



Texas CASA Pre-Service Training Curriculum
Facilitator's Guide



TEXASCASA
Court Appointed Special Advocates
FOR CHILDREN

OUR VISION

We envision a safe and positive future for all Texas children.

OUR MISSION

The mission of Texas CASA is to support local volunteer advocacy programs and to advocate for effective public policy for children in the child protective system.

ACKNOWLEDGMENTS

This guide is the work of many hands. We are grateful to everyone who originated and contributed ideas, including the dedicated staff members of CASA of Travis County who created and piloted the first revision and activities, the staff of National CASA who initiated the curriculum and provided its structure, and the staff of Texas CASA who revised and wrote the new manual and guide to match the most current directions of training and advocacy.

We are proud to offer a curriculum that is truly specific to Texas. We hope that the work of many hands can support the best possible preparation for both trainers and new advocates, and instill the belief that together, we can provide a CASA for every child.

Design by Tablo Consulting

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STRENGTHENING THE VOICES OF CASA STATEWIDE

TABLE OF CONTENTS

5	The Art of Facilitation
21	Session 1
37	Session 2
55	Session 3
71	Session 4
87	Session 5
103	Session 6
117	Session 7
131	Session 8
141	Sample Documents

User Agreement for the Pre-Service Curriculum Manual

This manual is only to be used as a pre-service curriculum for potential advocates that have been recruited and screened by CASA programs in good standing with Texas CASA and National CASA.



THE ART OF FACILITATION

Welcome! This guide was created to support CASA trainers and facilitators in offering the Texas CASA Volunteer Pre-Service Curriculum in a dynamic, energizing and unforgettable way.

As a trainer and facilitator, you have a profound opportunity to inspire and educate volunteers so that they serve with the greatest care and skill. The required 30 hours of learning that each volunteer must complete prior to serving as a Court Appointed Special Advocate sets the stage for the volunteer's experience with your organization, and lays the groundwork for their ability to meet the constantly changing challenges of advocacy. As a facilitator of pre-service training, you build the most important relationship with new volunteers before they serve a child.

We invite you to do it with our motto, called The CASA Way: "We have an uncompromising belief that we will achieve what others think impossible, and that each of us is an essential part of the solution."

This may sound like a bold statement. Considering the condition of the child welfare system in Texas and our country, however, how could we do less?

Your passion will ignite the passion of prospective volunteers. We have created this workbook to help you develop the skills you need to become a stellar guide and to provide a clear roadmap for each session.

We are here to back you up, cheer you on and support your expertise. Thanks for guiding the future of the CASA movement!

”
As a facilitator of pre-service training, you
build the most important relationship with
new volunteers before they serve a child.

GET PREPARED FOR YOUR SESSIONS

1. Download In-Class Videos and Handouts from the Texas CASA Website

Prepare for your sessions by downloading the videos and handouts that you'll need for each meeting from the Pre-Service Volunteer Training page at the Texas CASA website, learn.texascasa.org/preservice.

Most class sessions involve case study activities in which participants practice gathering information and developing recommendations. These case studies are designed to help learners dive deeper into the topics addressed in their Pre-Work. Each case study introduces complex and nuanced issues for volunteers to consider. Before facilitating each session, carefully review each case study packet, and prepare to guide a debrief discussion at the end of the activity.

2. Alert Participants to the Pre-Work Requirements

Before the first meeting and at the end of each session, facilitators should communicate what Pre-Work trainees will need to complete before the next session. They will need to complete a portion of reading before they come into the first training. The Pre-Work is an essential piece of the learning process that enables volunteers to explore topics in more depth as they prepare for the next session.

Participants may read the Pre-Work in the manual or complete it online at Texas CASA's Learning Center.

3. Provide Participants with Five Program-Specific Documents

There are five documents specific to your program that you will need to distribute to volunteers via email before class and in hard copy during the training:

- Advocate Job Description
- Program Policies
- Optima or Documentation Guide
- Court Report Template and Instructions
- The Bleux Case Court Report

Both the manual and the online version of the Pre-Work course refers volunteers to read these documents. Since the advocate job description, program policies, documentation guide and court report instructions vary widely from program to program, we have not included general examples in the Volunteer Manual. However, in the back of this guide, you

will find sample versions of these items, if you'd like to adapt them. You can email training@texascasa.org for templates.

As part of their Pre-Work for session 2, participants are directed to read a court report for the Bleux case provided by their facilitator. Please download the Sample Bleux Case Court Report from the facilitator portal and customize to fit your program's court report template. Email your finalized court report to your participants or handout hard copies at the end of session 1.

4. Prepare for Court Report Assignment

A significant part of the new curriculum includes a court report writing assignment as part of the Pre-Work for session 8. Learners practice writing a court report based on the Redd case, using your program's court report template and guidance. Determine how you would like them to learn this skill, and see instructions in session 7 for more guidance. Prior to session 8, you will email them a Word version of your court report template, your program's instructions for writing a court report and a de-identified court report from a sample case as an example of how they can organize the information. They will fill out the sample court report and email it back to you.

We suggest giving participants one week to complete this activity and providing careful, specific, strengths-based feedback to help them gain confidence and skills.

If your program requires additional outside assignments such as a court observation, be sure to communicate these expectations at the beginning of the training process.

EMBRACE PARTICIPANT-CENTERED LEARNING

Advocates’ learning outcomes—how well they understand the material, how confident they feel when practicing or using the skills and how they can translate the information into action—can have an incredible impact on their case outcomes as CASA volunteers. For that reason, we use best practices in adult learning, called participant-centered learning.

In the past, education often meant that information and content was delivered from someone who stood at the front of a room and talked; it was a transfer of knowledge from expert to learner in a standard manner using lectures. In the ideal contemporary classroom, the teacher is now a facilitator: one who makes learning take place. Everyone is a student, practice is the journey, and learning is a group social experience.

” **Tell me and I will forget.**
Show me and I might remember.
Involve me and I will understand.

In this new Pre-Service Curriculum, people learn the content and information ahead of time during Pre-Work or homework, and the face-to-face class time is used for experiences, role-play, modeling, discussion, and experimentation. In education terms, this is called “flipping the classroom.” This approach results in much better memory retention, confidence and ability on the participants’ part.

MAKE AN ACCESSIBLE, WARM AND TRAUMA-INFORMED SPACE

The creation of a trauma-informed space involves recognizing emotions and that each person’s past and present may possibly be activated by the stories and content in the training. We encourage participants to pay attention to themselves, stay connected, and say what they need to. Expressing emotions is a vital part of feeling safe and able to learn.

Keeping yourself well and energized is also part of a trauma-informed environment; you also count. Make sure you have plenty of water, sleep, nourishment and support as you guide others.

The creation of an accessible space means that it provides equal access to all and is welcoming and easily navigated by people with disabilities, including invisible ones.

DESIGN YOUR LEARNING ENVIRONMENT

One important way to empower your learners to succeed is to create a comfortable space for learning. The material can be difficult, but we create an environment of hope focused on appreciation and the motivations that we are joining around: making a positive difference for children and the exciting process of beginning that journey. Here are some ways to do that.



Music – Have upbeat music playing in the room when people come in and begin to mingle. Also play music again after class as people are getting ready to go and chatting with each other, and circulate among the participants thanking them for coming.



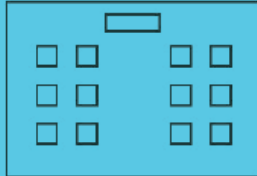

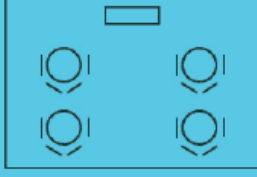
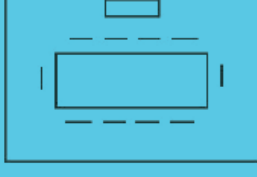
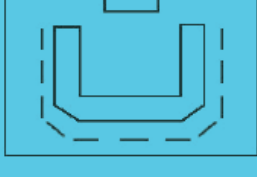

Physical Needs – Make sure the temperature in the room is not too cold or too hot. Water and snacks should be freely available throughout the training. Encourage learners to get up and move around or visit the restroom whenever they need to, not just during breaks. Our bodies are important!



Two Facilitators – If your program has the capacity, it is an excellent practice to have two facilitators at each training. It's an energy-intensive process and great to trade off. With two trainers, a greater diversity of background and perspectives can be represented.



Collaborative Room Arrangement – Choose from the room arrangements below to find the setup that works best for your space and number of participants, while creating the most open and collaborative feel.

	Description	Advantages	Disadvantages
<p>Classroom</p> 	<p>The traditional setup we're all familiar with from school.</p>	<p>Good for lectures and presentations where the speaker is the one doing all or most of the talking.</p> <p>Also great when the audience must take notes or for computer-based training.</p>	<p>Can be difficult for everyone to see the speaker, presentation.</p> <p>Does not encourage group work or discussions.</p>
<p>Theater</p> 	<p>As the name implies, simulates the setup of a theatre or auditorium.</p> <p>This set up allows the most people for a given size of room.</p>	<p>Good for very large groups, i.e., 100 or more people.</p> <p>Great for seminars and conferences.</p>	<p>Communication tends to be one-way and does not allow for much interaction.</p> <p>Not good if participants need to take notes or for any sort of group interaction.</p>
<p>Chevron</p> 	<p>Also known as "cabaret-style" or "clusters" allows for medium to large numbers of people divided into groups of 6 – 10.</p>	<p>Good for workshops where each group will work independently from others.</p> <p>Encourages mixing and allows trainer to easily circulate throughout the room.</p>	<p>Some participants will have poor visibility.</p> <p>May encourage lack of attention.</p> <p>Often requires addition of co-facilitators to manage group work and interactions.</p>
<p>Boardroom</p> 	<p>The traditional setup for board or committee meetings.</p> <p>Typically reserved for meetings not training or facilitation.</p>	<p>Good for small groups of peers who will spend most of their time talking.</p> <p>Good for seeing and interacting with others and sharing resources.</p>	<p>Not good for groups of 10 or more.</p> <p>Encourages hierarchical seating (and thinking).</p> <p>No "front" makes presenting difficult.</p>
<p>U-Shaped</p> 	<p>Open at one end the U or horseshoe shape allows for groups of up to 50 people to all see each other and presenters.</p>	<p>Preferred by many trainers as it allows eye contact with all and greater intimacy with participants.</p> <p>Encourages participation in group discussions.</p> <p>Optimal for presentations and demonstrations.</p> <p>Discourages "Hierarchy positions."</p>	<p>Limited to small or medium-sized groups.</p> <p>Those seated closest to the presenter or screen must turn to be able to see.</p>
<p>Circle of Chairs</p> 	<p>The open circle of chairs can be arranged in any shape (square, rectangle, etc.) and precludes the use of tables.</p>	<p>Excellent for group discussion with up to 50 people.</p> <p>Doesn't allow a place to "hide" and encourages interaction and discussion.</p>	<p>Makes note taking difficult.</p> <p>Limited to small or medium-sized groups.</p>

GROUP AGREEMENTS

Begin your training weeks by creating Group Agreements. The purpose of this is to form an open and respectful environment in which individuals feel safe sharing their ideas and opinions, and can think creatively. We recommend having your core “group agreements” already written, and inviting learners to add to it.

Here is a sample set of group agreements:

- Participate fully.
- Maintain confidentiality.
- Respect everyone’s viewpoint.
- Take care of yourself.
- Ask for help when needed.
- Silence all electronics.
- Have fun!

PROVIDE ROAD MAPS

A road map is an agenda. People relax and enjoy the ride more when they have a map! There are two kinds of maps to provide learners in a training: visual and verbal.

Visual

- Before each session, post a list of the activities and agenda of the session on flip charts.
- When writing on a flip chart or whiteboard, use a different color marker for every other line or to note layers of information.
- Use the PowerPoint presentations that accompany this guide to keep things on track.

Verbal

- When explaining an activity or transition:
 - Call people’s attention once or twice, and give them time to stop talking.
 - Consider using a bell or chime to call people’s attention and mark transitions.
 - Tell them, “In a moment, we will...” or “Now, we will...”
 - Repeat directions 2-3 times.
 - When asking people to turn a page, give them time to do so.
 - Let people know that for writing activities, sharing is always optional.

GUIDE DISCUSSION

Discussion is a great way to honor and invite the expertise that is in the room. Every participant knows something that they can contribute, and giving them time and opportunity to do so will help bond the group.

After you ask a question to the group, wait at least 15 seconds for someone to respond. If no one speaks up, ask for volunteers. When someone shares or asks a question, start your response with “Thank you!” Ask if others have a similar experience or question; encourage reflection. Ask for volunteers to read material out loud instead of having facilitators read it aloud; ask for volunteers to write on the parking lot, pass out handouts, and do the other business of the session. Give everyone an opportunity to be seen and heard.

At times, however, the facilitator has to redirect people who get off topic, have too much to say or derail the conversation. You can handle challenging people with a positive, gentle touch if you address the behavior and not the person, using one of these strategies:

- Remind everyone that the session has to stay on the agenda to finish on time.
- Ask if you can save their questions or ideas for break time to address one-on-one.
- Compliment them on their awareness, and return to the main point.
- Invite people who haven’t spoken in the session yet to speak up.
- If necessary, interrupt by saying, “Thanks for sharing that,” and then move on.

If a volunteer’s words directly go against CASA values (such as biases or negative stereotypes of groups), note it: “Those beliefs are incompatible with CASA advocacy,” then move the conversation away. For coaching on how to handle these conversations, watch the video on the Texas CASA Learning Center website called “Bias-Free Advocacy.” You can also direct potential advocates to view this video on their own (or show it in class).

If a volunteer displays strong negative feelings, anger or resentment toward a particular group, they may require one-on-one coaching, opportunities for further learning or even dismissal from the program. **Keep in mind that Pre-Service training is an important part of the screening process, and carefully follow up on any red flags.**

KEEP ENERGY MOVING

Physical movement and unexpected fun are the lifeblood of trainings! Get people moving, do energizers (at the end of this section), raise enthusiasm and return people's attention to the present.

Help people take off the many hats they wear outside of the classroom, and get themselves into the training experience. As the session progresses, use connection activities to help build a sense of community among learners.

ASK PARTICIPANTS TO EVALUATE EACH SESSION

Feedback is the lifeblood of a great group experience. Every group and member is different. At the end of each session, pass out evaluations to participants. Encourage them to be honest and help your training team improve and grow (find an evaluation form online at www.texascasa.org/preservice).

Use these to evaluate and help you make improvements in the future.

- What challenges came up during the course?
- Were there any technical problems?
- Were students confused by any activity instructions?
- Were students effectively engaged by the activities?
- Did things flow smoothly from content to activities?
- Was there anything that didn't feel quite right?
- What worked well and felt great?
- What should you definitely NOT change?
- Were there any "pleasant surprises"?
- Are there any issues to address at the start of the next session?

CONNECTION ACTIVITIES: OPENERS AND CLOSERS

Openers

Use brief, high-energy activities to open and end each session, as time allows. We include some here, and also invite you to find your own.

Name Game

- Stand in a circle.
- Each person chooses an attribute or characteristic for themselves that starts with the same letter as their first name. Example: “Abe is Affectionate,” “Jonathan is Jamming” and “Margaret is Magical.”
- The next person repeats the first person’s name and then adds their own. It goes around the circle, each person repeating all of the names that came before.

Alternative:

- Have each participant give their name and something they like that begins with the same first letter.
- Each subsequent participant does the same and repeats the name and like of everyone that went before. Example: The first person says “I’m Christopher and I like candy. The next person says “He’s Christopher and he likes candy, and I am Sylvia and I like swimming.”

High Fives

- Ask everyone to walk around the room for three minutes. They have to give a high-five to every single other person in the room. As the facilitator, you can say, “Look around—is there anyone you haven’t high-fived? Time is running out!”

Whoosh and Bing

- In a standing circle, pass a “whoosh” around the circle. This is done by saying “whoosh!” and throwing your hands toward the person next to you. After it goes around a couple times, stop the “whoosh!” and send a “bing!” going the opposite way, using a different hand gesture.

Tiny Dance Party

- Cue up one song on the sound system and say, “Let’s all stand up. I want everyone to start by moving just ONE part of your body, like your shoulder or your foot, to the music.” (Give that a minute or two.)

- Continue by prompting, “Great! Now add two more parts of your body, like your hands or your head.”
- Finally, say “Great! Now use your whole body to move while this song plays. Then we’ll move to the next activity.”

Ha!

- Participants stand or sit in a circle. Explain that you will give the group a word, and an important part of this exercise is to be serious and not to laugh.
- The first person will say the word once to the person on their right. They must make eye contact as they do.
- The person to their right will say the word twice, to the person on their right. They must also make eye contact.
- That person will say the word three times to the person on their right, while making eye contact.
- This will continue around the circle.
- Give them the word: “Ha!”
- Continuing around the circle, it will look like this:

Ha

Ha, ha

Ha, ha, ha

Ha, ha, ha, ha

Ha, ha, ha, ha, ha

The actual goal is to get everyone laughing.

One Word Closers

A fast way to bring a meaningful closure to each session is for participants to go around the room and say one word in response to a prompt question you offer them, such as:

- “I’d like each person to think of one word to describe what you will remember or want to take away from tonight. Let’s go around the circle and each say our word.”
- “If there was one thing you would give to the children we learned about tonight, what would it be?”
- “Share a word that describes how you are feeling right now.”

After all have spoken, clap for everyone.

FACILITATOR REFLECTIONS

How would you describe your personal style as a trainer?

What do you think your gifts are as a communicator?

What skills would you like to strengthen?

Who or what could help you strengthen those skills?

What do you like best about training people?

What are you most afraid of when giving a training?

The best thing that could happen/has happened in my training session is:

NOTES

Session 1

1



TEXASCASA
Court Appointed Special Advocates
FOR CHILDREN



OVERVIEW

This is a 3½ hour session. Although times may vary widely based on the number of participants, we have created a sample timeline based on an evening class beginning at 6:00 p.m. and ending at 9:30 p.m. Please adjust the timeline as needed to fit your training and class size.

In this session, participants learn about the roles and responsibilities of CASA volunteers and the principles that guide their work. Your goal as a facilitator is to establish the tone for the training and to create a positive learning environment. This includes:

- **Inclusivity:** Participants feel it matters that they are present.
- **Motivation:** Participants express their reasons for choosing to join the training.
- **Safety:** Participants feel they can ask questions, share opinions and explore values.
- **Inspiration:** Participants feel inspired about their contribution to child welfare.
- **Welcoming Burning Questions:** Participants ask pressing questions that free them to be attentive and involved.
- **Group Agreements:** Participants understand the norms and expectations for the training, and establish trust in the community.

This is a “big picture” session, setting the historical and current context of child protection and describing the CASA volunteer’s place in the overall system. This session provides an opportunity for participants to feel inspired, knowing they can make a difference in the lives of children.

As a facilitator, you should address the commitment required in being a CASA volunteer. Balance inspiration with realistic expectations. Make sure trainees know what they will be asked to accomplish. Encourage participants to think critically about the CASA role and its limits and parameters.

CASA volunteers need to understand the influence of their own values and race, class, gender, religious and other cultural experiences on their perspective. Watch for difficulty accepting or tolerating other perspectives, and follow up one-on-one about any red flags.

SUPPLIES AND CHECKLIST

Supplies:

- Name tags and supplies for name tents
- Sticky notes
- Snacks
- A/V equipment: computer, projector, screen, speakers
- PowerPoint presentation

Flip charts:

- A blank page titled “parking lot”
- A blank page titled “expectations”
- A prepared page listing group agreements, with room for more to be added

Handouts:

- Copies of the Volunteer Dilemmas worksheet
- Copies of your program’s policies and procedures, emphasizing the dos and don’ts for volunteers (see sample at the back of this guide)
- Copies of your program’s Volunteer Advocate Job Description (see sample at the back of this guide)
- Copies of your program’s Court Report Template and Court Report Instructions (see sample at the back of this guide)
- Copies of the Bleux Case Court Report styled in your program’s court report format. Learners will need to review this as part of their Pre-Work for session 2
- Copies of Session 1 Evaluation

Videos:

- “Emily’s Dragon”

Slide 1



- Greet participants warmly as they arrive and invite them to make name tents or name tags.
- Once participants have found a seat, fade your background music out and welcome your class! Introduce yourself and any co-facilitators.
- Ask participants to introduce themselves with their name and one detail (a light one, such as what they had for breakfast, the names of pets, a hobby they love).
- Do an opener exercise.

INTRODUCE GROUP AGREEMENTS

Bring everyone’s attention to the flip chart where you have listed the group agreements. Ask participants if they want to add anything to the list.

We have shared agreements so we establish values for our community and how we’ll interact, and to keep everybody engaged and safe. Can I get one person to read out each agreement? [Discuss each ground rule after all are read out.] Are there any ground rules that anyone would like to add to this list?

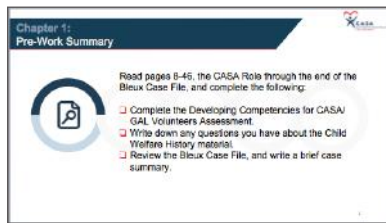
INTRODUCE TRAINING GOALS

Advance to slide 2



- Shift attention to the PowerPoint slide with training topics for this session. Briefly touch on what you will be covering to help learners feel oriented to the day’s agenda, including when they can anticipate a break.

Advance to slide 3



- Take a moment to celebrate and thank your class for the time they invested in completing their Pre-Work. Acknowledge how many hats they wear outside of this training and that you understand their time is precious. You can encourage them to high five the people on either side of them to start to build a class culture of celebration.

- Invite any questions learners have after completing their Pre-Work. This is a great opportunity to try out the parking lot, as their questions may relate to things that will be covered in the future. Acknowledge each question, and write questions for later in the parking lot.

Advance to slide 4

Competency Category	Knowledge, Skills and Attributes Development in Chapter 2
Foundations of Knowledge	Understands age-appropriate behavior and development for children
	Understands a child's basic needs
	Understands why the MSJ standard is in the best interest of children
Sound Judgment	Understands the cycle of attachment
	Understands what constitutes abuse and neglect
	Understands risk factors for child abuse and neglect
Communication	Understands the benefits and steps to using a strength-based approach
	Knows how to evaluate what is in the child's best interest

- Encourage learners to think about their Competencies Checklist throughout the entirety of training. Explain that there are a lot of skills that go into being a competent advocate, and you are here to support them in building these skills. Note the slide, which shows the topics from the checklist you'll be tackling together today.

ACTIVITY 1A: CELEBRATE EXCITEMENT AND RECOGNIZE CONCERNS

Advance to slide 5



- Ask volunteers to pause and think about what they are most excited and concerned about as they begin their CASA journey. Invite them to take a sticky note and write one sentence summarizing their apprehension and one summing up their excitement.

- Next, ask them to crumple up their sticky note and toss it into the air. Have each person pick up a crumpled note and ask for volunteers to read the paper they picked up. There may be overlap or connections between what people chose to write. The goal is to acknowledge and normalize apprehensions, and celebrate excitement.
- Alternative activity: Ask volunteers to share who they see as a hero and why, and to describe one characteristic of this hero they hope to bring into their work as a CASA.

ACTIVITY 1B: “EMILY’S DRAGON” AND THE IMPACT OF CASA VOLUNTEERS

6:40 – 7:00

Advance to slide 6 to show that we are moving into talking about the volunteer role; then advance to slide 7



- Play the video “Emily’s Dragon,” an 8-minute film from the point of view of a child who has been removed from her home and placed in foster care.
- Invite a large group discussion about responses learners had to the video. Ask what stood out to them as they watched the story, and what ways they saw the CASA volunteer helping the child.

Advance to slide 8



- Ask volunteers to read aloud the slides displaying the National CASA mission statement and your local program’s mission.

Advance to slide 9



- Emphasize the key aspects of the CASA volunteer movement: helping children find safety, permanence and the opportunity to thrive. As CASA volunteers, they will be part of a movement to make life better for children in the child protective services (CPS) system.

- Review evidence of effectiveness:
 - Children with CASA volunteers get more help while in the system, have more services ordered for them, are more likely to have a consistent, responsible adult presence and are less likely to be bounced from home to home.
 - A child with a CASA/GAL volunteer is more likely to have a plan for permanency, especially children of color.
 - Volunteers spend significantly more time with the child than a paid guardian ad litem, and CASA volunteers improve representation of children.

For citations and further study, visit www.casaforchildren.org

Advance to slide 10



- Pass out copies of your program’s **Volunteer Advocate Job Description**. To transition to the volunteer role, ask a question such as, How do you, as a courageous CASA volunteer, help us reach our mission? What specifically do CASA volunteers do that contributes to these stronger outcomes for the children we serve?

- Circle back to the description of the CASA role that learners reviewed as part of the Pre-Work for this session. Fill in details from your program’s Volunteer Advocate Job Description to help trainees understand the requirements specific to your program.
- Give an overview of the four main components of the CASA volunteer role: investigation, advocacy, facilitation and monitoring. Ask if a volunteer can explain the difference between what a CPS investigator does and our investigation work.



Help make these roles less abstract for learners by sharing a brief story to illustrate each of the four components.

Advance to slide 11



- Ask volunteers to think back on the Bleux case, which they read before coming to class. Ask them to quickly share what information they remember about the case.

Advance to slides 12 and 13 to reiterate timeline of Bleux case so far



Pose the question: “Based on what you learned about the four key components of the CASA volunteer role, how could a volunteer make a difference if assigned to this case?” (Some ideas might be: family engagement, medical care and observation of visits.)

Advance to slide 14; turn on music at low volume



ACTIVITY 1D: VOLUNTEER SKILLS

7:30 – 7:55

Advance to slide 15

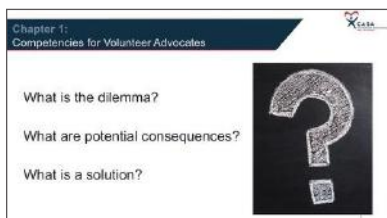


- Divide volunteers into small groups for this exercise. Ask volunteers to open their manual to the Volunteer Competencies list (beginning on page 10). Ask them to each share one area of strength and one area they want to develop in the small group.
- Ask each group to be prepared to share with the larger group common areas of strength and common areas for further development.
- Wrap up by inviting each group to report to the larger group. To help volunteers feel supported, discuss how they will be able to enhance the skill they want to develop throughout pre-service and in-service training. Tell participants that you will revisit the Competencies Checklist during the final training session to check in on which areas they've strengthened through training and which areas they want to continue to work on with their supervisor.

ACTIVITY 1E: PARAMETERS FOR CASA VOLUNTEER RELATIONSHIPS

7:55 – 8:25

Advance to slide 16



Before facilitating this session, make copies of the **Volunteer-Child Relationship Dilemmas** worksheet. If beneficial, add or substitute your own dilemma scenarios based on your program's experiences. Also prepare copies of your program's policies and procedures concerning the dos and

don'ts for volunteers (for example, volunteers should not give legal advice; volunteers should not give money or expensive gifts to children or families; volunteers should not give counseling or provide direct services; etc.).

- Divide class into small groups and pass out **Policies and Dilemmas** to groups.
- Introduce the activity:

As a CASA volunteer, you'll need to have enough direct contact with a child to gather information about the child's circumstances, including the child's needs and wishes, so you are able to make sound, thorough and objective recommendations in the child's best interest.

This should occur in person to provide you with firsthand knowledge of the child and their unique personality, abilities and needs. While social contact with the child can help to develop trust and a meaningful relationship, your role is that of an objective advocate for the child and not the child's attorney, caseworker, counselor, mentor or parental figure.

It's important to keep in mind that we do not provide direct services to the child, such as supervising visitation; however, it is appropriate for you to observe visitation to gather more info about parenting dynamics. CASA advocates never take a child into our home, provide shelter for the child or take the child on an overnight outing. As an advocate, your role is to identify challenges, as well as possible resources and solutions without risking the child's safety, your credibility as a professional and the integrity of the CASA program.

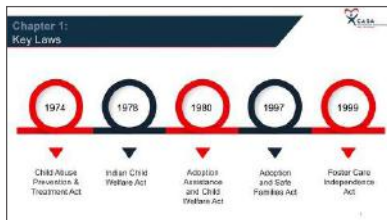
- Ask each table to discuss their dilemmas and answer three questions: What is the dilemma? What are the potential consequences of the dilemma? What is one possible solution?
- Give them 10 minutes to discuss, and then bring them back to large group to share. Be sure to also illuminate any specific problems and possible solutions that participants do not cover in the discussion. There are a number of possible solutions for each dilemma, and some will depend on your program's policies and procedures. If there is a best way to handle each situation in your program or if local rules apply, let participants know what is expected.
- Highlight ways to prevent each dilemma, such as by being honest with parties about the limits of the volunteer role.
- Let volunteers know that they will be reviewing the policies in more depth as part of their Pre-Work, and that you will be breaking them down as they progress through training.

Advance to slide 17 to transition into the Child Welfare System



- Have volunteers think back to what they learned about the laws in their Pre-Work, and ask for any questions they have about the laws.

Advance to slide 18



Highlight the takeaways of major child welfare laws:

- **Child Abuse Prevention and Treatment Act (CAPTA): 1974**
 - Requires that states have reporting laws, that they investigate abuse and neglect reports, and that they provide a guardian ad litem for each child.



Ask: Are CASA volunteers mandated reporters in Texas?
Yes! Everyone is.

- **Adoption Assistance and Child Welfare Act: 1980**

- Requires that states recruit culturally diverse foster and adoptive families.



Why is it so important for our community to have a diverse pool of foster and adoptive homes?

- Requires that states provide “reasonable efforts” to prevent or eliminate the need for removal of the child from the home or to make it possible for the child to return home.



Why do we believe that this is important?

- **Adoption and Safe Families Act (ASFA): 1997**

- Emphasizes the temporary nature of foster care and requires that permanency planning begin as soon as a child enters care.



Share a brief case story that can help learners understand why we need this law.

- **Indian Child Welfare Act (ICWA): 1978**



Ask the class: Can anyone share some background about why this law was created?

Here is background to offer if no one knows:

According to the National Indian Child Welfare Agency (ICWA), studies in the 1970s began to reveal that large numbers of Native children were being separated from their parents, extended families, and communities by state child welfare and private adoption agencies. In fact, research found that 25–35% of all Native children were being removed; of these, 85% were placed outside of their families and communities—even when safe and willing relatives were available to care for the children. Congressional testimony documented the devastating impact this was having on Native children, families and tribes. The intent of Congress under ICWA was to “protect the best interests of Indian children and to promote the stability and security of Indian tribes and families.”

- Recognizes that Indian children have special rights as members of sovereign nations within the United States.
- Lays out placement preferences for children who have been determined to be Indian children.
- Establishes the right of certain entities to appear as parties, including the tribe and the Indian custodian, if one exists.



What steps can we take as CASAs to comply with ICWA?

- ◆ Stress for volunteers the importance and urgency of asking parents and family members whether the children have Native American heritage. Although caseworkers are also mandated to ask about this, it often falls through the cracks.

- ***Foster Care Independence Act: 1999***

- Allows states to serve and provide resources to youth up to age 21.
- Increases federal funding to assist young people transitioning from foster care. *Let the class know that we will talk in greater depth in session 7 about the experiences and needs of older youth in foster care.*

- ***Fostering Connections to Success and Increasing Adoptions Act: 2008***

- Requires child welfare agencies to work with schools to support the education needs of children in foster care.
- Increases federal funding to assist and serve young people transitioning from foster care.
- Specifies that independent living services may be provided to young people at “various ages” and various stages of achieving independence, “including children waiting for adoption or other permanent options.”

Takeaways:

- It's important to acknowledge that our child welfare system is an imperfect system with an imperfect history.
- The laws that govern it have continued to change and evolve over the last century and will continue to change.
- One critical takeaway is understanding how the system has failed to account for the cultural needs of many children and the additional trauma this creates.
- Let the class know that throughout your time together, you'll have ongoing discussions about the importance of practicing cultural humility as CASA volunteers, as well as honoring and advocating for the cultural needs of our children.

ACTIVITY 1G: THE CHILD WELFARE SYSTEM

8:40 – 9:00

Advance to slide 19

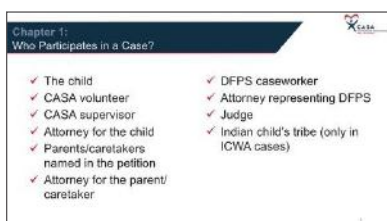


- Ask participants to open their manuals to the Child Protective Services flowchart and to take notes as you describe how a case moves through the system. Point out any differences between your jurisdiction and the flowchart, including names of hearings and timelines.

Using the Bleux case as an example, use sample dates to illustrate how long it could take for a child to achieve permanency.

- Explain the purpose of each hearing, and provide examples of what volunteers would do along the way, such as conducting interviews, engaging family members, making observations, connecting with community supports for parents and placements, identifying opportunities for the child to engage in community activities and submitting court reports. Tie this back to the four main components of the CASA volunteer role (investigation, advocacy, facilitation and monitoring) to help learners see how their role fits into the life of a case.

Advance to slide 20



- Next, ask participants to take notes as you describe the roles of the key players involved in the child welfare system, including the child, CASA volunteer, parent(s)/ caretaker(s), family and close community members, judge, attorneys, tribe members, caseworkers, child protection

agency and other service professionals. Clarify what each role is called in your area.

- Explain how the volunteer will work with each professional in order to develop a clear picture of the child’s situation and develop recommendations that would protect and promote what is in the child’s best interest.
- Share any tips or best practices from your program area for working with each group of people (for example, that caseworkers may be most responsive to text messages rather than email).

ACTIVITY 1H: INTRODUCTION TO COURT REPORTS

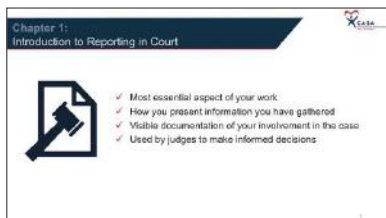
9:00 – 9:15

Advance to slide 21 to transition into the Working a Case section



- Introduce court reports as one of the most important vehicles of communication CASA volunteers have with the court and other legal parties. Explain that court reports are narrative documents where volunteers summarize the key points of the work they have completed on the case in between each hearing.

Advance to slide 22

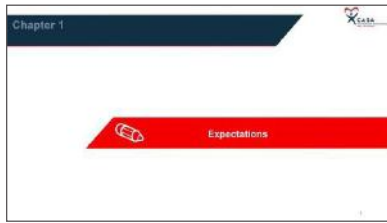


- Hand out copies of your program’s court report template and instructions for writing a court report. Let participants know that you will be breaking down the different sections of a court report throughout training, so they will need to bring these court report handouts with them to each

class. Explain that the court report is the most important way to effectively communicate the child’s needs to the court. Although it can sound daunting, completing the court report does not have to be a difficult task. Keeping detailed notes and contact logs during their advocacy work will help them to write each section of their report. Previous CASA reports, DFPS court reports and the service plan should also be reviewed to compare what was expected to happen with what actually occurred during the time between hearings.

- Share information about what processes DFPS caseworkers use in your area to write their reports, and what communication should look like between the CASA volunteer and the caseworker as they are preparing their independent reports.
- Give a brief overview of what is in a court report, and reiterate that the class will learn more about each section of the court report as they progress through training.

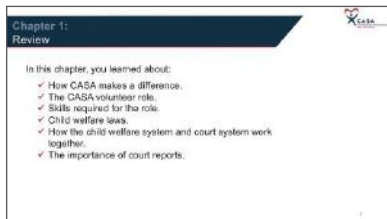
Advance to slide 23



- Now that volunteers have had an introduction to the training and their role as a CASA, ask your learners to write what they hope to gain from the training process on a sticky note and place it on the expectations flip chart in the front of the classroom. This can be a specific competency they hope to strengthen or something broader. Let them know that you will circle back to these at the end of the training process to check in on whether or not these expectations have been met.

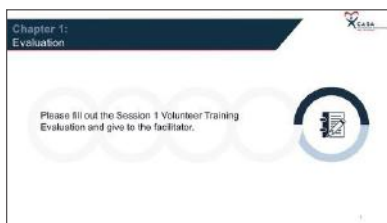
REVIEW, EVALUATION AND PRE-WORK ASSIGNMENT

Advance to slide 24



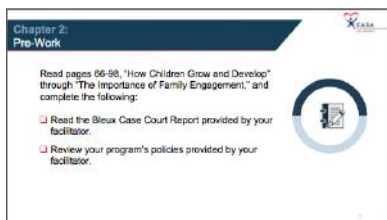
- In summary, quickly review the objectives from the beginning of the session to check in about volunteers' comfort level with the content. Invite any remaining questions.
- Share information with volunteers about ways they can learn more about the topics covered in this chapter.

Advance to slide 25



- Pass out evaluations and emphasize the importance of participant feedback.

Advance to slide 26



- Go over assigned Pre-Work for session 2 and ensure everyone has a clear understanding about what to tackle before the next session. Hand out copies of the Bleux Case Court Report for them to read or let them know they will receive this from you by email. Explain that time has passed since the case opened; Deshawn is out of the hospital and in foster care.

- Close the session by speaking from your heart about the courage, compassion, commitment or other powerful qualities these advocates-to-be are demonstrating in choosing to become a CASA volunteer. Let them know how grateful you are, and that you're inspired by their choices.

Session 2

2



TEXASCASA
Court Appointed Special Advocates
FOR CHILDREN



OVERVIEW

This is a 3½-hour session. Although times may vary based on the number of participants, we have created a sample timeline based on an evening class beginning at 6:00 p.m. and ending at 9:30 p.m. Please adjust the timeline as needed to fit your training and class size.

This chapter contains activities that allow participants to roll up their sleeves and begin to apply what they are learning to the scenarios in the Bleux case. Prepare a brief recap of the case to refresh everyone’s memory of what they know so far.

One major focus of this session is understanding child development, which can feel a little overwhelming, as it is a vast and varied subject! As a facilitator, it’s helpful to drive home the difference between the many theories and tomes of knowledge about child development and the basic information a CASA volunteer *needs* to know to succeed in their role. The goal is not for volunteers to memorize all the information, but to develop their intuition and be able to “red flag” situations that should be evaluated by a professional or discussed with a supervisor.

As the facilitator, you should acknowledge and build on what participants already know. Connect the content with their personal experience—we were all children once upon a time, and many participants currently have children in their lives.

Check the parking lot before session 2 begins to see if any of the parked issues from session 1 relate to material you will cover in session 2.

SUPPLIES AND CHECKLIST

Supplies:

- Name tents from previous class

Flip charts:

- Your “parking lot”
- Your expectations
- Your group agreements

Handouts:

- Case Assessment Questions handout
- Copies of Session 2 Evaluation

Videos:

- “Interviewing Skills: Meeting with a Parent” video

Slide 1



- Greet participants warmly as they arrive, and invite them to grab their name tents.
- Once participants have found a seat, fade your background music out and welcome your class back for session 2!
- Lead everyone in an opener exercise.

INTRODUCE TRAINING GOALS

Advance to slide 2



- Briefly go over the training topics for this session to help learners feel oriented to the day's agenda, including when they can anticipate a break.

PRE-WORK RECAP

Advance to slide 3



- As always, take a moment to celebrate and thank your class for the time they invested in completing their Pre-Work.
- Emphasize that the work they completed gave them a foundation in children's growth and development, children's needs, the importance of attachment in childhood, how to recognize child abuse and neglect, risk factors for child abuse and neglect and your program's court report.
- Invite any questions learners have in response to their Pre-Work, and capture any questions that will be covered later on the parking lot.

Advance to slide 4

Chapter 2: Chapter Competencies	
Competency Category	Knowledge, Skills and Attributes Development in Chapter 2
Foundations of Knowledge	Understands age-appropriate behavior and development for children
	Understands a child's basic needs
	Understands why the MSJL standard is in the best interest of children
	Understands the cycle of attachment
	Understands what constitutes abuse and neglect
Sound Judgment	Understands risk factors for child abuse and neglect
	Understands the benefits and steps to using a strength-based approach
Communication	Knows how to evaluate what is in the child's best interest
	Understands the elements of a court report

- This slide shows which topics from the Competencies Checklist you will be tackling together today.

ACTIVITY 2A: CHILDREN'S NEEDS

6:30 – 6:45

Advance to slides 5 and 6



- Divide the class into four groups. Assign one category of needs per group: **physical**, **emotional**, **developmental** and **cultural**. If you have a smaller class size, this activity can be done together in the large group.
- Each group will brainstorm a list of what Deshawn Bleux might need in their assigned category (for example, What are Deshawn's emotional needs?)
- Give the groups 5 minutes to quickly brainstorm a list together, and then ask for a volunteer from each group to share their ideas with the larger group.
- Once all the groups have shared, ask the larger group: How would these needs be different if Deshawn were 14?

ACTIVITY 2B: MASLOW'S HIERARCHY OF NEEDS

6:45 – 6:55

Advance to slide 7



- Reiterate that Maslow's hierarchy is a widely respected tool for understanding how our needs are interconnected, starting at the bottom with physiological needs, then moving up to safety, belonging, love, esteem, and self-actualization (this means becoming the best person that one can possibly strive to be in the service of both the self and others.)

- Ask the class, How can CASA volunteers help a child move up the pyramid? Are there any needs would you add for Deshawn, considering Maslow’s hierarchy?

*In our casework, we want to advocate for the wellbeing of the **whole child**. This is one reason why it’s so important that we work to engage family members and help maintain a network of supportive relationships for our children, because those feelings of safety, love and belonging are things that children absolutely need.*

Advance to slide 8



- Emphasize that keeping Deci’s research in mind can also help us see parents through a lens of deeper empathy. His work reminds us that people **need** access to the resources and skills necessary to meet the demands of daily life with competence and ability. People **need** to feel that they have autonomy and are empowered to make choices in their lives. People **need** to experience “relatedness” and connection to others in order to thrive.

*For some folks, it can be difficult to empathize with parents who have neglected or abused their kids. However, it’s not our place to stand in judgment of the parents that we work with. Our role is to focus on advocating for the needs of the children to be met, and we know that children **need** to be raised by their parents whenever safely possible. Doing this work effectively means choosing to practice compassion with parents who have made mistakes. In session 3, we’ll learn more about the Adverse Childhood Experiences or ACE Score, which can help us strengthen our empathy for parents who are struggling to safely parent their children.*

ACTIVITY 2C: ATTACHMENT

6:55 – 7:05

Advance to slides 9 and 10



- Ask for a volunteer to briefly summarize how the attachment cycle works, which they learned in their Pre-Work. Point out that many of the children we serve show signs of disrupted attachment.



Share one or two examples of specific children who never had a healthy attachment to their caretaker or have had that attachment broken. Hearing about children in the volunteers' community makes this issue feel more real for the participants.

- After each story, refer to the attachment cycle visual aid and ask the group where in the cycle the attachment was broken.
 - ◆ If you can't think of an example from your community, describe a 3-year-old who will go to anyone, sit on anyone's lap and show no emotion when the primary caretaker leaves. This child was bounced between numerous caretakers as a very young child because her mom was incarcerated. She has no strong primary attachment figure.
 - ◆ Another example could be a 7-year-old child who hoards food in foster care. As an infant being raised by parents who suffered from heroin addiction, this child was sometimes left to cry for hours without food, and at other times was provided with food whenever she expressed that she was hungry.

ACTIVITY 2D: THE MINIMUM SUFFICIENT LEVEL OF CARE

7:05 – 7:30

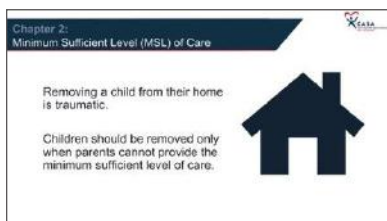
Minimum sufficient level of care is a key foundation for our advocacy work. Facilitators should dedicate sufficient class time to ensuring trainees truly understand what can be challenging ideas to accept.

Advance to slide 11



- Remember to check in with your class as the discussion unfolds. Ask what you can clarify to help make them feel more comfortable with the concepts.
- Transition to introducing the minimum sufficient level of care (MSL).

Advance to slide 12



- Stress that removing a child from the home because of abuse and/or neglect is a drastic remedy. Because removal is so traumatic for the child, the law requires that agencies work to keep the child in the home whenever it's possible to do so and still keep the child safe. But how do we know what a "safe home" looks like?

- Ask the class to pause and consider what a safe home looks like to them. Have them take a moment and conjure an image of a safe home in their mind. Once they've had a minute to visualize this, ask what the likelihood is that any two images look exactly the same. Point out that since we all have different life experiences, worldviews and personal standards, our perceptions of what constitutes a safe home vary.
- The Minimum Sufficient Level of Care is a baseline that's determined by a number of factors. Essentially, this baseline describes what must be in place for the child to remain in the home, and it's the same standard that's also used to determine whether or not parents have made sufficient progress so that a child can be safely returned to the family home. In every case, children should be removed only when parents cannot meet that child's MSL.

Advance to slide 13



- Walk the class through the factors of the MSL. Ask volunteers to throw out examples of **basic needs**, emphasizing that you are looking for only the most essential needs a child may have for survival and not something that is “nice to have.” Ensure volunteers surface these needs:
 - **Physical needs** (food, clothing, shelter, medical care, safety and protection)
 - **Emotional needs** (attachment between parent and child, freedom from emotional abuse and connections to supportive adults)
 - **Developmental needs** (educational needs and special help for children with disabilities)
 - Share an illustration of behavior that falls within and outside of social standards. For example, in terms of discipline, does the parent use disciplinary tactics that are widely practiced norms in our society such as time out? Or do they use approaches to discipline that would be widely viewed as cruel and unusual, like regularly refusing the child food?
 - Share examples of behavior that falls within the community norms. Some ideas:
 - The age at which a child is deemed old enough to care for other children is largely determined by cultural and community norms.
 - Even something as simple as sending a 9-year-old child to the store might fall within or outside community standards, depending on neighborhood safety, the distance and traffic patterns, the weather, the child's clothing, the time of day or night, the ability of the child and the necessity of the purchase.
- ? Pause for a perception check: Ask the class, “Based on these parameters, would the minimum sufficient level of care be the same for two siblings in the same home? If not,

why not?” Point out that the MSL for each child is based on that particular child’s specific needs, which can vary greatly based on age, ability, medical needs, etc.

- Have your class work in small groups at their table for five minutes to brainstorm answers to the questions:
 - How do you think the MSL standard benefits children?
 - How do you think the MSL standard benefits parents?
 - How does the MSL help us practice sensitivity to the cultural and community norms of the families we are working with?
- After five minutes, have volunteers quickly share back their ideas to the larger group. Then read the following statement aloud to the class and ask participants to respond: “Some people believe that the best place for children to grow up is in their own homes, with their own families—even if a foster family can provide material things that the children will never have if they are returned home.” Allow two or three minutes for group discussion.

Takeaway:

It can be difficult to accept that there may often be a pretty big gap between the Minimum Sufficient Level of Care required for a parent to be able to raise their child, and what would be the ideal level of care for that child. Of course we want every child to have the healthiest, most comfortable, empowering and joyful life full of opportunities. However, we need to always keep in mind that if a child is physically, emotionally and developmentally safe with a parent, being in their parents’ care is in the child’s best interest.

BREAK

7:30 – 7:45

ACTIVITY 2E: THE BEST INTEREST PRINCIPLE

7:45 – 7:50

Advance to slide 14



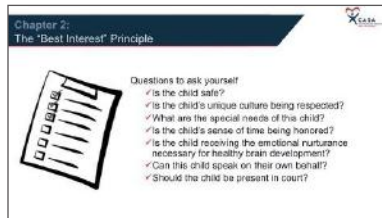
Begin this discussion by asking the class, “Who decides what’s best for the children in your life?”

Advance to slide 15



- Ask for a volunteer to read aloud the first two paragraphs under “The Best Interest Principle: What the National CASA Association Says.” Invite the class to comment on what stood out to them in that paragraph.

Advance to slides 16 and 17



- Briefly go through the Best Interest Checklist.

ACTIVITY 2F: RISK FACTORS FOR CHILD ABUSE AND NEGLECT

7:50 – 8:05

Advance to slides 18 and 19



- Ask if participants have any questions about the definitions of abuse and neglect from their Pre-Work. Emphasize that CASA does not investigate allegations of abuse or neglect; however, it's necessary to be able to recognize abuse and neglect in order to advocate for a safe home for a child. Let volunteers know they should always discuss any concerns with their supervisor.

Advance to slide 20



- Convey to participants that at some point all families encounter change, stress and perhaps even crisis—the family moves, a parent is laid off, childcare arrangements fall through, a new stepfamily comes into being, the car

breaks down, a child becomes ill, the rent goes up, and on it goes. The families that participants will encounter in their work as CASA volunteers are, by definition, under stress and are likely to be in crisis—if for no other reason than the state is now involved in determining whether their child remains in their care and custody. Some families cope well and adapt effectively to stress and crisis; others do not and become overwhelmed. Families that are not able to cope well are often isolated from resources, face a variety of challenges and are stressed by numerous problems that compound one another. These families may develop patterns that lead to, and then perpetuate, abuse and neglect.

- Briefly highlight key information from the risk factors for child abuse and neglect information that volunteers read as part of their Pre-Work. Divide participants into small groups and assign each group one category of risk factors (child-related, parent-related, social-situational, family and triggering situations). Ask that each group list the factors in their category that they noticed in the Bleux case.
- Allow five minutes for small group discussion, then ask groups to come back together and share their ideas. Stress that in many families, more than one condition contributes to the reason child protective services files a petition for the court’s intervention. As groups report back, be ready to offer some examples if participants do not come up with their own.
- Next, in the large group, lead participants in brainstorming the types of services, supports and interventions that should be implemented to alleviate the issues in the Bleux family. This is a great opportunity to circle back to the MSL and emphasize the importance of advocating for services that are directly related to any concerns about the parents’ abilities to meet the MSL for their children. Emphasize, “We don’t want to advocate for more services simply for the sake of quantity; we want to advocate for more appropriate services and supports for the sake of a quality intervention and lasting positive change.”

ACTIVITY 2G: FAMILY STRENGTHS AND WEAKNESSES

8:05 – 8:15

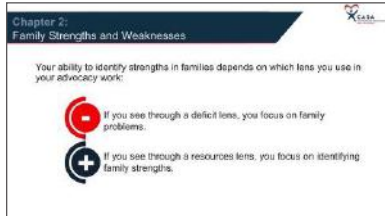
Advance to slide 21



- Have participants take a moment to think about their families (either their family of origin or their current/ chosen family), trying to focus first on an event that illustrates the strengths in their family and then on an event that exemplifies the weaknesses, struggles or deficits. Ask them to quickly write down one strength and one struggle, and give them

a moment to share their responses with a partner. After pairs have finished sharing, ask for a couple of volunteers willing to share in the large group. Be aware that some participants may have been raised in an environment of abuse and neglect themselves, and note that they only need to share what they are comfortable with.

Advance to slide 22

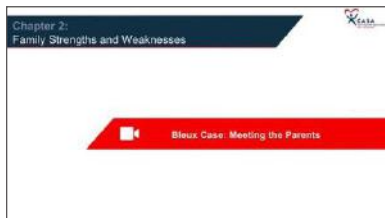


Ask participants, "What might be some benefits of using a strengths-based approach in your work as CASA volunteers?" Allow a few minutes for discussion.

ACTIVITY 2H: A STRENGTHS-BASED APPROACH TO SPEAKING WITH PARENTS

8:15 – 8:40

Advance to slide 23



- Play the video "Interviewing Skills: Meeting with a Parent." Guide participants to think about the Bleux family's strengths as they watch. Note a few items for participants before playing the video:
 - Ask participants to watch the video looking for tone, body language and other techniques that can be used in all interviews—with parents, foster parents, relatives, teachers and so on.
 - If your program does not provide an opportunity for CASA volunteers to visit with or talk to parents, underscore that the techniques depicted in the video are transferable to all interviews.
 - The video mentions that the mother has been engaged in anger management due to concerns about domestic disputes. Explain that although anger management is often the default intervention ordered for intimate partner conflicts, research shows that individual therapy focused on learning healthy relationship dynamics is a more effective intervention. This will be covered in greater depth in session six.
- Following the video, in the large group, discuss the following questions:
 - What strengths did you observe in the mother?
 - If you don't know whether or not a particular strength exists in this family, how might you gather information to find out? (For ideas on how to formulate

questions, direct participants to the “Asking Strengths-Based Questions” section on page 110 of their manual.)

- How would looking only at strengths or only at deficits affect your recommendations for this family?
- Transition into a discussion about family engagement, highlighting that the volunteer in the video did not seek out any information about family connections for the child. Encourage volunteers to think back on the information covered in their Pre-Work about the importance of bringing relatives to the table:

One of the strengths mentioned by the mother is that she has support from her sisters as well as from Miles’ family. Considering what you learned in your Pre-Work about engaging family members, what would you have asked this mother to find out more about these supportive relatives? What would the benefits of your family engagement efforts be for the Bleux family?

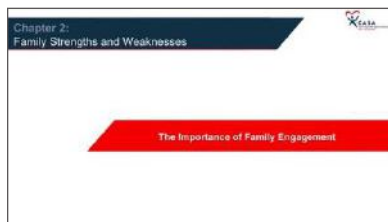
Answers could include:

- ◆ Gaining further insight about the child’s needs and strengths.
- ◆ Gaining further insight about the parents’ needs and strengths.
- ◆ Exploring the possibility of advocating for the child to have visits with appropriate relatives.
- ◆ Exploring the possibility of the child being placed with appropriate family members rather than in foster care.
- ◆ Exploring the possibility of an appropriate family member becoming approved to supervise parent/child visits in order to create a more natural visitation environment.
- ◆ Gathering information about other family members to contact.
- ◆ Building out a family tree.

ACTIVITY 2I: MYTHS AND FACTS ABOUT FAMILY MEMBERS

8:40 – 8:50

Advance to slide 24



Ask the class, “What are some false assumptions or ‘myths’ about the family members of children in the child welfare system?” Some ideas include:

- The family members would have come forward already if they really cared about the child.

- Everyone in the family probably has criminal history or has been involved with CPS.
- The family members are probably too poor to take good care of the child.
- There are no other family members.
- The caseworker is the person responsible for finding and engaging family members.

The goal is to break down these false assumptions that get in the way of pursuing family finding and robust family engagement efforts. Help participants understand that they can't get a clear idea about how safe and appropriate family members are until they find out more about them, and they should pursue every avenue to find safe adults in a child's family network. If your program has other tools for connecting with family members, share those here.

- Invite any questions participants may have about family engagement work.

ACTIVITY 2J: ASKING THE RIGHT QUESTIONS AND PLANNING YOUR NEXT STEPS

8:50 – 9:05

Advance to slides 25 and 26



- Give a brief recap of the Bleux case.
- Divide participants into small groups, and distribute copies of the Case Assessment Questions. Using the handout, groups should identify additional questions they would like to seek answers to, as well as possible sources for the information (caseworker, foster parent, birth parent, child, therapist, relative, etc.).
- In the large group, have volunteers plot out their next steps for working the Bleux case (for example, requesting records [which ones?], scheduling interviews, submitting reports, consulting with the program's case supervisor and appearing in court).

Advance to slide 27



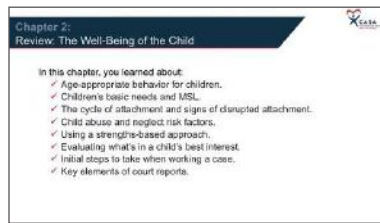
- Participants should have copies of your program's court report template, which you distributed in the previous session. Have trainees look at this template as you give a brief overview of each section of the report and its purpose. Explain how participants will access the report forms or templates, and how and when they will submit their written reports to the program.

Advance to slide 28



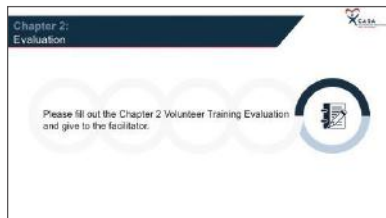
- Give participants an overview of your program's guidance for writing effective court reports, highlighting the most important tips and things that case supervisors check for when reviewing reports. Then, ask participants to answer the following questions using the sample report for the Bleux case:
 - Was the report organized, grammatically correct, factual, objective, concise and conclusive about what's in the child's best interest?
 - Are there unanswered questions?
 - Are the report's recommendations supported by facts and/or concerns?
 - Do the recommendations flow logically from other information stated in the report?
 - Are there other pieces of information that should have been included?
 - If you were the CASA volunteer on this case, are there other people that you would have liked to interview, or documents that you would have liked to review to support your recommendations?
 - Based on the report, do you feel that the judge would be able to make a decision in the best interest of the child?

Advance to slides 29 and 30



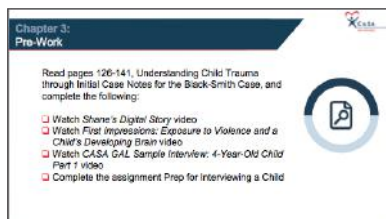
- In summary, quickly review the objectives from the beginning of the session to check in about volunteers' comfort level with the content. Invite any remaining questions.
- If applicable, share information with volunteers about ways they can learn more about the topics covered in this chapter.

Advance to slide 31



- Pass out evaluations and emphasize the importance of participant feedback.

Advance to slide 32



- Go over assigned Pre-Work for session 3, and ensure everyone has a clear understanding about what to tackle before the next session.

Session 3

3



TEXASCASA
Court Appointed Special Advocates
FOR CHILDREN



OVERVIEW

This is a 3½-hour session. Although times may vary widely based on the number of participants, we have created a sample timeline based on an evening class beginning at 6:00 p.m. and ending at 9:30 p.m. Please adjust the timeline as needed to fit your training and class size.

Be aware of participants who may be struggling with personal experiences of trauma, especially as you introduce the Adverse Childhood Experiences calculator. Be sensitive to their experiences, and work to compassionately support these participants in learning to self-assess how past experiences might affect their advocacy.

This session introduces the importance of effective communication in CASA volunteer work. Allow opportunities for participants to practice the skills they're learning in order to build confidence and prepare them for their role.

SUPPLIES AND CHECKLIST

Supplies:

- Name tents from previous class

Flip charts:

- Your “parking lot”
- Your expectations
- Your group agreements
- A flip chart for each group to use during the Black-Smith case study exercise

Handouts:

- Copies of the Black-Smith case study materials
- Copies of Session 3 Evaluation

Videos:

- “Adverse Childhood Experiences (ACE) Study” video

Slide 1



- Greet participants with enthusiasm as they arrive, and invite them to grab their name tents.
- Once participants have found a seat, fade your background music out and welcome your class back for session 3!
- Lead everyone in an opener exercise.

INTRODUCE TRAINING GOALS

Advance to slide 2



- Briefly go over the training topics for this session to help learners feel oriented to the day’s agenda, including when they can anticipate a break.

PREWORK RECAP

Advance to slide 3

- Celebrate and thank your trainees for the time they invested in completing their Pre-Work. Invite any questions learners have in response to their Pre-Work, and capture any questions that will be covered later on the parking lot.

Advance to slide 4

Chapter 3: Chapter Overview and Competencies	
Competency Category	Knowledge, Skills and Attributes Development in Chapter 3
Foundational Knowledge	<ul style="list-style-type: none"> Understands the nature and scope of trauma, and how it affects children Understands possible reactions of children to separation and loss Understands the importance of resilience in overcoming traumas in children
Sound Judgement	<ul style="list-style-type: none"> Understands making appropriate fact based recommendations to the court
Communication	<ul style="list-style-type: none"> Knows how to utilize basic communication and interviewing skills Knows strategies for interviewing children

- This slide shows which topics from the Competencies Checklist you will be tackling together today.

Advance to slide 5



- The goal of this discussion is to anchor the topic of trauma in participants’ own knowledge and help them be aware of how their life histories may affect their advocacy.

Advance to slide 6



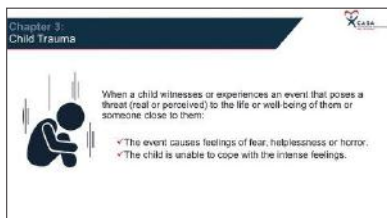
- Show the slide with the Walt Whitman quote, and ask for a volunteer to read it aloud. Invite a few participants to share their thoughts on the meaning of the quote. Point out that both negative and positive experiences have an effect on children.

Advance to slide 7



- Show the PowerPoint slide about the Feelings Thermometer and briefly introduce this concept. Emphasize that it is important for participants to be aware of their reaction to trauma and to any personal experience with trauma. Encourage participants to talk to program staff if they feel their advocacy role may be affected by experiences with trauma.

Advance to slide 8



- Recall the information on Understanding Childhood Trauma that the participants read as part of Pre-Work.

Advance to slide 9



- Remind volunteers that very often children in the system have been exposed to multiple traumatic events or trauma over long periods of time. Because of this, it's important that volunteers have an understanding of what trauma is and how children are affected by it. It's

important to note that everyone involved in the system will often have their own trauma histories as well.

Advance to slide 10



- Ask participants to think back on the "Shane's Story" video that they watched. Ask participants to recall the various types of trauma that Shane experienced before and after entering the child protective services system, and invite a volunteer to capture the group's ideas on a flip chart.

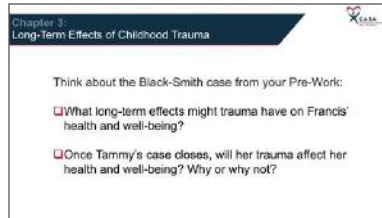
Shane's experiences included domestic violence (wrestling matches between his mom and dad), physical abuse from his dad, substance abuse in the home, his dad's death from alcohol, his mom's depression and his removal from his parents.

Advance to slide 11



- Remind participants to always treat the children we work with as individuals, and not as victims. Emphasize the importance of advocating for trauma-informed therapeutic providers whenever possible to support children healing from trauma.
- Point out that many of the parents we work with also have traumatic histories of their own. The mother in the Black-Smith case is one example, which you will be discussing next.

Advance to slides 12 and 13



- Play the video about the Adverse Childhood Experiences (ACE) Study.
- Ask volunteers to turn to page 145 in their manual and review the Adverse Childhood Experiences score sheet. Ask them to check YES for questions two, four, five, seven, eight and nine. Let them know that this is the ACE score for Frances Smith (the mother from the Black-Smith case).
- Have volunteers discuss the following questions in their small groups:
 - What long-term effects might unresolved trauma have on Frances' health and well-being?
 - Once Tammy leaves foster care, will her traumatic experiences affect her health and well-being?
 - Discuss participants' responses in the large group. Note: When participants consider Frances' ACE score, they may start considering their own score. Don't ask participants to share their personal scores, but let them know that it's natural to think about their own experiences and where their ACE score falls on the chart. Be aware of participants who may be struggling with trauma issues that could affect their work as a CASA volunteer. This is a great moment to highlight the importance of intentional self-care practices that help us strengthen our own resilience in this work. Ask the class for a few volunteers to share one thing they plan to do to take care of their well-being this week.

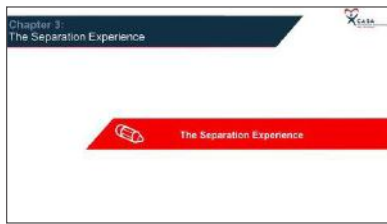
ACTIVITY 3D: THE SEPARATION EXPERIENCE

Advance to slide 14



- Explain that children in the child protection system may experience trauma from being removed from the home. Each new placement increases the likelihood of irreversible damage to their emotional and psychological health. However, because a child's safety has to be the primary consideration, sometimes they must be moved for protection.

Advance to slide 15



- Ask participants to sit with their eyes closed as you read the following separation scenario, and imagine the experience of being a child who is removed from their home. Warn participants that sometimes this exercise makes people feel sad or uncomfortable as

they think about personal experiences of themselves or someone they know. Give participants permission to open their eyes or leave the room at any point if needed.

Sit comfortably and close your eyes as you visualize yourself as a 4-year-old child at home one evening with your mom and dad. A lady came to the day care center today and asked you lots of questions about what your mom and dad do when you are bad, whether you have enough food at home, how much your daddy drinks and how often he hits your mommy. You are pretty sure you are going to be in a lot of trouble because the lady said she had to tell your parents that she talked to you. You can barely eat your dinner, and your mom is already mad about that. Your dad is drinking another beer, which usually is a bad sign.

There is a knock on the door and that same lady is standing there with a police officer. Now you know you are really in big trouble. She tells your mom and dad that she is taking you away with her. Will they put you in jail? She sits near you at the table and tells you not to worry. She asks your mom or dad to get some clothes together. She asks if there is any special toy or blanket that might help you sleep better. You just can't imagine what it will be like to sleep in jail with all of those mean people that were there with your dad the last time he went.

But the lady doesn't take you to jail. The police officer and the lady take you to a big house in another part of town. They are chatting and laughing on the way. You can tell they are trying to be nice, but you are really scared. The lady walks you to the door, and another lady opens it up. She has a big smile on her face, takes your bag of stuff and says, "Come right in." Behind her is a man. He is smiling too. There are a bunch of other kids who are all looking at you. The new lady says, "Welcome. This is your new home. We are so glad to have you." She keeps smiling and seems really nice, but there must be some mistake. You didn't ask for a new home . . . You already have a mom and dad . . . You don't have brothers and sisters . . . This isn't your room . . . And what is this food that they are giving you? You realize that this is all your fault and that your mom and dad must be really mad now. You wonder if you'll ever see them again.

- After you read the story, allow participants a moment to reflect. Then ask them to discuss the following questions in a large group:
 - What feelings did you experience as you imagined being removed from your home and your parents?
 - What might you do as a CASA/GAL volunteer to mitigate the negative effects of removal for Tammy, the older child in the Black-Smith case? (Answers to this question might include recommending regular visitation with her mother; advocating for placement with her younger sister, Grace; advocating that Tammy not experience multiple placements once in the foster care system; and explaining in an age-appropriate way what's happening and why.)

ACTIVITY 3E: TRAUMA AND RESILIENCE

7:10 – 7:20

Advance to slide 16



- Ask participants to think of a difficult time in their life and what helped them get through it.
- Ask volunteers to read aloud the two paragraphs about resilience that appear on page 147 in the Volunteer Manual.

Advance to slide 17



- Afterward, briefly emphasize these points: Resilience is very individual. Though some children are naturally more resilient than others, resilience can be built and enhanced through practice.

Advance to slide 18



- In pairs, have participants choose one of the "seven Cs" and answer the following question:
- How can you help to build or reinforce this characteristic in a child you work with as a CASA/GAL volunteer?

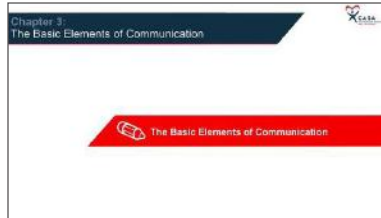


Share a story of how a CASA volunteer empowered a child to build resilience.

ACTIVITY 3F: THE BASIC ELEMENTS OF COMMUNICATION

7:20 – 7:25

Advance to slides 19 and 20



- Have participants think of a time when they had a miscommunication with a friend, colleague or family member. Give them a minute to write down one thing that contributed to the problem. Then ask for a few volunteers to share in the large group.

Advance to slide 21



- Encourage volunteers to keep in mind that strong self-awareness, sensitivity and skill are keys to effective CASA work. It's important they "take their temperature" and be aware of their own feelings as they communicate with others on their case; if their emotional temperature is high, it might come across in their communication. Ask the class for a few ideas of how people self-regulate themselves in moments when they're feeling charged.

Advance to slide 22

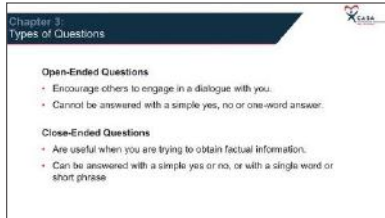


- Remind participants that communication includes much more than just the words we use. It's important to be aware of our body language and the feelings we're conveying, as well. Be sensitive to what the other person might be feeling, and always approach conversations with an open mind rather than an attitude of judgement.

ACTIVITY 3G: OPEN-ENDED VS. CLOSED-ENDED QUESTIONS

7:25 – 7:30

Advance to slide 23



- Recall the information on open-ended and closed-ended questions that the participants read through in Pre-Work. Discuss any questions that the participants may have.
- Briefly discuss leading questions and why they are never a good idea in our advocacy work. Ask the class, “What’s the problem with asking a child, ‘You’re afraid of your mom, right?’”

Advance to slide 24 through 26



- Ask the class to identify what type of question they see on the screen.

ACTIVITY 3H: CASA VOLUNTEER INTERVIEW

7:30 – 7:50

Advance to slide 27

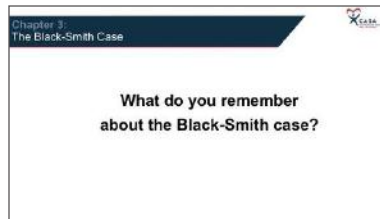


- Before playing the video of a CASA/GAL volunteer interviewing a four-year-old child, first ask half of the class to focus on what the volunteer did well, and ask the other half to focus on identifying areas for growth.
- Play the video. Then discuss in the large group what the volunteer did well and what they need to improve.
- Ask for any questions from the Pre-Work on interview techniques. Have them think about the child interview they prepared during their Pre-Work. In the large group, ask them to share answers to the following questions:
 - Which of the strategies from the video did you employ in your interview?
 - How many of your questions were open-ended? Closed?
 - What would you change if you were to rewrite your interview questions now?
 - If time allows, have participants share in pairs the interview they designed as part of their Pre-Work.

ACTIVITY 3I: THE BLACK-SMITH CASE

8:00 – 8:50

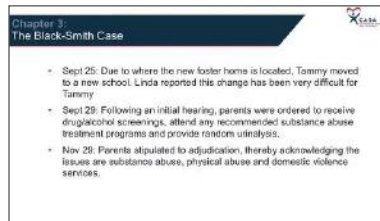
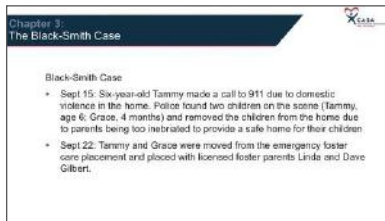
Advance to slides 28 and 29



- Explain to the class the basic format of the case study activities. It's helpful to highlight the following key points as you walk your participants through how this activity will work:
 - The case study activities will help participants apply the information they've learned so far to simulations that will prepare them for their CASA/GAL volunteer work.
 - Volunteers will review these case studies in small groups, with a large group debrief at the end.
 - Within each small group, there are four different roles to play: **Runner**, **Scribe**, **Moderator** and **Questioner**.
 - ◆ The Runner approaches the facilitator asking for interviews.
 - ◆ The Scribe writes down information and recommendations.
 - ◆ The Moderator keeps the group on task and tracks the amount of time left for the activity.
 - ◆ The Questioner asks questions from the Questioner's List.
 - Each group receives the same first set of documents: the initial case file and the Questioner's List.
 - Once each group digests the information in the case file, the group will decide who they would like to interview next. The designated Runner can then ask the facilitator whether an interview transcript is available for the person they have identified. Groups do not have a list of interviews or documents available; they must make educated guesses about who would be helpful to interview based on information in the case file. They can request one interview transcript at a time. This process will continue for approximately 35 minutes. Throughout this time, the Questioner should help the group stay on track by asking case-related questions and referring periodically to the Questioner's List.

- As small groups get more information about the case, they should prepare to make recommendations to the court about services for the parents, services for the child and placement. After about 35 minutes, the groups should take 5 minutes to finalize their recommendations and write them on the flip chart in large, legible handwriting.
- A large group debrief follows to discuss findings, recommendations and outstanding questions.

Advance to slides 30 and 31



- Ask the class to briefly summarize what they remember about the Black-Smith case they read in their Pre-Work.

Advance to slide 32

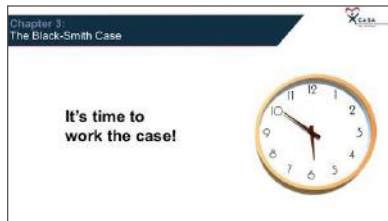


- Divide the class into groups of four and ask them to assign roles (Runner, Scribe, Moderator, Questioner) within their group. If you have an uneven number of volunteers, participants can share roles. Hand out copies of the Questioner's List to each group.

Introduce the activity:

Take several minutes to re-familiarize yourself with the information in this case file. You will also receive a list of questions that your Questioner should remind your group to consider as you review documents and make your recommendations. After you review the initial case file, determine whom your group would like to interview next. Send your Runner to the facilitator to request an interview transcript from a person with whom you'd like to speak. You may continue to request additional interviews and documents, one at a time, over the course of 35 minutes, in order to complete your information gathering for the case. After 35 minutes, your Scribe should write your group's recommendations to the court regarding a) services for the child, b) services for the parent and c) placement decisions, on the flip chart.

Advance to slide 33



- Once participants have begun working in small groups, monitor each group to be sure they understand the activity, but be careful not to micromanage the groups. Be sure to allow participants enough space to learn and make mistakes, which can be discussed during the debrief.

Interviews available for the Black-Smith case:

(This list is for your use only. Groups must decide who they want to interview.)

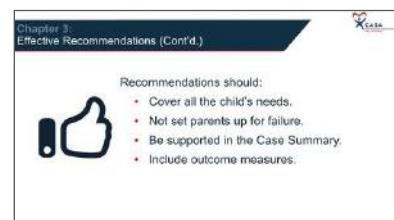
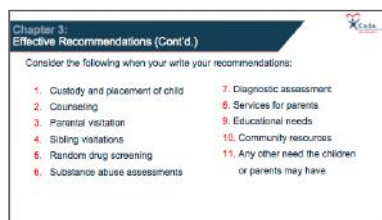
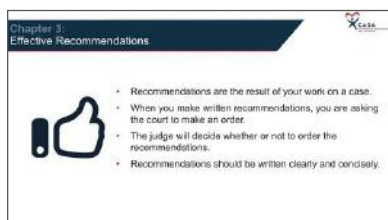
- CASA/GAL Supervisor: Jessica Clarkson
- CPS Caseworker: Becky Howard
- Child: Tammy Black
- Tammy's first grade teacher: Mrs. Gallego
- Foster parents: Linda and Dave Gilbert
- Maternal aunt: Anne Black

- Invite groups to move around, stretch and take a few minutes to read other groups' recommendations on flip charts around the room.
- Hand out the debrief questions, and ask the small groups to discuss them for several minutes. Afterward, go through these questions in the large group, and address any other questions participants may have about the case. Focus the conversation around the session 3 topics: trauma, ACE, resilience, open-ended/closed-ended questions and the CASA/GAL interview. If issues arise that you know will be covered in more depth in later sessions, put these topics on the parking lot flip chart, and circle back to them during that session.

ACTIVITY 3J: WRITING EFFECTIVE RECOMMENDATIONS 8:50 – 9:15

- Ask participants to take out your program's guidance for writing court reports, which you distributed in session 1.

Advance to slides 34 through 36

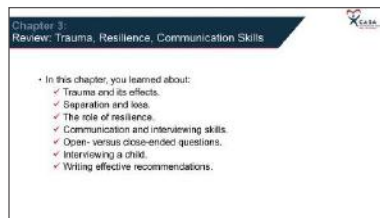


- Give an overview of your program’s philosophy on writing effective recommendations.
- Have participants work in their small groups from the previous activity. Ask them to evaluate the effectiveness of the recommendations they wrote for the Black-Smith case. They should discuss the following questions:
 - What recommendations would you add?
 - How would you rewrite your recommendations to include outcome measures?
- In the large group, ask each group to share what changes they would make to their recommendations.

REVIEW, EVALUATION AND PRE-WORK ASSIGNMENT

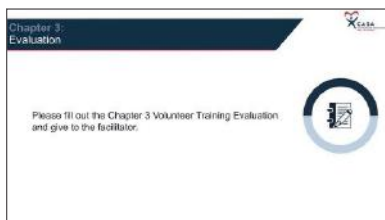
9:15 – 9:30

Advance to slides 37 and 38



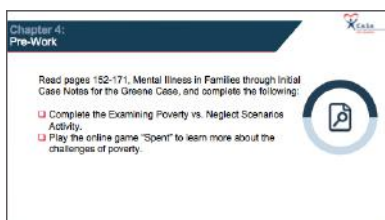
- In summary, briefly review the objectives found at the beginning of the chapter to check in about volunteers’ comfort level with the content. Answer any remaining questions.

Advance to slide 39



- Hand out copies of the Session 3 Evaluation and collect them before participants leave.

Advance to slide 40



- Go over assigned Pre-Work for session 4 and ensure everyone has a clear understanding about what to tackle before the next session.
- Lead everyone in a closing activity.

Session 4

4



TEXASCASA
Court Appointed Special Advocates
FOR CHILDREN



OVERVIEW

This is a 3½-hour session. Although times may vary based on the number of participants, we have created a sample timeline based on an evening class beginning at 6:00 p.m. and ending at 9:30 p.m. Please adjust the timeline as needed to fit your training and class size.

Keep in mind that some people in the training likely have personal experience with mental health issues. Remember to be sensitive to this, and work to compassionately support participants in learning to self-assess how their own experiences might affect their advocacy.

As you present the mental health information in this session, stress that CASA/GAL volunteers do not have any role or responsibility in diagnosing mental illness in parents and/or children.

It is important for participants to understand that while mental illness and poverty are risk factors for child abuse and neglect, most people affected by mental illness and poverty do not abuse or neglect their children. When working on a case that involves either mental illness or poverty, participants should always focus on the parent's ability to provide a safe home as outlined by the Minimum Sufficient Level of Care.

SUPPLIES AND CHECKLIST

Supplies:

- Name tents from previous class

Flip charts:

- Your “parking lot”
- Your expectations
- Your group agreements
- A flip chart for each group to use during the Greene case study exercise

Handouts:

- Research your program’s release of information policies to give an overview during this presentation. If appropriate, make copies of your program’s release forms that participants will use in their work as CASA/GAL volunteers.
- Copies of your program’s guidelines around documentation and/or utilizing Optima (see sample at the back of this guide)
- Copies of the Greene case study materials
- Copies of the Session 4 Evaluation

Additional information:

- The poverty Pre-Work debrief activity asks participants to estimate the following:
 - What is the minimum wage in Texas?
 - What are the current poverty guidelines for a family of four in Texas?
 - What percent of people of color in Texas falls within the poverty guidelines?
What percent of the white population in Texas falls within the poverty guidelines?
- Answers are included in the facilitation guide for that activity; however, it is recommended that you research these questions before this session to ensure the data you have is up to date. If you’d like to find additional information about children living in poverty, the National Center for Children in Poverty offers many resources on its website. Visit nccp.org for more information.

Slide 1



- Greet participants with enthusiasm as they arrive and invite them to grab their name tents.
- Once participants have found a seat, fade your background music out and welcome your class back for session 4!
- Lead everyone in an opener exercise.

INTRODUCE TRAINING GOALS

Advance to slide 2



- Briefly go over the training topics for this session to help learners feel oriented to the day's agenda, including when they can anticipate a break.

PREWORK RECAP

Advance to slide 3

Chapter 4:
Pre-Work Recap

Read pages 152-171, Mental Illness in Families through Initial Case Notes for the Greene Case, and complete the following:

- Complete the Examining Poverty vs. Neglect Scenarios Activity.
- Play the online game "Spent" to learn more about the challenges of poverty.

- Celebrate and thank your trainees for the time they invested in completing their Pre-Work. Invite any questions learners have in response to their Pre-Work, and capture any questions that will be covered later on the parking lot.

Advance to slide 4

Competency Category	Knowledge, Skills and Attributes Development in Chapter 4
CASA/GAL Role Foundation of Knowledge	Understands how to obtain relevant confidential information. Understands how mental illness affects families. Understands strategies to advocate for children and adolescents with mental health disorders.
Sound Judgment	Understands how poverty can impact families and children. Understands the confidentiality requirements of being a CASA/GAL volunteer.

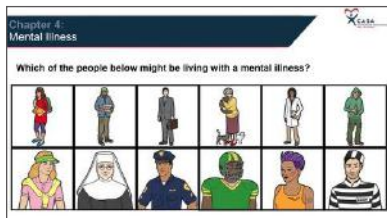
- Explain that this slide shows which topics from the Competencies Checklist they'll be tackling together today.

Advance to slide 5



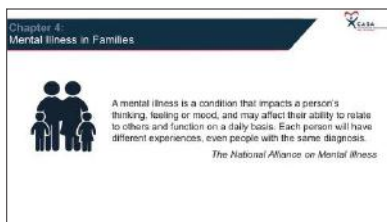
- Engage participants in a brief review of Pre-Work by asking them what they learned about mental illness, whether any of the information they read surprised them and what they found helpful. Move quickly through slides six through fifteen to briefly reiterate what volunteers read in Pre-Work and answer any questions.

Advance to slide 6



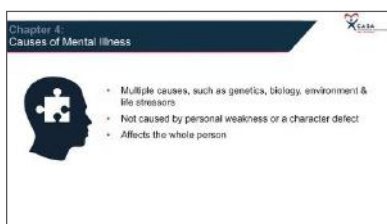
- Ask the class to consider which of the individuals pictured on the slide might be living with a mental illness. Give the group a moment to consider this, and then, if participants don't say it themselves, explain that mental illness is invisible: you can't tell just by looking at someone whether or not they are living with mental illness.

Advance to slide 7



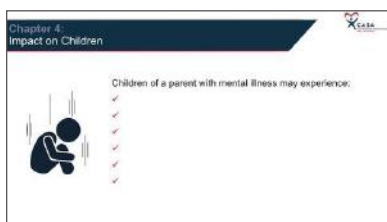
- Ask for a volunteer to read aloud the definition of mental illness on the slide. Then ask the class for their thoughts on what causes mental illness.

Advance to 8



- Briefly go over the factors that can contribute to experiencing mental illness. Emphasize that although mental illness is often very stigmatized in our society, it's imperative that they understand mental illness is not caused by personal weakness.

Advance to slide 9



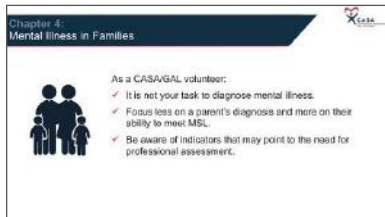
- Ask the class, "What are some things that a child of a parent with an untreated mental illness may experience?" See slide 10 for some possible answers.

Advance to slide 10



- Quickly go through these responses, including inappropriate levels of responsibility or “parentification,” self-blame, anger or anxiety, instability, school-related problems, and shame or isolation.

Advance to slide 11



- Emphasize the importance of focusing on a parent’s ability to meet the MSL for their child, regardless of their diagnosis. Remind volunteers that it’s not their role to diagnose mental illness, and that if they have concerns about possible indicators of mental illness to consult with their supervisor.

Advance to slide 12



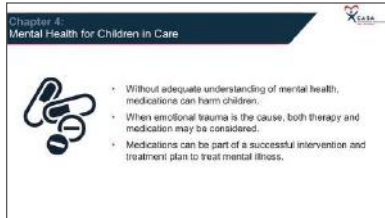
- This slide shows some possible indicators of mental illness, including social withdrawal, behavior changes and hopelessness. Keep in mind that many of these can also be responses to trauma. It’s very important to advocate for trauma-informed interventions and supports whenever appropriate.

Advance to slide 13



- Ask the class for their thoughts on the following questions:
 - How might parental mental illness affect Marky Greene?
 - What might you do as a CASA/GAL volunteer to gather additional information about the impact of parental mental illness on Marky?

Advance to slide 14



- Ask for a volunteer to describe what it means to take a multimodal approach to managing mental health disorders in children.

Advance to slide 15



- Share any program-specific information about multimodal resources volunteers should be aware of in your area.

Advance to slide 16



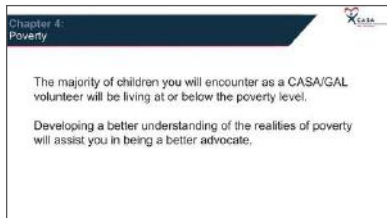
- Briefly go over useful questions advocates should ask a doctor prescribing medication for their child, included in their Pre-Work on page 158.
- Divide participants into groups of three or four and ask them to discuss the question below based on the information they read for Pre-Work:
 - How might CASA volunteers advocate for a youth with mental health needs that are not being met?
 - In the large group, have participants share their answers and any other questions that arose.

Advance to slide 17



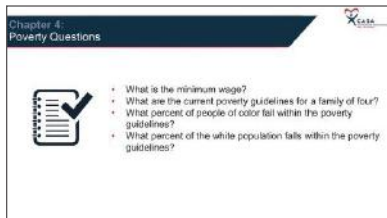
- Explain that poverty is a very common issue faced by the families we work with, so understanding the realities of it is imperative.

Advance to slide 18



- Explain that some people struggle to meet basic needs but still earn too much money to qualify for government services.

Advance to slide 19



- Have participants try to guess the the answers to the following questions, shown on the slide. Answers are included here, but be sure to research these questions before class to ensure this information is up to date:

- What is the minimum wage in Texas?

Answer: In Texas, the minimum wage follows federal guidelines, which is currently \$7.25 per hour.

- What are the current poverty guidelines for a family of four?

Answer: The 2018 poverty line for a family of four is \$25,200.

- What percent of people of color fall within the poverty guidelines?

Answer: In 2016, 21 percent of the African-American population and 20 percent of the Hispanic population in Texas fell beneath the poverty line.

- What percent of the white population fall beneath the poverty line?

Answer: In 2016, 8 percent of the white population fell beneath the poverty line.

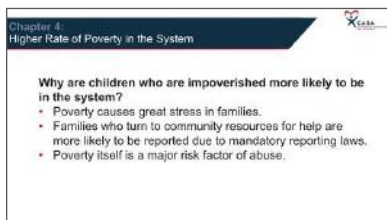
- Use the following questions to connect this information with the work volunteers will be doing on their cases:
 - Why do you think this information is relevant for your work as a CASA/GAL volunteer?

- What are common stereotypes about why certain populations experience poverty at a higher rate? How does our society’s history of racial discrimination contribute to these stereotypes?
 - Would you have to make changes in your life to live below the poverty threshold in Texas? If so, what kind of changes would you make?
 - What skills or strengths does it take to live in poverty and provide for your family?
- Open a brief discussion about families living in poverty who rely on public transportation. How might lack of personal transportation impact a parent’s ability to access services and attend visits in your area? Help participants think through what obstacles might be faced by those who must rely solely on public transportation. You might mention the following reasons a parent might not show up for an appointment:
 - Public transportation took too long or did not run on schedule.
 - They didn’t have the money to pay for public transportation.
 - They couldn’t walk the distance from home to the transit stop or from the transit stop to the location of the appointment.
 - They couldn’t take extra time off from work to accommodate the transit schedule.
- Help participants see that a missed appointment might not mean a parent doesn’t care about their children; instead, it might be a result of the barriers and challenges faced by families in the system.

ACTIVITY 4D: RATE OF POOR CHILDREN IN THE SYSTEM

7:05 – 7:20

Advance to slide 20



- Have the participants think back on the article they read in the Pre-Work: “Why Are Poor Children More Likely to Be in the System?” Pose the question, “Why are children who are impoverished more likely to end up the system?” and encourage a robust conversation. Be prepared to address and counter statements that are based in class bias or stereotypes.

Advance to slide 21

Chapter 4:
Higher Rate of Poverty in the System

Discuss:

- What effect might living in poverty have on access to health care, education and day care?
- What effect does current poverty have on future poverty?
- Are the experiences of families of color who are impoverished different from those of white families who are impoverished? Are race and income level interconnected?

- Ask participants to turn to a partner and answer the questions listed below. Assure participants that there are many factors involved in each issue.
 - What effect might living in poverty have on access to education, health care and day care?
 - What effect might current poverty have on the likelihood of future poverty?
 - How are the experiences of poor families of color different from those of poor white families? What about Native American families? How are race and income level interconnected issues?

Advance to slide 22

Chapter 4:
Risk Factors of Poverty

Children who are impoverished face a greater risk of impaired brain development due to exposure to a number of other risk factors including but not limited to:



- Inadequate nutrition
- Parental substance abuse
- Maternal depression
- Exposure to unsafe environments
- Low-quality day care

- After five minutes of discussion, ask volunteers to share some of their answers with the large group.

ACTIVITY 4E: POVERTY AND NEGLECT

7:20 – 7:30

Advance to slide 23

Chapter 4:
Poverty vs. Neglect

Are the following safety issues?

- A family does not have a refrigerator.
- A family lives in a rental unit with holes in the floor.
- A family lives in a car.
- A family does not have a regular pediatrician.
- A family does not have a stroller.
- A family does not have money to buy the mother's antidepressant medication.
- A family does not have a crib for their infant.
- A family has one parent who uses drugs.

- Ask the participants to recall the scenarios that they examined on child safety. In the large group, have participants describe the factors they considered when completing the sentences in the scenarios.

Advance to slide 24

Chapter 4:
Poverty vs. Neglect

What keeps a family from asking for help?

- Culture
- Language or literacy barriers
- Immigration issues
- Child's age
- Thinking a problem is only temporary
- Pride
- Embarrassment or shame

- Encourage participants to think about these situations from different perspectives by asking questions like:
 - Are cultural issues present that might cause the family not to ask for help?
 - Are there language or literacy barriers that prevent the family from accessing resources?

- Are there immigration status issues or other factors that may prohibit the family from feeling safe in seeking support?
- Is the situation temporary or permanent?
- What is the age of the child?
- Are other risk factors present, such as substance abuse or untreated mental health disorders?

ACTIVITY 4F: OBTAINING CONFIDENTIAL RECORDS

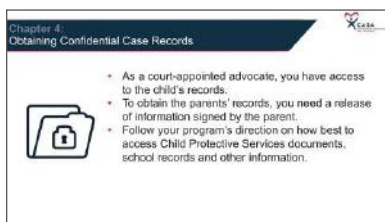
7:30 – 7:40

Advance to slide 25



- Ask participants to recall the information that they read about obtaining confidential records as Pre-Work. Note that, in general, CASA/GAL volunteers have much broader access to the confidential records of an assigned child than they do to those of the child’s parents.
- Mention any program-specific policies about how to request confidential information. For instance, are your volunteers required to get permission from a parent’s attorney before having a parent sign a release of information allowing access to their confidential records? Does your program recommend that volunteers ask parents to sign releases the first time they meet them, when they might be most willing to sign?
- If appropriate, distribute copies of your program’s release forms that participants will use in their work as CASA/GAL volunteers, and tell participants how to access these forms once they are appointed to a case.

Advance to slide 26

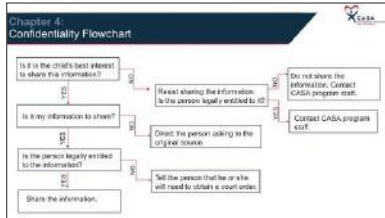


- If time allows, have participants discuss the following questions in small groups:
 - List several types of confidential records concerning children and how having access to these records would benefit you as a CASA/GAL volunteer. What is one important confidential record concerning Marky Greene that you would want to review?
 - List several types of confidential parental records and how having access to that information would benefit you in your volunteer role. What is one parental record you want to review in the Greene case?
 - Ask groups to report back in the large group.

ACTIVITY 4G: CONFIDENTIALITY AND THE CASA VOLUNTEER

7:40 – 7:50

Advance to slide 27



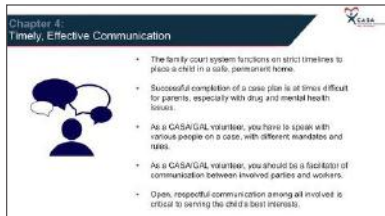
- Ask participants for any questions on the information that they learned about confidentiality from reviewing the manual and your policies and procedures as part of their Pre-Work. Walk the class through the confidentiality flowchart featured on the slide to help participants

understand how they can determine whether or not to share information. Answer any questions and reiterate that volunteers can always check in with their supervisor if they are unsure about whether something is confidential.

ACTIVITY 4H: EFFECTIVE COMMUNICATION WITH PROFESSIONALS

7:50 – 8:00

Advance to slide 28



- Ask the participants to recall the information they read about the necessity of timely, effective communication as Pre-Work, and provide a brief overview. Remind participants that as CASA/GAL volunteers, they will need to speak with numerous people during the life of the case,

many of whom will have different mandates and rules to follow. Each may have information critical to the information gathering process. Keeping lines of communication open with all parties and professionals is essential.

Advance to slide 29



- Have the class brainstorm 10 attributes of good communication in CASA/GAL volunteer work. Capture this list on a flip chart.

ACTIVITY 4I: THE GREENE CASE

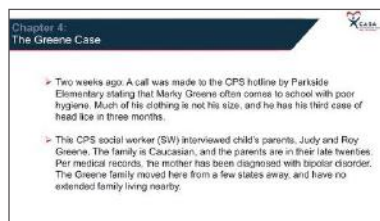
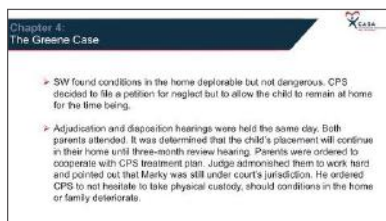
8:10 – 9:00

Advance to slides 30 and 31



- Ask class what they remember about the Greene case from their Pre-Work.

Advance to slides 32 and 33



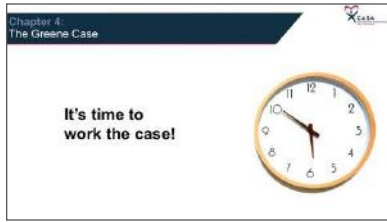
- Quickly summarize what we know so far about this family's situation.

Advance to slide 34



- Recap from session 3 how case studies work and remind participants about the four roles: Runner, Scribe, Moderator and Questioner. Explain that as they collect information they should be synthesizing that info to make recommendations to the court.
- Give each group about 35 minutes for interviews and an extra five minutes to discuss recommendations, and ensure that each group has a flip chart to capture their recommendations.

Advance to slide 35



- Once participants have begun working in small groups, monitor each group to be sure they understand the activity, but be careful not micromanage the groups. Be sure to monitor the time.

Interviews available for the Greene case:

(This list is for your use only. Groups must decide who they want to interview.)

- Marky Greene: First Contact
- Marky Greene: Second Contact
- Former Landlords of the Greenes
- Intensive In-Home Family Therapist: Monica Morales
- Parents: Judy and Roy Greene
- School Nurse and Marky's Teacher
- CPS Caseworker Ryan Headon: First Contact
- CPS Caseworker Ryan Headon: Second Contact

- Invite groups to move around, stretch and take a few minutes to read other groups' recommendations posted on flip charts around the room.
- Hand out the debrief questions, and ask the small groups to discuss them for several minutes. Afterward, go through these questions in the larger group, and address any other questions participants may have about the case.

ACTIVITY 4J: TAKING NOTES

9:00 – 9:20

Advance to slide 36



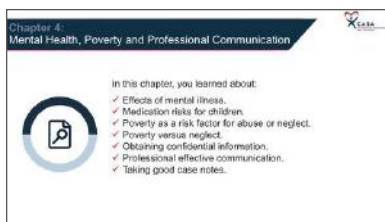
- At the start of this activity, make sure each small group has a copy of the Greene case study interview with Monica Morales, the intensive in-home family therapist. Ask each group to have one person read the interview aloud to their group. Then, working individually, participants should summarize the interview into one paragraph for their case notes. This activity is intended to simulate the process of pulling out key information from an interview to record for later use when writing the volunteer court report.

- Ask for a few volunteers to share their notes in the large group. Point out what worked well and any ways they might improve their notes. Stress the importance of keeping thorough notes throughout their case, and explain why this is so essential (e.g. they're used for court report writing, trial preparation and communication of case updates with supervisor).
- Explain your program's expectations and guidelines around documentation and case notes. Distribute handouts of your program's guidelines around documentation.

REVIEW, EVALUATION AND PRE-WORK ASSIGNMENT

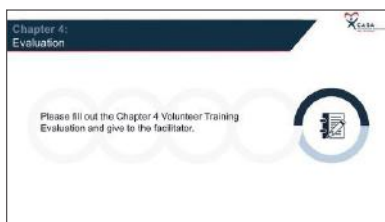
9:20 – 9:30

Advance to slides 37 and 38



- In summary, briefly review the objectives found at the beginning of the chapter to check in about volunteers' comfort level with the content. Answer any remaining questions.

Advance to slide 39



- Hand out copies of the Session 4 Evaluation and collect them before participants leave.

Advance to slide 40



- Go over assigned Pre-Work for session 5 and ensure everyone has a clear understanding about what to tackle before the next session.
- Lead everyone in a closing activity.

Session 5



TEXASCASA
Court Appointed Special Advocates
FOR CHILDREN



OVERVIEW

This is a 3½-hour session. Although times may vary based on the number of participants, we have created a sample timeline based on an evening class beginning at 6:00 p.m. and ending at 9:30 p.m. Please adjust the timeline as needed to fit your training and class size.

This session addresses substance abuse and how it can affect a parent's ability to care for a child. Make connections between the information and CASA/GAL volunteer work. Why do participants need to know about this subject? Why do they need to be aware of their personal values about substance use and abuse? Look for ways to help volunteers set aside their own values in order to consider what's best for a child.

This session introduces the concepts of culture, diversity, disproportionality and cultural competence. Session 6 will delve further into these issues, addressing bias, stereotyping, institutional racism, and allowing participants the opportunity to create a plan for increasing their cultural competence.

Issues of cultural competence and diversity may be sensitive subjects for volunteers to discuss. In this training session, create a safe environment where volunteers can explore these often emotionally laden issues in a productive, respectful and child-focused way. Responding to differences with sensitivity and an open mind can be difficult but can also greatly enrich our lives. Your goal as the facilitator is to engage the participants in a process of change to better serve children and families. It may be helpful to review your group agreements at the beginning of this session.

SUPPLIES AND CHECKLIST

Supplies:

- Name tents from previous class

Flip charts:

- Your “parking lot”
- Your expectations
- Your group agreements
- A flip chart for each group to use during the Bass case study exercise

Handouts:

- Culture Iceberg handout
- Make enough copies of the Culture Puzzle handout for each pair in the class to have one. You will need to cut the puzzle pieces apart along the dotted lines in preparation for this activity.
- Copies of the Bass case study materials
- Copies of the Session 5 Evaluation

Videos:

- News clip video, “Saving Kids: Children of Addicts”

Additional information:

- Prior to facilitating this session, find out which drugs are commonly abused in your community by researching the topic online or talking to caseworkers about the drugs they see most often in their work with families. Be ready to share this information in class by creating a handout about locally abused drugs or adding the information to the Chapter 5 PowerPoint presentation. If your program doesn't already have a list of substance abuse treatment resources in your community, consider preparing a handout with organizations' names, contact information and details about the services they provide.
- Prior to facilitating this session, research local statistics about the demographics of children in care to determine whether disproportionality exists in the child protective services system where you live. Consider checking with your local child protective services agency to see if they have demographic information for children in care in your local area. Be ready to share the information you found about disproportionality in your state and local area in class.

Slide 1



- Greet participants with enthusiasm as they arrive and invite them to grab their name tents.
- Once participants have found a seat, fade your background music out and welcome your class back for session 5!
- Lead everyone in an opener exercise.

INTRODUCE TRAINING GOALS

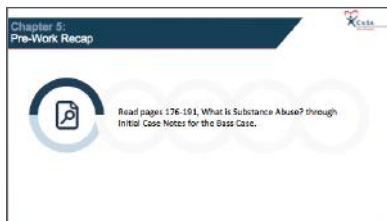
Advance to slide 2



- Briefly go over the training topics for this session to help learners feel oriented to the day’s agenda, including when they can anticipate a break.

PREWORK RECAP

Advance to slide 3



- Celebrate and thank your trainees for the time they invested in completing their Pre-Work. Invite any questions learners have in response to their Pre-Work, and capture any questions that will be covered later on the parking lot.

Advance to slide 4

Chapter 5: Competencies	
Competency Category	Knowledge, Skills and Attributes Development in Chapter 5
Foundation of Knowledge	Understands the ways substance abuse can affect children and families Knows the importance of being aware of resources in the community that assist with substance abuse
Cultural Competency	Knows strategies and steps to increase cultural competency skills and demonstrate culturally competent child advocacy Understands the root causes of disproportionate representation of children of color in the child welfare system and the disparate outcomes children of color experience
Communication	Understands the importance of speaking and writing clearly and concisely

- Review this slide showing which topics from the Competencies Checklist they’ll be tackling together today.

Advance to slides 5 and 6



- During this activity, keep in mind that some participants may have personal experience with individuals who have struggled with substance abuse. Be sensitive to this possibility and support volunteers in assessing their readiness to practice non-judgment and compassion on their case.
- Ask participants to take three minutes to think of people they know who have experienced substance abuse and create two lists:
 - What are their strengths?
 - How does/did their substance abuse impact their lives?
- Ask participants to recall the information about substance abuse they reviewed in their Pre-Work, and discuss any questions they may have. Share the information you gathered about commonly abused substances in your local community, as well as treatment resources in your area (e.g. inpatient, outpatient, sober living, 12-step programs and therapy). Help participants understand the difference between types of testing for substance use in your area (for example, urinalysis, hair strand and nail scrape).

Note: If a participant raises a question about the current research into alternatives to the abstinence model of treatment, acknowledge that while these models are being tried in some places, most court systems will not allow anything other than abstinence for parents with substance abuse issues.

ACTIVITY 5B: SUBSTANCE ABUSE AND PARENTING

6:35 – 6:45

Advance to slide 7



- Using a flip chart or whiteboard ask class to brainstorm how substance abuse affects parenting. Once the class has created a list, ask them to briefly look over the list on page 192 of their manual to see more ideas.

Advance to slide 8



- Show the clip of the news story, “Saving Kids: Children of Addicts.” As they watch the video, ask participants to think about advocating for a similar family as a CASA/GAL volunteer. After the clip, ask the participants to share the challenges of advocating for a family with parental substance abuse, as well as their reactions to this family’s story.

Advance to slide 9



- Go over key points to consider when deciding whether to recommend a child return home. Emphasize that they are looking for the parent to make progress towards demonstrating an ability to meet the MSL for their child. Relapse is often part of a successful recovery process, and a relapse does not mean that the parent has failed in their recovery efforts.
- This is a great opportunity to emphasize that volunteers may never use or be under the influence of drugs or alcohol while doing their CASA work, and to highlight any other policies your program has around substance use.

Advance to slides 10 and 11



- Have class read the short “Shannon’s Story” section in their manual, starting on page 193. Use slides 10 and 11 to provide a quick summary.
- Divide participants into two groups: one to argue for termination of parental rights so that Shannon can be adopted by Natalia and Marie; the other to argue for additional time for the mother to show she can safely parent. Emphasize to participants that they need to use information from this unit to support their position each time they argue

for a specific recommendation. Highlight how important it is for CASA/GAL volunteers to think about both the short-term and the long-term consequences of their recommendations and to consider the individual needs of each child.

- Be ready to tackle the issue of homophobia if it arises in the discussions. If a participant expresses that Shannon should not be adopted by Natalia and Marie because they are a same-sex couple, be very clear that this is a biased belief and not appropriate to use in evaluation. Follow up later.
- Allot five minutes for the groups to prepare their arguments, using a flip chart to outline their position. Bring the groups back together and ask each group to present its arguments. Each group will have two minutes to present. When they are finished, note that there were valid points made on both sides. Then, briefly highlight the information in the section “What a CASA/GAL Volunteer Can Do.”

ACTIVITY 5E: UNDERSTANDING CULTURE

7:25 – 7:45

Advance to slide 12



- Give an overview of the material about culture that appears in the Volunteer Manual, including the definitions of culture, diversity and cultural competence.

Advance through slides 13 and 14 to show definitions.



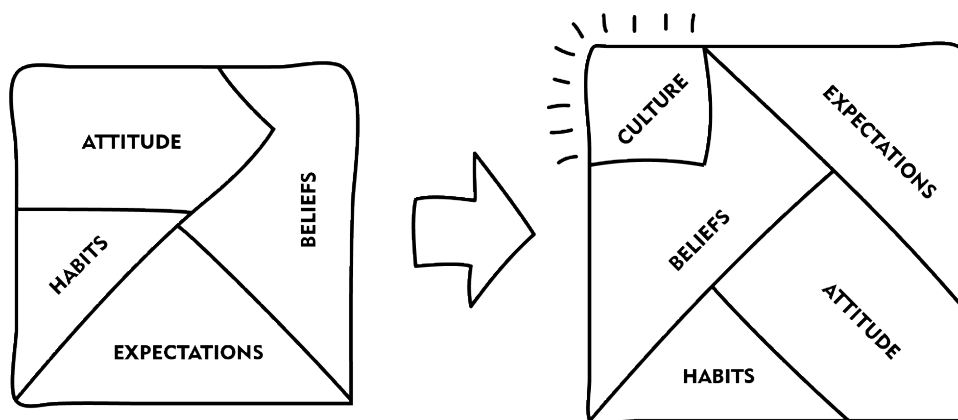
Advance to slide 15



- Distribute the Culture Iceberg handout, and quickly walk participants through this analogy. There are parts of culture we can see and parts we can't see but know are there, below the surface. The part above the waterline makes up only about ten percent of an iceberg's entirety.

The visible parts of culture might include dress, music, food and games. Those that we can't see but know are there include unwritten rules guiding patterns of speech, concepts of time and the meanings of body language.

- Ask participants to find a partner, choose one component found below the waterline of the culture iceberg and take a total of five minutes to each explain an unseen rule of their culture. Although a pair of participants may be of the same race or ethnicity, chances are they will find slight variations in their culture's rules, expectations or customs. The pairs won't need to share with the larger group.
- Be aware that sometimes people have a difficult time identifying their culture. For example, white people who do not have a strong sense of their ethnicity may feel like they do not have a culture. Help participants understand that it is often members of the dominant culture who have a harder time identifying aspects of their culture, because it has come to feel like the norm rather than a part of their personal identity. In this case, recommend that for this activity, people think about culture—rules, expectations and guidelines—in terms of their family, their workplace or their geographic region. If there are many people struggling with this issue, you may want to consider offering additional training and/or resources during the year on cultural awareness, diversity and inclusion.
- Part two of the activity challenges participants to consider rethinking the way they approach a task while being conscious of differences in culture. Distribute pieces one through four of the puzzle, withholding piece five, labeled "culture." Ask the pairs to use all four pieces to construct a square. This should take about 5 minutes.
- After they finish, distribute piece five to each pair. Tell them they must now construct a new square using all five pieces. This will be more challenging. They will want to revert to what they know from building the first square and may find it difficult to set this knowledge aside. The finished puzzles look like this:



- Take five minutes to discuss the following questions after the pairs have completed the second square:
 - What was it like having to make a new puzzle after receiving an additional piece?
 - How is this activity similar to advocating for a child from another culture?
 - Possible answers to the second question include the following:
 - ◆ What worked the first time didn't necessarily work the same way the second time.
 - ◆ They had to start all over again without any preconceived notions.
 - ◆ They had to forget what they did before and think of completing a square in a whole new way.
 - This can be what it's like working with children, youth and families from different cultures. What worked well with one family might work very differently with another. That one small piece made a drastic change in constructing a new square.



Share a case story that illustrates the importance of cultural awareness and how a CASA volunteer can advocate for a child's cultural needs to be met.

ACTIVITY 5F: THE VALUE OF DIVERSITY

7:45 – 7:50

Advance to slide 16

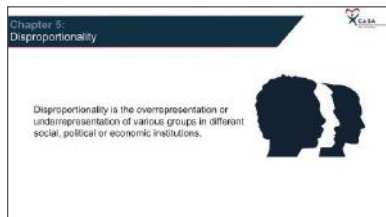


- Ask the participants to recall the information they read in their Pre-Work about diversity, the National CASA Vision Statement and guiding principles. Discuss any questions they may have.
- In the large group, ask participants to briefly share which principle they found most important and why.
- Ask if there were any principles people struggled with, and help to clarify the spirit of the principle. Point out that principle #11 means that a program's volunteer pool should match community demographics, not necessarily that each volunteer should "match" the child they are advocating for.
- If your program has a non-discrimination statement emphasizing that CASA volunteers will not discriminate against any individual based on their sexual orientation, race/ethnicity, religion, immigration status, gender identity or expression, or socioeconomic status when advocating for a child's best interest, introduce this here.

ACTIVITY 5G: DISPROPORTIONALITY AND DISPARATE OUTCOMES

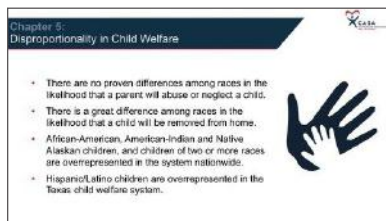
8:00 – 8:10

Advance to slide 17



- Prior to this training session, research your local statistics about the demographics of children in care to determine whether disproportionality exists in the child protective services system where you live. Share the information you found about disproportionality in your area with the class.

Advance to slide 18



- Ensure that everyone has a clear understanding of the meaning of disproportionality and how it manifests in the child welfare system.
- This discussion is intended to help participants see how institutional racism and lack of cultural competence on the

part of professionals and volunteers can affect the children they serve. Be sensitive to the fact that disproportionality may be a new concept for many participants. As a large group, lead the class in a discussion of the following questions:

- Why do you think disproportionality exists in the child welfare system? What factors might contribute to it?
- What other systems impact the lives of the children and families you will work with as a CASA/GAL volunteer? What are some examples of disproportionality in those systems?
- What is one thing you can do to become aware of unconscious racial bias in your role as a CASA/GAL volunteer?

Other systems that affect the lives of the children and families in the child welfare system include education, health care, housing and criminal justice. Disproportionality in these systems includes overrepresentation of African Americans and Latinos/as in disciplinary actions and special education; underrepresentation of African Americans and Latinos/as in gifted and talented programs; health disparities among people of color even when there is no difference in income and education; overrepresentation of people of color in the

juvenile justice system; and racial profiling of African American males. The fact that disproportionality exists for the same populations across all these systems further reinforces that the problem is due to systemic factors rather than individual factors. Well-meaning individuals are often unaware of their racial or cultural biases, but these biases are barriers to eliminating disproportionality. Some things CASA/GAL volunteers can do to become aware of their biases include:

- Learn more about the history of racism and oppression in the United States.
- Develop relationships with people from different racial and cultural backgrounds.
- Consider what might have happened to a family in their interactions with various systems rather than assuming something is wrong with the family.
- Examine their attitudes and assumptions about people living in poverty.

ACTIVITY 5H: RACE IN THE MEDIA

8:10 – 8:20

Advance to slide 19



- Review and comment on the Associated Press photos and captions below following Hurricane Katrina in 2005.
- Ask the class to consider the following questions:
- How does the media negatively impact the public perception of poor people?
- How does the media's portrayal of poor communities and communities of color impact the response of the child welfare system?
- How does understanding this help us in our advocacy?

ACTIVITY 5I: THE BASS CASE

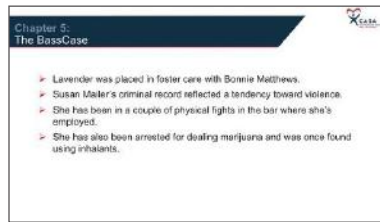
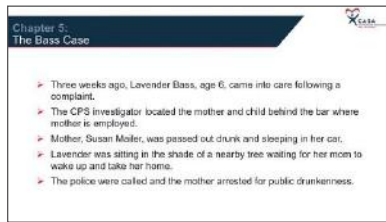
8:20 – 9:05

Advance to slides 20 and 21



- Have the class open their manuals to the initial file for the Bass case, which they read for Pre-Work. *Use slides 22 and 23 to briefly re-familiarize participants with the information in the case file.*

Advance to slides 22 and 23



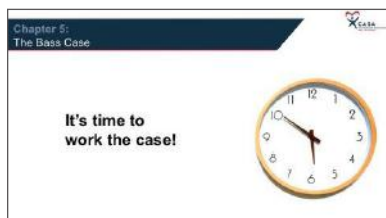
- Quickly recap how case studies work and remind participants about the four roles: Runner, Scribe, Moderator and Questioner. After they review the initial case file, they can send their Runner to the facilitator to request an additional interview transcript from a key player they'd like to speak with. As they collect information they should be synthesizing that info to make recommendations to the court. Give each group a copy of the Questioner's List to help keep them on track as they review documents and determine their recommendations. After 30 minutes, each team's Scribe should legibly write on the flip chart that group's recommendations to the court regarding services for the child, services for the parent and placement decisions.

Interviews available for the Bass case:

(This list is for your use only. Groups must decide on their own who they want to interview.)

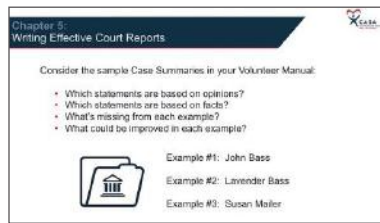
- CPS Caseworker: Lisa Kelly
- Attorney for the Program and Volunteer Supervisor
- Lavender Bass and Foster Mother: Bonnie Matthews
- Father: John Bass
- Maternal Aunt and Grandmother: Leah Mailer and Rebecca Mailer (First Contact)
- Maternal Aunt and Grandmother: Leah Mailer and Rebecca Mailer (Second Contact)
- Mother: Susan Mailer

Advance to slide 24



- Start the activity and give each group about 30 minutes for interviews and an extra five minutes to discuss recommendations, and ensure that each group has a flip chart to capture its recommendations.
- After 35 minutes, invite the groups to stand, stretch and read the recommendations of the other groups around the room.
- In the large group, discuss the debrief questions and any others that arose during the activity.

Advance to slides 26 and 27



- This activity focuses on developing clear written communication skills. Ask the participants to recall the sample court report summaries that they read on page 190 of their Pre-Work. Discuss the following questions:
 - Which statements are based on opinions?
 - Which statements are based on facts?
 - What's missing from each example?
 - What could be improved in each example?
- Review the examples with participants, and point out how they can be improved using the information below and any other insights you can offer based on your program's expectations for writing effective reports.

Example 1: John Bass

- *"He was busted for pot..."* Avoid use of slang.
- *"Mr. Bass has never been a father to Lavender..."*: State objectively.
- *"He admits to a history of using inhalants..."* Be more specific to avoid implying continued or current use of inhalants.
- *"Mr. Bass claims..."* Use of specific words can imply alternative meaning. Use "states" instead of "claims."

Example 2: Lavender Bass

- *"Lavender spends a lot of time in the yard and is not very engaged..."* Provide more specificity about significant child behaviors. Engaged with others? With only foster parents? When engaged in developmentally appropriate activities?
- *"Lavender sometimes ignores the foster mother and doesn't listen to her when she is talking. The foster mother states she has to call her time after time to get her attention..."* The first sentence is an individual interpretation of the situation. The second sentence provides more specifics.
- *"This is not the best foster placement for Lavender..."* Avoid statements without any explanation of what led to a conclusion.

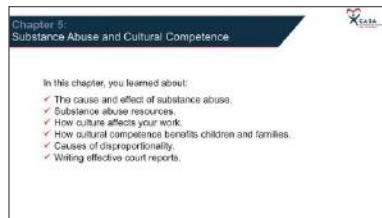
Example 3: Susan Mailer

- *“A criminal records check confirmed Ms. Mailer has a tendency toward violent behavior...”*
Include specifics on history if relevant to the parental ability and child’s protection.
- *“CASA/GAL volunteer feels like drugs are being done at the home of the maternal aunt and grandmother. The children are also fearful of them...”* Statements should be fact based without assumptions, which might represent cultural misinterpretations.

REVIEW, EVALUATION AND PRE-WORK ASSIGNMENT

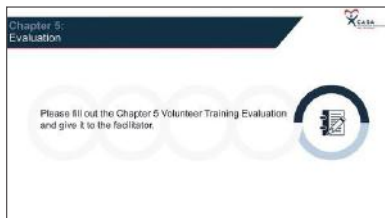
9:20 – 9:30

Advance to slides 27 and 28



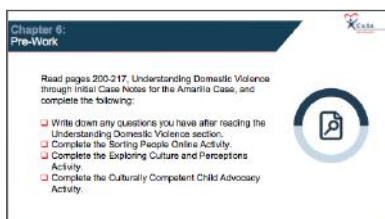
- In summary, briefly review the objectives found at the beginning of the chapter to check in about volunteers’ comfort level with the content. Answer any remaining questions.

Advance to slide 29



- Hand out copies of the Session 5 Evaluation and collect them before participants leave.

Advance to slide 30



- Go over assigned Pre-Work for session 6 and ensure everyone has a clear understanding about what to tackle before the next session. Clarify that the Amarillo case is pronounced “Am-uh-ree-yo.”
- Lead everyone in a closing activity.

Session 6



TEXASCASA
Court Appointed Special Advocates
FOR CHILDREN



OVERVIEW

This is a 3½-hour session with a sample timeline based on a training taking place from 6:00 p.m. to 9:30 p.m. Please adjust the timeline as you see fit to match your program's class size and timing.

Keep in mind that some participants may have personal experience with domestic violence. Be sensitive to this fact, and work to compassionately support participants in learning to self-assess how their own experiences might affect their advocacy. The 911 call included in this chapter can evoke strong reactions and painful feelings. Prepare participants for this so it is not a surprise. Be prepared to debrief or take a break if necessary.

This chapter goes deeper into cultural competency issues, asking participants to explore their own values and perceptions. Again, create a safe environment where volunteers can explore these often emotionally charged issues in a productive and respectful way that stays focused on providing the best possible advocacy for children. Your goal is to engage participants in a process of change to better serve children and families.

Emphasize that if participants rely solely on familiar cultural and socioeconomic norms, they will probably draw conclusions that reflect their personal biases rather than the best interest of the child.

Keep making the connections between the training material and CASA/GAL volunteer work. Why do participants need to know about these topics? Why do they need to be aware of their personal values in these areas? Look for ways to help volunteers set aside their values to work with families whose values and experiences may be different.

The Amarillo case study exercise in this session addresses working with undocumented immigrants. Ensure that volunteers understand the importance of using people-centered language like “undocumented immigrant” or “undocumented citizen” rather than dehumanizing terms such as “illegal alien.” For some, this may be a new way of thinking. If necessary, practice using this language in class and reinforce that these families are equal to all other families CASA serves.

Before facilitating this session, familiarize yourself with Special Immigrant Juvenile Status (SIJS). This law gives some undocumented youth in foster care a unique opportunity to apply for Lawful Permanent Resident status (also known as receiving a Green Card). For more information, visit the Texas CASA Learning Center and search for the webinar titled, “Advocating for Undocumented Youth.”

SUPPLIES AND CHECKLIST

Supplies:

- Name tents from previous class

Flip charts:

- Your “parking lot”
- Your expectations
- Your group agreements
- A flip chart for each group to use during the Amarillo case study exercise

Handouts:

- Print the Challenges You May Face scenarios and post them around the room before class begins.
- If your program doesn’t have a list of domestic violence resources in your community, prepare a handout with the names of organizations, their contact information and information about the services they provide. Make copies to distribute during activity 6A.
- Create a list of resources in your community that can help participants increase their cultural competence. Prepare a handout to distribute during part 2 of activity 6F.
- Case study materials for the Amarillo case.
- Copies of the Session 6 Evaluation.

Videos:

- Why We Stayed
- Lisa’s 911 Call

Slide 1



- Greet participants with enthusiasm as they arrive and invite them to grab their name tents.
- Once participants have found a seat, fade your background music out and welcome your class back for session 6!
- Lead everyone in an opener exercise.

INTRODUCE TRAINING GOALS

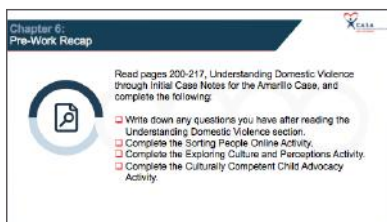
Advance to slide 2



- Briefly go over the training topics for this session to help learners feel oriented to the day's agenda, including when they can anticipate a break.

PREWORK RECAP

Advance to slide 3



- Celebrate and thank your trainees for the time they invested in completing their Pre-Work. Invite any questions learners have in response to their Pre-Work, and capture any questions that will be covered later on the parking lot.

Advance to slide 4

Competency Category	Knowledge, Skills and Attributes Development in Chapter 6
Cultural Competency	Understands and demonstrates self-awareness to eliminate the influence of personal biases and values when working with diverse groups. Knows strategies and steps to take to increase cultural competency skills and demonstrates culturally competent child advocacy. Understands how to recognize and challenge own biases.
Foundation of Knowledge	Understands how domestic violence affects children and families. Knows the importance of being aware of resources in the community that assist with substance abuse.
Communication	Understands the importance of speaking and writing clearly and concisely. Knows how to utilize basic communication and interviewing skills.

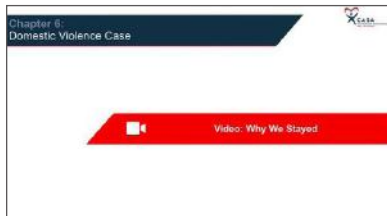
- Explain that this slide shows which topics from the Competencies Checklist they'll be tackling together today.

Advance to slides 5 and 6



- Define domestic violence, explaining that domestic violence happens to people of all genders, races, educational backgrounds and socioeconomic levels.
- Briefly recap the homework reading about domestic violence, and then give an overview of the information in the manual about the intersection of domestic violence and CASA/GAL volunteer work. Distribute copies of the handout with information about domestic violence resources in your community. Be sure to answer any questions participants have about the power and control wheel, and the many different types of abuse people can experience.

Advance to slide 7



- Introduce this video by stating that for people without personal experience, it can sometimes be difficult to understand why someone might stay in an abusive relationship. This video shares some of those reasons from survivors themselves. Play the video “Why We Stayed.”

Advance to slide 8



- Lead the large group in a discussion of the following questions:
 - What was going through your mind as you watched the video?
 - How do you think hearing these stories might influence your advocacy?
 - Was there a “Why I Stayed” reason that surprised you or spoke to you?
 - Which reasons were not covered?

The video mentions fear, love, lack of resources, isolation from support systems, religion, and self-blame as barriers to ending abusive relationships.

Some other barriers to leaving could include:

- Disability: Living with a physical or mental disability can sometimes lead a victim to feel dependent on their partner, which can make it harder to leave the relationship.
- Immigration status: If a person is undocumented, they may feel unsafe reporting the abuse out of fear of possible deportation. The abusive partner could also threaten to report them to the authorities if they tried to leave.
- Custody of children: Abusive partners may threaten to take custody of the children, which can be terrifying for the victim. If shared custody is granted, the safe parent may fear that if she is not present to protect the child from the abusive parent, things will be worse.

Point out that leaving is often the most dangerous time, because abuse is about power and control. When a victim attempts to leave, they are taking control and threatening the abusive partner's power, which could cause the violence or psychological manipulation to escalate. Mention that volunteers **should not try to persuade a victim to leave due this danger. Volunteers can provide resources and information if the victim is interested in connecting with help.**

ACTIVITY 6B: 911 CALL

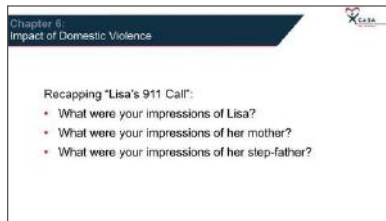
7:00 – 7:25

Advance to slide 9



- Play the recording of six-year-old Lisa's call to 911 during a domestic violence incident in her home. Prepare volunteers ahead of time by alerting them to the intensity of the call. Keep in mind that listening to this recording may be very difficult for participants, especially those who have experienced domestic violence. Allow any participants who are worried about listening to it to leave the room during this part of the activity.
- After the call give a short follow-up about what happened to Lisa's family. According to press information from the New York State Office for the Prevention of Domestic Violence, "Responding officers charged Pierre [Lisa's stepfather] with assault and child endangerment, took photographs of the scene and of Cindy's [Lisa's mother's] visible injuries, and collected statements from Cindy and Lisa. Prosecutors subpoenaed the 911 tape and transcript, and Pierre pled to the charges. He served almost a year in jail." Lisa has consented to the public release of the recording to "help people understand what things are like for kids."

Advance to slide 10



- Ask the class what struck them about Lisa. What was Lisa experiencing? What were their impressions of Lisa's mother and stepfather?
- Direct the class to pages 220 and 222 in their manual, which list services and supports for people in abusive

relationships. Lead a group discussion on the following questions:

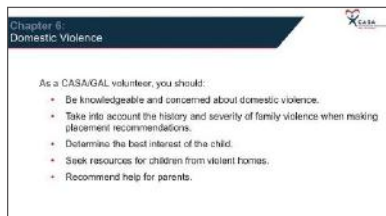
- What services might you recommend for Lisa's family? Ensure that volunteers understand the importance of advocating for appropriate interventions specific to intimate partner abuse rather than anger management services. Research shows that anger management techniques can be counterproductive to changing abusive and controlling behaviors. Stress that couples counseling can be unsafe for victims if the dynamics of power and control have not been adequately addressed.



Ask, "How might you approach your first interview with Lisa? What barriers might be present when interviewing Lisa? How might you overcome those barriers?"

The goal is to help volunteers focus on building rapport.

Advance to slide 11



- Quickly go over what a CASA/GAL volunteer can do aside from recommending appropriate services. If time allows, open your web browser to the National Domestic Violence Hotline's website at www.thehotline.org and briefly show participants how they can search for more information.

ACTIVITY 6C: CHALLENGES YOU MAY FACE

7:25 – 7:45

Advance to slide 12



- Post the Challenges You May Face scenarios around the room before class begins. Have volunteers move around the room to read them. Ask them to choose three 'hot button' issues they believe would be particularly challenging for them and have them mark an X on that scenario. The scenarios are:

- A man who leaves his child in the car while he drinks at a bar until closing time.

- A father who fondles his four-year-old child.
 - A mother who does not get out of bed for days due to depression, leaving her children without care or food.
 - An abusive partner who believes his wife deserves to be hit.
 - A mother who uses drugs throughout her pregnancy.
 - A parent who blames the child for the beating they received.
 - A parent who lives in a deplorably dirty home with human/animal waste and no water.
- Ask a few people to share in the large group. Emphasize that we all have biases, but it is important to recognize them and set them aside in order to advocate for the child with impartiality.
 - Lead the class in a discussion of how our own personal values might impact our effectiveness and objectivity when faced with challenging situations on a case. If volunteers need support remaining unbiased, they can seek help from their supervisor.

ACTIVITY 6D: EXPLORING CULTURE AND PERCEPTIONS

7:45 – 7:50

Advance to slides 13 and 14



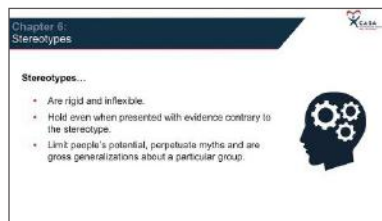
- Ask the participants to recall the activity on Exploring Culture and Perceptions that they have completed as Pre-Work. Discuss any questions that they may have.
- Help participants understand how difficult it can be for parents to disclose deeply personal information with people in positions of power. Ask them to consider what it would be like to walk in Susan Mailer’s shoes. Share that it can be challenging to work with a parent who is not fully honest or forthcoming, and emphasize the need to practice compassion in these situations. When there is so much at stake, sometimes a lack of honesty may be motivated by fear or by a desire to present oneself in the way we believe will look best to others.

Advance to slide 15



- Ask the participants to recall the activity on Culturally Competent Child Advocacy that they completed as part of their Pre-Work.

Advance to slides 16 and 17



- Provide a brief overview of the differences between stereotyping and cultural competence, which volunteers reviewed before class. Invite any questions about this material and about the 10 Benefits of Practicing Culturally Competent Child Advocacy on page 207 of their manual.
- Ask the class to think of a time they felt categorized or stereotyped because of the way they identify. How did that feel? How might a foster child feel? Ask if any volunteers would like to share their experiences.
- Guide participants to open their manual to page 208 and review the Institutional Bias Checklist. Have them think specifically about the Bass case. Does considering these questions help them look at the case differently at all?

Advance to slide 18



- Ask the participants to recall the Tips on How to Become More Culturally Competent section that they read as part of Pre-Work. Also, ask them to recall the Individual Action Plan for Increasing Cultural Competence that they have prepared.

- Provide a brief overview of the article and the purpose of the plan. Ask participants to share some of their ideas for cultural competence resources in your community, and then pass out the list of community resources that you created.

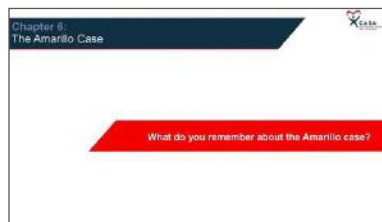
BREAK

8:05 – 8:15

ACTIVITY 6G: AMARILLO CASE

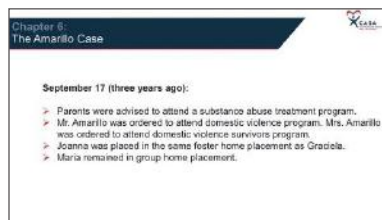
8:15 – 9:00

Advance to slides 19 and 20

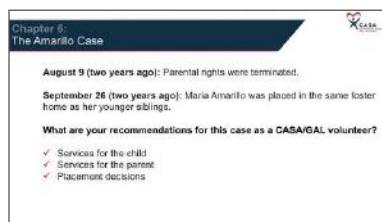


- Ask the class to briefly recap what they know so far about the Amarillo case. *Click through slides 21 through 24 to summarize the case information.* Emphasize here the importance of using people-centered language when discussing immigration status.

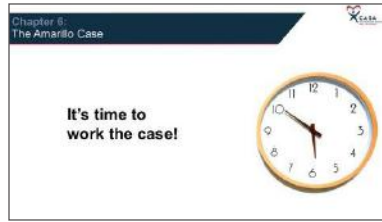
Slides 21 and 22



Slides 23 and 24



Advance to slides 25 and 26



- Remind the class how case studies work and recap the four roles: Runner, Scribe, Moderator and Questioner. Explain that as they collect information they should be preparing to make recommendations to the court.
- Give each group about 30 minutes for interviews.

Interviews available for the **Amarillo** case:

(This list is for your use only. Groups must decide on their own who they want to interview.)

- Medical History: Maria Amarillo
 - CPS Caseworker: Alberta Gillis
 - Maria Amarillo: First Contact
 - School Guidance Counselor: Julia Mansfield
 - Foster Parents: Stanley and Karen Becker
 - Maternal Aunt: Consuela Amarillo
 - Kinship Relatives: Pedro and Anna Valdez
 - Maria Amarillo: Second Contact
 - CASA Supervisor
- After 30 minutes, give the groups five minutes to discuss and write down their recommendations.
 - Ask participants to move around, stretch and walk around the room to read the other groups' recommendations.
 - As a large group, debrief and address any questions. Make sure to attend to the two issues detailed below.

Immigration Status

Help volunteers understand that a person's immigration status does not impact their ability to act as a placement for a child. Advocates must *not* make an assessment about a person's ability to meet the MSL based on legal status. Although being undocumented can create unique challenges, it does not inherently prevent someone from being able to meet the MSL for a child. This is also a great opportunity to explain how your program addresses language barriers (for example, utilizing bilingual staff members, Language Line or other resources to communicate with family members and others who do not speak English.)

Access to Contraception

Explain that youth in foster care have a right to access contraception. Medicaid covers a wide selection of contraceptive methods including birth control pills, injections, implants, IUDs and others. Children and teens in foster care receive Medicaid benefits, and the federal Medicaid statute guarantees that minors who are covered by Medicaid may give their own consent and receive confidential family planning services by request.

This means that foster youth, regardless of their age, do not need permission from anyone to receive birth control or reproductive care. Many youth may be unaware of their right to access birth control because it is not explicitly outlined in the Texas Family Code or Children's Bill of Rights. CASA volunteers, DFPS caseworkers and the child's attorney ad litem should work together to ensure that youth are aware of their ability to access contraceptives, and understand how to do so.

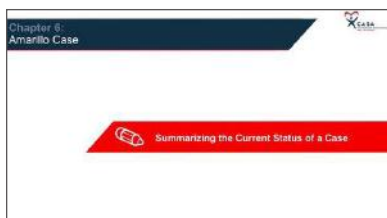
However, this can be complex. Under Texas state law, foster parents can refuse to facilitate a foster youth's access to contraception and can refuse to care for a youth who uses birth control. Various medical providers may not be aware that federal law takes priority over state law, and that Medicaid has this provision. Encourage volunteers to seek guidance from their supervisor on how to have a developmentally appropriate conversation with youth about their rights to contraception and family planning, as well as how CASA volunteers can help facilitate the youth's ability to exercise this right when needed. The youth has the right to services.

According to the National Campaign to Prevent Teen and Unplanned Pregnancy, a teen girl in foster care is two and a half times more likely to become pregnant by age 19 than her adolescent peers who are not in foster care. Reiterate for volunteers that access to reproductive healthcare is part of a youth's overall safety, well-being and permanency.

ACTIVITY 6H: SUMMARIZING THE STATUS OF A CASE

9:00 – 9:20

Advance to slide 27



- Have participants write a two- or three-paragraph summary of the current status of the children in the Amarillo case using the appropriate format for your program's court report. Their summaries should be based on the notes and interviews they read in the previous

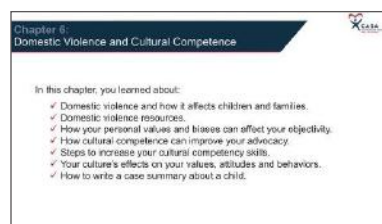
activity, and should focus on the current status of the children. It could be beneficial to prepare a brief example of what this might look like for another case they have reviewed, such as the Greene case or the Bass case, to help guide them in this activity.

- Once they have completed writing their summaries, discuss in the large group what they included in their case status summaries. Point out any key information they may have left out. The goal is to help volunteers gain confidence in crafting court report summaries.

REVIEW, EVALUATION AND PRE-WORK ASSIGNMENT

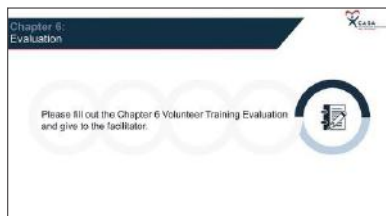
9:20 – 9:30

Advance to slides 28 and 29



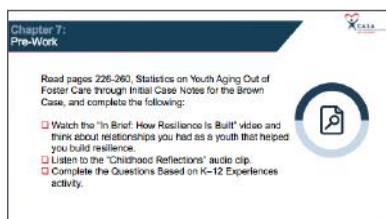
- To wrap up, review the learning objectives to check in about volunteers' comfort level with the content. Answer any remaining questions.

Advance to slide 30



- Hand out copies of the Session 6 Evaluation and collect them before participants leave.

Advance to slide 31



- Go over assigned Pre-Work for session 7 and ensure everyone has a clear understanding about what to tackle before the next session.
- Lead everyone in a closing activity.

Session 7



TEXASCASA
Court Appointed Special Advocates
FOR CHILDREN



OVERVIEW

This is a 3½-hour session with a sample timeline based on a training taking place from 6:00 p.m. to 9:30 p.m. Please adjust the timeline as you see fit to match your program's class size and timing.

The material in this chapter about educational advocacy and advocacy for older youth is intended to briefly introduce these crucial issues. Consider scheduling additional in-service training on the subjects.

Acknowledge and build on what participants already know about working with older youth. Connect the content with their personal experience—we were all young people once upon a time! We can use our own experiences and memories to strengthen sensitivity to the needs of youth.

At the end of this session, be prepared to talk about the court report writing assignment included in Pre-Work for Session 8. You will email the class a Word version of your program's court report template; they will use it to write a report for the Redd case and then email their report to you.

You will also need to share with them your program's instructions for writing a court report and a de-identified court report from another case as an example of how they can organize the information. Be sure to give the class a clear deadline for when they will need to complete this assignment, and emphasize the importance of meeting deadlines in their CASA work. We suggest giving participants one week to complete this activity, and providing strengths-based feedback to help participants gain confidence and skills.

SUPPLIES AND CHECKLIST

Supplies:

- Name tents from previous class

Flip charts:

- Your “parking lot”
- Your expectations
- Your group agreements
- A flip chart for each group to use during the Brown case study exercise

Handouts:

- Kinship Benefits handout
- Case study materials for the Brown case
- Copies of the Session 7 Evaluation

Videos:

- The Bailey’s Story video
- The Randy’s Story video

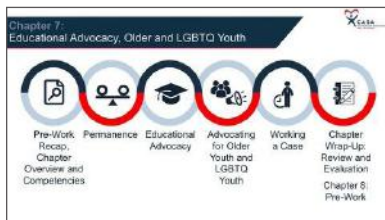
Slide 1



- Greet participants with enthusiasm as they arrive and invite them to grab their name tents.
- Once participants have found a seat, fade your background music out and welcome your class back for session 7!
- Lead everyone in an opener exercise.

INTRODUCE TRAINING GOALS

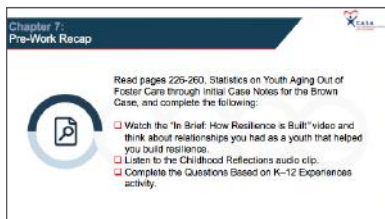
Advance to slide 2



- Briefly go over the training topics for this session to help learners feel oriented to the day's agenda, including when they can anticipate a break.

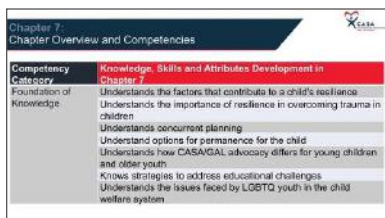
PREWORK RECAP

Advance to slide 3



- Celebrate and thank your trainees for the time they invested in completing their Pre-Work. Invite any questions learners have in response to their Pre-Work, and capture any questions that will be covered later on the parking lot.

Advance to slide 4



- Explain, "This slide shows which topics from the Competencies Checklist we'll be tackling together today."

Advance to slides 5 and 6



- Start with a quick reminder about resilience and its importance to teens. Ask them to recall the “Childhood Reflections” audio clip from their Pre-Work and to verbally share examples of ways they saw the youth exhibit resilience. Ask them to recall the Ecological Model of Factors Affecting Resilience diagram from their Pre-Work. Connect participants’ discussion about ways the youth demonstrated resilience to the factors affecting resilience shown on the graphic (e.g., a child’s thoughts and behaviors, family, school, local community and the wider society).
- Share with the class that research has shown that individuals differ widely in their responses to stress. With regard to children in particular, we should be aware that it is never too late to learn how to improve stress responses. By teaching youth the tools to build resilience, advocates can help to diminish the negative effects of adversity. Individual coping strategies and good social support systems play an enormous and positive part in healing from childhood trauma.
- As CASA/GAL advocates, volunteers should be looking for positive, caring adults in each child’s social environment and should advocate for ways to strengthen those ties when appropriate.
- Divide participants into two groups, and have each group reflect on either the Greene case or the Amarillo case (from previous sessions). Ask them to identify three factors on the diagram that are present in Marky’s or Maria’s case and discuss the following questions:
 - What impact did these factors have on the case?
 - How could a CASA/GAL volunteer help nurture resilience in Marky or Maria?
 Have the groups share back their responses in the larger group.

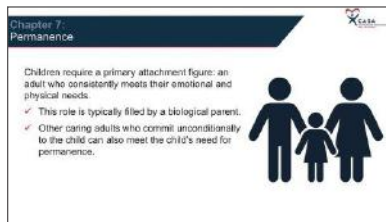
ACTIVITY 7B: BAILEY’S STORY

Advance to slide 7



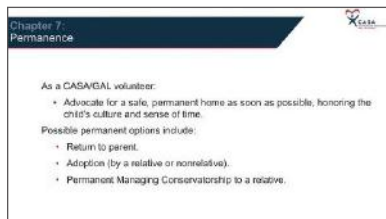
- Play the video “Bailey’s Story” from Stories of Aging Out. Then proceed to the next slide to give an overview of the information in the Volunteer Manual about permanence.

Advance to slide 8



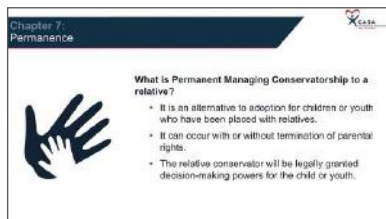
- Emphasize the importance of a primary attachment figure and a strong sense of belonging.

Advance to slide 9



- Address the need for urgency in advocating for permanency.

Advance to slide 10



- Distribute copies of the Kinship Benefits handout. Ensure that volunteers have a clear understanding of what it means for the court to grant Permanent Managing Conservatorship to a relative or fictive kin. This is sometimes called a kinship guardian. Explain what types

of benefits relative caregivers can qualify for. Make sure the following points are clearly understood by participants.

- Currently, if a relative or fictive kin becomes licensed by a foster agency **and has the child placed in their care for at least six months after becoming licensed**, they may be able to qualify for Permanency Care Assistance (PCA) once they are granted Permanent Managing Conservatorship of the child. **This entails payments from the state of \$400 to \$545 per month, approximately equal to monthly adoption assistance benefits.**

- Because the child must be placed in this home for a full six months *after* the home has become licensed in order to qualify for PCA benefits, it's important to explore this option early on the case. If child advocates wait to explore the possibility of foster licensure until nine months into a case, this will cause the case to be extended and permanency to be delayed.

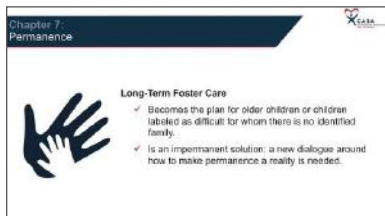
- Not all relative placements are able to meet the requirements to become a licensed foster home (and thus be eligible for PCA payments).

- Encourage volunteers to talk with their supervisor about ways they can advocate for relative placements. **The extra financial support can make all the difference for a relative who is licensed and allow the child to stay within their lifetime family network.**
- Explain the role of a DFPS kinship worker and how volunteers can expect to collaborate with them when working a case that involves a relative placement.
- Stress the importance of advocating for every kind of appropriate assistance for relative caregivers. Advocates should research other social services and financial and emotional support options for families and make sure they are getting all the benefits they can. To help relative placements be sustainable, it's important for them to have the benefit of this work by volunteers. Trauma-informed care training can be helpful for some relative placements, as well as support from a trauma-informed family therapist. Consider recommending that family members watch the video series on the Texas CASA Learning Center called "Trust-Based Relational Intervention" to learn concrete skills, and to search the center for more information on the topic.



Share a brief story to help participants understand what kind of circumstances could lead to a relative being granted PMC rather than adopting a child.

Advance to slide 11



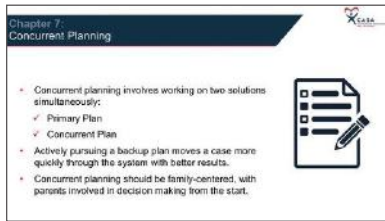
- Share that for children like Bailey, long-term foster care and 'aging out' become the default plan, which is never a good outcome. We believe that all children deserve a safe and positive future, and this includes finding permanency and a strong sense of connection and belonging.

Advance to slide 12



- Ask the large group how Bailey found permanence and how she did not. How could a CASA volunteer have helped improve Bailey's permanency outcome?

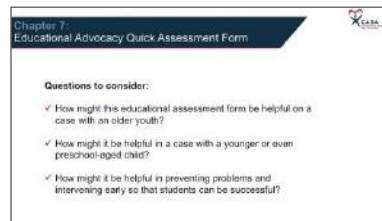
Advance to slide 13



- Provide a brief overview of concurrent planning, ensuring volunteers understand what it is and why it's so important. Reiterate that the CASA/GAL volunteer explores all available options for permanency while providing cultural-sensitive feedback to parents about their progress toward reunification. If you have time, share an example from a case that illustrates why pursuing a strong backup plan for permanency is in the child's best interest.

ACTIVITY 7D: EDUCATIONAL CHALLENGES FOR CHILDREN IN CARE

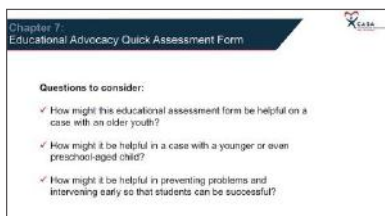
Advance to slides 14 and 15



- Remind the group about the case information they reviewed about Jessica Brown as part of their Pre-Work. As a large group discuss what educational advocacy might look like for Jessica. Guide the class to consider how the Educational Advocacy Quick Assessment Form on page 261 of their manual might be helpful:
 - How might a tool like this be helpful in a case with an older youth?
 - How might it be helpful in a case with a younger or even preschool-aged child?
 - How might it be helpful in preventing problems and intervening early so that students can be successful?

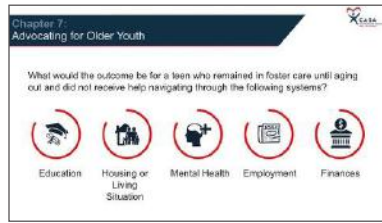
ACTIVITY 7E: PERSONAL REFLECTIONS

Remain on slide 15



- Ask volunteers to recall the experiences they wrote about as part of the Connecting to Your K-12 Experiences exercise in their Pre-Work. Ask the large group: How might your own experiences in school affect your advocacy for a child?

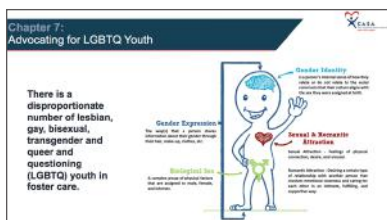
Advance to slides 16 and 17



- Ask participants to consider the statistics they reviewed on page 226 of their Pre-Work addressing youth aging out of foster care. Ask them to consider what the outcome for Bailey might have been if she had aged out of foster care without anyone to help and support her. Ask each participant to brainstorm what issues Bailey might face in each of the following systems:
 - Education
 - Housing or living situation
 - Mental health
 - Employment
 - Finances
- Stress the importance of providing age-appropriate advocacy for youth before they age out of the system. If there are any useful resources for older youth in your area, share those with volunteers.

ACTIVITY 7G: LGBTQ YOUTH

Advance to slide 18



- Transition into a discussion of advocating for LGBTQ youth. As you guide this discussion, be sensitive to how participants respond to the topic and use this opportunity to look for professionalism, appropriateness and an ability to meet all youth with an attitude of respect, care and non-judgment. If a participant makes negative remarks and does not appear open to a change of perspective, they should not be accepted into CASA service. If they do appear open to learning and shifting biased beliefs, engage in a coaching process prior to assignment. Make sure to follow up with their supervisor so that they are required to take further training to ensure they can serve youth without causing harm.

- Using the graphic on the slide, briefly explain the following components of identity:
 - **Gender identity** is a person’s psychological sense and internal experience of their gender.
 - **Biological sex** refers to a designation assigned at birth based on what genitals, reproductive anatomy and chromosomes an individual is born with.
 - **Gender expression** refers to how a person chooses to express their gender identity (this could include clothing, makeup, hair, name and pronoun).
 - **Sexual and romantic attraction** refers to one’s own feelings about which gender(s) one feels attracted to.
- Ask the class to think back to when they were teenagers. Was there a difference about them that they were proud of? Did they feel accepted by everyone? Did their peers ever make fun of them for any part of who they were? If so, how did they feel or respond? Did they make fun of anyone else? How did that person respond? Ask if anyone would like to share. It’s okay if no one does; this can be a very personal topic.

Advance to slide 19



- Play the Randy’s Story video.
- Ask the class to consider what obstacles LGBTQ youth might encounter in the foster care system that could hinder their ability to maintain their identity. Then ask how a CASA volunteer could help.
- For some participants who have not previously engaged in learning about the experiences of LGBTQ folks, the LGBTQ glossary that they reviewed for their Pre-Work might feel overwhelming. Let the class know that they do not need to memorize these definitions—the important thing is to be respectful, open to learning and supportive of their CASA youth’s identity.
 - Mention the importance of not outing CASA youth (or anyone!) without their explicit permission to do so.
 - Encourage them to work with their supervisor around wording in court reports and other communication to protect the youth’s information.
- Offer resources for further learning:
 - GLSEN.org (Gay, Lesbian and Straight Education Network) provides current resources on supporting LGBTQ students. They offer trainings for adults, as well as support groups and events at school. They also offer educational advocacy. The group’s name is pronounced “glisten.”
 - PFLAG.org (Parents and Friends of Lesbians and Gays) offers support groups and social events specifically geared toward adults who are connected to or related to

LGBTQ people. They are open to those who may have negative or homophobic feelings, and offer a process for learning acceptance and letting go of bias. There are PFLAG and GLSEN groups in 21 Texas cities and towns.

- Direct volunteers to the Texas CASA Learning Center to search for “Serving LGBTQ Youth: Promising Practices in Adoption and Foster Care” created by the All Children, All Families initiative of the Human Rights Campaign.
- Any other groups specific to your area.

BREAK

8:00 – 8:10

ACTIVITY 7H: THE BROWN CASE

8:10 – 9:00

Advance to slides 20 and 21



- Ask the class to briefly recap what they know so far about the Brown case. *Click through slides 21 through 24 to summarize the case information.*

Slides 22, 23 and 24



Advance to slides 25 and 26



- Remind the class how case studies work and recap the four roles: Runner, Scribe, Moderator and Questioner. Explain that as they collect information they should be preparing to make recommendations to the court.
- Give each group about 30 minutes for interviews.

Interviews available for the Brown case:

(This list is for your use only. Groups must decide on their own who they want to interview.)

- Jessica Brown and School Guidance Counselor: Kenya Scott
- Angela Rodriguez
- June Miller: Former CASA/GAL Volunteer
- Foster Mother/Cousin: Candice Clark (First Contact)
- Foster Mother/Cousin: Candice Clark (Second Contact)
- Mother: Helen Brown
- Mother's Former Boyfriend: Wayne Pender

- After 30 minutes, give the groups five minutes to discuss and write down their recommendations.
- Ask participants to stand, stretch and walk around the room to read the other groups' recommendations.
- As a large group, debrief and address any questions.

ACTIVITY 7I: WRITING THE PARENTS' SECTION OF A COURT REPORT

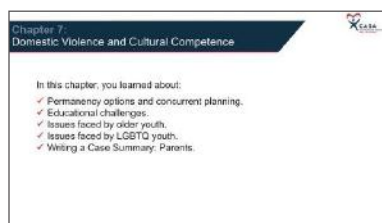
9:00 – 9:20

Advance to slide 27



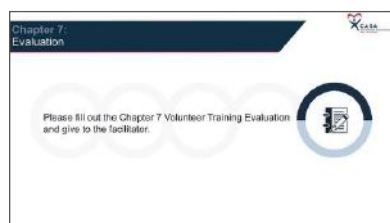
- Ask the class to write two or three paragraphs summarizing the parents' situations on the Brown case, based on the notes and interviews they read in the previous activity. It could be helpful to have on hand a short example of this section from another court report that you read aloud to help them get a feel for how the information is typically organized. Once they have completed writing this section, have them turn to a partner and compare what they wrote.
- Briefly outline your program's expectations around writing this section of the report and, if time allows, share an example of how this section could be written for the Brown case.

Advance to slides 28 and 29

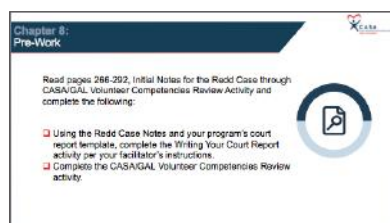


- In summary, briefly review the objectives found at the beginning of the chapter to check in about volunteers’ comfort level with the content. Answer any remaining questions.

Advance to slide 30



- Hand out copies of the Chapter 7 Evaluation and collect them before participants leave.
- Go over assigned Pre-Work for session 8 and ensure everyone has a clear understanding about what to tackle before the next session.



Note: Devote extra time to helping participants understand how to complete the court report writing assignment included in their Pre-Work. You will email them a Word version of your program’s court report template that they will use to write a report for the Redd case and email back to you.

Also include your program’s instructions for writing a court report, and consider including a de-identified court report from another case as an example of how they can organize the information. Give the class a clear deadline for this assignment. We suggest one week to complete this activity. Then, trainers should review and respond to each practice court report. Provide strengths-based feedback to help participants gain confidence and skills in writing reports on their case. Stress that this is an opportunity for participants to apply what they have learned so far and demonstrate their readiness to work a case independently.

- Lead everyone in a closing activity.

Session 8



TEXASCASA
Court Appointed Special Advocates
FOR CHILDREN



OVERVIEW

This is a 3½-hour session. Although times may vary based on the number of participants, we have created a sample timeline based on an evening class beginning at 6:00 p.m. and ending at 9:30 p.m. Please adjust the timeline as needed to fit your training and class size.

This session wraps up the Pre-Service training program! As participants prepare to launch into their real-world role as CASA/GAL volunteers, help them review what they have learned in training, evaluate their strengths and challenges, and identify their support systems.

Emphasize the supervisory role of the CASA/GAL program staff. Volunteers now have the essential information and skills to do CASA/GAL volunteer work, but they can—and should—rely on staff for assistance, consultation and support.

Consider inviting participants to make this final session a potluck! Everyone can bring snacks to share in celebration of their completion of training together. If you choose to do this, build in extra time at the beginning of the session for people to share food and connect. If facilitating a potluck isn't feasible, consider finding another way to applaud the participants' hard work and create a spirit of celebration, such as a cake or ending with a short dance party.

SUPPLIES AND CHECKLIST

Supplies:

- Name tents from previous class
- Sticky notes

Flip charts:

- Your “parking lot”
- Your expectations
- Your group agreements
- Create flip charts with the following headings and hang them around the training room for activity 8B: CASA/GAL Volunteer Role, Child Welfare System and Laws, Cultural Competence, Working with Children, Working with Families, Communication Skills, and Working a Case.

Handouts:

- Copies of the Session 8 evaluation

Additional preparation:

- To help trainees get a full picture of the CASA volunteer experience, consider inviting a panel of experienced volunteers to share their perspectives during Activity 8D of this final session. Be sure to prepare the guest speakers ahead of time with the specific topics you would like them to cover, including:
 - Receiving a case assignment.
 - Meeting a child.
 - Assessing a child’s needs.
 - Building a relationship with caseworkers, attorneys and other professionals.
 - Working with parents and engaging family members.
 - Following a case as it progresses.
 - Making recommendations in court (or, generally, how to act/speak up in court).
 - How to persevere when times get tough.
 - How to stay on top of documentation.
 - How to maintain emotional boundaries and practice self-care.

Slide 1



- Greet participants with enthusiasm as they arrive and invite them to grab their name tents.
- Once participants have found a seat, fade your background music out and welcome your class back for session 8!
- Lead everyone in an opener exercise.

INTRODUCE TRAINING GOALS

Advance to slide 2



- Briefly go over the training topics for this session to help learners feel oriented to the day's agenda, including when they can anticipate a break.

PREWORK RECAP

Advance to slide 3

Read pages 266-292, Initial Notes for the Redd Case through CASA/GAL Volunteer Competencies Review activity and complete the following:

- Using the Redd Case Notes and your program's court report template, complete the Writing Your Court Report activity per your facilitator's instructions.
- Complete the CASA/GAL Volunteer Competencies Review activity.

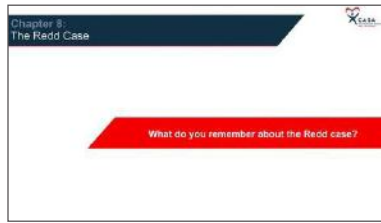
- Celebrate and thank your trainees for the time they invested in completing their Pre-Work. Invite any questions learners have in response to their Pre-Work, and capture any questions that will be covered later on the parking lot.

Advance to slide 4

Competency	Knowledge, Skills and Attributes Development in Chapter 8
CASA/GAL role	Understands the function of a CASA/GAL report to the court. Understands the competencies necessary to succeed as a CASA/GAL volunteer. Knows how to act within the CASA/GAL volunteer role and can differentiate their role from that of others involved in the case. Know how to find support and resources to assist their advocacy.
Sound Judgment	Understand making appropriate fact based recommendations to the court. Understand basing decisions on thorough review of the information.

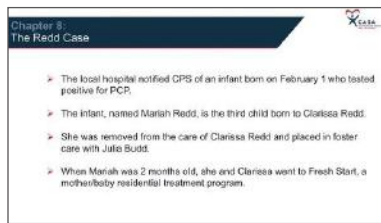
- Explain, "This slide shows which topics from the Competencies Checklist we'll be tackling together today."

Advance to slides 5 and 6



- Ask participants to recall the Redd Case Interviews that they reviewed as part of their Pre-Work. *Click through slides 7 through 9 to review the initial case information.* Discuss any concerns or questions about the case.

Slides 7, 8 and 9



Advance to slide 10



- Assuming trainees have already completed their court report writing assignment, provide an overview of the elements of a strong court report for this case. Briefly go over each section and highlight key points that should be included for the judge. Allow time for questions and clarifications.

Advance to slides 11 and 12



Provide participants with sticky notes. Ask them to take a few minutes to think about what questions they have about each of the following topics: the CASA/GAL volunteer role, the child welfare system and laws, cultural competence, working with children, working with families, communication skills and working a case. Instruct them to brainstorm one question for at least four of the topics, each on a separate sticky note. Once they have written their questions, have them post the questions on the corresponding flip charts around the room.

- Once all the participants have posted their questions, ask them to take 15 minutes to walk around the room and visit each flipchart. If there are questions that they know the answers to, they can jot down the answer on sticky notes and stick it next to the corresponding question on the flipchart. They may continue to walk around the room to see if the questions they posted have been answered, and to see what other questions and answers their fellow training participants posted.
- In the large group, discuss any unanswered questions.

Advance to slide 13

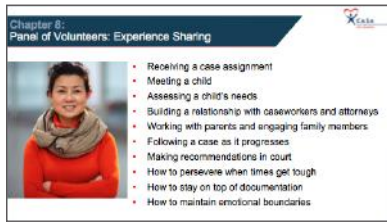


- Share a brief overview of what volunteers can expect when they present in court. Explain that volunteers carefully prepare and practice with their supervisors before presenting in court. Address the information that volunteers typically include in their verbal updates to the court, how long they usually speak, and the importance of formality and titles (for example, using “Your Honor” to speak to the judge, referring to other parties by “Ms. [Last Name]” rather than addressing them by first name in court, and speaking from the perspective of the organization, e.g., “CASA believes” rather than “I believe”).

Advance to slide 14



Advance to slide 15



- Introduce a panel of experienced volunteers. Let participants know that there will be time for questions at the end of the presentation. If the panel does not cover key areas, ask questions that will lead to that information.

BREAK

8:00 – 8:10

ACTIVITY 8E: FINDING SUPPORT

8:10 – 8:25

Advance to slide 16



- Have participants describe to a partner what kinds of support they think they'll need as a CASA/GAL volunteer.
- Ask participants to recall the activity in their Competencies Review from Pre-Work, in which they created a plan to strengthen specific competencies.

Acknowledge that they can't do it alone (none of us can), that everyone is here to support one another and that they will need support to implement these plans. Ask for a few volunteers to share the types of support they think they'll need and seek, and where they might find it. Then describe the types of support volunteers can expect from your program. Suggest any other ways they can support themselves and each other.

- Remind participants they are required to take 12 in-service training hours per year to continue to expand their advocacy skills and knowledge. Tell them about opportunities your program offers for these trainings, as well as the courses they can take on the Texas CASA Learning Center.

- Emphasize the importance of self-care in this work. Because of the time demands, stress and frustration that can sometimes be a part of CASA/GAL volunteer experience, it's key that volunteers actively work to take care of their emotional well-being. Share the metaphor of remembering to put on your own oxygen mask first. So often, people deplete themselves for the sake of others, but if we remember to take care of our own essential needs first we will actually be able to serve better. We cannot feed anyone else if our own plate is empty.

ACTIVITY 8F: EXPECTATIONS REVIEW

8:25 – 8:35

Advance to slide 17

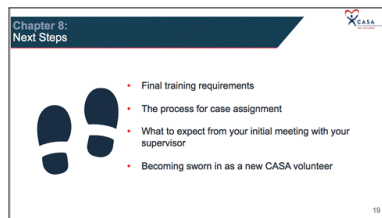


- Remind participants about the expectations regarding what they hoped to gain from the training process that they captured on sticky notes during the first class session. Invite volunteers to come to the expectations flip chart in the front of the classroom and to review what they wrote. Ask them to remove the sticky note if they feel that their expectation was met, leave their sticky note in place if they feel their expectations have not been met, and to write new sticky notes sharing their thoughts and feelings about what they learned, if they wish. Let them know that this is helpful feedback.

ACTIVITY 8G: LOOKING AHEAD

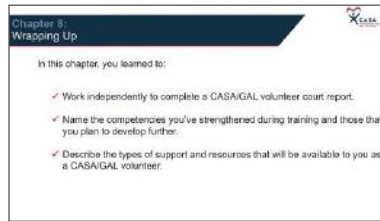
8:35 – 8:50

Advance to slides 18 and 19



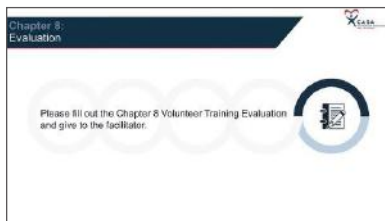
- Share the following with participants:
 - Any other requirements they need to complete to finish training.
 - The process and timeline for matching volunteers to a case.
 - What to expect from their initial meeting with their volunteer supervisor.
 - The swearing-in process.
 - Any other relevant program-specific information.

Advance to slides 20 and 21



- In summary, you may review the objectives found at the beginning of the session to check in about volunteers' comfort level with the content. Answer any remaining questions.

Advance to slide 22



- Allow time for participants to complete the Session 8 Volunteer Training Evaluation and the Post-Training Assessment, and let them know their feedback will help your program strengthen future trainings.
- End the session with a closing exercise. Plan to stay after class to answer any additional questions participants may have one-on-one.

Sample Documents



TEXASCASA
Court Appointed Special Advocates
FOR CHILDREN

Sample Documents



CONTENTS

- 142 Sample Court Report Instructions
- 156 Sample Optima Guide
- 171 Sample Program Policies
- 195 Sample Advocate Job Description

SAMPLE COURT REPORT INSTRUCTIONS

Each CASA program may have their own unique court report template and detailed instructions for writing reports to the court. Refer to your program's guidance so that your report is tailored exactly to the standards of your local court.

The CASA volunteer court report is the most essential aspect of your work. The report outlines what you discover, your assessment of the child's situation, and what the court needs to do to help the child achieve a safe, permanent home. It is your primary tool in communicating the child's perspective. The court report is the vehicle through which you present your recommendations about what services will meet the child's needs.

The facts stated throughout the report are the foundation of your recommendations and should be clear, concise, and easily distinguished from opinions and assumption. When writing the document, it is imperative to respect all the individuals involved in the case. A report written from an honest and objective view can eliminate defensive attitudes and ease implementation of the recommendations.

You will have greater success defending your written documentation and representing the best interests of the child if the report is free from bias.

Judges rely on the information in CASA volunteer court reports as they make their decisions. You will submit reports for most hearings. The report provides a way to systematically organize pertinent information and give the court a clear mental image of the child's situation. Most of the information the court receives is derived from your written documentation, which becomes part of the record at each court hearing. CASA volunteer court reports are shared with all parties to a case and any other individuals who are authorized by law to receive them. They will be a part of the legal case record.

All CASA programs require that court reports be submitted to the CASA program office prior to court. Staff will review all CASA volunteer court reports to ensure the recommendations are supported by facts and all relevant information and documentation has been included. Staff may make suggestions about wording or edits to make your report clearer.

The main components of the CASA volunteer court report are as follows:

- **Child(ren)/Situation**—This will typically be completed by your supervisor.
- **Permanency Plan**—This will typically be completed by your supervisor and will state the current plan, along with whether or not CASA agrees with it. If not in agreement, CASA's recommended plan will also be included.

- **Summary of Contacts**—This is where you take over writing the court report and list all contacts made since the last hearing date.
- **Case Summary**—This is the narrative section, where you provide a summary of the updates, strengths, and needs of each child and parent on the case. This section should support the rest of the document and include all needed information on the case.
- **Areas of Concern**—This is where you highlight and summarize concerns, which have already been explained in the Case Summary, to ensure they are addressed by the judge.
- **Recommendations**—This is where you list what you would like to have ordered by the judge. Every recognized Area of Concern from the previous section should be answered by a Recommendation in this section.

Writing Effective Recommendations

Your recommendations to the court regarding the best interest of the child(ren) are the result of your work on a case up to that point and the culmination of your volunteer court report. When you make a written recommendation, you are asking the court to make an order. The judge will decide whether or not to order the recommendations listed. As with everything in the court report, your recommendations should be written clearly and concisely.

Consider the following areas of concern when you write your recommendations:

- Custody of child and child’s physical placement (always the first recommendation in your listing)
- The child’s attachment needs
- The child’s need for normalcy
- Counseling (individual or family; remember to be specific if trauma-informed therapy is needed)
- Parental visitation (supervised or unsupervised)
- Sibling visitations (if siblings are in a different placement)
- Random drug screening at the request of the caseworker
- Substance abuse assessments
- Diagnostic assessments (including following all recommendations thereof)
- Services for parents (these should be directly related to any concerns about parents’ ability to meet the MSL for the child or children)
- Educational needs
- Community resources
- Any other need (language, transportation, scheduling of services, etc.)

Recommendations Should Cover All of the Child's Needs

Perhaps it seems obvious to say that the recommendations should cover the child's needs, but consider the following questions:

- What if the child has a need that has not been met over multiple hearings? Do you still ask for it?
- What if the child has a need that the county doesn't provide services for? Do you still ask for it?
- If the child's needs are great in one area, for instance mental health, should the child's educational needs still be listed, even though the mental health needs must be addressed before the educational needs can be attended to?
- If the child is placed with extended family members who can't meet some of their needs, do you still press for all needs to be met even though it may cause the child to be moved?

For these or other challenges in getting a child's needs covered, consult with your CASA supervisor to strategize the best solution.

Recommendations Should Not Set Parents Up for Failure

One of the central dilemmas for CASA volunteers is the fact that children do best when they live with their parents or other family members who can provide a minimum sufficient level of care, and yet the parenting abilities of these adults may seem marginal to the volunteer. Parents and caregivers in our cases might be struggling or limited in significant ways. CASA volunteers must advocate for the child's safety and, at the same time, keep in mind that the only standard a family should have to meet is the minimum sufficient level of care.

Poverty in and of itself should not be a factor when deciding if a family will be allowed to raise its own children. It is easy to set parents or guardians up for failure if we make recommendations they cannot afford to meet. Additionally, a long laundry list of court orders can be so discouraging that a parent who could in fact succeed may give up. If that occurs, how have we served the child's best interests?

Consider these questions:

- What other ways might we set a parent up for failure?
- How have we fallen short in our advocacy for the child's best interest if we do set the parents up for failure? (Who else is failing here?)
- How can we set a parent up for success?

All Recommendations Should Be Supported in the Case Summary

Imagine you are the judge reading a CASA volunteer court report and you come across recommendations concerning issues that were not mentioned in the Case Summary. What would you think?

- Why is it important to support each recommendation in the Case Summary?
- How does writing a recommendation to address an issue not discussed in the report put that recommendation at risk?
- If the case is appealed and all reports in the file are read again, what are the implications for court reports that don't support their own recommendations?

Recommendations Should Include Outcome Measures

Outcome measures add specific parameters that define a successful execution of the recommendation. They clarify the expected outcome and set observable goals.

As you look at the chart that follows, consider these questions:

- How will you know if the court-ordered recommendations in the “without outcome measures” column have been met?
- In which case are you more assured that the children's needs will be met?

Recommendations WITHOUT Outcome Measures	Recommendations WITH Outcome Measures
Mother must have substance abuse evaluation and follow recommendations from same.	Mother must have substance abuse evaluation, follow recommendations from same and remain actively engaged in recovery work for 3 months before court considers reunification.
Child should have visitation with siblings.	Child should have visitation with siblings set up bi-weekly and supervised by an approved visit supervisor, preferably a relative.

Important Tips for Writing Your Court Report

Respect Deadlines

- Turn your court reports in on time—typically two to four weeks before your hearing date, and to the deadline specifically decided upon by your supervisor. Court reports must be turned into the court a week before the hearing date, and there is a multi-step staff review process once a volunteer turns in a report.

Content and Recommendations

- The report should be child-centered. Stay focused on the child(ren) and how circumstances or issues are affecting them.
- Look for solutions, not problems.
- Eliminate negative emotions, subjective phrases, personal bias and judgments.
- Let the court know when something that was supposed to happen has slipped through the cracks.
- Be creative and courageous. Feel free to think outside the box, but back up your recommendations with facts and observations, not opinions.
- Your recommendations should include outcome measures and be time-sensitive and as specific as possible so they may be turned into official court orders. (e.g., CASA recommends evaluation be scheduled within 14 days.)
- Do not assume the reader knows what you know. Give all needed information.
- Reports should generally only include information gathered since the last hearing, unless some background information is necessary.

Writing

- Keep your court report brief. Reports should be between 3 and 5 pages in length.
- When reporting information, be sure to identify the source and date of the information as specifically as possible.
- Do not transcribe information from other reports directly into your report. Paraphrase information using your own words.
- Do not include quotations from attorneys.

Formatting

- Always refer to yourself and your supervisor as “CASA” as opposed to “I” or “your supervisor’s name.” This way CASA always speaks with one voice and you do not need to differentiate between who did what. (e.g., CASA recommends . . . , CASA is concerned . . . , It is CASA’s understanding . . .)
- Use bold text to highlight important information in the court report.

- Use italics as subheadings in the Summary section when there is a lot of information on a specific topic.
- Write out dates (January 1, 2016) except for the children’s birthdays (which should be MM/DD/YY).
- Refer to the parents by their full names, as Ms./Mrs./Mr. [Last Name] or as the “mother” or “father.” Do not refer to the parents by only their first name or as “mom” or “dad.” Refer to everyone else by their role. (e.g., The foster parents, Johnny’s teacher, the DFPS caseworker . . .)
- Define acronyms the first time you use them. (e.g., “Family Team Meeting (FTM)” can be followed by “During the FTM . . .”)
- Be consistent with titles. Pick a title and stick to it throughout your report.

Reviewing Your Report

- Remember to spellcheck and proofread, both for typos and the facts of the case. Check children’s ages, birthdays, name spelling, updated placement, etc.
- As you review your court report, ensure that the Case Summary, Areas of Concern, and Recommendations all reflect and support each other. There should not be new information, concerns, or recommendations that show up at the end without having been first addressed during the Case Summary. Every recognized Area of Concern should be answered by a Recommendation.
- Scrutinize your report as the parties’ attorneys will; do not leave room for unanswered questions.

Confidentiality

- Keep in mind that court reports are public documents. In order to protect the confidentiality of the children we serve, do not include information on the following:
 - Placements and addresses: The names of foster homes, shelters, residential treatment centers (RTCs), or group homes should never be used, which is why we only state type and distance. The only exception to this rule is if the child is placed with a parent or relative since the parents are aware of the location of the children. When sharing where parents live, mention only the city and do not include parents’ street address.
 - Serious behavioral issues (sexual, violent, etc.) or juvenile court involvement: You may allude to these issues and then say they will be discussed verbally with the judge. (e.g., “Tommy and Sarah are placed separately due to allegations of inappropriate behavior that will be further discussed in court.” -or- “Tommy is placed in a secure facility. CASA will further discuss his legal issues at the hearing.”)

Court Report Template and Instructional

CASA OF WILDFLOWER COUNTY
100 Best Interest Dr
Bluebonnet, Texas 75022
(555) 555-5555 FAX (555) 555-5555

Cause No. D-1-FM-18-123456
Initial Permanency Hearing

IN THE INTEREST OF:

MARIAH REDD

CHILD

DATE OF HEARING: JULY 29, 2018

CHILD/SITUATION

IN THE DISTRICT COURT OF
WILDFLOWER COUNTY, TEXAS

126TH JUDICIAL DISTRICT

Mariah Redd

DOB: 2/1/2018

5 months old

Mariah Redd is currently living in a foster home in Bluebonnet, TX, where she was placed on February 6, 2018.

The Texas Department of Family and Protective Services (DFPS) was granted Temporary Managing Conservatorship (TMC) of Mariah Redd on March 18, 2018. Case was initiated due to the child, Mariah Redd, testing positive for the drug Phencyclidine (PCP) at birth. The dismissal date for this case is March 20, 2019.

PERMANENCY PLAN

The current DFPS Permanency Plan is Family Reunification, with a concurrent plan of Relative Adoption. CASA is in agreement with this plan.

SUMMARY OF CONTACTS SINCE LAST REVIEW

▶ Instructions for Summary of Contacts

This is where you as the CASA volunteer take over writing the court report. Write this section as a bullet-pointed list of all the people you have contacted since the last hearing.

Redd
D-1-FM-18-123456
Page 1 of 8

- Use “CASA” instead of “I”.
- Mention your contact with the child first, then: DFPS caseworker; attorney ad litem; child’s therapist; teacher, school counselor, daycare teacher; foster parents, caregivers, facility staff; Foster Licensing Agency Case Manager; pediatrician; parents; parents’ attorneys; parents’ service providers (if you have a signed Release of Info).
- Include people whom you have attempted to contact (with dates) even if you have not reached them. These should be documented in your case notes as well.
- Do not include names beyond children, parents, and relatives. Refer to all other contacts by their titles so that the judge can keep this information straight (DFPS caseworker, the foster parents, the child’s science teacher, etc.).
- Include important meetings you have attended—PC, ISP, FGC, etc. —and include dates if possible.

CASE SUMMARY SINCE LAST REVIEW

“Mariah Redd (5 months old) is...”

▶ Instructions for Case Summary: Children

This is the narrative section where you provide a summary of the updates, strengths and needs of each child, and parent on the case, beginning with the oldest child. This is your chance to tell the judge who the children are, how they are doing, what services they are receiving, what progress has been made, what their unmet needs are, and what needs to happen for them to be able to return home safely. You do not need to include details of the original allegations of abuse or neglect.

Anything you identify as an Area of Concern in the next section, for which you subsequently present a Recommendation as an answer, should be supported in the Case Summary section. Someone reading the report should not be learning anything new about the case in Areas of Concern or Recommendations.

An Important Note on Confidentiality: Court reports are public documents. To protect the confidentiality of the children we serve, do not include information on serious behavioral issues (sexual, violence, etc.) or on juvenile court involvement in your report. You may allude to these issues and note that they will be discussed verbally.

Writing/Formatting:

Write in paragraph form. Use bold to highlight important information. If a topic has a lot of content, use a subheading in italics to organize.

Start with the child's name, age, current placement, their behavior within that placement, and a short description of who the child is. Share something positive in this paragraph to personify the child for the judge.

Focus on the following areas:

- How is the child doing in their placement, at school, medically, psychologically, developmentally, etc.?
- What services are they receiving?
- What progress has been made?
- Have any successes occurred?
- What is going well? What is not going well?
- What is the plan to fix any issues?
- Does the child have unmet needs? Is there a plan to meet those needs?
- How are the child's cultural needs (if any) being met?
- Is a court order necessary to get needs met, or is a resolution being worked on outside the courtroom?

Educational Updates:

- Do not mention the name of the child's school.
- State whether the child is receiving regular or special education services. If special ed., give the qualifying designation: ED—Emotionally Disturbed, LD—Learning Disabled, OHI—Other Health Impairment, or 504.
- Include the date of the last or upcoming ARD meeting.
- Discuss the child's behavior in school, including their grades, academic progress, attendance and when CASA reviewed the educational passport.
- Share if the child is in any extracurricular activities, and if so, how they are going.

Health/Development Updates:

- Are there any particular health issues or developmental concerns?
- Is the child on any medications? If so, what is the name and dosage of the

medication? What diagnosis is the medication prescribed to treat? Is the child experiencing any side effects?

- Is the child up-to-date on vaccines and well-child checks?
- Has the child had developmental assessments (ECI or psychological)? What were the results and recommendations?
- Does CASA believe the child would benefit from additional assessments or services? If so, which ones?
- Is the child receiving previously recommended services? If not, why?

Therapeutic/Psychological Updates:

- What frequency and type of therapy is the child receiving: individual, group, play, occupational, etc?
- What general issues are being worked on in therapy, and what, if any, progress has the therapist reported? Share notes and comments from the therapist.
- What, if any, mental health diagnoses does the child have, and what is the plan to treat these diagnoses?
- Diagnoses and Medications (if applicable): Be sure to check spelling of medications and include dosages, who dispenses each med, frequency, why it is being used and how it is helping (get info from child, caregiver, teacher, etc). What, if any, side effects is the child experiencing?
- You do not need to include detailed information from the child's psychological evaluation, such as types of tests that were completed. Simply list the diagnosis and the recommendations from the psychologist.

Additional Topics:

If you have another topic you need to discuss, add another paragraph. Make sure to mention any special recognition the child has received or any pertinent information not covered above.

Next Child:

Once you have completed the oldest child's section of the report, continue on with a separate section for the next oldest child and so on until each child has their own section. Even when children have similar information, **each child must have their own section with their own individual information.**

Information Applying to All Siblings:

If you have information that applies to all children identically, such as Family Visitation Updates, create a subheading in italics after all the children's individual reports to share only once.

Family Visitation Updates:

- Report on sibling and parental visits. Where are they taking place? Are the visits supervised or unsupervised and by whom? What is the frequency of visitation?
- How are the visits going? What observations has CASA made about the visits?
- What strengths does CASA see during the visits?
- What concerns does CASA have about the visits? Share recommendations to address these concerns.
- Is CASA requesting any changes with the current visitation schedule?

"Clarissa Redd (mother)..."

"Johnny Smith (father)..."

▶ Instructions for Case Summary: Parents

Upon completing a section for each child, do the same for each parent. **Every parent must have their own paragraph, including missing, deceased, and incarcerated parents, and alleged fathers whose paternity is yet to be verified.** With multiple fathers, list (father of child-name) next to each person's name in summary. It is helpful to continue to include parents even if their parental rights were terminated.

Focus on the following areas:

- Start with the mother and her information, then the father(s) of the oldest to youngest child.
- Where does the parent live? (Do not include parents' street address, only city.)
- Are they employed? If so, full-time or part-time, and what is their position?
- Discuss any progress on the parents' service plans. Be sure to list which services are completed, which are in progress, and which services the parent has not started (make sure to state why services not are completed if it is not the parents' fault).

- Keep in mind that completion of services is not the only measure of a parent's ability to safely parent their children. As you prepare your report, consider the MSL for each child and ask yourself whether the child could safely return home today. If not, what are the specific concerns and/or barriers to reunification?
- What are the parent's strengths and skills?

▶ **Instructions for Case Summary: Other Family Members**

It is important to help build a supportive community around the parents as they work towards the goal of reunification. Once you have completed a section on each and every parent, you can add a section about any other significant relatives or fictive kin who are involved with the child. For example, you would include this section if the child is placed with a relative and there are issues that need to be addressed to support the relative, or if CASA located a relative and is advocating for placement of the child with that relative.

AREAS OF CONCERN

▶ **Instructions for Areas of Concern**

In this section of the report, CASA highlights and summarizes concerns in bullet-point format **that have already been explained in the Case Summary section of the report.** For example, if CASA is concerned about Ronny's failing grade in math, then that should have been explained in the education section of the report and it will now be reiterated here. **Do not** mention a concern that does not have a corresponding explanation in the Case Summary.

Make sure to list all concerns you hope to have addressed by the judge. List concerns regarding the children first, followed by concerns regarding the parents.

RECOMMENDATIONS

▶ **Instructions for Recommendations**

This section is where you list what CASA would like to have ordered by the judge. Make sure that each recommendation is as specific as possible so that it can be more easily enforced. There should be only one recommendation per numbered line. Do not list

multiple recommendations for the same person, or multiple people's recommendations, in one sentence, even if the recommendation is the same for each person.

Every recognized Area of Concern from the previous section should be answered by a Recommendation in this section.

Recommendations must be something that the court can legally order. The judge has jurisdiction over DFPS, attorneys, parents, CASA, and the children, so these are the only people that can be ordered to do something.

Examples:

- The judge cannot order the school to provide math tutoring, but they can order DFPS to locate tutoring services for the child.
- A biological parent's partner cannot be legally ordered to do something on a DFPS case, but if they are willing to participate in services, then DFPS can be ordered to make said services available.

Based on the above summary and observations, CASA of Wildflower County, Inc. respectfully recommends:

1. That the Texas Department of Family and Protective Services maintain Temporary Managing Conservatorship of Mariah Redd;
 - ▶ The first recommendation is always about the legal status of the case and only changes if that status changes.
2. That the child's current placement be ...
 - ▶ The second recommendation is always about placement of the children. This recommendation only changes if CASA is requesting a change in placement.
3. That ...:
 - ▶ The next recommendations can cover whatever specific orders CASA would like to see the judge make. Always start with orders relating to the oldest child first, then the next oldest, etc.
4. That ...; and
 - ▶ After orders regarding the children, move to orders about the mother, then the father of the oldest child, etc. All recommendations must be for things that the judge can order and enforce. The judge cannot order a parent to learn better parenting skills. However, the judge can order the parent to participate in parenting classes.
5. That the case be reviewed within three months.
 - ▶ The last recommendation is always about when CASA would like for the case to be reviewed. Most cases are reviewed every 3–4 months, but CASA can request an earlier review. If there are issues on the case that need a quick resolution, it may be appropriate to suggest an earlier review if you feel there's a need for additional accountability. This will help ensure that difficult problems are resolved sooner.

Your Name
CASA Volunteer

Date

Your CASA Supervisor's Name
CASA Supervisor

Date

Your CASA Program Director's Name
CASA Program Director

Date

Redd
D-1-FM-18-123456
Page 8 of 8

Troubleshooting Issues

Reach out to your supervisor if you have any questions or issues using Optima.

Frequently Asked Questions

What is Optima?

Optima is a database for CASA programs. It contains confidential information about children, volunteers, and cases.

How does Optima work?

Optima is web-based. You can access it via a web browser and with a password.

Why use Optima?

Optima allows you and your supervisor to create and maintain a shared set of information about children and cases. Optima also allows us to track our service, coordinate our efforts, and report on our actions to funders and other stakeholders. When you use Optima, we are better organized, more accountable, and able to devote more time and resources to helping children. It is important to remember that because our entire advocacy is documented in Optima, you must be mindful about what information goes into Optima, as all Optima records can potentially be subpoenaed.

Can I use Optima from my mobile phone or tablet?

Yes. Optima works with Explorer, Chrome, Firefox, Safari, and Opera.

When you use your mobile phone to login, you will be directed to Optima Go, the mobile tool, which allows you to add quick notes and contact logs, as well as view hearing details, documents, see week-at-a-glance events and add calendar events.

What training and support is available?

The basics of using Optima are taught throughout the CASA volunteer training program. At your initial case sign-up, talk with your supervisor about any questions you have regarding monthly mandatory inputting of information into Optima and other logistics to manage your case. You will use this how-to guide to continue to familiarize yourself with Optima. Your supervisor will continue to be a support and help you learn to navigate the database.

What if I forget my password?

Use the blue Forgot Password link on the log-in screen. The email address associated with your Optima account should be the same email used on your volunteer application, unless you changed this prior to completing training. If you do not receive the email message with the link to reset your password, contact your supervisor for assistance with logging in.

What fields are mandatory?

✪ This represents a section with mandatory fields. Be sure to read entire section details to ensure you're entering all data. Update all mandatory fields as you learn of new information, within the same week.

Volunteer Dashboard

Your Profile

Once you're logged in, you'll be at the Volunteer Dashboard page—this is your main page. From here you can navigate to other tabs and sections. You get back to the main page by clicking on the Volunteer Dashboard icon.

✪ Personal Information

From the Volunteer Dashboard, click the Personal Info button to update:

- Contact Information (Demographics section)
- Emergency Contacts
- Employment
- Case Preferences (About Tab)

Click on the green Edit and Add buttons to update Personal Info sections listed above. Be sure to click the green Save button when you're done. You can edit an existing entry by clicking on the green Edit button or clicking on the Pen and Paper icon. You can delete entries by using the red X button in the Action column.

Address Book

The Address Book is linked to you, which means you will have access to this throughout any case you're assigned while you're an active volunteer. Use the Address Book as a community resource guide, not for case-specific information. Click on the blue Address Book button on the Volunteer Dashboard page. Click on the green Add button to create a new entry or the Pen and Paper icon to edit an existing entry.

Calendar

You can view by day, week, or month by clicking on any one of the Today/Week/Month buttons. Use the arrow buttons to move to a previous or future date.

Create a new event

Double left-click on a day in the calendar to create a new event. If you have multiple cases, link the case to the calendar event using the drop-down menu in the Case field of the event pop-up screen.

Save/export event

Save/export an event if you would also like to view it in a personal calendar. Once you click on the orange Save/Export as iCal button (this will work for all calendar types), it will appear as a download on your computer. If you export from your phone, the event will show up in your default calendar and you can choose which calendar to add it to.

Hearings and court report reminders that are entered in the hearing section of the Case Details page will auto populate into the Optima calendar.

New Docs

New Docs tab, located on your Volunteer Dashboard, will show you all recently (within 14 days) uploaded documents to your case. After 14 days, they will no longer show up in this section, but they can still be found in the Documents tab of the Case Details page where they will live indefinitely.

Continuing Education and Non-Case Activities

★ Training Logs

The Training Logs tab is located on your Volunteer Dashboard. You are required to complete a minimum of 12 Continuing Education (CE) hours per calendar year.

Enter Continuing Education hours

Click on the Training Logs tab and then click on the green Add button. You can view your year-to-date totals in this section. Note that the status will state “pending” until the log is read and approved by your supervisor. Be sure to include a summary in the notes section.

Time needs to be entered in decimals. For example, 90 minutes will be 1.5, or one and a half hours, and you would list a 30-minute training as .5 for half an hour.

Non-Case Activity Logs (Optional)

The Non-Case tab is located on your Volunteer Dashboard. This section allows you to enter hours and mileage for non-case related activities. For example, volunteering for different CASA events. If you would like or need the total of these activities for tax purposes, please let your supervisor know and this can be emailed to you.

To enter, click the Non-Case tab and then click the green Add button and enter the activity information and then click the green Create button. You can edit an existing entry by clicking on the Pen and Paper icon in the Action column.

Case Management

Case Details

The Cases tab shows you a list of cases you are currently assigned. You can get to the Case Details page by either clicking on the case number -or- clicking on the Pen and Paper icon in the Action column. The Case Details page contains the entire case information and is broken down into specific sections.

The Case Information section shows a quick summary of case name/number details and notes.

The Case Assignments section only contains CASA staff and CASA volunteer information. It is a history of all CASA staff/volunteers assigned to the case. A release date and reason will be entered by the CASA supervisor when a party is no longer assigned to the case.

Children in Case

This section shows all children appointed to CASA. If a child has been closed out, they will have a closure date, but they will still appear in this section.

Child Details

Find the child you want to review/update, and click on the Magnifying Glass icon in the Action column to view the individual Child Details page, which will have specific information about a child, including the Languages, Disabilities, and Schools tabs, where you will add information.

★ Languages

1. Click on the Languages tab at the bottom of the Child Details page.
2. Click the Add button and choose from the drop-down menu (you can add multiple languages, but be sure to select the Primary Language checkbox to identify the child's primary language if they speak multiple languages).
3. Click the green Create button.

★ Disabilities

1. Click on the Disabilities tab at the bottom of the Child Details page.
2. Click the Add button and choose from the drop-down menu (only add disabilities if you've received official documentation with diagnosis).
3. If disability type is not in the drop-down, let your supervisor know so that it can be added to the drop-down menu.
4. Click the green Create button.

★ Schools

School information needs to be updated each time a child changes schools, no matter the reason.

1. Click on the Schools tab at the bottom of the Child Details page.
2. Go to School History section.
3. Click the Add button and enter the following fields:
 - a. School Name
4. Grade
5. School Start Date
6. School End Date (when appropriate)
7. Contact Name/Title/Phone/Email (when available; if you do not have this information when entering school, you can come back and edit later)
8. Click the green Create button.

Update Schools

1. Click on the Schools tab at the bottom of the Child Details page.
2. Go to School History section.

3. Find the school you want to update and click on the Pen and Paper icon in the Action column.
4. Click the green Save button.

If school/daycare is not in the drop-down, fill out the School/Daycare Request form at <http://bit.ly/casaschoolupdate>. The form is also located on the CASA website in the password-protected Volunteer Resource area.

Placements

Ending a Placement

In the Current Placements section, click on the Magnifying Glass icon in the Action column of the placement that is ending. When the Placement Details page populates, click the green Edit button and enter the To Date field, the ending date of placement (last day child was at placement). Click the green Save button.


Adding a Placement

 Placements need to be entered within the same week of the placement change.

In the Current Placements section, click the green Add button, then complete the steps below in each section:

- Children Placed: Click on "Select All" -or- an individual child, depending on which child will be placed in the facility
- Placed With (select one): Select a Placement Facility or Family Member from the drop-down menu
 - Placement Facilities begin with initials of placement type; some may begin with the actual placement type and then the name of the facility/foster home.
Examples:
 - ◆ Criminal Justice Facilities will be entered as: CJF Gardner Betts Juvenile Justice Center
 - ◆ Foster Homes will be entered as: FH Mills, Nicole and Porter, Daniel
 - ◆ Shelters will be entered as: Shelter Austin Children's Shelter
- If you do not see the foster home (FH) or facility in the drop-down menu, fill out the Placement Request Form at <http://bit.ly/casaplacement>. The form is also located on the CASA website in the password-protected Volunteer Resource area.
- Family/fictive kin will only show up in the Family Member drop-down if they have been entered into the Family Members section on the Case Details page. Make sure

you enter them there first before attempting to add family/fictive kin as a new placement.

-  Placement Details—Enter all the following fields:
 - Hearing Date
 - From Date
 - With Siblings
 - Placement Type
 - Placement Reason
 - Reasonable Distance—Select checkbox if placement is within one hour of downtown courthouse.
 - In County—Select checkbox if placement is in Your Program’s County.
 - Click the green Create button.

All placements that are updated in the Current Placement section can also be found in the Placement History tab located at the bottom of the Case Details screen, along with a history of all placements where the child resided.

Family Members/Fictive Kin

Family Members Section

Add Family/Fictive Kin

- Click the green Add button to create a new family member record. Enter as much information as you have. You can always come back and edit any missing fields or update information (e.g., phone numbers, address, notes).
 - The *Active* checkbox should be selected if the family/fictive kin are engaged on the case (i.e. you speak to them on a regular to semiregular basis, they attend hearings, meetings, visits, etc.).
- After you hit the green *Create* button, the tabs Relationships/Languages/Disabilities/Concerns/Employment will show up at the bottom of the screen.
- Link family/fictive kin to the child through the Relationships tab.
 - Click the green *Add* button.
 - Check child name.
 - Choose appropriate Relationship Type from drop-down.

Edit/View Family/Fictive Kin

Click the Magnifying Glass icon in the Action column to edit and/or view details for any family/fictive kin already entered.

🌟 Languages

1. Click the *Languages* tab at the bottom of the Family Details page.
2. Click the green *Add* button and choose from the drop-down menu (you can add multiple languages, but be sure to select the Primary Language checkbox to identify the primary language if they speak multiple languages).
3. Click the green *Create* button.

Additional Options

You can also add disabilities and employment information by clicking on those tabs. The Concerns tab is empty because each family member has a notes section where you can be more specific about any concerns.

🌟 Contact Logs

Each month use the Contact Log feature to document all mandatory advocacies (🌟). Some of these contacts may overlap. For instance, your visit to your CASA child and your contact with the placement provider may be part of the same contact log, just as a court hearing or supervised visit may also serve as your contact with the DFPS caseworker. With the contact log feature, you can select which people were included in the contact.

🌟 *It is extremely important that you are submitting contact logs as soon as possible. Talk with your supervisor about the deadline to complete your monthly contact logs (for example, some programs require that contact logs be submitted within 5 days of the activity happening and no later than the 5th of the following month.)*

Enter Amounts of Time

Optima requires that you enter an amount of time. However, if you do not want to track your hours, enter 0 into the Hours field to create the contact log. Time entered for contact logs should be entered on an hourly basis. For instance, 60 minutes is entered as "1," and 15 minutes is entered as ".25," etc.

Creating a Contact Log

The Contact Logs tab is located along the bottom of the Case Details page. Click the green Add button and follow the steps below:

1. Activity Date: This auto-fills when the Contact Log is opened, so be sure to change the date to reflect the actual activity date.

2. Activity Type: What did you do? Child face-to-face visit, attend court, contacted the placement, etc.
3. Select the Out of Court checkbox if Contact was not a court hearing.
4. Contact Type: How was the contact made? Face-to-face, email, phone, etc.
5. Hours: If you choose not to track your hours, you still need to enter 0 to be able to create the contact log.
6. Notes: Always enter notes, so your supervisor will be able to review and be kept up-to-date on your case.
7. Select party/parties that were contacted at time of activity by clicking the checkbox next to their name in the box located to the right of the Contact Log page.

Contact Logs can also be created directly from your Volunteer Dashboard. Click the Pen and Paper icon, and it will take you to a Contact Log screen.

Contact Log Status

When Contact Logs are created, they auto-populate on your supervisor's dashboard, where they will read and then either approve or deny it. The Contact Log status will remain as "pending" until your supervisor opens and reviews it. You will be able to see the status from your Contact Logs tab.

Denied Contact Logs

You are responsible for reviewing and updating any Denied status Contact Logs. Your supervisor will write questions/updates directly into the notes section of the Contact Log. Follow these steps below to update Denied Contact Logs:

1. Click the Pen and Paper icon of the Denied Contact Log to open Contact Log.
2. Review the notes section and make any updates.
3. Click the green Save button.

Grouping Contact Logs

Ideally, you'll enter a Contact Log for each instance of an advocacy activity, but in some instances, you may save time by combining activities of the same type that occurred within the same calendar month. For example, if you have three phone calls with a DFPS worker during a month, you could enter three Contact Logs. However, the intensity of some case assignments may make it difficult to keep up with the data entry. It's permissible for volunteers to condense different contacts into a single Contact Log within these parameters:

- Do not combine different types of activities.
- Do not combine activities that occurred in different calendar months.

An example of a combined Contact Log would be, “Had 5 conversations with the paternal aunt regarding her frustration with the location of the weekly visits.”

Capturing Miscellaneous Time

Volunteers may have miscellaneous activities that add to their volunteer time but aren't worthy of separate Contact Logs. To declare an accurate total of volunteer hours, a volunteer can create a Contact Log using “Admin Review/Research (Data Collection/Read)” to capture time spent on miscellaneous activities. Entering non-correspondence activities (e.g. updating Optima or writing court report)—there are “Updating/reviewing Optima” and “Court report (writing/editing)” activity types you can choose from the drop-down menu.

View and Search Contact Logs

1. Click the blue View Notes button on the Contact Logs section, and all your approved contact notes will appear on one page.
2. Click the blue Search button.
3. Enter start/end date if you only want to search within a specific time frame
4. Unselect the Null checkbox to search by any of the following:
 - Subject
 - Party
 - Activity Type
 - Volunteer (Contact log entered by specific person—you, another volunteer, your supervisor)

★ Associated Parties

An associated party is any professional connected with the case. Associated parties are added to a list that is viewable in all cases, so please use this feature to list professionals but not people whose record in Optima should be specific to a single case. Associated parties are divided into 3 categories:

- Attorneys
- Caseworkers (only DFPS)
- Interested parties (service providers and other professionals)

Please don't edit the job title or other information for an associated party to customize that person's information for a specific case. Changes made to contact information, job title, etc. will appear across all cases to which the associated party is linked.

The Associated Parties tab can be found at the bottom of the Case Details page.

Add Associated Party

Click the green Add button, then click the Party Type button. Then search for party in the drop-down menu that will appear. Parties are listed by last name, first name.

If you do not find the name of the person you need in the drop down, fill out the Associated Party Request form at <http://bit.ly/assocparty>. The form is also located on the CASA website in the password-protected Volunteer Resource area.

When you save the Associated Party, you will be redirected to the details screen for that specific party. Depending on whether the person is assigned to the child(ren) or the parent(s), you'll select the green Add button for either the children, parents, or both, to link them. For instance, link the father's attorney to the father and the child's therapist to the child.

Linking Family Member

Choose the name of the Family Member. The date will auto-populate to the current date, so be sure to change to the actual date they were assigned. The release date and release reasons should be left blank.

Linking Child(ren)

Choose the name of the child or select all. The date will auto-populate to the current date, so be sure to change to the actual date they were assigned. The release date and release reason fields should be left blank.

Release Associated Party

Find the party you want to release and click the Magnifying Glass icon in the Action column. This will take you to the Associated Party Details page, where you will scroll down to the Child section or Family Member section. Click the Pen and Paper icon to release the party from either a child or family member, depending on to whom they are assigned. Enter the release date. Click the green Save button.

Do not delete, as it's important we keep a history of all associated parties.

The associated party will still show up in the Associated Parties section, but now the checkbox in the Released column will be selected.

Case History

We do not delete any information when updating a case. Optima allows you to keep a history of all changes (e.g., children in a case, placements, schools, caseworkers, etc.). It is very important to keep a history of anyone who has ever been involved in the case, no matter the part they played.

Documents

Upload Document

Before you upload a file, make sure you change the file name to something you can easily find, because once it's uploaded, you *cannot* change the file name.

We recommend you use the following format when naming the file:

Last name, First name - Document name

Examples:

- Grimes, Rick - psychological
- Grimes, Judith - daycare report
- Grimes, Carl - report card

To upload a document, go to the bottom of the Case Details page to the Documents tab:

1. Click the green *Add* button.
2. Click the *Choose Files* button to find the document you want to upload. You can multi-select files.
3. Choose Document Type from the drop-down menu.
 - Use the Case File (Documents) Contents form at <http://bit.ly/casafiledocs>. The form is also located on the CASA website in the password-protected Volunteer Resource area.
4. Enter Document Date. This is the date the document was completed/signed, not when it was uploaded. Be sure to change this date if different from upload date.
5. Click the green *Save* button.

View Document

1. Choose Document Type from the drop-down menu.
2. Click the blue *Apply* button.
3. Click the *Magnifying Glass* icon in the Action column to view a specific document. The document will download, and you can open to read contents.

Hearings

Create a New Hearing

Hearings must be entered within 1 week of the last hearing date.

Mandatory Fields Pre-Hearing

Go to the Hearings tab, located at the bottom of the Case Details page. Click the green Add button, and enter the following:

- Hearing Date
- Hearing Time
- Hearing Location
- Judge

Click the green *Create* button and several new sections will populate:

1. Click Hearing Types tab.
2. Click the green *Add* button and choose Hearing Type from the drop-down.
3. Click the green *Create* button.
4. Go to Hearing Participants section.
5. Click Child tab.
6. Click the green *Add* button and Select All.
7. Click the green *Create* button.

Edit or Update a Hearing

Mandatory Fields Post-Hearing

Go to Hearings tab located at the bottom of the Case Details page, and find the hearing you want to edit/update. Click the Magnifying Glass icon in the Action column to open the Hearing Details page, and complete the following:

1. In Hearing section, click the green Edit button.
2. Update the Hearing Status field from blank to updated status (e.g., completed/recessed).
3. Click the green Save button.
4. Click Hearing Outcomes tab.
5. Click the green Add button.
6. Choose recommendations made by CASA from the drop-down (you can select multiple options).
7. Click the green Create button.

Volunteer Input

Once assigned to your case, your CASA supervisor will provide more specific instruction for this section.

Recommendations are entered in number form into the Accepted/Rejected/Negotiated fields. Once the hearing has been completed, you will find the hearing in the Hearings tab. Click the Magnifying Glass icon in the Action column to get to the Hearing Details page and the Volunteer Input section.

Click the green Add button, and the Add Volunteer Input screen below will populate. Complete the fields in this section. Only select the Excused checkbox if you did not attend court and your supervisor was aware you would be absent. Once you click the green Create button, you will see the fields populate into the Volunteer Input section.

There are a few other sections in the Hearing Details page:

- Court Ordered Services: Allows you to add what service was ordered.
- Visitation: Allows you to choose the type of visitation per family member and child as well as specified frequency and actual frequency.
- Permanent Plan: Allows you to choose CASA's primary permanent plan type for the child(ren) as well as the DFPS permanent plan type.

★ Case Closure Wellbeing

Create an Assessment (Child Closure Survey) for each child when closing a full case or an individual child:

1. At the bottom of the Case Details page, click the Wellbeing tab and then click the green Add button.
2. Choose the child from the Child Name/Age drop-down.
3. Choose Case Closure from the Wellbeing Category drop-down.
4. Choose Child Closure Survey from the Assessment Name.
5. Click the green Assess button.
6. The Add Assessment screen will pop up asking if you are sure you want to continue because you'll need to complete the entire assessment (14 yes/no questions) in one sitting.
7. Click the green Save button when complete. You will not be able to save if the Assessment is not complete.
8. You can edit the Assessment by clicking on the Pen and Paper icon.

SAMPLE PROGRAM POLICIES

Code of Conduct

Mission Statement

CASA exists to promote and protect the best interest of children who have been abused or neglected, by training volunteers to advocate for them in courts, in schools, and in our community to help them find safe, permanent and loving homes.

Vision Statement

For every child who needs us, CASA envisions a trained volunteer advocate, a safe home and a promising future.

Values Statements

In working to achieve our vision, we act on the following core values:

- Excellence in all our endeavors.
- Inclusiveness, diversity, respect for all cultures and ethnicities: for children, families, volunteers, staff, Board, and supporters.
- Empowering the community through strong screening, training, supervision and support of volunteers.
- Honorable and respectful involvement in the child welfare system, with the courts and all parties.
- Independent and educated recommendations, true to our understanding of each child's best interest, that prioritize children's safety and, wherever possible, preserve connections to their families.
- Responsible use of resources to maximize our positive impact on the child welfare system.

Ethics Statement

It is CASA's duty to promote the safety and well-being of the children we serve. We shall protect children from abuse and from practices that are emotionally and physically damaging, disrespectful, degrading, dangerous, exploitive or intimidating.

Our commitment as an organization is to create an environment for children and youth that is safe, nurturing, empowering, and which promotes growth and success for the children we serve. This Code of Conduct outlines specific expectations of employees and

volunteers as we strive to accomplish our mission together.

1. Children and youth will be treated with respect at all times.
2. Children and youth will be treated fairly regardless of race, ethnicity, religion, sexual orientation, age, gender, gender identity and gender expression, relationship status, physical abilities, national origin, immigration or citizenship status.
3. Employees and volunteers will not swear or tell off-color jokes in the presence of children or youth.
4. Employees and volunteers will not discuss with children or youth private details of their personal lives or sexual encounters or in any way involve children in their personal problems or issues.
5. Employees and volunteers will not use or be under the influence of alcohol or illegal drugs in the presence of children or youth.
6. Employees and volunteers will not have sexually-oriented materials, including printed or internet pornography, in the presence of children or youth.
7. Employees and volunteers will not have secrets with children or youth.
8. Employees and volunteers will avoid wearing provocative or revealing attire in the presence of children or youth.
9. Employees and volunteers will not stare or comment on a child's or youth's body.
10. Employees and volunteers will adhere to uniform standards of affection.
11. Employees and volunteers will avoid affection that cannot be observed by a third party.
12. Employees and volunteers shall not abuse children or youth in any way, including the following:
 - Physical abuse: hitting, spanking, shaking, slapping, unnecessary restraints
 - Verbal abuse: degrading, threatening, cursing
 - Sexual abuse: inappropriate touch, exposing oneself, sexually-oriented conversations
 - Mental abuse: shaming, humiliation, cruelty
 - Neglect: withholding food, water, shelter

No type of abuse will be tolerated and will result in immediate dismissal from CASA. CASA will fully cooperate with authorities if allegations of abuse are made and investigated.

Employees and volunteers will report concerns or complaints about CASA employees, volunteers or children to the Executive Director.

CASA employees and volunteers shall not have engaged in or been accused or convicted of child abuse, indecency with a child, or injury to a child.

Program Policies

1. MINIMUM EXPECTATIONS OF SERVICE TO A CASE AND BEST PRACTICE RECOMMENDATIONS

A. Advocates will:

1. In a timely manner after appointment, obtain firsthand a clear understanding of the needs and situation of the child by reviewing all relevant documents and records and interviewing the child(ren), parents, relatives, social workers, teachers, doctors, therapists and other persons with significant knowledge of the child to determine the facts and circumstances of the child.
 - a. **Best Practice Recommendation:** Documents should be reviewed by the volunteer within 14 days and by the Case Supervisor within 7 days. Children should be interviewed within 14 days of appointment and other relevant parties should be interviewed within 30 days of transfer from Family Engagement.
2. Maintain confidentiality of all issues and records of the case and return all case documents to the CASA program after the case is closed.
 - a. **Best Practice Recommendation:** Records should be returned within 30 days for hard copies, and by the end of the calendar month in which the case is closed for uploading all digital files into Optima and deleting from volunteer's possession.
3. Notify all parties to the case of CASA's appointment.
 - a. **Best Practice Recommendation:** Notify parties within 2 business days of the Supervisor's and/or volunteer's appointment to the case.
4. Communicate with the Department of Family & Protective Services (DFPS) caseworker after appointment and at least one time per month for the duration of the case.
 - a. **Best Practice Recommendation:** Contact the DFPS caseworker within one week of appointment.
5. Meet the child(ren) within 30 days and meet in person with the child(ren) at least one time per month if they live within 60 miles of the CASA office.
 - a. **Best Practice Recommendation:** Meet child(ren) in person within 14 days of case assignment. Children will be seen in person one time per month for regular visit at the placement, and one time per month face-to-face contact, such as observing a visit, transporting child to activity or service, court,

school meeting, etc. When possible, children should be notified in advance when the visit will occur. In the event that the visit has to be canceled, the advocate will notify the child directly whenever possible.

- If children are placed:
 - Between 60 and 180 miles from the CASA office, then the advocate will meet in person with the child(ren) at least once every three months.
 - ◆ **Best Practice Recommendation:** Children will be seen every 60 days in person.
 - 181 miles or more from the CASA office, then the advocate will meet in person with the child(ren) at least once every six months.
 - ◆ **Best Practice Recommendation:** Children will be seen no less than once every three months in person, if in the state of Texas.
 - 50% of the advocate's in-person contacts should occur where the child lives.
 - When monthly visits are not required (based on location), advocates will supplement with other types of monthly age appropriate contact with the child(ren), including video conferencing, telephone calls, e-mails, and/or letters as applicable for the child's age and interests. All contacts (whether electronic or otherwise) should be documented and are considered to be part of the case file. The Supervisor should be copied and included in the volunteer's supplemental correspondence whenever possible.
 - **Best Practice Recommendation:** If the advocate is not seeing the child in person every month, the child should receive at least one letter/postcard, email or text message, when age-appropriate, in the months they are not seen. It is also best practice to use FaceTime or Skype to speak to children in months that face-to-face contact cannot be made. This communication should be documented in Optima, and photos/scanned images of any non-digital correspondence should be uploaded and shared with the Case Supervisor.
6. Meet in person with the child's primary placement provider in a timely manner after placement occurs, and communicate with the placement providers at least once a month thereafter for the duration of the assignment of the child's case.
- a. **Best Practice Recommendation:** Initial contact with the primary placement provider should occur within 2 business days of CASA appointment and

in-person contact should occur within 14 days of placement. Communication with the placement provider should occur at least 2 times per month for the duration of the case.

7. Advocate for the child(ren)'s best interest in the community by interfacing with mental health, medical, legal, educational and other community systems to assure that the child(ren)'s needs in these areas are met.
 - a. **Best Practice Recommendation:** The advocate will check in with collaterals, such as teachers/school staff, therapists, attorneys, medical/dental health professionals, or any other person involved in the treatment of, or who has a professional/client relationship with the child, at least once per month either in person, or via phone/text, or email.
8. Determine if a Permanency Plan, an educational passport, and a medical passport have been created for the child(ren).
 - a. **Best Practice Recommendation:** When appropriate, the advocate will serve as the child's Surrogate Parent for Education, after having completed the one-hour training and being appointed as such by the Court.
9. Participate in all scheduled case-related meetings.
 - a. **Best Practice Recommendation:** The advocate should participate in person; however, when in-person participation is not possible, the volunteer will participate by phone and ensure that the Supervisor or another CASA staff member is able to attend in person. The volunteer will confer with the Case Supervisor prior to each scheduled meeting regarding CASA's position and expected topics of discussion.
10. Seek cooperative solutions by facilitating and maintaining communication with the child(ren)'s parents, relatives, attorney ad litem, social workers, teachers, doctors, therapists and other service providers as applicable.
11. Appear at all hearings to advocate for the child(ren)'s best interest and permanency. Provide testimony when necessary, making recommendations for specific appropriate services for the child, and when appropriate, the child's family. Provide written court reports for all permanency and review hearings.
 - a. **Best Practice Recommendation:** Reasons for each recommendation should be documented. The Supervisor or other approved CASA staff must be the CASA representative to sign all court orders. Both the volunteer and Supervisor will sign court orders in person that result from a hearing in which the volunteer is present. The volunteer will meet in person or over the phone with the Supervisor prior to any courtroom presentation, whether it

be a regularly scheduled hearing or specific testimony. The volunteer will adhere to CASA of Your County's guidelines/expectations of courtroom presentations/testimony. Court reports will be submitted to the Supervisor no later than 14 business days before the court hearing date, as long as the hearing was announced more than 3 weeks in advance.

12. On each case, assigned volunteers and Supervisor will communicate with one another at least once a month to update records and contact logs and participate together in scheduled case conferences.
 - a. **Best Practice Recommendation:** All contact logs will be entered in Optima within 7 days of the activity date. The volunteer will meet with the Supervisor at least once quarterly in person. The volunteer will initiate contact via phone or email with the Supervisor at least twice per month, not including submitting contact logs in Optima. Court reports will be completed for all hearings announced with at least 2 weeks' notice.
13. Inform the court promptly of important developments in the case through appropriate means as determined by court rules and statutes.
 - a. **Best Practice Recommendation:** Inform the legal parties, and Court when appropriate, of any case updates or substantial issues in a timely manner, including a change in CASA's position or Permanency Plan.
14. Monitor implementation of service plans and court orders assuring the court-ordered services are implemented in a timely manner and that review hearings are held in accordance with the law.
 - a. **Best Practice Recommendation:** Follow up with DFPS regarding court orders/referrals/mandated case meetings within 2 weeks after each hearing. The advocate will ensure that the parent(s) are provided with a Release of Information form as soon as possible after meeting them in person.
15. Participate in 12 hours of Continuing Education training per year.
 - a. **Best Practice Recommendation:** The Continuing Education hours should be documented in Optima by the volunteer no later than 30 days after completion. Their Supervisor will check in with the volunteer during the quarterly in-person meeting to ensure that Continuing Education requirements are being met, and will regularly recommend Continuing Education opportunities that would meet the volunteer's individual needs for growth and improvement in their role. The volunteer will also seek out their own opportunities for Continuing Education and will discuss with their Supervisor.

B. Volunteer's Role as it Relates to CASA

It is rare for a volunteer and the CASA staff to be in conflict regarding their positions on a case, however at times this situation may exist. When a volunteer and Supervisor or Program Manager have a conflict that cannot be resolved among themselves, the Director of Advocacy and/or the Chief Program Officer will act as a mediator to resolve the conflict. If a volunteer and the staff cannot reach consensus it is imperative the volunteer understand that CASA is appointed as the guardian ad litem to every child served by its program. Volunteers act as designated representatives of the CASA program. Therefore, volunteers are expected to discuss areas of controversy and conflict and defer final judgment to CASA of Your County.

- **Best Practice Recommendation:** Refer to rights and duties of GAL (Texas Family Code FAM § 107.002). Should a volunteer not adhere to the policies set forth, but not qualify for immediate dismissal from CASA, the Supervisor may put the volunteer on an Advocacy Improvement Plan after staffing the situation with the Advocacy Program Manager and either the Associate Director or Director of Advocacy. To the extent that it is appropriate, the volunteer will be included in the development of the Advocacy Improvement Plan.

C. Grounds for Immediate Dismissal from CASA

1. Taking action without CASA or court approval that endangers the child or is outside the role or powers of the CASA program.
2. Initiating ex parte communication with the court.
3. Violating a CASA policy, court rule, or law.
4. Failing to complete required pre-service and in-service Continuing Education training.
5. Failing to demonstrate an ability to effectively carry out assigned duties.
6. Falsifying a volunteer application or misrepresenting facts during the screening process.
7. Having allegations of child abuse/neglect brought against you.
8. Experiencing an irresolvable conflict of interest.

2. ADVOCATE-CHILD RELATIONSHIP

The advocate must establish a relationship with the child that promotes the child's well-being and enhances the advocate's objectivity while serving as the guardian ad litem. **In order to establish such a relationship, adherence to the following policies is required:**

A. Maintaining appropriate boundaries with children

Appropriate standards of affection help to promote a positive, nurturing environment for children, while protecting them from harm and protecting employees and volunteers from misunderstandings.

The following guidelines must be carefully followed by all employees and volunteers working with children:

Appropriate physical interactions include: Side hugs; Pats on the shoulder, back or head; High-fives, hand-slapping and handshakes; Verbal praise; Holding hands (with young children in escorting situations); Allowing pre-school or kindergarten-aged children to sit on employee's or volunteer's knees. If a child is verbal, the advocate must ask the child's permission before initiating any physical contact.

Inappropriate physical interactions include: Full-frontal hugs; Kisses; Showing affection in isolated areas; Sleeping in a bed with a child; Allowing children older than kindergarten-aged to sit on employee's or volunteer's knees; Wrestling, Piggyback rides, Tickling; Any type of massage given by or to a child; Any form of affection that is unwanted by the child or the employee or volunteer; Compliments relating to physique or body development; Touching bottom, chest or genital areas.

During the course of their CASA work, specifically while on outings in the community, it is possible that the advocate will need to facilitate the child's use of the bathroom. Children who are on an outing with an advocate are not to be sent to bathrooms without adult supervision. At minimum, when a child is using a multi-stall bathroom, the advocate should check the public bathroom for potential risks prior to child(ren) entering, be standing near the entryway so they can have auditory supervision of the child. Advocates can and are encouraged to be inside the facilities, when possible, so they can be easily seen by the children and so they are able to immediately stop any inappropriate activity. They should not, however, be behind closed doors with a child. For single stall bathrooms, the advocate should be positioned outside of the bathroom to make sure no one else enters the restroom. In rare situations, diapering of a young child may be required. When diapering, advocates should be in a visible area of the room where they can be observed by others. Diaper changing should be documented in an activity log in Optima. In the event of an unexpected one-on-one meeting with a child or if something unusual occurs during a private meeting, the volunteer will notify the Supervisor immediately and the interaction will be documented in Optima within 1 business day.

B. Appropriate Discipline and Prohibited Abuse

Rarely will an advocate be faced with a situation where it is appropriate to discipline a child. However, it is reasonable to assume this situation may occur. Therefore, CASA takes the following position regarding disciplinary methods.

It is expected that advocates will comply with all laws regarding child abuse as specified in the Texas Family and Penal Codes. Furthermore, CASA does not endorse or condone any form of violent disciplinary methods toward children. **Physical discipline may not be used by anyone representing CASA under any circumstance. Further, using language or mode of speech that is degrading or embarrassing (i.e., abusive verbal communication) is not an acceptable means of discipline.** Discipline must be constructive and educational in nature. Correction must be fair, reasonable, consistent and related to the specific misbehavior. Discipline should be individualized and age-appropriate. Examples of appropriate discipline include giving the child choices, connecting then correcting, etc.

Any incident of unacceptable verbal/non-verbal discipline (as described/defined above) of a child that occurs while conducting CASA business will be considered child abuse and appropriately reported to the Texas Department of Family and Protective Services. Any staff or volunteer who is alleged to have engaged in any form of child abuse will be reported to the Texas Department of Family and Protective Services and immediately placed on administrative leave for the duration of the investigation. If child abuse allegations are substantiated, the volunteer and/or staff members involved will be subject to immediate termination.

If any staff member, volunteer or board member has reason to believe a child has been mistreated or has reason to believe that a child is in imminent danger, that person has an obligation to comply with the Texas Family Code 261.101 regarding the requirement to report child abuse and neglect.

Child abuse can be reported to TDFPS at 1.800.252.5400.

C. Maintaining Appropriate Communication with Children

Advocates are prohibited from speaking to children in a way that is, or could be construed by any observer, as harsh, coercive, threatening, intimidating, shaming, derogatory, demeaning or humiliating.

Appropriate verbal interactions include: Positive reinforcement, appropriate jokes, encouragement, and praise.

Inappropriate verbal interactions include: secrets; cursing, shaming, belittling, name-calling; harsh language that may frighten, threaten or humiliate children; derogatory remarks about the child, their family, or other parties in the case; discussing sexual encounters or in any way involving children in their personal problems or issues; sexual jokes; making threats to withhold care.

D. Transportation

This policy varies from program to program. In the course of fulfilling the duties as a child's advocate, it will be necessary for the advocate to have in-person contact with their child(ren). An advocate may provide transportation for the child(ren) but is not required to do so.

The advocate acknowledges that the risk of liability is covered only by their own insurance and they choose to accept that responsibility.

An advocate who wishes to provide transportation to the child(ren) must maintain a safe driving record and cooperate with CASA to obtain copies of the same on request. **A signed transportation release form, current proof of liability insurance and a copy of a valid and current driver's license must be on file in the CASA office before an advocate can transport a child in an automobile.** A volunteer may not transport a child in a vehicle other than a standard automobile without the express written consent of the volunteer's Supervisor and the child's guardian or the child's managing conservator. The advocate is required to ensure that children are restrained in age appropriate safety restraints when being transported. **A volunteer should notify the assigned Supervisor each time they transport the child(ren). All transports must also be documented in the case file (i.e., Optima Contact Log) within 1 business day by either the volunteer or Supervisor. Documentation should include the date, names of any children transported, and the starting and ending locations.**

CASA considers travel and parking expenses incurred by volunteers as an in-kind tax-deductible donation to the agency and therefore does not reimburse volunteers for travel expenses. Additionally, CASA does not reimburse volunteers for any case-related expenses incurred while performing the duties of a Court Appointed Special Advocate.

E. Gifts or Financial Assistance for Children or Families

Advocates are prohibited from giving cash to children or families, and from giving gifts or purchasing items for children or families that cost more than \$25. If a child, caregiver or

family needs assistance of greater than \$25, a request can be made through the program. CASA will provide birthday gifts and holiday gifts for advocates to give to the child(ren).

F. Other Prohibitions

Additionally, advocates are prohibited from the following activities:

1. Introducing or identifying the child as being appointed to CASA to anyone not professionally related to the child's case.
2. Involving the child with anyone who is not related to the child's case.
3. Taking the child to the advocate's home or to the home of the advocate's personal friends or family.
4. Giving legal advice or therapeutic counseling.
5. Making placement arrangements for the child.
6. Taking a child on an overnight outing.
7. Taking a child on an outing that includes aquatic activities (e.g., any water activity that requires changing clothes).
8. Signing a waiver of liability for a child while on an outing (e.g., trampoline park).
9. Engaging in activities which are likely to result in conflict of interest or expose the program or advocate to criminal or civil liability.
10. Causing a child or family to become dependent on the advocate for services that are provided by other agencies or organizations. Such activities may jeopardize the safety of the child, the integrity of the program, or the objectivity of the advocate.
11. Dispensing prescribed or over-the-counter medication to or authorizing medical treatment for the child without the permission and direction of the child's conservator or placement.
12. Carrying a firearm or weapon when in the presence of the child(ren), except for law enforcement officers who are required to carry a weapon.
13. Failing to comply with CASA of Your County's safe and drug free work policy (below) as it applies to employees.

3. SAFE AND DRUG FREE WORKPLACE POLICY

CASA is committed to providing volunteers and clients with a safe, efficient and productive environment. Using or being under the influence of drugs or alcohol may pose serious safety and health risks.

Drinking alcohol while in the presence of clients is prohibited. Additionally, because the children to whom we are assigned may have had extreme experiences concerning abuse of alcohol, it is prohibited that alcohol be consumed prior to (i.e., on the same day) meetings with the clients and is prohibited before transporting clients.

Volunteers using prescription drugs or over the counter drugs are responsible for being aware of any potential side effects such drugs may have on their judgment or ability to perform their duties. If such use may impair the volunteer's judgment or ability to perform their job, the volunteer should report the potential side effects to their Supervisor prior to meeting with clients. Together they can plan the best strategy for meeting the client's needs during the time the medication is required.

Any illegal activity will be reported to appropriate law enforcement officials. CASA will cooperate fully with law enforcement agencies in the detection, arrest and prosecution of any employee or other person engaged in such activity.

4. CASE CLOSURE

The role of a Court Appointed Special Advocate is by nature a transitory one. An effective advocate recognizes that children who have been abused or neglected face many unpredictable transitions in their lives. In order to minimize the negative impact of such transitions, an advocate is responsible for providing a healthy transition for the child(ren) when CASA is dismissed from the case. It is CASA of Your County's expectation that each advocate will carefully plan and execute their final contact with the child(ren) on their case, and that their exit from the case not be abrupt. A volunteer's Supervisor can provide resources to assist in smooth transitions for children.

CASA requires advocates to cease contact with the child(ren) after their case is closed. If a child, family or adoptive family initiates or tries to maintain contact with their volunteer, the volunteer must inform their Supervisor and should seek to limit that contact. It is not permissible for a volunteer to initiate contact with a former child, family or adoptive family after case closure.

- **Best Practice Recommendation:** If a closed case is re-opened, CASA will make best efforts to re-assign the same volunteer from the previous case, if the volunteer is willing/able and it is in the child's best interest. If a closed case re-opens and it is determined that contact by the volunteer was not ceased when it was supposed to, that volunteer may not be assigned to the case again.

In very specific cases, when a youth is at least 18 years old, on track to become independent, and without adult supports or permanency ("aging out"), the volunteer may

choose to become a “healthy adult connection.” This is not an expectation of CASA and the role would not be as the youth’s advocate, but rather as a healthy adult who agrees to be supportive in selective ways. A Permanency Pact is beneficial and encouraged in defining this relationship. If a volunteer is considering this possibility, they should first discuss it thoroughly with CASA staff before speaking with the youth. Again, this arrangement would occur only after the case has closed, after case files have been returned to the CASA offices and the youth is at least 18 years of age.

5. CONFIDENTIALITY

CASA is committed to the confidentiality of certain information regarding its clients, volunteers, staff, Board and donors as a means of ensuring compliance with the law and protection of clients’ safety and anonymity. Confidentiality is defined as the assurance that access to information regarding any client, volunteer, employee, Board member or donor shall be strictly controlled, and that any violation of such control shall be a breach of faith. Information regarding any client, volunteer, employee, Board member or donor of CASA shall not be used for purposes that were not intended by the person when the information was provided. Information on individual clients is used solely for the provision of services for them.

Confidential information shall include but is not limited to the following:

- Any and all case files, records or other information regarding a current or former client, including their names, addresses of employment, residence, and family addresses of clients, staff, volunteers, student interns, donors and board members.
- Photographs taken of clients unless explicit permission is provided to the Executive Director or their designee by the individual involved.
- The contents of any current or former employee’s personnel file.
- The contents of any current or former volunteer’s file.
- The contents of any current or former donor’s records at CASA.

All board members, employees and volunteers will receive a copy of CASA of Your County’s Confidentiality Policy and will be asked to sign an agreement of confidentiality. This agreement will cover confidentiality during the board member’s tenure or the employee’s or volunteer’s service, and will also include a provision for maintaining confidentiality after board tenure, employment or volunteer service is over.

All subpoenas for records must be served to the Executive Director (or their designee) as custodian of records. Response to a subpoena of records will be decided on a case-by-case basis. CASA of Your County’s custodian of records may consult other legal counsel

regarding such subpoena. The response to the request will then become a part of the record. CASA has the right to require 24-hour notice for purposes of making the file available.

Except by order of the court, as a general rule, no information pertaining to a client, volunteer, employee or board member may be released without a properly executed written consent form.

Information may be released in an extreme emergency with the express approval of the Executive Director. This includes but is not limited to suspected child abuse, medical emergencies that are life-threatening to client or child, medical incompetence, or when the safety or welfare of clients is at extreme risk.

CASA is required by law to report to the proper authorities any act of child abuse, suspected child abuse, elder abuse, or abuse of a disabled person.

It is CASA of Your County's policy that it cannot keep confidential any threats to human life of either a suicidal or homicidal nature.

Notwithstanding any of the above, CASA may determine that disclosure of confidential information shall not be made even though all requirements of release have been met. Where CASA concludes that the requested release would endanger the client, CASA of Your County, other clients, staff, student interns, volunteers or board members, the Executive Director is not bound by the requirements of release. CASA may also conclude that disclosure in a particular case will create an appearance of non-confidential services that will undermine the integrity of the program. The Executive Director (in consultation with an attorney) is authorized to resist disclosure by all appropriate and lawful means, citing statute, public policy, contractual obligation, constitutional privacy claims, etc. Where the client, nonetheless, seeks disclosure, the Executive Director should advise the President of the Board of the decision to resist and seek board support for their decision since CASA resources may have to be allocated to the protection of confidential information.

Financial or statistical information regarding policies, procedures, or methods of determining eligibility or any other information that does not identify a client is not considered confidential.

A. Case Records

A confidential, written case record shall be maintained on each child.

- All case records, open or closed, will be regarded as confidential. Records on open cases will be kept in secure, locked files, and may also be stored electronically with appropriate security provisions. Records of closed cases may be kept in offsite storage and/or electronically, with appropriate provisions made for security of both hard copy and electronic files.
- A volunteer officially assigned to a case by CASA may possess a copy of the case file and/or Optima access on their assigned case **only**. It is the responsibility of the volunteer to protect the security and confidentiality of this file and to return this file to the CASA office immediately upon their resignation from the case. **Optima access to the case in question will also cease upon case closure.**
 - **Best Practice Recommendation:** The Supervisor will close the case in Optima within the same calendar month as the Court's case closure date. The volunteer must have all documentation entered by this time.
- CASA will release information contained in volunteer files to other CASA programs to which the volunteer may apply in the future only with the express written permission of the volunteer.
- Content of case records shall be considered to include all materials containing information provided by the client, other case parties, and professional providers, including tape recordings, photos, videotapes, interviews, etc. The following shall govern the content of case records:
 - The content of case files is limited to information that is required for statistical and funding purposes, establishing goals for permanency and for documenting the need for services.
 - Each entry into client files must indicate the name and date of the staff member making the entry.
 - Telephone and electronic communications related to the case are required to be documented within the case file.
 - Former client files and closed cases will be destroyed in accordance with CASA's document retention and destruction policy and schedule.

6. COMMUNICATION

A. Official Communication

Because the volunteer acts as a representative of CASA on the case to which they are assigned, it is required that all official communication (case documents, letters, reports,

notices, evaluations etc.) be routed through the CASA office utilizing the agency's appropriate contact information. The CASA logo and letterhead are the property of CASA and may not be used or reproduced without the express consent of a volunteer's Supervisor, Advocate Program Manager, Associate Director of Advocacy, Director of Advocacy or the Chief Program Officer.

- **Best Practice Recommendation:** All electronic communication to/from volunteers will go through a separate email address that the volunteer creates solely for the purpose of CASA communications. The volunteer will have an electronic signature at the end of every email that includes their contact information, as well as contact information for CASA of Your County. The Supervisor will be copied on all electronic communication that the volunteer sends and receives.

B. Informal Communication

Throughout the duration of the case, in the course of fulfilling the responsibilities of an advocate, it will be necessary for the advocate to communicate on a regular basis with case participants. Volunteers are required to contact and update their Supervisor regarding their case **at least once monthly**. Additionally, it is imperative a volunteer's Supervisor be kept apprised of important case developments. Volunteers are prohibited from making written recommendations to the Court that have not first been discussed and agreed upon with the Supervisor. Conversely, Supervisors may not submit written recommendations to the Court without the knowledge and agreement of the volunteer.

Email communication should be considered as written communication and as such it is essential to maintain objectivity and professionalism when communicating in this manner. All email communication can potentially be subpoenaed in the event of a trial. It is a good practice when utilizing email communication to copy the Supervisor. CASA strongly discourages advocates from releasing their personal contact information to children and their families.

C. Media

To ensure that the confidentiality of children is always protected, and that CASA has a cohesive, consistent message being delivered to the community, all volunteer communication with media (including television, newspapers, radio, blogs/online publications, etc. - even small publications like church bulletins or organizational emails) should be coordinated through CASA of Your County's Director of Communications. If a volunteer is contacted by the media, has a media connection or idea they would like to

pursue, or has an opportunity to be featured for their volunteer work, they should immediately communicate with their Supervisor who will connect them with the Director of Communication to consider how this opportunity will be best pursued.

D. Online Communication and Social Media Guidelines

CASA believes that social media, when used appropriately, can be a powerful tool to increase awareness, support and sense of community for those of us engaged in advocacy for children who've been abused or neglected. We also believe it is important that those who choose to engage in social media understand what is recommended, expected and required when they discuss CASA-related topics. Our ability to serve children depends entirely on the trust and support of our community, and it is critical that we handle the confidential information entrusted to us responsibly.

When you engage in social media and online communication, you become a public figure. As a public figure that is associated with CASA, you have a responsibility to help protect this organization and our clients. The following expectations, along with both positive and negative social media examples, are intended to give you guidance in both promoting and protecting CASA, and to protect the children we serve.

1. **Never reveal confidential information.** Sharing stories that illustrate the value of CASA advocacy for children is often the most powerful way to engage the public in our cause and promote empathy for the children we serve. However, our standards and policies prohibit the sharing of confidential information.
 - a. **It is unacceptable to discuss online any identifiable details of cases. This includes names, ages, case-specific details, time-specific statements and the sharing of photographs.** It is acceptable to discuss general details and to use non-identifying pseudonyms and non-time-specific statements so long as the information provided does not contain information recognizable to the family or others associated with the family or case. For example, use general terms such as "youth" instead of "13-year-old girl." You should be careful to protect the dignity of families, children and social agencies, even if they are not named.
2. **Use common sense.** Don't put anything online that you would not want to see with your name attached to it on the front page of the paper where your boss, your mom, your co-workers and neighbors can read it. Remember, it is possible that you will work with this judge, Supervisor, caseworker, lawyer, etc. again in the future or even bump into them on the street, so don't burn bridges. Even if you

don't see them again, CASA definitely will, and it is important not to hurt CASA's relationships.

- a. **Keep in mind that anything you say online is not private.** Evaluate what you say about working with CASA in advance to make sure that your online statements will not affect your position in the courtroom when you are advocating for a child.
3. **Don't be a hero.** If you see something negative posted about CASA online, don't jump to the defense immediately; you might just feed the flames of someone who just wants to pick a fight. Please inform CASA if you see a negative representation of CASA online and we will determine the best way to respond or not.
4. **Be transparent.** Identify yourself and your role at CASA when you discuss CASA-related matters. Write in the first person. If you have a vested interest in something you are discussing, be the first to point it out. Be clear that you are speaking for yourself, that the opinions expressed are solely those of the author and do not necessarily represent the views of CASA.
5. **Be considerate.** Remember that anyone, including volunteers and CASA staff, may be actively reading what you publish online. Refrain from any communication intended to bash or embarrass CASA, families, board members, donors or your colleagues. If you have suggestions for improvements please go through the proper channels to air your concerns and share your suggestions. Always show proper consideration for other people's privacy and for topics that may be considered objectionable or inflammatory, such as politics and religion.
 - a. **Always consider how other parties on a case might feel about your statements.** While we recognize the tremendous work that advocates do every day, be careful about implying that another party on a case did not do their job adequately, or accidentally insulting anyone involved with the case, as you could hurt feelings and damage both your and CASA's relationship with those involved in this system.
6. **Be accurate.** Even though your posts may be primarily made up of personal opinion, do your research and check that your facts are accurate. Make sure you have permission to post any copyrighted information (e.g., research, statistics) and be careful about posting or linking to items that may contain viruses. Be the first to admit to and correct your own mistakes.
7. **Try to add value.** Does your posting provide worthwhile information and perspective? Does it help people better understand and feel more connected to our cause? Does it build a positive sense of community?

8. **Always comply with the law in regard to copyright/plagiarism.** Never post someone else's work without their express permission (other than short quotes that comply with the "fair use" exceptions).
9. **Be aware of laws related to libel and defamation of character.** Defamation of character can lead to lawsuits against the author of the statement and will reflect negatively on the CASA cause. In choosing your words or content, imagine CASA staff, your family and all parties on your CASA case are reading everything you post.

In #8 and #9 above, CASA only wishes to raise awareness of these issues. We believe this is an area in which our staff, volunteers and supporters should be aware of possible risk and try to inform themselves, but we are not offering any legal advice on these matters.

Positive Social Media Examples: These sample posts tell the CASA story without revealing confidential information about cases.

- Had a blast hanging out with the kids I serve as a CASA volunteer at Chuck E Cheese's. ESPECIALLY, the go-carts, which we did over and over. So much fun! #awesome
- Great day at court as a CASA volunteer! Can't believe what a difference one adult can make to a child. Learn more- <http://www.texascasa.org>
- Happy to have played a part in an awesome adoption & help kids have a good future. Become a CASA volunteer - <http://www.BecomeACASA.org> (This could also be about a family reunification, etc.)
- Do it!! CASA Superhero Run Sept 15?! Come support CASA volunteers so we can help more children in need. <http://www.casasuperherorun.com>
- Helped the kids I serve as a CASA volunteer get the school supplies & clothes they needed for a great start to school this year. I'm rooting for their success! #superstars

Negative Social Media Examples: These sample posts either reveal too much information about a case or take a stance that could be damaging to future CASA relationships.

- Great day in court as a CASA volunteer. I was the only one up there who knew the child well and was able to help get the judge to make a good recommendation.
- Finally the judge ruled correctly on my CASA case! So happy to see the kids I serve get to a happy home. Now they are free of drug-addicted parents.
- Had a blast yesterday with the 10-year-old kid on my CASA case at Chuck E Cheese's. He loved the go-carts, which we did over and over. So much fun!
- I'm a proud CASA volunteer! Just attended the Reagan High School graduation of the teen boy I advocate for.

E. Digital and Social Media Communication Guidelines for Casework Purposes

It is always important to keep confidentiality in mind when communicating digitally about your CASA case. You should be the only person who has access to the means by which you communicate with or about youth on your case in order to protect this confidentiality.

Issues that could affect this include:

- Avoid using shared email accounts accessible by another family member or friend for your casework.
- Delete any case photos that sync from your phone to a shared device (tablet, computer, etc).
- Be conscious of family or group phone plans that sync email, text messaging, and photos across multiple devices.
- Ensure your mobile devices and social media accounts are secure so that others don't have access to your communications with or about youth.

On some cases, especially with older youth, social media tools like Facebook and Instagram may be the only way a youth will communicate with an advocate or could be a means of gathering crucial information about a youth who is missing or a family member who may not be telling the truth about a situation. As an advocate you must keep in mind confidentiality, privacy and maintaining appropriate boundaries, so if you need to use any online or social media tool in your casework, here are some important guidelines:

1. Before using social media, evaluate whether or not it is a necessary tool for communication with the youth you're appointed to and **consult with your Supervisor before making any decisions. Using social media to communicate with youth should be a last resort.**
 - a. Keep in mind that typically social networks try to limit usage to only youth who are 13 years or older.
2. If deemed necessary, you should only connect online with the youth you're appointed to. **Do not connect with family members or other parties connected to the CPS case**, even if you're unable to see information on their profile you would like to view.
 - a. Do not create any pseudonym accounts to attempt to gain greater access to someone on the case to gather more information about them.
3. **Only use direct/private messaging** to communicate with anyone involved in a case.

- a. Never publicly post to a youth or family members' wall or comment on a post. Do not tweet at a youth or family member. Do not tag a youth or family member in any of your posts.
 - b. Never publicly mention meeting locations/dates/times.
4. **Your private/direct messages with a youth via social media are part of case record and should be documented and shared with your Supervisor.**
 - a. It is important to copy and paste all conversations via social media into Optima.
 - b. Please enter these conversations into the Contact Logs under Activity Type: Child Contact: Social Media.
5. Keep your own privacy in mind.
 - a. Create segmented CASA lists for the youth you serve and limit their ability to see any of your personal information or posts (especially on Facebook and Instagram).
 - b. Review your privacy settings to ensure that your CASA list and the general public (which could include family members and others you're not connected to at all) cannot see any of your personal information or posts.
 - c. If you need to use Twitter or Instagram on a case, consider creating a separate profile just for CASA work that you don't actually post any personal information or photos to.
 - d. Hide any friends/followers lists that include CASA contacts from your public profile.
6. Never share confidential information over social media, even if using private messaging.
7. Never use any location-sharing social media tools (e.g., Facebook Check-Ins) when working on a CASA case.
8. Finally, when the case ends and you say goodbye to the youth you are serving, it is important to end any online connections including un-friending on Facebook, un-following on Instagram, etc.

7. CONFLICT OF INTEREST

It is important to avoid any conflict of interest that may arise on a case to which an advocate is assigned. The relationships that are established with case parties need to be treated with the utmost professionalism. A volunteer is considered by other case parties as

a paraprofessional on the case. This requires the volunteer to act as a professional throughout the life of the case.

The following policy should be followed when a conflict of interest exists:

- **Personal:** An advocate taking a personal role in a CPS case involving a friend or family member - e.g., acting as a character witness or placement option in another CPS case. An advocate should make a choice between their CASA case and the other CPS case. If the advocate chooses to continue with the CASA case they should not have any contact with any of the professionals on the other case. As well, they should not go to court or any other official meeting related to the other case. An advocate also cannot be related to any party on the case to which you are assigned.
- **Professional:** An advocate has dual professional roles on the same case - e.g., serving as the advocate and the classroom teacher for the same child. The advocate should not accept that case or should resign the case as soon as the conflict becomes apparent. This specifically includes but is not limited to acting as a foster parent to any child in the conservatorship of CPS or acting as an adoptive placement to any child in the conservatorship of CPS.
- **Endorsements:** An advocate using their Court Appointed Special Advocate status to endorse a political candidate, product, program or service. Using CASA status for anything other than promoting the CASA program or serving as an advocate for a child is considered a conflict of interest and is strictly prohibited.

The advocate should immediately notify their Supervisor if they become aware of any situation that has the potential to create a conflict of interest with a CASA case.

8. HARASSMENT

CASA is committed to maintaining high standards of professional conduct in the volunteer experience. In keeping with this commitment, we prohibit any form of harassment, which would have the effect of creating a threatening, uncomfortable, or hostile environment. CASA categorizes any unwelcome conduct or discriminatory behavior based on a person being in a protected class (e.g., gender, ethnicity, sexual preference) as harassment. Examples of behavior that might be considered unwelcome include jokes, slurs and offensive emails.

It is the responsibility of all advocates to conduct themselves in a manner conducive to creating a harmonious environment that is free of sexual or otherwise unlawful harassment and intimidation. Each advocate will be held individually responsible for their acts of sexual or otherwise unlawful harassment while conducting their responsibilities for CASA of Your County.

CASA also recognizes that our advocates could become victims of harassment by an individual outside of CASA but connected to the advocate's case work. It is the responsibility of each volunteer to inform their Supervisor (who will inform the Executive Director) if the volunteer believes they are being harassed by any other individual connected to their case work.

Immediate and appropriate disciplinary action will be taken in response to any incident of harassment. CASA will not retaliate against anyone for a good faith claim of harassment.

9. ABUSE BETWEEN CHILDREN

CASA will not allow the mistreatment, bullying (including cyber bullying), or abuse of one child by another child. Any volunteer who observes or learns of the mistreatment, bullying (including cyber bullying) or abuse of one child by another should immediately notify their Supervisor. These incidents will be documented and reported to the Child Abuse Hotline, as appropriate. As a reminder, if any staff member, volunteer or board member has reason to believe a child has been mistreated or has reason to believe that a child is in imminent danger, that person has an obligation to comply with the Texas Family Code 261.101 regarding the requirement to report child abuse and neglect.

Child abuse can be reported to TDFPS at 1.800.252.5400.

10. ACKNOWLEDGMENT

By initialing each segment below, I acknowledge that I have read and fully understand the Code of Conduct as well as CASA of Your County's policies governing expectations and prohibitions of advocates, both volunteers and employees:

Code of Conduct

_____ Mission, Vision, Values and Ethics Statements

Program Policies

_____ Minimum Expectations of Service to a Case and Best Practice Recommendations

_____ Advocate-Child Relationship

_____ Safe and Drug-Free Workplace Policy

_____ Case Closure

_____ Confidentiality

_____ Communication

_____ Conflict of Interest

_____ Harassment

_____ Abuse Between Children

Further, I agree to execute my duties in strict accordance with these policies.

I declare that I have not perpetrated physical abuse, sexual abuse, emotional abuse, or neglect against a child or an adult and that I have never been accused of these acts.

I understand that CASA of Your County's policies are subject to change at any time. I understand that if changes occur, CASA will notify me via electronic communication at the email address that I provide to them and that revisions and policy changes will also be available on the CASA website.

I understand that it is my responsibility to stay informed and in compliance with current and future policies of CASA of Your County.

It is my clear understanding that if I violate CASA of Your County's policies, current or as they may be revised in the future, I am subject to the immediate termination of my relationship with this organization.

Name: _____

Signature: _____

Date: _____

SAMPLE ADVOCATE JOB DESCRIPTION

A CASA volunteer is a court-appointed, trained and committed adult who ensures that each child's individual needs remain a priority in an overburdened child welfare system. They get to know the child while also gathering information from the child's family, teachers, doctors, therapists, caregivers, and anyone else involved in the child's life to make independent and informed recommendations to help the judge decide what's best for the child.

Supervision

CASA volunteers are paired with a staff professional who supports and guides them every step of the way. This includes preparing for and attending case-related hearings and meetings and guiding the volunteer to pertinent resources specific to each case. The different CASA programs call this professional by a variety of titles, such as advocate supervisor, advocate coordinator, case supervisor and coach supervisor. When the staff professional who is there to guide them is not available for a meeting or hearing, another CASA staff member will attend to support the volunteer.

Responsibilities

Investigation:

- Obtain a clear first-hand understanding of the needs and situation of the child(ren).
- Meet the child(ren) within 30 days of starting the case.
- Throughout the case, meet in person with the child(ren) within the timeframe required by your program.
- Review all relevant documents and records.
- Talk with the parents, relatives, social workers, teachers, doctors, therapists, and other persons with significant knowledge of the child(ren) to determine the facts and circumstances of the child(ren).

Facilitation:

- Communicate with the Department of Family and Protective Services (DFPS) caseworker after appointment and at least one time per month for the duration of the case.
- Participate in all scheduled case-related meetings.

- Identify, locate and actively engage the child(ren)'s relatives and fictive kin in the decision-making process, working to maintain or rebuild a lasting family support system that will continue past the closure of the case.
- Seek cooperative solutions by facilitating and maintaining communication with the child(ren)'s parents, family members, attorney ad litem, teachers, doctors, therapists, and other service providers as applicable.
- Inform the court promptly of important developments in the case through appropriate means as determined by court rules and statutes.
- Communicate with your advocate supervisor at least once a month to update records and contact logs in the Optima database and participate together in scheduled case conferences.
- Maintain confidentiality of all issues and records of the case and return all case documents to the CASA program after the case is closed.

Advocacy:

- Provide written court reports for all permanency and review hearings.
- Appear at all hearings to advocate for the child(ren)'s best interest and permanency.
- Provide testimony when necessary, making recommendations for specific appropriate services for the child(ren) and, when appropriate, for the child(ren)'s family.
- Advocate for the child(ren)'s best interest in the community by interfacing with mental health, medical, legal, educational, and other community systems to assure that child(ren)'s needs in these areas are met.

Monitoring:

- Continue to meet in person with the child(ren) as required by your program.
- Meet in person with the child(ren)'s primary placement provider in a timely manner after placement occurs and communicate with the placement providers at least once a month thereafter for the duration of the assignment of the child(ren)'s case.
- Monitor implementation of service plans and court orders, assuring the court-ordered services are implemented in a timely manner and that review hearings are held in accordance with the law.
- Determine if a Permanency Plan, an educational passport, and a medical passport have been created for the child(ren).

Training:

Volunteers must finish all training requirements within the time frame established by your program, and all background checks must be completed and cleared to be assigned to a case. Volunteers are also asked to complete 12 hours of Continuing Education each year.

Commitment:

CASA volunteers commit to spending 15–20 hours per month for the duration of one specific case (17 months on average). A volunteer's commitment to seeing a case through until it closes ensures a consistent, reliable adult in a child's life and a better chance for the child to reach a safe, permanent home.

Requirements:

- Volunteers must be at least 21 years of age and be able to pass extensive reference, Child Protective Services, sex offender registry, and criminal background checks before becoming a CASA volunteer.
- Volunteers should have effective oral and written communication skills and be comfortable with computer technology, including email and word processing.
- Volunteers may not be a current foster parent or be in the process of adopting a child from Child Protective Services.
- If the volunteer is an attorney, they may not concurrently be appointed to any cases involving Child Protective Services in the county in which they are serving.

NOTES

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