessary, but isn't sure what to do. When she called Caring Hearts Serving Seniors to inquire about this Power of Attorney service, she learned that the group had a policy in place prohibiting volunteers from becoming financial proxy for participants. Luisa worries that Christine hasn't been forthright about her role as a congregational volunteer.

In addition, during their weekly devotional discussion, Christine has communicated the church's need and appreciation for donations to its capital campaign. Christine has left literature with Luisa describing how to adjust one's estate plan to incorporate charitable gifts to their church. Luisa was always under the impression that Caring Hearts Serving Seniors was a voluntary charitable mission of her church, but began to feel some pressure to respond to the services she's receiving with a donation.

Luisa is hesitant to confront Christine directly regarding the Power of Attorney document or the planned-giving instructions. She's considering requesting another volunteer to "broaden her circle of friends" but doesn't want to hurt Christine's feelings.



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