

Section II: Growth Planning Resources

This section of the toolkit provides resources to support each of the six critical areas that will be a part of the strategic growth plan:

- Executive Leadership
- Judicial Engagement
- Community Engagement
- Fund Development
- Diversified Board of Directors
- Organizational Excellence

Executive Director Assessment Tool

SECTION I

Vision, Mission and Strategies

DIRECTIONS: The executive director's role has both strategic and operational components. Working with the board, the executive director must develop a shared vision for the future of the organization, build understanding around the current mission, and develop appropriate goals and strategies to advance that mission.

How satisfied are you that the executive director:	Not Satisfied		Satisfied		Not Sure	N/A
1-1 has worked with the board to develop a clear vision for the organization and understands his or her own leadership role?	1	2	3	4	NS	NA
	<input type="checkbox"/>					
1-2 has worked with the board to translate the organization's mission into realistic goals and objectives?	1	2	3	4	NS	NA
	<input type="checkbox"/>					
1-3 has worked with the board and staff to create an effective process for long-range or strategic planning for the organization?	1	2	3	4	NS	NA
	<input type="checkbox"/>					
1-4 has a sense of what must change and what must remain the same in order to accomplish the organization's mission & realize its vision?	1	2	3	4	NS	NA
	<input type="checkbox"/>					

What are the major strengths of the executive director in this area?

How can the executive director do better in this area?

SECTION II

Accomplishment of Management Objectives

DIRECTIONS: Working with the board, the executive director establishes operational objectives that support the strategic plan. The executive director is responsible for leading the staff in the implementation of the strategic plan and any annual plans.

How satisfied are you that the executive director:	Not Satisfied		Satisfied		Not Sure	N/A
2-1 selects and cultivates qualified senior staff, models effective behaviors and skills, and builds morale among staff and volunteers?	1	2	3	4	NS	NA
	<input type="checkbox"/>					
2-2 ensures that there are appropriate systems in place to facilitate the day-to-day operations of the organization in the areas of:	1	2	3	4	NS	NA
a. development and delivery of programs?	<input type="checkbox"/>					
b. education and outreach?	1	2	3	4	NS	NA
	<input type="checkbox"/>					
c. policy development?	1	2	3	4	NS	NA
	<input type="checkbox"/>					
d. administration and operations?	1	2	3	4	NS	NA
	<input type="checkbox"/>					
e. fund-raising and resource development?	1	2	3	4	NS	NA
	<input type="checkbox"/>					

What are the major strengths of the executive director in this area?

How can the executive director do better in this area?

SECTION III

Program Management

DIRECTIONS: A nonprofit organization carries out its mission by offering specific programs and services. The executive director leads the staff in managing and administering these programs and services. This requires a thorough knowledge of the organization's mission area as well as an understanding of technical, operational, and ethical issues.

How satisfied are you that the executive director:	Not Satisfied		Satisfied		Not Sure	N/A
3-1 demonstrates substantive knowledge regarding the organization's programs and services?	1	2	3	4	NS	NA
	<input type="checkbox"/>					
3-2 works with the board to develop appropriate policies to ensure the efficiency and effectiveness of programs?	1	2	3	4	NS	NA
	<input type="checkbox"/>					
3-3 sets high standards of quality for the organization's programs?	1	2	3	4	NS	NA
	<input type="checkbox"/>					
3-4 recommends new programs and the modifications or discontinuance of current programs, as appropriate, to the board?	1	2	3	4	NS	NA
	<input type="checkbox"/>					

What are the major strengths of the executive director in this area?

How can the executive director do better in this area?

SECTION IV

Effectiveness in Fund-Raising and Resource Development

DIRECTIONS: The executive director, in partnership with the board and appropriate staff, is responsible for developing and implementing appropriate fund-raising and financial development strategies. The executive director and board use their combined strengths, knowledge, and relationships to help the organization achieve its objectives.

How satisfied are you that the executive director:	Not Satisfied		Satisfied		Not Sure	N/A
4-1 has a clear understanding of the current and future financial resources needed to realize the organization’s mission?	1	2	3	4	NS	NA
	<input type="checkbox"/>					
4-2 works in concert with the board and development staff to implement a fund-raising program that meets the goals established for the organization?	1	2	3	4	NS	NA
	<input type="checkbox"/>					
4-3 is innovative in the creation of partnerships with businesses or other institutions that contribute to the organization’s resources?	1	2	3	4	NS	NA
	<input type="checkbox"/>					
4-4 guides the revenue-generating activities in order to provide adequate income to the organization?	1	2	3	4	NS	NA
	<input type="checkbox"/>					
4-5 is an effective fund-raiser, working well with staff, donors, and board members to secure adequate income and strong personal commitments from those who have an interest in the organization?	1	2	3	4	NS	NA
	<input type="checkbox"/>					

What are the major strengths of the executive director in this area?

How can the executive director do better in this area?

SECTION V

Fiscal Management

DIRECTIONS: Ensuring that income is managed wisely is especially important for a nonprofit organization operating in the public trust. It is the role of the executive director to see that solid planning and budgeting systems are in place and that the organization's goals and strategic plan serve as the basis for sound financial planning. It is the executive director's responsibility to ensure that qualified staff are hired to accurately monitor, assess, and manage the financial health of the nonprofit.

How satisfied are you that the executive director:	Not Satisfied	Satisfied	Not Sure	N/A
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<p>5-1 is knowledgeable regarding financial planning, budgeting and management of the organization's investments and endowment, and understands the place of each in the organization's overall financial picture?</p>	<p>1 2</p> <p>?</p>	<p>3 4</p> <p>?</p>	<p>NS</p> <p>?</p>	<p>NA</p> <p>?</p>
<p>5-2 has established a system linking strategic and operational planning with the organization's budgeting process?</p>	<p>1 2</p> <p>?</p>	<p>3 4</p> <p>?</p>	<p>NS</p> <p>?</p>	<p>NA</p> <p>?</p>
<p>5-3 presents financial reports to the board on a regular basis and submits an annual budget for board review, revision and approval?</p>	<p>1 2</p> <p>?</p>	<p>3 4</p> <p>?</p>	<p>NS</p> <p>?</p>	<p>NA</p> <p>?</p>
<p>5-4 ensures that a clear and accurate accounting system is maintaining, allowing the board to monitor the organization's finances and operations in relation to the approved budget and to make informed financial decisions?</p>	<p>1 2</p> <p>?</p>	<p>3 4</p> <p>?</p>	<p>NS</p> <p>?</p>	<p>NA</p> <p>?</p>

What are the major strengths of the executive director in this area?

How can the executive director do better in this area?

SECTION VI

Operations Management

DIRECTIONS: The executive director is responsible for day-to-day management. The executive director works with staff to develop, maintain, and use the systems and resources that facilitate the effective operation of the organization.

How satisfied are you that the executive director:	Not Satisfied		Satisfied		Not Sure	N/A
6-1 is knowledgeable regarding the operations of an effective office environment?	1 ?	2 ?	3 ?	4 ?	NS ?	NA ?
6-2 has ensured that the organization has in place:						
a. sound risk management policies, including adequate insurance coverage?	1 ?	2 ?	3 ?	4 ?	NS ?	NA ?
b. appropriate personnel policies and systems for staffing?	1 ?	2 ?	3 ?	4 ?	NS ?	NA ?
c. plans for the appropriate use of technology and technological systems?	1 ?	2 ?	3 ?	4 ?	NS ?	NA ?
6-3 ensures compliance with all legal and regulatory requirements?	1 ?	2 ?	3 ?	4 ?	NS ?	NA ?

What are the major strengths of the executive director in this area?

How can the executive director do better in this area?

SECTION VII

The Executive Director/Board Partnership

DIRECTIONS: The executive director and the board must work together as partners. Each arm of leadership draws upon its own unique strengths and abilities. The executive director and the board have joint responsibility for developing and maintaining a strong working relationship and a system for sharing information. The board is responsible for creating a written job description for the executive director that is clear and agreed to by all parties.

How satisfied are you that the executive director:	Not Satisfied		Satisfied		Not Sure	N/A
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7-1 is clear about the differences between his or her role and that of the board?	1	2	3	4	NS	NA
	<input type="checkbox"/>					
7-2 is an effective partner with the board in leading the organization?	1	2	3	4	NS	NA
	<input type="checkbox"/>					
7-3 has been delegated the authority necessary to manage the organization effectively?	1	2	3	4	NS	NA
	<input type="checkbox"/>					
7-4 raises issues and questions and provides adequate information to inform board discussions?	1	2	3	4	NS	NA
	<input type="checkbox"/>					
7-5 receives an annual review in a timely and thoughtful way that articulates specific strengths and areas of improvement?	1	2	3	4	NS	NA
	<input type="checkbox"/>					

What are the major strengths of the executive director in this area?

How can the executive director do better in this area?

SECTION VIII

The Board/Staff Relationship

DIRECTIONS: Because many organizational issues require a partnership of board and staff to be addressed effectively, it is important that the board, executive director, and staff members assigned to assist the board in carrying out its work have a good and strong working relationship.

How satisfied are you that the executive director:	Not Satisfied		Satisfied		Not Sure	N/A
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<p>8-1 has established appropriate systems for dialogue and communication between the board and staff to ensure that the board maintains a good knowledge of the organization?</p>	1	2	3	4	NS	NA
	?	?	?	?	?	?
<p>8-2 and other appropriate staff members have built effective working relationships with the members of the board who are responsible for specific aspects of organizational governance?</p>	1	2	3	4	NS	NA
	?	?	?	?	?	?
<p>8-3 has a collegial working relationship with the staff and the board?</p>	1	2	3	4	NS	NA
	?	?	?	?	?	?

What are the major strengths of the executive director in this area?

How can the executive director do better in this area?

SECTION IX

External Liaison and Public Image

DIRECTIONS: The executive director and board members are key players in establishing and maintaining positive relationships with the many groups that support the work of the nonprofit.

How satisfied are you that the executive director:	Not Satisfied		Satisfied		Not Sure	N/A
9-1 maintains a positive professional reputation in the local community and is a good ambassador?	1	2	3	4	NS	NA
	<input type="checkbox"/>					
9-2 cultivates effective relationships with:						
	1	2	3	4	NS	NA
a. community and business leaders?	<input type="checkbox"/>					
	1	2	3	4	NS	NA
b. constituents?	<input type="checkbox"/>					
	1	2	3	4	NS	NA
c. public officials?	<input type="checkbox"/>					
	1	2	3	4	NS	NA
d. relevant professional organizations?	<input type="checkbox"/>					
	1	2	3	4	NS	NA
e. potential funders?	<input type="checkbox"/>					
9-3 is an articulate and knowledgeable spokesperson for the organization?	1	2	3	4	NS	NA
	<input type="checkbox"/>					
9-4 is knowledgeable about the public policy dimension of the organization’s work, and provides strong advocacy for the organization’s interests?	1	2	3	4	NS	NA
	<input type="checkbox"/>					

9-5	is well regarded by his or her professional peers	1	2	3	4	NS	NA
	in the organization's areas of focus	<input type="checkbox"/>					

What are the major strengths of the executive director in this area?

How can the executive director do better in this area?

Additional Questions:

1. What are the three major strengths of the executive director?
2. What are some limitations in the executive director's performance?
3. What have been the most significant achievements of the executive director over the past year?
4. What external factors have influenced the executive director's performance?
5. In the past year, what difficult issues have faced the organization, and how did the executive director bring them to resolution?
6. Have any legal or ethical issues arisen with regard to the operations of the organization? How were these brought to successful resolution?
7. What are areas in which the board could provide better support to the executive director?
8. What should be the organizational goals for the executive director for the coming year?
9. What should be the personal development goals for the executive director for the coming year?
10. Additional comments:

Core Competencies for Executive Directors

Provides Leadership—Fosters the development of a common vision for the agency among volunteers, staff and the community; clear direction and sense of priorities; makes tough, courageous decisions; creates energy and enthusiasm; guides the board and key committees in policy formulation and interpretation; mobilizes for action.

Catalyst for Strategic Planning—Understands changing social, economic, philanthropic and political climate; develops innovative approaches to meet trends; acts as catalyst for needed change and strategic planning among staff, volunteers and the community.

Skilled at Resource Development—Able to develop and lead effective resource development strategies; has personal ability to make fundraising appeals; adept at in-kind and planned giving resource development.

Relationship Builder—Establishes open, trusting and candid working relationships with all stakeholders; treats everyone fairly and with respect; demonstrates commitment to diversity objectives; deals constructively with conflicts; builds consensus and a credible image to the community.

Encourages Volunteer Involvement—Understands and puts into action volunteer recruitment, training and recognition strategies; skilled at bringing diverse people together and mobilizing them for mission fulfillment; handles well the paradox of leading and being led by volunteers.

Effective Communicator—Articulates both verbally and in writing; listens well; encourages differing ideas and opinions; presentations are well organized and understandable; promotes communication throughout the organization.

Mature Self-Confidence—Has a positive outlook; able to handle stress constructively; knows own strengths and weaknesses; clear sense of personal passion and direction; constant learner; seeks feedback; high standards of personal integrity.

Provides Effective Staff Leadership—Attracts high caliber employees; creates effective organizational structure; makes tough staffing decisions; supports and encourages staff; understands and implements good, legal personnel strategies and policies; focuses on results and measures staff on outcomes; strives to achieve staff diversity; coaches staff; provides a learning and personal growth environment; creates passion in staff for mission achievement.

Financial and Resource Management Skills—Understands budget development and implementation; manages resources wisely; develops and maintains strong financial controls.

Demonstrates Commitment to Agency's Values—Possesses a passion for serving people; committed to the vision, mission and goals of the agency; understands and implements strategies to fulfill the vision, mission and goals.

Skilled at Community Building and Collaboration—Understands and reacts to the wider community issues; is a collaborator rather than believing the agency is the only way to address community resources and needs.

Executive Director Performance Appraisal and Development Plan

Referring to the functional job description for this employee’s position, enter the critical job elements in the first column. Special expectations, which have been identified, should also be noted in this column. Compare the employee’s actual performance with the applicable standard and rate observed performance. Supporting comments are to reflect to what extent the employee exceeded or fell below the standard.		
Performance Standards, Critical Job Elements, and Special Expectations	B=Below M=Meets E=Exceeds	Supporting Comments
<u>Administration:</u>		
Acts as the official staff representative for CASA of ____; reports to the President of the Board; confers with such other Board officers or committee chairs as is appropriate.		
Recruits, hires, trains, supervises, and evaluates all staff.		
Serves as liaison to Texas CASA and National CASA; and with appropriate private and tax-supported agencies on the local and state levels.		
Maintains all personnel files and records according to policy and the most recent employment and nonprofit legal guidelines.		
Maintains current knowledge of legislation affecting children, knowledge of the local and state court system.		
Assists the Board in forming and implementing policies, procedures, and activities on the basis of their effect on the overall program.		
Presents problems confronting the organization to the Board, including outlining possible solutions.		
Arranges and conducts an orientation for new Board members.		
Notifies the Personnel/Executive Committee immediately of any criminal charges.		
<u>Financial:</u>		
Forms and administers the budget as approved by the Board.		
Prepares financial reports, i.e., monthly financial reports for the treasurer and Board, monthly or quarterly financial reports to grantors.		
Administers or supervises the payment of vouchers and accounts.		
Reviews company insurance policies, assists with the annual audit, tax statements and returns, initiating periodic reports to the Board.		
Maintains accurate records and separate accounts for multiple grants.		

<u>Fundraising:</u>		
Assists with or prepares and submits all grant proposals.		
Maximizes funds available from foundations, grants, state and federal agencies.		
Participates with the Board in fundraising activities and special events.		
<u>Programs:</u>		
Oversee the recruitment, screening and training of Volunteer Advocates, ensures each Volunteer Advocate is matched to the appropriate child case, and provides supervision to Volunteer Advocates as needed.		
Ensures that National CASA, Texas CASA and local program standards are met and maintained.		
Assures that appropriate communication is maintained among CASA of _____, court personnel, child welfare agencies, and the legal community.		
Makes community presentations re: child abuse and the role of CASA as well as the need for volunteers and to raise community awareness.		
Develops and oversees methods of program evaluation to ensure the quality of services.		
Supervises the development and administration of training through workshops, seminars, symposiums for volunteers, staff and the Board.		
Maintains current information about similar programs and agencies.		
Provides statistical information to the Board and to funding sources.		
Uses the expertise of the Advisory Board, Friends of CASA, and other volunteers.		
<u>Planning and Development:</u>		
Develops long and short-term objectives annually as part of an annual report made to the Board of Directors.		
Reviews standards for Texas CASA and National CASA; assures compliance with funding and regulatory entities.		
Submits policy development or proposed changes for Board approval.		
Oversee public relations for all facets of CASA of _____ programs including volunteer recruitment, fundraising and public awareness.		
<u>Other Responsibilities:</u>		
Performs other functions as directed by the Board of Directors		

Section II

Employee Development

A development plan **must** be provided for each employee. This development plan must address any critical job element/performance standard rating that is below standard. **Any employee meeting/exceeding all standards of performance will have a development/enrichment plan provided.** Enter any training activities, or other experiences which are planned to improve this employee’s performance. Include the names of persons responsible for the accomplishment of all aspects of this development plan. Also, include dates by which planned actions are to be accomplished and cite training resources.

Performance Standard/ Development Plan	Planned Activity/ies	Dates for Completion	Progress Dates	Resources

Section III

Supervisor Comments

Supervisor’s comments will include additional observations and/or constructive criticisms regarding the individual’s performance not covered in Section I, to include among other subjects the following:

Communication Skills (verbal, written, interacting)

Attendance/Usage of Leave (ability to use time wisely in the performance of job duties)

Attitude (toward supervision, extra assignments not included as a critical job element, relating to other units/customers horizontally and vertically, employee initiative, coaching/mentoring, other)

Initiative (degree of independence, self-motivation and resourcefulness in performing job duties)

Commitment (loyalty and dedication to agency mission)

Section III (continued)

Employee Comments (optional)

Employee comments may include reactions, concerns, agreement or disagreement regarding the Performance Appraisal/Development Plan. Each employee being appraised is strongly encouraged to reflect the following:

- (1) Appraisal content;
- (2) Resources to perform the job (positive/negative).
- (3) Management support (positive/negative).
- (4) Relevance of job description and proposed changes to current job description.

Employees must update their personnel files at this time, e.g., change of address, change of education levels, etc.

Section IV

Signature Blocks

I have discussed this performance plan with the employee.		I have read, understand, and have received a copy of this appraisal. I understand my signature does not necessarily indicate agreement and I am free to respond in writing within 5 workdays for my file.	
Supervisor's Signature	Date	Employee's Signature	Date
Supervisor's Printed Name		Employee's Printed Name	

Sample Memorandum of Understanding (MOU)

MEMORANDUM OF UNDERSTANDING

Re: Court Appointed Special Advocates

Between: The East Texas Cluster Court (Court)
Texas Department of Family and Protective Services, Brazos County (CPS)
Voices For Children, Inc., CASA of Brazos Valley (CASA)

Date: **Revised Agreement** – May 2007

I. PROCEDURES FOR REFERRAL AND ASSIGNMENT OF CASES

Objective - To establish the method by which cases are chosen and referred to the CASA Program. The CASA Program, in cooperation with the court, retains the right to establish priorities for service as well as to determine from among cases referred for appointment, those it can serve appropriately, within the limits of its resources, capacities and mission. (*Appendix A: CASA Mission Statement*) CASA assignment requires a court order. All referrals will be forwarded to the Judge of record or the Presiding Judge for consideration. CASA shall be assigned at the earliest possible stage of the court proceedings.

A. Priorities for Case Referral:

1. Children to be served are removed from the home and/or at imminent risk of being removed from the home.
2. The case is complex, involving serious allegations of sexual or physical abuse and/or neglect.
3. Permanency is an issue.
4. All ages up to eighteen are appropriate for referral.

B. Referring Parties Include:

1. A Judge - Direct Referral

The following parties to court proceedings may make a request to the court for referral of a case for CASA appointment:

2. The Assistant District Attorney representing CPS
3. Personnel of CPS; including Director, Supervisor and Caseworker
4. An Attorney for the child – Attorney ad litem
5. An Attorney for the child's family

C. Method of Referral:

1. A Judge concludes that a CASA appointment and CASA assistance are appropriate. A direct referral by court order may be initiated at any stage of the proceedings. CASA assignment requires a court order, and a specific court order outlining the appointment has been drafted for this purpose (*Appendix B*).
 - a. An "Order Appointing Guardian Ad Litem" order is completed and signed by a judge and forwarded to the CASA office from the District Attorney's office.
2. A referral to the CASA program will be accepted under the following conditions:
 - a. The referral for services is consistent with the CASA mission
 - b. A volunteer is available to serve as CASA
 - c. There is no excessive hardship (ex: the travel required to sufficiently perform the CASA role is not greater than 6 hours one way)

D. Assignment of a CASA - Upon receipt in the CASA office of a Court Order of appointment from the Judge:

1. CASA staff shall meet with the prospective volunteer to discuss the specifics of the case and to determine if there are any areas of conflict of interest.
2. The CASA volunteer may sign a case acceptance form signifying assignment. If the volunteer declines, subsequent volunteers will be approached until the case is accepted.
3. CASA staff shall send letters of notification of volunteer assignment to all parties to the case, including the natural parents and the foster parents. A copy of the court order may also be sent to parties who have not previously been sent one.

II. ROLES AND RESPONSIBILITIES OF THE CASA VOLUNTEER, THE CASEWORKER, AND THE ATTORNEY AD LITEM

Objective - To ensure quality representation for the best interest of the child, the partnership between the CASA Volunteer, the Caseworker and the Attorney shall be structured to facilitate communication, collaboration, and a commitment to teamwork. At the same time, each is a parallel and independent resource for the Court to consider in its decision to serve the best interest of each child.

A. Roles and Responsibilities of the CASA Volunteer (Guardian ad litem), under the supervision of the CASA Volunteer Coordinator:

1. Provides the court with independent and objective information regarding children involved in dependency and neglect cases.
2. Conducts an independent review, examines all relevant documents and may interview all persons directly having knowledge of the child's and/or family's situation to formulate an objective understanding of what is in the best interest of the child.

3. Assists the court in assuring that the best interests of the child are served at all times in relation to his or her right to a safe and permanent home and to his or her needs.
4. Reviews issues of compliance and non-compliance with family service plans and court orders.
5. Participates in team meetings or staffings involving the child.
6. Advocates for the child and for needed services in a timely manner.
7. Visits any potential caretaker.
8. Attends all court hearings and submits a written report to the court and the parties outlining the findings and the advocate's recommendations 5 days prior to the hearing.
9. Initiates and maintains regular contact with the child's caseworker and attorney.
10. May request a case conference if a goal change or placement change is indicated by all parties.
11. May request a placement hearing if placement recommendations are not agreed upon by all parties.
12. Completes Home Assessments on potential caregivers.
13. Reports any incidents of suspected child abuse or neglect to the appropriate authorities immediately.
14. Remains actively involved in the case until a permanent resolution is established for the child and/or formal dismissal is ordered by the court.
15. Refrains from becoming inappropriately involved in a case by providing case management or direct counseling services to the child or family.
16. Maintains confidentiality of all information obtained, with the exception of reporting information to the court.
17. Accepts case supervision and maintains regular contact with the CASA volunteer coordinator.
18. Upholds the Memorandum of Understanding (MOU) between TDFPS and Texas CASA.

B. Roles and Responsibilities of the CPS Caseworker, under the supervision of the Casework Supervisor:

1. Assumes responsibility for child protection; identifies problems or risk factors which must be addressed in order for the child to remain/return home; plans a course for treatment; initiates a Family Service Plan; and coordinates appropriate service referrals.
2. Orients CASA to a new case by meeting with them, sharing case information and providing access to the appropriate file(s).
3. Completes the Service Plans in a timely manner and provides copies of each completed plan to CASA and the AAL.
4. Notifies the CASA and AAL of any changes in address, phone number, or household composition of parents or child.
5. Maintains regular contact with CASA and AAL regarding all case issues.
6. Provides access to and copies as requested of all documentation on a case, including family service plans, petitions to court, letters, reports to court, notices of hearings, and court orders in a timely manner to CASA and AAL.

7. Ensures hearings are scheduled as mandated or ordered and that all parties are notified 15 days in advance.
8. Attends all court hearings and submits a written report to the court and the parties 10 days prior to the hearing.
9. Informs the CASA and AAL of plans to change the goal or placement of a child and requests a case conference as necessary.
10. Invites the CASA and AAL to attend team staffings held to discuss a child's case.
11. Upholds the Memorandum of Understanding (MOU) between TDFPS and Texas CASA. (*Appendix C: TDFPS and Texas CASA Memorandum of Understanding*)

C. Roles and Responsibilities of the Attorney ad litem:

According to Texas Family Code 107.012, 107.014:

(a) **Appointment.** – In a suit filed by a governmental entity requesting termination of the parent-child relationship or to be named conservator of a child, the court shall appoint an attorney at litem to represent the interests of the child immediately after the filing, but before the full adversary hearing, to ensure adequate representation of the child.

(b) **Powers and duties.** - The Attorney ad litem shall:

- Investigate to the extent the attorney ad litem considers appropriate to determine the facts of the case;
- Obtain and review copies of all of the child’s relevant medical, psychological, and school records;
- Call, examine, or cross-examine witnesses;
- Become familiar with the American Bar Association’s standards of practice for lawyers who represent children in abuse and neglect cases.
- Interview the child if the child is four years of age or older;
- Interview individuals with significant knowledge of the child’s history and condition, including the child’s foster parents; and
- Interview all parties to the suit.

Additional Responsibilities:

1. Makes time available for consultation with the CASA and the Caseworker as circumstances require.
2. Maintains regular contact with CASA and CPS regarding all case issues.
3. Determines legal strategies for a case and files motions and petitions.
4. Participates in case conferences and team staffings as notified and available to attend.
5. Determines and presents witnesses in a formal hearing.

III. EXPECTATIONS/FACILITATION OF POSITIVE WORKING

RELATIONSHIPS Objective - To delineate the joint and individual responsibilities of the participating entities.

- A. Periodic evaluation of the program's effectiveness and operations and of this agreement shall be conducted by the Presiding Judge, the CPS Director, and the CASA. Revisions and changes shall be their joint responsibility.
- B. Interactions between all participants shall be facilitated by the respective supervisors with areas of disagreement communicated and resolved as early as possible.
- C. CASA, CPS and the Court agree to work together toward the mutual goals of:
 - Providing maximum protection and representation for children who are currently being physically, sexually, or emotionally abused; being neglected; or being exploited; and protecting children who are at risk of harm;
 - Providing a full array of social and health services to help the child and family and to prevent re-abuse of children;
 - Preserving the family as a unit when in the best interest of the child and pursuing other permanency options when that is in the best interest of the child, working towards a resolution within a framework of 12 months;
 - Carrying out these goals in a timely manner.

To this end, **CASA shall:**

- Provide professional staff and recruit qualified volunteers for the CASA program;
- Train volunteers to fulfill their role as Court Appointed Special Advocates;
- Provide CASA Volunteers with professional supervision and consultation;
- Assign a specific CASA Volunteer (based on availability) to cases referred to the CASA program by the court;
- Cooperate with CPS, the AAL and the Court, including providing them with copies of CASA court reports prior to a scheduled hearing and upon request;
- Provide training on the CASA program to CPS and other related or involved service agencies;
- Keep confidential all information about children and families referred to the CASA program.

To this end, **CPS shall:**

- Refer dependency cases to the Judge and CASA for CASA appointment at the earliest possible stage of CPS involvement, according to the current procedure worked out jointly;
- Provide professional staff;

- Participate in CASA volunteers pre-service training;
- Cooperate with CASA upon court ordered assignment, including orientation of the CASA to the case and providing access to the case files, provision of copies of reports and documents as issued;
- Notify CASA and the AAL of all hearings and team staffings on cases referred to CASA.

To this end, **the Court shall:**

- Refer appropriate cases to the CASA program at the earliest possible stage of the court proceedings;
- Issue court orders appointing and removing a CASA as Guardian ad litem to represent the best interest of the child;
- Appoint an Attorney ad litem in a timely manner to a child's case to represent the legal interests of the child;
- Participate in CASA volunteers pre-service training;
- Support applications for CASA funding.

Presiding Judge, Brazos County
East Texas Cluster Court

CPS Program Director, Brazos County
Department of Family & Protective Services, Brazos

Executive Director
Voices For Children,
Inc. CASA of Brazos
Valley

Date of Signing

Sample Working Agreement between CASA and the Court

WORKING AGREEMENT BETWEEN THE COURT APPOINTED SPECIAL ADVOCATES OF ANY COUNTY AND THE JUDICIAL DISTRICTS AND COUNTY COURTS OF ANY COUNTY, TEXAS

- I. The Judicial Districts and County Courts of Any County, Texas, agree to work with the Court Appointed Special Advocates of Any County, Inc. (hereinafter referred to as CASA) in the administration and operation of this agreement, pursuant to Section 107.031, subchapter C of the Texas Family Code.
- II. Responsibilities of Parties
 - A. Under the terms of this agreement, CASA will:
 1. Recruit volunteers for the program.
 2. Conduct all local, state and national screening and background checks for volunteers serving as advocates, as required by National CASA and Texas CASA standards.
 3. Provide 30 hours of initial training and 12 hours of continuing education for the volunteers in the necessary casework and legal skills so that each volunteer will be able to fulfill the CASA volunteer's role as the child's guardian ad litem advocate.
 4. Assure that each volunteer, after completion of CASA's new volunteer training, will be sworn in and given an oath of office by one of the Judges of Any County.
 5. Make and maintain procedures for case referral and assignment of cases to specific CASA staff and volunteers.
 6. Consult with the Attorney ad Litem throughout the case. The attorneys representing other parties to the suit will also be contacted during the case fact-finding as necessary.
 7. Conduct an independent fact-finding investigation, monitor all court orders for compliance by all parties, and make recommendations as to the best interest of the child(ren) involved in the suit.
 8. Ensure that the CASA volunteer prepares written Court Reports with assistance from the advocacy supervisor of the facts in the case. Reports shall include: information gained from the fact-finding investigation, names of persons contacted, compliance of court orders, and recommendations for the best interest of the child(ren) involved in the suit and, after approval by the Program Director or his/her designee, direct these Court Reports to the court clerk for filing.

9. All CASA Court Reports will be distributed to the appropriate parties involved in the suit.
 10. Notify the court of the volunteer advocate assigned to the case, and any reassignment throughout the life of the case.
 11. The CASA volunteer and CASA staff will attend hearings to provide verbal information as requested by the judge.
 12. A CASA staff will review all court orders and sign when in agreement.
 13. Encourage and facilitate the cooperation of CASA staff and volunteers with court staff and officers of the court.
- B. Under the terms of this agreement, the Judicial Districts and County Courts of Any County will:
1. Direct the appointment of CASA to cases based on the primary criteria that the cases involve abused and neglected children in need of a permanent placement. The CASA staff will assign a specific CASA volunteer to each of these cases as available. The appointment of CASA may occur at any stage of the court process.
 2. Ensure that the CASA program and CASA staff/volunteers will have reasonable access to court records.
 3. Formalize the appointment of CASA and subsequent assignment of a CASA volunteer via Order Authorizing Appointment of CASA of Any County. An attorney, a caseworker, the foster parents or a representative of a facility, etc may request CASA on a case. All cases that involve the Texas Department of Family Protective Services petition to secure Temporary Managing Conservatorship of a child will be "automatic", thus allowing for immediate service to these children, unless otherwise requested by either party (CASA or judiciary).
 4. Encourage and facilitate the cooperation of court staff and officers of the court with the CASA staff and CASA volunteers.

Judicial Districts and County Courts of Any County, Texas

 (NAME), XXth Judicial District Court Judge

 (NAME), County Court at Law #xx - Judge

Court Appointed Special Advocates (CASA) of Any County, Texas

 (NAME), Executive Director of CASA of Any County, Texas

Executed this _____ day of _____, 20_____.

Endorsement Letter from the Honorable Ronald Pope



328th DISTRICT COURT

Fort Bend County,
Texas

Ronald R. Pope
Judge Presiding

March 24, 2009

(281) 341-4406
Fax 281-341-4426

The Honorable Abel Herrero
Vice-Chair, Human Services Committee
Texas House of Representatives
P.O. Box 2910
Austin, Texas 78768-2910

Re: H.B. 1943

Dear Representative Herrero,

You have asked for my reasons for appointing CASA volunteers as guardian ad litem ("GAL") in my court room. I appoint CASA as GAL in my court room because GAL status gives them all of the tools they need to effectively advocate for children and give me the information I need to make better decisions.

I am a District Court Judge in Fort Bend County and have been for more than six (6) years. I handle CPS cases regularly and I always appoint a CASA volunteer as the Guardian Ad Litem. There are no exceptions to that appointment.

CASA volunteers have been invaluable in their pursuit of the "best interests" of the child or children. Our CASA volunteers have many hours of training, expert supervision and guidance by CASA staff, a commitment to the child or set of siblings I appoint them to advocate for. Giving them the ability to act as guardian ad litem in every case, will give every court in this state a strong, independent voice for children. Because they are volunteers, they are beholden to no one except the best interests of the child.

As guardian ad litem, CASA's role and duties are clearly set out in Chapter 107 of the Family Code and include:

- obtaining and reviewing all of the child's relevant records;
- visiting with the child and everyone involved in the case and the child's life;
- receiving notice and attending each hearing and staffing on the case;
- reviewing and signing, or declining to sign, agreed orders affecting the child;
- explaining the basis for their opposition to the agreed orders, if they disagree;

401 Jackson, 3rd Floor • Richmond, TX 77469

The Honorable Abel Herrero
Page Two
March 24, 2009

- testifying as witness at hearings and trials on the best interests of the child; and
- submitting a report regarding the GAL's recommendations relating to the best interests of the child and the basis for those recommendations.

If CASA volunteers are not appointed as GAL, in my opinion, they lack the authority to secure and present the information any judge would want to have in order to make the best decision about children.

I hope this information is helpful in your deliberations on HB 1943. Please feel free to call me should you or other members of the committee have questions.

Thank you.

Sincerely,



Ronald R. Pope

Testimonial Memo from the Honorable Darlene Byrne

DARLENE BYRNE

Judge

(512) 854-9313

KATY GALLAGHER PARKER

Staff Attorney

(512) 854-4915

RENE SALINAS

Court Operations Officer

(512) 854-9870



126TH DISTRICT COURT

TRAVIS COUNTY COURTHOUSE

P. O. BOX 1748

AUSTIN, TEXAS 78767

FAX: (512) 854-9780

ARLICE HARRIS

Court Clerk

(512) 854-4308

MEANETTESALGADO

Official Court Reporter

(512) 854-7848

Date: May 6, 2009

To: Members of the Senate Jurisprudence Committee

From: The Honorable Darlene Byrne, Judge, 126th Judicial District Court

Re: Written Testimony in Support of Senate Bill 2434

I. Introduction

My name is Darlene Byrne, Judge of the 126th Judicial District Court in Travis County, Texas. I preside over all the child abuse and neglect cases on the civil side of the docket in Travis County. We have approximately 25 new child abuse and neglect cases filed each month in Travis County by the Department of Family and Protective Services ("Department"). We have approximately 950 children in substitute care or foster care. I am also the Chair of our Juvenile Justice Board in Travis County wherein we work with over 1000 youth in the delinquency system daily in our county. I am honored to be on the Board of Trustees for the National Council for Juvenile and Family Court Judges ("NCJFCJ") and preside over one of thirty-seven Child Victim's Act Model Courts in the country designated by the NCJFCJ, which is a court that hears civil child abuse and neglect cases. Finally, I am thrilled to work as the Vice Chair of the Supreme Court of Texas Permanent Judicial Commission for Children, Youth and Families in Texas.

II. Position

Despite the many roles in which I serve, I am providing written testimony in support of Senate Bill 2434 personally, based on my experiences as a district court judge and not on behalf of any other entity or organization. In my jurisdiction, whenever I appoint a CASA for a child, I always do so in the role of guardian ad litem for the child. In my experience, I have seen CASAs work tirelessly, professionally, courageously, and thoroughly in this role providing much needed best interest testimony, case investigation,

recommendations and resources to our youth. Although I am a strong advocate for judicial discretion of individual judges across the state as they run their courtrooms in the manner they best see fit, I support this legislation because, in Travis County, I have seen numerous benefits to the routine appointment of CASA as guardians ad litem. I believe that in Travis County these appointments improve the manner in which the entire child welfare system supports the children we serve.

III. Overview

a. Travis County Perspective

As a District Court Judge in Travis County, I am obligated to make decisions every day which reflect the "best interest" of children who have been victimized by abuse and neglect. To assist me in this task, I often appoint CASA of Travis County to represent the interests these children. We are fortunate in Travis County to have the benefit of the fourth-oldest CASA program in the State of Texas, operating since 1985. The program started with approximately 43 volunteers serving 85 young people. It has grown to the point where, today, the program has around 400 volunteers serving 1,100 young people annually. Travis County's program serves approximately 75% of all youth in Travis County in the conservatorship of the Department.

I should point out, however, that I cannot speak to the manner in which cases are handled in other jurisdictions in Texas and am unfamiliar with local CASA organizations outside of Travis County. It is my understanding that some other jurisdictions in Texas do not appoint CASA in the role of guardians ad litem, but rather in the role of "next friend". I cannot speak to this role as it is not a practice employed in my jurisdiction. I also understand that some jurisdictions routinely appoint all attorneys in the "dual role" of attorney and guardian ad litem for the pendency of the case. In Subsection (c) below, I will attempt to articulate why this model has not been my preference in Travis County.

b. Practice of Routinely Appointing CASA as Guardians ad litem

Whenever I appoint a CASA for a child, I always do so in the role of guardian ad litem for the child. My reasoning for this is that, while not a party to the suit, the guardian ad litem has an established advocacy role in child welfare proceedings with specific powers and duties enumerated under Section 107.002 of the Texas Family Code. As the guardian ad litem, a CASA advocate may bring matters to the attention of the court which otherwise might have gone unnoticed. CASA file detailed reports with the Court in advance of each statutory hearing. CASA appear at statutory hearings along with other parties. Additionally, in my jurisdiction I have supported the authority of CASAs, as guardians ad litem, to call hearings when such advocacy is necessary to bring matters to the attention of the Court. I believe that the statutory framework of the guardian ad litem role supports this type of child advocacy in the court setting.

c. Appointment of Independent Guardians ad litem May Help Avoid Conflicts of Interest Inherent in the use of Dual-Role Attorneys

I understand that some other jurisdictions in Texas routinely appoint all attorneys in the "dual role" of attorney and guardian ad litem for the pendency of the case. While I recognize the benefit of legal advocacy in the courtroom, this stringent use of the dual role model has not been my preference due to my legal and ethical concerns regarding conflicts of interest. I am primarily concerned that the dual role inherently requires the attorney to substitute their judgment for that of the child's. When the dual role is utilized irrespective of the child's age and the ability or willingness of the child to express preferences, conflicts of interest are bound to exist. In fact, my reading of Section 107.008 of the Texas Family Code is that it purports to limit the use of the dual role to avoid conflict situations. That statute says that an attorney in the dual role may only substitute their judgment for the child's judgment when the lawyer determines that the child cannot meaningfully formulate the child's objectives of representation in a case because the child: (1) lacks sufficient maturity to understand and form an attorney-client relationship with the attorney; (2) despite appropriate legal counseling, continues to express objectives of representation that would be seriously injurious to the child; or (3) for any other reason is incapable of making reasonable judgments and engaging in meaningful communication. Under this statute, I believe that, if the child is sufficiently mature to understand and form an attorney-client relationship and continues to express preferences which differ from what the lawyer deems to be in the child's best interests despite the lawyer's counseling of the child, it is inappropriate and, even, impossible for the attorney to continue to serve in this dual role. In my opinion, unless the child is appointed a separate attorney ad litem, the child will be effectively denied the benefit of the legal representation they are statutorily entitled to. I strongly believe this is one of the great benefits of using CASA as guardians ad litem. When CASA serves as an independent guardian ad litem in the case, the attorney is free to advocate for the child without risk of conflicts developing.

d. Benefit of High-Quality Child Advocacy at No Cost to the County

In my experience, CASA does a very effective job of investigating and representing the best interests of children in court when appointed as guardian ad litem. In general, I have observed CASA staff members and volunteer advocates to be extremely dedicated, well-trained in investigation and child advocacy techniques, and knowledgeable about the child welfare system. I believe it is an incredible benefit to the taxpayers of Travis County that CASA provides such quality services without any expense to the county. Additionally, in my view of the laws and ethical rules relating to conflicts of interest, I believe the routine use of CASAs as guardians ad litem saves Travis County thousands of dollars each year which would otherwise be required to be spent on attorneys or social workers

to perform the independent investigatory and advocacy roles which CASAs provide as guardians ad litem.

e. Response to Bill Opponents

Because of the unique nature of each case and fact scenario, I am a strong advocate of judicial discretion of individual judges across the state to run their courtrooms as they see fit in light of the case needs. I believe some opponents of Senate Bill 2434 are opposed to the bill because they believe judicial discretion in the manner of appointing CASA to a case will be impeded. Although I am sensitive to this concern, I still support the bill because I believe that this legislation would help to maximize the impact of a valuable resource across all jurisdictions in Texas. As detailed above, I also believe opponents of the bill construe the law related to the dual role appointment and substitute judgment quite differently than I do. On this point, I respectfully disagree and can only respond that I believe that when a mature child articulates their preferences, their perspective should be accurately represented to the court. Youth deserve fair representation in court regarding their lives, hopes, and dreams.

IV. Conclusion

I currently appoint CASA to represent approximately 75% of the children in Travis County who are in the managing conservatorship of the Department. Based on my positive experiences with CASA as guardians ad litem, I would choose to appoint CASA to represent children in this capacity in all cases if enough CASA advocates were available in my jurisdiction.

Sincerely,

Darlene Byrne
Judge, 126th District Court
Travis County, Texas

Judicial Perspectives

*The following commentaries were excerpted from The Judges' Page newsletter, a publication of **The National CASA Association** in partnership with **The National Council of Juvenile and Family Court Judges**.*

Editor's Page: The Role of CASA/GAL Programs and Volunteers in Achieving Successful Dependency Court Outcomes

*J. Dean Lewis, Judge (retired)
Former Member, National CASA Association Board of Directors
Past President, National Council of Juvenile and Family Court Judges*

Summary

This issue of *The Judges' Page* newsletter is dedicated to sharing the extraordinary achievements and replicable best practices of CASA and guardian ad litem programs across the nation.

The first CASA program was created in 1977 by Judge David Soukup in Seattle, WA. The program was established to provide court-based advocacy for abused and neglected children through the use of trained and supervised community volunteers. The CASA model spread quickly as judges and communities around the nation learned from the Seattle program. With the assistance of the National Council of Juvenile and Family Court Judges, the National CASA Association was founded in 1982.

Today over 950 state and local CASA/GAL program offices exist in 49 states. In 2007, nearly 250,000 children were served by the 60,000 volunteers affiliated with these programs. In 2007, the number of children served since the first CASA/GAL program was created reached 2 million. Research reveals that children who have a CASA/GAL volunteer are more likely than other foster children to achieve timely permanency. (See the National CASA Association's website for a summary of independent research demonstrating the effectiveness of CASA volunteers - nationalcasa.org/about_us/studies.html.)

The National CASA Association and its member programs strive to provide abused and neglected children with the best possible advocacy. Programs are governed by the *National CASA Association's Standards for Local CASA/GAL Programs* and are evaluated as to compliance on a regular basis.

(casanet.org/program-management/standards/0605_standards_for_local_programs_0053.pdf)

Volunteers are trained and monitored based upon the requirements of standards. Many programs have developed enhanced services and have expanded the role of the volunteers. This issue is dedicated to sharing with you, the readers, the extraordinary achievements of CASA/GAL programs across the nation and alert you to exemplary practices that can be replicated in your community.

The Role and Responsibilities of the CASA/GAL Volunteer: What Do Judges Think?

J. Dean Lewis, Judge (retired)

Former Member, National CASA Association Board of Directors

Past President, National Council of Juvenile and Family Court Judges

Summary

Judges from CASA programs across the country share what they find to be most valuable about the role and responsibilities of the CASA/GAL volunteer and how that role affects the outcome in dependency court cases.

The first CASA program was established by a judge and judges continue to play a key role in developing new CASA/GAL programs, sustaining existing programs and expanding the CASA/GAL network. The role and responsibilities of the CASA/GAL volunteer are established by National CASA standards (nationalcasa.org/download/Judges_Page/0806_standards_7E_0119.pdf). There are four core CASA/GAL volunteer responsibilities:

- To obtain firsthand a clear understanding of the needs and situation of the child through review of records and personal interviews documenting the information gathered in a court report that establishes the volunteer's recommendations
- To identify and advocate for the child's best interests
- To seek cooperative solutions by acting as a facilitator among the parties
- To monitor the child's situation and implementation of court orders

In 2005, the National CASA Association conducted a national survey of over 550 dependency court judges (nationalcasa.org/JudgesPage/Article/judge_value_casa_volunteers.htm). Judges surveyed indicated that the CASA/GAL volunteers' activities are very useful, that their input in informing court decisions is valued and that volunteers are very effective in supporting court processes. In fact, the survey revealed that judges frequently incorporate CASA/GAL volunteer recommendations into the court's order.

The Judges' Page recently asked key judicial leaders from diverse jurisdictions what they find to be most valuable about the role and responsibilities of the CASA/GAL volunteer and how that role affects the outcome in dependency court cases. These judges, who sit in courts across the nation, share their personal observations and experiences below.

Judge Patricia A. Macias, 388th Judicial District, El Paso, TX President, National Council of Juvenile and Family Court Judges

Independence is what judges find most critical about the CASA volunteer's role. The child's voice demands an advocate who fulfills their role and who speaks clearly and with determination about what is best for the child, even if that position stands alone.

Judges listen carefully to each word, written and spoken, by a CASA volunteer. The judge depends on them to gather all the information, to facilitate communication among all the collaborative team members, to master the skill of advocacy, and to have commitment in monitoring the case progress to permanency.

But for the judge to make a sound decision, it requires much more. While maintaining positive relationships with all individuals surrounding the child, the CASA volunteer is obliged to be self-determined and not swayed or influenced by others.

Upon taking the oath to serve, a volunteer commits to act as a principled participant in legal proceedings. This means offering a position on behalf of the child based on unbiased information and free from outside pressure or personal interests.

**Judge Ernestine Gray, Orleans Parish Juvenile Court,
New Orleans, LA President, National CASA
Association**

**Past President, National Council of Juvenile and
Family Court Judges**

What I find most critical about the role of the CASA/GAL volunteer is the fulfilling of the core responsibilities of gathering information, advocating, facilitating and monitoring. What comes to mind is the CASA volunteer who drives 5-1/2 hours to attend a twenty minute staffing (the staffing was longer because he was there) and challenges everyone in attendance to say at least one positive thing about his CASA child; who ensures that his CASA child takes his meds, which have been appropriately prescribed; and who challenges his CASA child to live up to his potential. He is not afraid to let his CASA child know that he cares and wants him to do well.

**Judge Michael Nash, Presiding Judge, Los Angeles Juvenile Court, CA
2006 National CASA Judge of the Year
Secretary, National Council of Juvenile and Family Court Judges**

To me, CASA volunteers are the most independent persons in our process. They are not beholden to anyone but the children each of them represents. When you combine that notion with their training, their desire to help one child at a time, and the lack of a caseload, it almost always results in information and recommendations that not only help me as the judge make better decisions, but also lead to better outcomes for each child. I have seen CASA volunteers help find services for children that I was told were not available and I have seen them find permanent placements for children when our system faltered in that regard. In many instances, the efforts of CASA volunteers were absolutely heroic.

Judge Lisa Jones, Juvenile Court Judge, Southwestern Judicial Circuit, GA

I rely on CASA volunteers to provide the court with an independent recommendation specific to each child. It is comforting to know the volunteers are meeting with these children, their families, their doctors and teachers—with all those who impact the children's lives—and compiling all of this information in a report to the court.

**Judge Douglas F. Johnson, Separate Juvenile Court of Douglas
County, Omaha, NE President-Elect, National Council of Juvenile
and Family Court Judges**

Recently, I accepted a 12-year-old boy's admission that he pointed a pistol at his 15-year-old friend's head and pulled the trigger. Casey said he was only trying to scare his friend, Joe. Unfortunately, when the pistol fired, Joe was killed. At the dispositional hearing his advocate spoke eloquently through her tears about Joe whom she had come to know as his CASA volunteer.

The courtroom was absolutely still as Nancy spoke. She asked of Casey and I that Joe's life not be forgotten nor in vain. Being Joe's CASA volunteer, Nancy readily recounted that he was a wonderful young man, so talented, loving, caring and fun to be with. She could see the promising life Joe once had. She wanted Joe to be remembered as the victim in this case. She hoped that

somehow Casey would come to understand the senselessness of his actions and the resulting needless loss of a young life.

I received a probation officer's predisposition report and an evaluation about Casey. But when the CASA volunteer spoke, I learned about the tragic loss of life and the promise of a remaining one. She gave heartfelt and personal reflections because she knew Joe so well. Trying to help yet another child, she asked that I help Casey take responsibility for his actions, improve and rehabilitate himself, make something positive out of his own life, and thereby honor Joe's life.

A CASA volunteer speaks up as a strong advocate for a child, even when he is dead. And in this case, she even had the wherewithal to speak up and help the boy who killed his friend.

Judge Leonard Edwards (ret.), Judge in Residence, Center for Families, Children & the Courts, Santa Clara, CA
1992 National CASA Judge of the Year
Past President, National Council of Juvenile and Family Court Judges

I have found that the most important aspect of the CASA volunteer's role is the relationship that is formed between the volunteer and the child. When a volunteer has been appointed, I know that there is a person in the child's life who will get to know that child personally, on a one-to-one basis. The advocate will be focusing on just one child and will give that child the feeling that at least one person is truly dedicated to her. When the child has an important matter to discuss or needs support, she is more likely to turn to the advocate than anyone else. In fact, children trust volunteers more than anyone else in the child protection system (our recent survey clearly demonstrated that fact) because they know that the volunteers are not paid (and everybody else is). So what courts are doing when they create, expand, and support CASA programs, is providing a significant relationship for each child for whom an advocate is appointed. It is a gift, the gift of an important person in a child's life.

Judge Louis A. Trosch, District Court, Mecklenburg County, NC
Board Member, National Council of Juvenile and Family Court Judges

CASA/GAL volunteers keep judges' eyes on the prize. They make sure that abuse and neglect hearings focus upon the children, who are at the center of the proceedings and the most important people in the process. All too often the child's best interest gets lost in the shuffle of legal arguments, case plan monitoring, statutory requirements and budgetary constraints. Because CASA volunteers are the only people in the case unencumbered by county or state budget woes, bureaucratic red tape, policy restrictions or crippling caseloads, they can focus all of their energies upon the needs of the children. The resulting insights may range from a child's placement preference to a favorite toy being lost, but they always represent the voice of the child. That voice is paramount and it is also fragile. Unfortunately, without CASA volunteers, that voice is also, all too often, silent. To make sure that the needs of my children stay front and center I try to hear one last time from the CASA volunteer at the end of every hearing.

Judge Patricia M. Martin, Circuit Court of Cook County, Child Protection Division, Chicago, IL Treasurer, National Council of Juvenile and Family Court Judges

I remember my first experience with a CASA volunteer. I was a new judge and my initial reaction was, "Who is this person and what is CASA?" I quickly learned how valuable these dedicated volunteers are. I came to rely on them as my eyes and ears in child protection cases. Because of CASA volunteers, I was able to see numerous abused and neglected children leave the system to permanent homes to be raised by loving families, both biological and adoptive. As presiding judge of one of the largest child protection court systems in the nation, I have expanded my reliance on the CASA program, often asking the volunteers to help develop innovative solutions to the problems that confront the child

welfare system. The volunteer has always come through and has proven to be a valuable partner in numerous court programs.

**Judge Leslie Kirkland Riddle, Family Court Judge, Fifth Judicial Circuit, Columbia, SC
2008 National CASA Judge of the Year**

Be “the voice of reason” is what I enjoy telling new CASA guardians at each swearing-in ceremony. CASA guardians have the unique ability to bring a calming sense of reason in many volatile family court cases. I often share the dear lesson learned from my father: “You can catch more bees with honey!” Families who feel respected and heard are far more receptive to services and intervention resulting in expedited permanency for our children. The CASA volunteer is the child’s appointed voice in court, the eyes and ears of the court, and the arms of hope to a maltreated child.

I recently received a letter from a young man who is incarcerated. After reading a newspaper article about my selection as the 2008 National CASA Judge of the Year, this young man wrote to me. In his letter of congratulations, he stated that I was the judge who had first sentenced him to incarceration at Department of Juvenile Justice. He recalled the words I said to him and shared “how much he wished he had listened.” I have difficulty expressing the heartfelt emotions I experienced reading this letter. Since that time, the two of us have exchanged mail and I frequently read his letters to troubled youth and families before me. Needless to say, the message from this young man has a tremendous impact on them. I share this story to illustrate the power of CASA’s voice!

My guardians provide heightened advocacy for children, and I depend on them in all child maltreatment cases. And through the CASA network, winning the 2008 Judge of the Year Award was a great honor and one that led to a reconnection with a young man whose story has since helped many troubled youth.

**Judge R. Michael Key, Juvenile Court of Troup
County, LaGrange, GA Vice President, National
Council of Juvenile and Family Court Judges**

There are millions of good, caring, well-intended people in this world who never make a meaningful difference in the life of a child outside their family or circle of friends. Not so with CASA volunteers, who, on an average day, change for the good the lives of children with whom they had no previous connection and, on many extraordinary days, literally save children’s lives. While the later statement might sound like an overstatement, it is fact. Not long after we started our CASA program, we had a case where we had removed a child because of physical abuse, but we were planning on returning the child at an upcoming hearing. Even after the CASA volunteer filed her report, she continued to work the case. On a hunch, she checked with the local hospital and found out the child had been taken to the emergency room within the last few days with injuries that, standing alone might not justify a mandatory report (hence, none was made), but given the history of the case, confirmed that the child would have been at risk of serious injury or even death had we not had that information and had we returned the child home, which we surely would have done without that information. There are many other perhaps less dramatic, but equally important, examples of CASA volunteers providing information that keeps children safe.

CASA volunteers plug gaps in the safety net that should protect the children who come into the child welfare system, specifically those children who are in foster care. Having been found to be vulnerable in their own homes, we owe these children a duty to protect and nurture them. And that cannot be left just to the foster parents with whom we place these children, however committed and capable they might be. Nor can it be left to an over-burdened child services agency where the case is passed from case worker to case worker, sometimes due to turnover and sometimes due to established protocol. Except for those fortunate courts, like ours, where we have an attorney child advocate for each child in foster care, the volunteer is the only consistent source of information and advocacy for the child.

CASA volunteers benefit the court in fulfilling its role in two ways, one in court and one out of court. The decisions judges make are only as good as the information on which the decisions are based. It is absolutely critical that the court has information that is current, complete, accurate and relevant. In my court, CASA volunteers, more than any other participants, provide that kind of information. Even the attorney child advocate, because of significant case loads, cannot generally provide that kind of information without the help of the volunteer, who helps the court fulfill its role by ensuring that the child's needs are being met. I think that CASA volunteers generally do a better job of improving child well-being than the rest of us.

Judge Elise Givhan Spainhour, Family Court Judge, Bullitt County, KY

I am so fortunate to be in a place with a CASA program. I know I can rely on the information I receive from a CASA volunteer in our program. The quality of my decision making is improved by every point of view and bit of information I know about a child and his or her situation. The quality of services received by a child is improved by the presence of a CASA volunteer. CASA participation lowers the chance I will make a mistake with a child and improves the odds I will catch the mistake if I make it. I know I am a better judge because I have CASA volunteers in my courtroom, and my county is a better place for children because of CASA volunteers.

Judge Susan B. Carbon, Supervisory Judge, Concord Family Division, NH Past President, National Council of Juvenile and Family Court Judges

What do I expect from the CASA/GAL volunteer in fulfilling his/her role?

- 1. I want a CASA volunteer who really knows the child/teen. This means developing a level of trust and respect, something which isn't done easily, nor quickly.*
- 2. I want the volunteer to know what the child wants and what may be in the child's best interests; to clearly understand if there is a difference, and if so to articulate it.*
- 3. I want the volunteer to understand the parents, their limitations, their potential, and how they are progressing towards reunification (assuming the child has been removed). This helps put the child's wishes and needs in context.*
- 4. I want the volunteer to have spoken with the child protection agency, school and service providers to be able to make independent assessments of progress all around. This enables them to identify gaps, and commend progress.*
- 5. I want the volunteer to be well prepared for the hearing, meaning his/her report is filed on time, and he/she has reviewed all other reports and is prepared to comment in court.*
- 6. I want the volunteer to feel free to speak her/his voice, independent of anyone else. The CASA volunteer needs to be free to, and must, voice his/her opinions.*
- 7. I want the volunteer to be confident enough to compliment those who are doing well (parents, child protection agency, service providers, child), and offer constructive criticism for those who are not.*
- 8. I want the volunteer to understand what needs to happen at each hearing so that reports and remarks are tailored to the decisions that must be made. Understanding the legal process is important, although the CASA volunteer certainly does not need to be an attorney.*
- 9. I want the volunteer to empower the child/teen to speak for her/himself; even though the CASA volunteer is the voice of the child, the child's voice should be heard directly if the child so wishes.*
- 10. I want the volunteer to be there for the child from start to finish, so that the child will know he/she is not expendable, and that reliance and consistency mean something.*
- 11. I want the volunteer to hold everyone, including the judge, accountable so that every hearing has a purpose and is time well spent.*
- 12. Finally, I really like it when the volunteer brings a new photo to each hearing. It reminds me that the child's life is ticking by so quickly.*

As I write and reflect, this seems to be a huge load, and yet time and again, our very well trained CASA volunteers come through. We have an amazing group here, all of whom are respectful, courteous, knowledgeable, compassionate and well-grounded. Our kids benefit from their competence and preparation. We rarely have a hearing that was not helpful in moving issues forward. To the contrary, they are purposeful and productive due in part to the CASA volunteers. They support the kids in ways some parents never have, and they never give up on the kids. They guide them, support them, and stand by them, allowing the kids to flex their wings, but they are there to make sure they won't be hurt in the process; most have suffered enough hurt already.

One of my CASA volunteers told me that the child he was assigned told him he thought the CASA volunteer was the judge. Given all that I expect, and receive, from my CASA volunteers, I took this remark as a compliment! So did he.

Working Together to Support Children in Need

*Hon. Ernestine Gray, Orleans Parish Juvenile Court,
New Orleans, LA President, National CASA
Association Board of Trustees*

Summary

My involvement with CASA has grown over the years because I believe in what CASA and guardian ad litem volunteers do: serve as the voice of children, making a positive, lasting difference in their lives.

Shortly after I became a judge in New Orleans 24 years ago, one of my colleagues asked for the support of the other judges in establishing a new CASA program. From that point on, I have been involved with CASA New Orleans: doing public service announcements to recruit volunteers, participating in training and swearing in new advocates.

I became involved with the National CASA Association in 2001 when I was president of the National Council of Juvenile and Family Court Judges (NCJFCJ). As you may know, the NCJFCJ president also serves on the National CASA board. After my year as president of the Council, I was happy to be asked to stay on as a National CASA trustee. Since that time, I have been proud to contribute as an active member of the Standards Committee, the Education and Public Awareness Committee and the Inclusion and Outreach Committee. In June 2008 I assumed the presidency of the National CASA Association.

My involvement with CASA has grown over the years because I believe in what CASA and guardian ad litem volunteers do: serve as the voice of children, making a positive, lasting difference in their lives. I think our advocates' work with children is critically important. Advocates speak on behalf of children when others cannot or do not. They bring their recommendations for what is in the child's best interest. And they are able to focus on supporting an individual child because they normally have one case or a maximum of two, in stark contrast to social workers or attorneys.

I will give just one example of a case where I saw a CASA volunteer make a difference. We have a pilot program in my court working with infants and toddlers. One case involved a mother who was initially a bit hostile. I told her on the first day she came into court: "It is very important for you to show me by your actions that you want to have your children back. And you do that best by working your case plan. What we ask you to do, you try to do it." In the beginning, she was not willing to cooperate. I assigned a CASA volunteer to her case, and the volunteer was able to establish a

rapport with the mother. I imagine the volunteer said to her something like: “If you care about your children, which I don’t doubt that you do, these are the things you need to do. And while you’re being upset with the agency and not complying, not going to visit, it is your children who are suffering.” Talking that through with her, the volunteer was able to get the mother to turn around and start working the case plan. She is making good progress now and is on her way to reuniting with her children

Over the last few years, the National CASA Board of Trustees has focused on creating an ambitious strategic plan. In this roadmap, we set out a few important goals for ourselves. I think the two most important are *increasing the number of volunteers* to serve more children and being *more inclusive* by developing the diversity of our network—program staff, volunteers and board members—and our National CASA staff and board. These are not activities that can succeed in just one or two years. So I want to make sure we do everything we can to push our strategic plan further along. I hope that you, as judges, volunteers, attorneys and child advocates, are willing to help me fulfill these two important objectives to improve advocacy for children in our courtrooms.

Sample Judge and Attorney Survey of Volunteer CASA/GALs

Judge and Attorney Survey of Volunteer CASA/GALs

Please try and give a general rating of your experience with CASA/GALs and not a specific volunteer.

Please circle the number that best corresponds with your response to the following statements.	Strongly Agree	Agree	Disagree	Strongly Disagree
1. I understand the role of the CASA GAL/volunteers.	4	3	2	1
2. Volunteer CASA/GALs act professionally.	4	3	2	1
3. Volunteer CASA/GALs understand the court system.	4	3	2	1
4. Volunteer CASA/GALs understand the child welfare system.	4	3	2	1
5. Volunteer CASA/GALs have an understanding of the needs of the children.	4	3	2	1
6. Volunteer CASA/GALs respect my opinion.	4	3	2	1
7. Volunteer CASA/GALs are working for the best interests of the children.	4	3	2	1
8. I find CASA/GALs helpful.	4	3	2	1
9. Volunteer CASA/GALs make a difference with the children they serve.	4	3	2	1
10. I would like to see more children served with the CASA/GAL program.	4	3	2	1
11. Volunteer CASA/GALs provide an objective opinion.	4	3	2	1
12. Volunteer CASA/GALs influence court decisions.	4	3	2	1
13. Volunteer CASA/GALs are prepared for court hearings.	4	3	2	1
14. Volunteer CASA/GALs make appropriate recommendations.	4	3	2	1
15. Volunteer CASA/GALs are valuable to the courts.	4	3	2	1
16. It is important for CASA/GALs to attend court hearings.	4	3	2	1
17. Volunteer CASA/GALs have a positive reputation in my community.	4	3	2	1
18. Volunteer CASA/GALs have a good working relationship with others involved in the case.	4	3	2	1

19. What is your role? (i.e., judge, Attorney for the Child, Attorney for the Parent, Other) _____
20. In what ways could CASA/GALs better serve children?
21. In what ways could CASA/GALs better work with you?
22. Do you have any other comments about CASA/GALs?

Fund Development Readiness Assessment

The purpose of this exercise is to assess and uncover your fund development achievements and challenges. It is meant to be used as a tool to stimulate productive discussions that shed light on what is needed for your organization to achieve its fund development goals as part of the growth planning process.

Depending on your organizational structure, the likely participants will include the executive director, any staff who are/were involved directly in fundraising, the board, and any additional individuals involved in helping your program in the area of fund development.

Completing the Assessment

Individually, rank your perception of organizational readiness in each of the twenty-two questions related to fund development leadership/support, finances and planning. Thoughtfully consider the current state of your organization and evaluate the overall performance over the last 1-2 years rather than singling out one fund-raising event. Make notes regarding areas that you would like to explore in group discussion.

Keep in mind that there are no “wrong” answers. What is most important is thoughtful rating and open group discussion. Although consensus may result regarding certain points of discussion, consensus-building is not the main purpose of completing this assessment.

Following the Completion of the Assessment

Ideally, the meeting leader will conduct a group discussion following the individual completion of the assessment. Review each question and poll the group for ratings on each question. If there are wide variations on the response to a question, explore the topic with the group. Note where there is general consensus in areas of strength or weakness. Share with the group that it is very common for organizations to engage in boosting their readiness before expanding their fund development activities. Essentially, this assessment “takes the pulse” of your current fund development health. Preparing to successfully engage in expanded fund-raising actions is essential to successfully undertaking new and aggressive fund development activity. Taking this assessment is the first step to understanding your program’s strengths and areas for improvement.

Consider the results of this Fund Development Readiness Assessment as it relates to achieving and sustaining growth. How will your Fund Development Action Plan address these areas?

Fund Development Readiness Assessment

Rating 1 - 10	<p>Rating Scale: Please use any numerical score between 1 and 10 where: 1 = NO readiness / support / experience / success / understanding 5 = SOME readiness / support / experience / success / understanding 10 = COMPLETE readiness / support / experience / success / understanding</p>	
	Question	
	<ol style="list-style-type: none"> 1. 2. 3. 4. 5. 6. 7. 8. 9. 10. 11. 12. 13. 14. 15. 	<p>Our local CASA program has a strong, positive image and reputation within the community.</p> <p>We have documented evidence of community support (i.e., consistent financial contributions from individuals and local businesses, community leaders on the board, recognition by the press and local government, an active volunteer base).</p> <p>Our constituencies understand and support our mission and vision. (And may understand our purpose and need for fund expansion.)</p> <p>Our record of service to the local communities is above reproach.</p> <p>We have an annual budget that is approved, understood and monitored by the board. This budget includes all program and administrative/management expenses and all sources and uses of funds.</p> <p>We have a clear understanding of the programs that run at a surplus/deficit and have identified ways to capitalize on and address these programs.</p> <p>We have a written statement of our financial position that is immediately available to potential individual and organizational donors.</p> <p>We have a solid history of fund-raising success and our constituents have responded positively in the past to our fund development efforts.</p> <p>We currently have strong financial stability (i.e., our funding & donations are identifiable and stable for the next few years, we have good diversity of funds -- <30% from one source, we work collaboratively with other agencies, etc.).</p> <p>The funding we seek is available in our community and/or from our constituents.</p> <p>We have an adequate number of active board members.</p> <p>The board provides clear leadership within our organization.</p> <p>The board actively participates in fundraising.</p> <p>We have, among our staff, board members and volunteers, well informed, influential, and experienced leaders.</p> <p>We have one or more staff dedicated to fund development, excluding the Executive Director.</p>

	<p>16.</p> <p>17.</p> <p>18.</p> <p>19.</p> <p>20.</p> <p>21.</p> <p>22.</p>	<p>Beyond this inner circle of leaders, we have available to us a substantial body of additional staff and volunteers who are willing to assist in fundraising planning and activities.</p> <p>Comprehensive planning has been completed, involving board and staff, resulting in up-to-date written strategic plans.</p> <p>Our identified funding needs and case-for-support are a logical outgrowth of our strategic plan (for growth).</p> <p>We have prepared credible documentation of the funding needs and opportunities that explain the details, the project(s), and the history. Our plan focuses on positive outcomes, benefits, and people served.</p> <p>We have a process in place to address significant obstacles that may be uncovered before or during the fund development campaign.</p> <p>We are internally ready to undertake one or more fund development projects. We have in place or can recruit experienced development staff, board members, volunteers, highly accurate and retrievable donor/prospect and financial records, appropriate policies and procedures (gift processing and acceptance, donor and volunteer recognition, investment, and adequate support personnel and technology).</p> <p>The organization has the financial resources necessary to plan and conduct a fund-raising campaign, and the leadership is unanimously committed to the project.</p>
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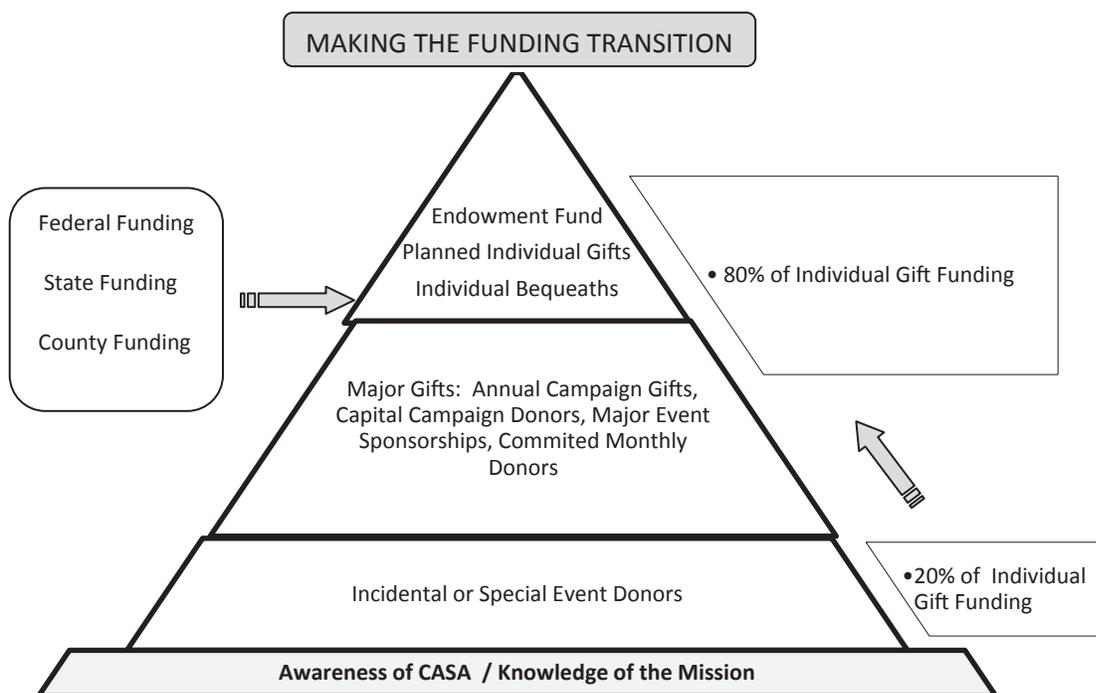
Notes:

Donor Funding Development Pyramid

The Donor Funding Development Pyramid represents a deliberate progression in gift giving, beginning first with an awareness of CASA and the mission we have to serve ALL foster children with a CASA volunteer. This concept of fund development utilizes a bottom-up approach, with funding progressively sought from a broad target base to a select group of donors whose commitment and loyalty to CASA is directly proportional to the size of the contribution. Ideally, the vast majority of program funding will transition from one-time incidental giving (e.g., special event donation) to substantial outright gifts and planned gifts (those that will be realized after the individual donor's lifetime). As your program matures, the relative individual giving should move up the pyramid until a program can preferably sustain itself in tough economic situations based on the peak level of the pyramid.

Just as the ideal movement and weight of individual giving shifts over time from bottom to top, your funding plan should also include a transition from left to right. The annual program budget should move away from heavy reliance on federal, state and county funding toward financial program independence, supported by individual gift-giving.

While this funding structure is not a transition that happens quickly, it is a transition that is possible for most programs when a practical and aggressive fund development plan is executed consistently over time. To learn more about moving up the pyramid, see **Making the Move from Fundraisers to Fund Development** in **Fund Development Resources, Section II**.



Making the Move from Fundraisers to Fund Development

We all know that special events are generally the least effective way to raise money. While they can be useful for increasing awareness, gaining public recognition for corporate sponsors, and recruiting volunteers, they typically represent – or should – a relatively small amount (20%) of what a program depends upon from individual donor gifts. If your program does not reflect this, it's time to consider an aggressive move up the donor pyramid. (See the **Donor Funding Development Pyramid in Fund Development Resources, Section II.**)

So how do we make the transition from relying on event-based fundraisers and “friendraisers” to securing major gifts and planned giving in order to ensure the long-term financial stability of our programs?

Sophisticated funding development and growth from individual donations requires *a plan within a plan*. In other words, there must be a systematic way to move donors from being new adopters of CASA to being loyalists and lifetime donors. Financial security does not reside in moderate first and second-time donations. It's created with broad annual donation commitments, significant capital gifts, and planned giving arrangements. And to get to that point, a donor must not only be a loyal, if not vocal, advocate of CASA, but truly identify personally with CASA and our mission to serve abused and neglected children.

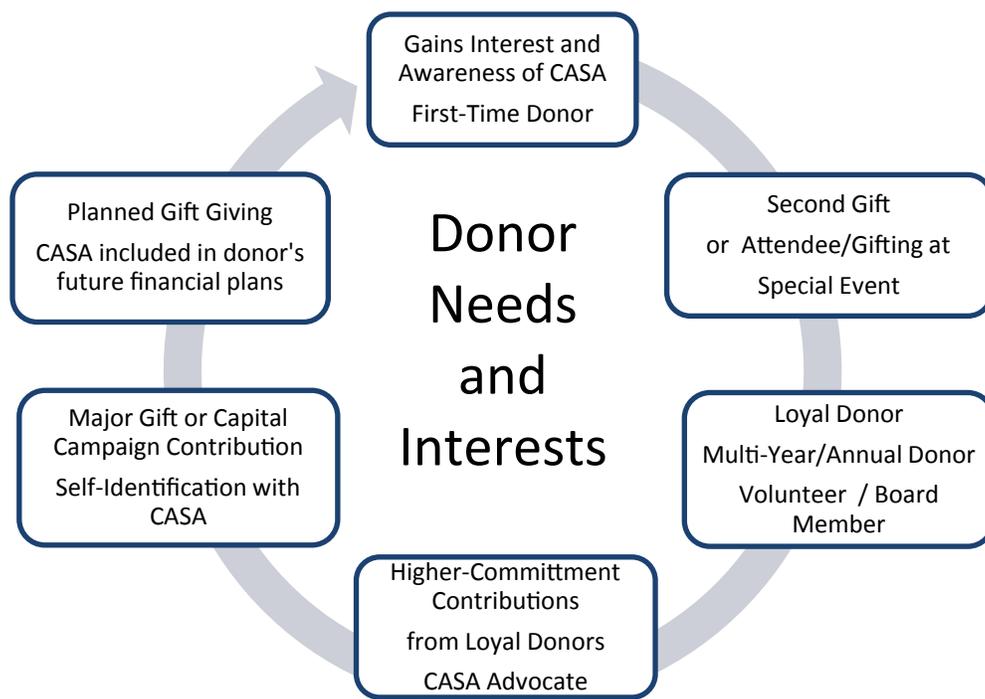
As you complete the **Fund Development Readiness Assessment**, think about the system you will use to both plan and track donor growth. Cultivating donors from the first-time, one-time donor to a committed lifetime donor does not happen by accident. The very first step is really changing our own mindset from a focus on the program and our goals, to genuinely being focused on the donor and his/her needs. In reality, it is the intersection of a donor's needs with our CASA mission that will result in consistent and significant gifts. The idea of relationship-based fundraising is not a new concept, but it's one that requires planning, time, and adopting a new set of expectations. Just as any relationship develops over time, the donor relationship generally has a life cycle.

The relationship typically begins with a general awareness of CASA, directly or indirectly. The individual makes what begins as a one-time contribution. Perhaps the donor learns of CASA at an event or through advertising. They may have a friend involved with CASA who asks for a contribution. Whatever the method, the cycle begins. Where it stops is up to you. Cultivating relationships is up to you, not the donor.

Research shows that the vast majority of donors target 1-2 charitable non-profit organizations for their donations. More than 90% of donors indicate that they never get contacted by the selected organizations without being asked for another donation. In addition, 90% stop giving to the organization by the 5th anniversary of their first donation. Considering the time, energy and money it takes to secure donors, what does this mean?

While it's often difficult to uncover the reasons why any particular individual stops giving, research shows that, aside from financial inability, **the reasons stem from a lack of communication and a failure of the nonprofit organization to cultivate the bond between it and the donor.** Thus, most organizations are missing the critical imperative of consistently and correctly focusing on the all-important donor relationship. They remain program-centered instead of donor-centered. Getting major contributions is a two-way street and the most important direction to drive is toward the donor's needs and interests.

CASA Program Donor Life Cycle



Developing Your Major Gifts Program

When we think of growing a program financially, it is the major gifts that will be the platform for solidifying our financial base and transforming our ability to serve *some* to the ability to serve *all*.

Begin to make the most of the time and energy devoted to fundraising by moving away from fundraising events or campaigns to securing the financial future of your CASA program. Doing this requires a long-term approach and a plan for cultivating a strong and permanent donor base. Take the following steps to create the basis for your major gifts plan:

1. Create a fund development team.

Begin by selecting a group of individuals who are united in their long-term (3 years +) commitment to realizing the CASA vision. Confirm each person's individual commitment before moving forward. Select a group of people with diverse skills, knowledge and roles within CASA. The team should consist of the ED, any staff directly involved in fundraising and fund development, and a few key board members. Think about the member skill set as it relates to the team goals: identifying potential donors, planning and strategizing, getting in the doors, hosting meetings and events, making "the ask", sustaining the relationships. The members of this team may change slightly over time, but it is this key group of individuals (perhaps with outside expert assistance) that will create and execute the plan for a dynamic financial future for your program. The leadership of your program must lead by example, becoming actively engaged in the drive toward establishing relationships to acquire major donors, garner higher-level gifts and secure larger foundation grants.

2. Review the commitment to the mission and vision.

This step simply requires a clear understanding of the reason for growth and an overall assessment of the reason for the future financial needs of the program. Individually and as a team, review and renew your commitment to the Mission and Vision for your CASA program. Take time to first consider the shift in expectations – from a primary reliance on government funds to self-sufficiency in funding. What kind of change will this require in thought for the ED, the staff, the board? What new dedicated roles are needed? What challenges does it immediately bring to mind? What are the benefits upon realizing this goal? What would it mean to the children you serve to be financially independent – removing the concern about "next year's funding"? Begin exploring these ideas about the future and, as a group, reaffirm your commitment to the vision you have. Your vision will fuel your actions.

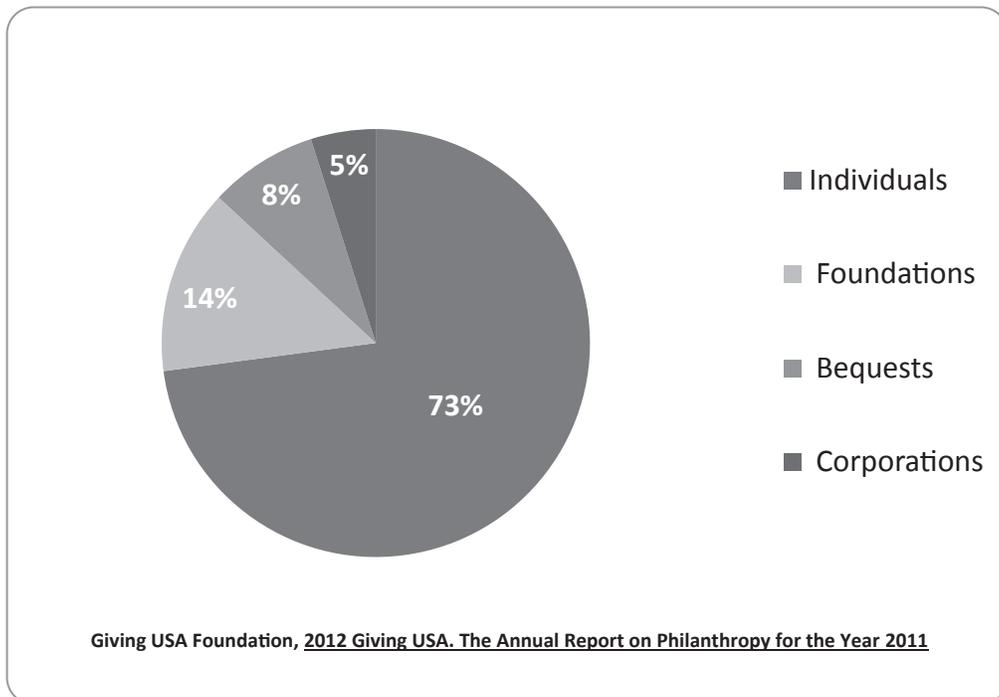
As you revisit your own commitment to the mission and vision, keep in mind that major donors and foundations are usually viewed as *investing* in the mission, vision and leadership of an organization. Put yourself in their shoes. Why would someone choose to invest in CASA and make it an important part of their charitable contributions plan? Why not? What other organizations are your key "competitors"? What are they doing to successfully attract major donors? At every turn during the fund development process, keep the donor at the forefront of your thinking.

3. Understand your starting point.

As part of the strategic plan development, you will complete a historical overview, data analysis and current overview. (See Developing a Strategic Plan for Growth in Section I.) This information is essential not only to understand the organizational structure, but a financial assessment of where you've been, where you are, and where you plan to go. It is a basic part of your fund development plan.

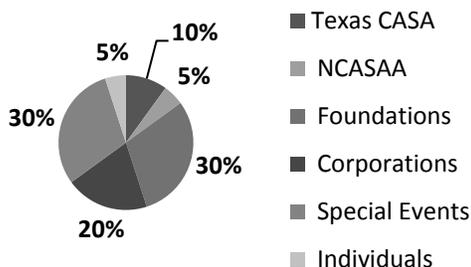
In reviewing this information, determine the relative balance of your funding. Does your program currently have a diverse funding base? Do you really know where your money comes from and in what proportion to your total budget? What is your donor retention rate?

According to the Giving USA Foundation, total estimated charitable giving in the U.S. reached \$298.42 billion in 2011, an increase of 4% from 2010 (0.9% adjusted for inflation.) The greatest portion of this (\$217.79 billion) was given by **individual donors**, representing 73% of total estimated giving.

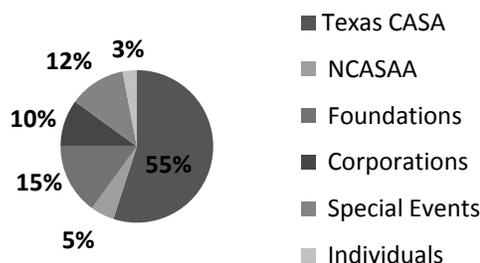


Your program’s funding plan should incorporate four targeted areas of development, from greatest to least: 1) individual donors – large and small, 2) foundations, 3) corporate donors, and 4) government funding. Consider the current proportion of your funding for these key areas. The average current CASA program – large or small – receives 50% or more of its funding from government sources. What does your “pie” look like now? What would you like it to look like a year from now? 3 years? 5 years? 10 years? What does your definition of self-sustaining look like?

Current Funding Sample
Local CASA Program Fund Allocation
Annual Budget \$500,000+



Current Funding Sample
Local CASA Program Fund Allocation
Annual Budget \$100,000-\$250,000



Currently, the majority of CASA programs rely heavily on government funding. That is the nature of our history and we are grateful to have received such strong governmental support for the good work we do. But to thrive and grow, it is essential to change the expectations to a picture of greater self-sufficiency and reliance on major individual donor support.

Gaining clarity at the beginning of the transformation is invaluable. As you assess your starting point, ask and answer these tough questions. *How are we currently cultivating individual donor relationships? How many appointments are being made every week/month with new/existing donors to strengthen relationships and ask for support? When we lose donors, what are the reasons? What are we doing to consistently thank our donors for their gifts? What are we consistently doing to report to our donors how their gifts are being used? What are we consistently doing to report to our donors the achievements we are making in serving children? What are we consistently doing to ask our donors for their input and feedback?*

4. Set the funding goals.

After you have a clear sense of where you are and where you've been, it's time to set goals for where you plan to go. When it comes to fund development, most of these goals will be numerical, but keep in mind that goals should aim for both quantity *and* quality. This is a long-term plan and its realization will result from many incremental "wins" along the way. Like the first three steps, setting goals is a team effort and a specific time should be set aside to meet and define the goals.

One thing to do is to define what your CASA program defines as a "major gift". Since the definition depends only on the interpretation of your key stakeholders and is an internal term, held confidentially by the members of the organization, there's really no reason *not* to put this definition in terms of dollars. Remember, the definition of "major gift" should be relative to the

program, not to the wide list of potential donors. Think of the amount in an annual timeframe (e.g., \$1,000 one-time-gift, or \$200 monthly donations, etc.) It may make sense to define gifts in categories based on the current fundraising budget. For example:

Total Current Fundraising Income Goals	Foundation or Corporate Donation			Individual Donation		
	Modest	Mid-Range	Major	Modest	Mid-Range	Major
Low - \$100K - \$199K	\$100 - \$999	\$1,000 - \$3,499	\$3,500 +	\$1 - 149	\$150 - \$299	\$300 +
Med - \$200K - \$299K	\$100 - \$1,999	\$2,000 - \$4,999	\$5,000 +	\$1 - \$399	\$400 - \$749	\$750 +
High - \$300K +	\$100 - \$3,999	\$4,000 - \$8,999	\$9,000 +	\$1 - \$699	\$700 - \$1,499	\$1,500 +

While the concept of a bequeathed amount may not necessarily be defined in dollars, it's possible to set a goal for the number of bequeath commitments to gain each year.

Having defined goals is essential to assessing results and levels of success in your fund development progress.

A well-known way to set goals is by using the SMART method. For our purposes, SMART will stand for **S**pecific, **M**easurable, **A**ligned with values, vision and mission, **R**ealistic, and **T**ime **B**ound. Using this may help you in creating a complete set of written goals.

Specific – Define, in writing, the annual financial goals for years 1-5 based on target source and dollar amount. If your goals include overall increases in funding, shift in your “pie”, key funding targets, make this clear. Consider whether the amounts sought will be for unrestricted or restricted funding. Creating an action plan is part of being specific. Define and write not only the goals but the ways that you intend to achieve the goals. The focus of specificity is making certain that everyone has exactly the same understanding of the parameters and definition of the goal.

Measurable – Measuring the goal simply means understanding when the goal has been met. It's answering questions like “how much?” and “how many?” Set goals that define funding in terms of amounts, ratios, and frequency of things like dollars, donors, time, and costs-to-obtain. Keep both quantity and quality in mind with funding. Quality in fund development is really a measurement of the relationships with your constituents. Surveys to donors, staff, volunteers and the board can provide a picture of the experience that these people have with your program and measure the quality of your fund development actions.

Aligned with values, vision and mission – Consider the donor when evaluating your goals. If the financial goals do not clearly support the mission and cut a straight path to serving children, make sure that you re-evaluate the goal. Remember that donors are not giving to CASA, they're giving to the children we serve. Many non-profits have lost crucial funding sources when they

became too focused on serving those *within* the organization rather than those being served *by* the organization.

Realistic – Goals should be reasonable and achievable. Setting aggressive financial goals that can be achieved over time with skill and hard work is a good idea. Reaching new heights is certainly possible with greater levels of consistent effort, effectiveness and efficiency. However, make sure that what you want to do is within the realm of the possible, not the impossible. Consider your funding, human resources, environment, geography, demographics, etc. Determine what is possible for you to change and what is not. As you set the goals, ask “is this realistic given our history, current situation, resources and commitment?”

Time bound – When setting goals and action steps, make sure that timetables, deadlines and accountability are all a part of the plan. Determine the “who, what and when” to keep the fund development team on track. Divide the work across the entire team and solicit others to help with carrying out the plan. Communicate frequently. Schedule meeting dates, in advance, to help stay on track and complete tasks in a timely manner. Hold each other accountable for making continuous forward progress. And again, keep your donor in mind. If you’re asking for their money to accomplish a goal, be clear about when you intend to achieve that goal.

5. Craft the CASA message and create the presentation.

Are you ready today to share a well-written and well-rehearsed presentation to an individual donor, a small group of donors or a large group of donors? *What are the differences in the type of venues you may have for these presentations? How will this dictate the length and type of presentation you make? Where are these people in the donor life cycle? How might this change your message?*

Preparing a personal, yet professional presentation is a critical first step in the transition to your focus on major donors. It is vitally important to know your message and maintain unified, cohesive communication when it comes to fund development. Always begin with the donor in mind and prepare a compelling case based on how someone who is unfamiliar with CASA might need to become familiar with the history, the people, and the tremendous positive impact that CASA has on abused and neglected children and the community as a whole.

Include in your presentation the mission, vision and historical success of your CASA program. Include past results and share how results are measured, making sure to use the kind of language that will resonate with your potential donors. Include the future goals and the strategies with which you intend to accomplish these goals. Be sure that your strategic plan is available to potential donors. Plans with clearly articulated multi-year measures for results, timelines and key milestones are much more likely to impress a potential donor that you will be responsible in putting their money to good use.

Before finalizing the presentation, ask a few skilled business people from outside CASA to listen to and objectively review the presentation. Ask for constructive feedback on how the

presentation could be improved. It can be extremely valuable to get an objective outside perspective to build a more comprehensive and compelling case for securing financial support.

Last, make sure everyone who will deliver these messages has a complete grasp of the materials. An unprepared or poorly executed delivery can actually do your program more harm than good. Unless a potential donor has a comprehensive understanding of CASA, it's the delivery of the presentation, one-on-one or in a group setting, that will define CASA for that potential donor. Set up times when the funding team members can present the information to the staff, board and volunteers. This is good practice for the team and creates the message consistency that the other CASA constituents should hear and repeat to their family, friends and co-workers.

6. Create the prospect list.

This step requires both internal and external research. If you do not already have some type of donor management/tracking software, now's the time to strongly consider investing the time and/or money into an electronic way to plan and track for donor growth. Part of good fund development is simply good data organization. Developing donor relationships is essential. Keeping track of information about your key donors and prospects will help you cultivate these relationships by staying aware of your individual donors' needs, interests, and donation trends.

Consider your prospect list a fundamental tool for creating a major gifts program. Begin by listing the donors you already have, assessing their commitment to CASA and their financial capability. (It's essential to tailor your solicitation to someone's ability to give.) There are many ways to organize the data and highlight the information you have - and don't have - about your current donors. Select a method that all members of the fund development team agree will work, allowing the member(s) responsible for maintaining the system to have a significant vote in the decision.

Next, begin creating a list of individuals and foundations that are not currently donors, but whose future support you desire. Think about prominent members of the community, leaders within local businesses, those who've been recognized for philanthropic funding, etc. Place them in priority order and, as a group, determine what you know about them. Determine pathways to them and discuss opportunities to engage them in discussion. Your goal here is first to understand them and understand their interests and needs. Only by uncovering your future donors' interests and unmet needs can you determine whether a genuine affinity for CASA will exist and lead to financial support.

Regardless of the method you use to create and track donor information and activities related to developing those relationships, be systematic and organized in your approach. Begin with a select group of prospective donors and continue adding to it as you become more comfortable with the process. (Once you begin communication with a prospect, it's very important to maintain consistency. This is difficult to do if you've got more prospects than your team can reasonably handle.)

It may help to create a chart that matches your financial goals with the prospects and level of giving needed to reach those goals. There are many tools on the internet available to do this. One such tool, made available free of charge by Blackbaud, Inc., is available online at www.blackbaud.com/company/resources/giftrange/giftcalc.aspx.

Charting your financial needs and determining how many gifts and in what amounts are needed to reach your goals will create a structured and visual picture to add to your plan. Again, start with reasonable goals that can be attained by hard work. Plan to grow your donor base along with growing the amount of the individual donations. If possible, create charts for years 1-5, knowing that they can be modified to accommodate your pace of growth.

7. Focus on the relationships.

By now you've selected your team, confirmed your mission, determined your starting point, created your goals, crafted your message and decided on your targets. All of this is simply the pre-work for the most important step – building and sustaining the donor relationship.

Training people how to create strong donor relationships is a bit like teaching someone to ride bikes – it can't be done well on paper. Ideally, all members of the team should be interested in personally building the long-term donor relationships. But this doesn't mean that everyone needs to have an extroverted, people-oriented style of behavior. Quite the contrary. Because your potential donor pool will consist of all types of individuals, your team should also contain members with differing behavioral styles. People are generally most comfortable communicating with others who “match” their style. Think about this as you start getting to know your potential donors. When cultivating relationships, the keys to communicating should be to project your genuine self, represent the core values of CASA, and consider the donor first.

To build good relationships, focus on the donor. It can't be said enough. Donors don't give to CASA. They give to fulfill their own emotional desire to help children in need. Take time to learn about this topic. Become a student in the art of initiating, cultivating and stewarding donor relationships. Two excellent resources to get you started on this include Ken Burnett's books *Relationship Fundraising: A Donor Based Approach to the Business of Raising Money* and *The Zen of Fundraising: 89 Timeless Ideas to Strengthen and Develop Your Donor Relationships*.

As you move forward, it will quickly become clear that making the request to give is a matter of timing. Resist the urge to solicit a major gift before the time is right. Cultivating relationships and securing major gifts from new donors is like having a prize-winning flower garden – it takes attention, time and patience! Appreciate the unique beauty in each donor as you would each flower, and realize that not all donors will “bloom” at the same rate or time.

Ultimately, each CASA program will uncover unique ways to develop a major gifts program that accommodates the program, the community and the prospective donors. As you move forward, keep in mind that this is a marathon, not a sprint. Embrace this challenge with confidence, knowing that effectively transitioning your program to a primary reliance on individual donations will undoubtedly yield the best long-term return on your efforts.

Sample Annual Fund Development Plan

2012 FUND DEVELOPMENT PLAN

I. 2012 FINANCIAL GOALS

PROJECTED OPERATING BUDGET: \$618,118.00

Income Categories	FY 2011 Income Actual	FY 2012 Income Projections	% of Total 2009 Income
Government (Fed/State/County)	\$385,972.00*	\$380,851.00	62%
Foundations	37,003.00	27,000.00	4%
Individuals/Family Trusts	62,033.00	53,000.00	9%
Service Organizations	2,045.00	2,000.00	.3%
Federated Campaigns (i.e., indirect public support such as United Way, CFC, etc.)	89,692.00	107,000.00	17%
Special Events	32,155.00	32,000.00	5%
Other (Unsolicited Income)	17,955.00*	3,000.00	.5%
Interest Income	1,800.00	2,500.00	.4%
1998 Audited Excess Revenues		10,767.00	1.8%
TOTAL INCOME	\$628,655.00	\$618,118.00	100%

*(including approximately \$13,000 in one-time gifts)

II. STRATEGIC GOALS (non-monetary goals impacting success of plan)

- 100% giving by the board of directors, executive director, and key staff (92% giving was achieved in previous FY).
- 100% participation by board in some fundraising task, including cultivation of donors (65% participation was achieved in previous FY).
- Enhanced communications re: fund development within the board and with prospects, including regular presentations at board meetings by fund development chair.

- Develop plan for ongoing recruitment/training of fundraising volunteers.
Recruit a minimum of ten non-board volunteers to work in fund development.
- Develop new prospects for both personal solicitation campaign and direct mail solicitation; cultivate family foundations/trusts.
- Strengthen donor cultivation program and board and staff understanding of the purpose and process of cultivation.
- Actively involve staff, volunteers and board in special events and fundraising activities (e.g., direct mail-outs, 5K, Mardi Gras, volunteer recognition evening, Birdies for Charity, in-kind contributions such as graphic design/print work for direct mail and publications, etc.)
- Strengthen coordination between the community relations and fund development committees to further support fundraising efforts.
- Maintain systems for ongoing monitoring/evaluation of progress in all areas of fund development.

III. SOLICITATION STRATEGIES

A. Annual Campaign and Major Donations Activities

1. Board and Staff Solicitation (Chairs: Board Pres, Fund Dev.Chair)
Time Frame: Annual Campaign - September-December, 2012
of Prospects: 32
Goal: 100% giving; \$7,000 (Amount raised in previous FY: \$7,800)
Method: Personal solicitation. Request amounts based on donor history (one-time annual giving in lieu of multiple direct mail solicitations; these individuals will, however, get notice of special events.)
Solicitors: President and Fund Development Chair
2. Individual Solicitation (Chair(s): Name(s), with 12 team solicitors)
Time Frame: Annual Campaign - September-December, 2012; major donor relationship-building activities throughout the year
of Prospects: 250-275 top individual donors, Advisory Board, family trusts/foundations
Goal: \$30,000; 60% renewals, 15% gift upgrades (\$28,500 received/pledged for FY 2011)
Method: Personal solicitation by board and non-board volunteers (one-time annual giving in lieu of multiple solicitations.)
Solicitors: (names)

B. Special Events

1. CASA 5K (Walk Chair: Name)

Time Frame: May 6, 2013

Targeted # of Walkers: 100

Goal: \$16,000 gross/\$14,800 net (FY 2011 Walk grossed \$16,100)

Method: WOM by staff, board and volunteers, news articles in local/regional papers, advertisement, radio spot and TV PSAs, post on website and Facebook page

2. Mardi Gras Ball (Chair(s): to be named)

Time Frame: February 2013

of Prospects: 50 individuals (previous attendees/invitees, new)

Goal: \$17,000 gross/\$9,500 net; 350 guests, volunteers, and board (\$14,000 raised by 2011 Mardi Gras Ball)

Method: Personal requests from staff and board, close interaction with SCBTS coordinators, monthly newsletter announcement.

C. Direct Mail

Each direct mailing will have a different theme to encourage multiple gifts and to reach individuals with varied interests. Direct mailing is responsibility of fund development chair.

Federated Campaign Mailings:

Letter to previous donors through United Way, Day of Giving, and CFC campaigns to encouraging renewal in the 2012 campaign and possible gift upgrade.

Time Frame: August-November 2012

of Prospects: 500 previous donors (including board members who choose to contribute through the donor option program)

Goal: United Way: \$35,000; 75% renewal, 15% upgraded gifts (\$34,000 raised in most recent campaign) DoG & CFC:\$7,000 (\$7,300 raised in most recent campaign)

Method: Mailings; newsletter articles, publicity in workplaces.

Direct Mail

Time Frame: December, 2012

of Prospects: 2,500 (1,000 new)

of Donors: 200

Goal: \$8,000; 60% renewal, 15% gift upgrades, 5% new donors (\$8,000 raised in most recent CASA holiday drive)

Method: Mailing with remit enclosure; follow-up articles in newsletter; holiday mailing possibly signed by board members/staff/volunteers. Follow-up mailing to major donors in previous campaign who have not renewed their gift.

Direct Mail

Time Frame: April-May, 2013

of Prospects: 3,000 (1,000 new)

of Donors: 200

Goal: \$8,000; 60% renewal, 15% gift upgrades, 5% new donors (\$6,000 raised in 2011 friends of CASA drive)

Method: Mailing with remit enclosure; follow-up articles in newsletter; and follow-up letter within one month to non-respondents (if staff resources permit). Mailing possibly signed by selected board members and volunteers. Follow-up mailing to major donors in previous campaign who have not renewed their gift.

D. Government and Foundation Grants

Time Frame: On-going throughout the year

of Reports: 165

of New Prospects: at least 10

Goal: \$365,528: 9 government applications; \$30,000: 15 foundation proposals; \$65,000: United Way Grant (include in Fed. Campaign Total)

Method: Finance Director and relevant program staff prepare grant applications.

IV. Cultivation Strategies (Making "Friends")

The purpose of cultivation is:

- 1) To add prospects to our donor base and develop them to become active supporters and regular donors; and
- 2) To improve relationships with current board members, donors, volunteers, and other friends of CASA to build a greater understanding of how they can help us achieve our mission.

Donor and volunteer recognition are critical to the cultivation process. Cultivation needs to be discussed regularly at board meetings to encourage each board member to become part of the cultivation process.

A. Open Houses:

This is a responsibility of the P.R. Committee; chair(s) to be named through that committee.

Time: Twice per year: December, 2008 (Donor Recognition)
and April, 2009 (Volunteer Recognition)

Goal: Appreciation evenings at CASA for donors and volunteers; opportunity to see facilities, meet staff, volunteers and board; recruitment of potential volunteers; and cultivation of potential donors.

Method: Special mailings with invitations; newsletter articles; public announcements; personal invitations by board.

Responsible: staff, board and volunteers

B. Communications

Holiday Card: Holiday card to 300 friends and major donors (not a solicitation)

E-Newsletter: 6x per year. Sent to agency mailing list (3,500+) provides regular updates on agency programs, legislature updates, activities, and special events. Mailing list includes funders, donors, volunteers, local colleges/universities, elected officials, other agency executives, and service providers.

Annual Report: Annually to coincide with September 1 fiscal year. Mail in September. This is a major communications tool sent to government and private funding sources, large donors, agency executives, and public officials, and is submitted with most proposals and requests to large donor prospects.

CASA Yearbook: Another major communications tool featuring success stories. Distributed at annual Recognition Evening and mailed to major corporate sponsors of event and major ad-takers, major funding sources as well as new prospects.

Other Publicity/Public Relations: A separate public relations plan will be developed by P.R. Committee to help reinforce cultivation efforts of this Fund Development Plan. A close communications linkage between the Fund Development and P.R. Committees needs to be maintained to adequately support the objectives of the Fund Development Plan.

V. Monitoring the Fund Development Plan and Process

- The Development Committee will meet 6 times a year to review the progress of the plan and, with development staff, will identify problems and solutions.

- Development staff and committee chair will discuss development issues on a regular basis.
- Committee chair and development staff will monitor sub-committee chairs; committee chair will follow-up re: problems.
- Development Committee will discuss fund development plan and progress at monthly board meetings.
- Development staff will provide financial and statistical data with which to help evaluate progress of the plan.

VI. 2012 Fund Development Calendar

NOTE: Include a fund development calendar with specific monthly meeting agenda items that include future event planning , donor updates and plans, action steps, fund development goal attainment and review of completed actions/events

Values of a Volunteer-Centered Culture

1. Our mission is **volunteer dependent**. Staff-provided advocacy is inherently less valuable than advocacy provided by volunteers and our program reflects this value through our engagement with volunteers, our policies and procedures, regular measures of volunteer satisfaction and by adherence to related standards.
2. We create a welcoming and supportive environment for our volunteers through positive interaction with all staff and board members. We have a well maintained office with space and equipment dedicated to volunteer use. We respect and value the time our volunteers dedicate to our program and offer our assistance wherever and whenever needed.
3. Our recruitment plan is team-developed and implemented by many. Recruitment training is incorporated into staff time, board meetings and volunteer in-service. Care and consideration of the needs of prospective volunteers provide the foundation of our recruitment activities.
4. Pre-Service training is conducted regularly, and at times and locations convenient to participants. Staff members who work directly with volunteers participate in pre-service training. Our trainers have completed National CASA's Training of Facilitators for the National CASA Pre-Service Curriculum. Volunteers completing our pre-service training are prepared for the work of advocacy.
5. Volunteers are coached by staff members who are competent in areas related to advocacy **and** volunteer management skills. Staff members regularly consult with supervisors regarding their work with volunteers. Coaching includes guiding volunteers toward effective advocacy at every level, constructive methods of addressing conflict with volunteers, assessing performance and assuming ownership of a volunteer's tenure.
6. Our leaders work proactively with stakeholders to assure volunteers are able to perform their duties without undue interference and are treated with respect.
7. We regularly solicit feedback from our volunteers regarding their experiences with our program. We utilize this feedback to improve practice whenever possible.
8. We understand the dynamics of secondary trauma when working with abused or neglected children and we offer support to our volunteers as appropriate, including periods without a case, when requested.
9. We invest in our volunteers by encouraging them to play an increasing role in the success of our program through legislative advocacy, specialized advocacy service, advisory committees, mentoring roles and other non-advocacy opportunities.
10. We continuously recognize and extend our appreciation for the work of volunteers through our every day interactions and special celebrations. We understand that our program would not serve children without them.

Volunteer-Centered Culture Assessment

Volunteer-Centered Culture

Volunteers represent the critical means by which every CASA program's mission is best realized. Ensuring a program culture that clearly communicates the value of volunteers is the responsibility of every CASA program staff member. A volunteer-centered culture isn't just a best practice for recruitment and retention, but the very basis for quality advocacy and a healthy, growing program.

There are many different ways to go about conducting an assessment of your program's culture. It's important to look at all aspects of program functioning in light of the messages conveyed to potential and current volunteers. And because culture in any organization tends to change and shift over time, assessing and enhancing volunteer-centered culture should be an ongoing and ever present process.

The following ideas are not meant to represent an exhaustive list. Develop your own assessments as a staff team, with board members and with your volunteers.

Assessing/Enhancing Volunteer-Centered Culture in Your CASA Program

□ **Advocacy Impact**

Do your program policies and procedures reflect the significance you place on volunteer advocacy related to:

CASA/GAL appointment (GAL) case assignment (policies allow for matching of volunteer to case, timely appointment) court appearances (court schedule makes appropriate use of volunteer time, volunteers actively participate) court reports (changes aren't made without volunteer notice and discussion, CASA reports are referenced in court) stakeholder interaction (volunteers initiate conversations/meetings as appropriate)

Seek regular input from volunteers regarding the difference they feel they make on their cases and ways program staff and/or policies can promote or enhance the impact of their advocacy efforts.

□ **Staff**

Seek volunteer feedback regarding the engagement, friendliness and comfort level when interacting with various CASA staff members.

Include a focus on volunteer-centered culture in employee orientations.

Help all staff members understand their important role in contributing to the volunteer-centered culture.

Provide regular professional development for staff who work directly with volunteers in effective advocacy coaching, communication, support and conflict resolution.

□ **Data**

Compile and analyze statistical data that shows your program's growth in volunteers assigned for the previous 3-5 years. Include retention, volunteer demographics and volunteer to case ratio averages. What may the numbers tell you about your program's volunteer culture?

□ **Phone**

Often times, the phone is the first personal contact between your program and a potential volunteer. Use the attached Recruitment 360° (R360°) Telephone Assessment at least 2 times annually.

□ **Website**

Seek regular outside feedback on the user-friendliness of your website, particularly as it applies to potential volunteers. Use the attached R360° Website Assessment Tool. Use technology to help current volunteers with ongoing program requirements, such as contact forms or tracking in-service hours. Use social media to keep volunteers engaged and invested.

□ **Office Space**

Ask several people to complete the R360° Virtual Office Tour. What stands out as a potential barrier to volunteers feeling comfortable at your office? What can you do to address such barriers? Do you provide dedicated space for volunteers to use when working in the office?

□ **Communication**

Assess all program communication (print, newsletters, volunteer application, pre-service information, business forms, email signatures, etc.), paid and earned media coverage, event and themed PR (child abuse awareness month, 5K, etc.), and other forms of communication to volunteers, staff, board members, stakeholders and the community. How do you communicate the value of CASA volunteers?

□ **Inclusion**

In what ways does your culture reflect the value of inclusion and diversity to volunteers, including diversity in race and ethnicity, gender, age, socioeconomic status and education? Has your volunteer recruitment process been evaluated from these different perspectives?

□ **Training**

Through regular evaluations of both pre-service and in-service training, programs have the opportunity to continually improve and enhance the volunteers' learning experience, leading to both an increase in quality advocacy for children and retention of the tenured volunteer. Use end of training evaluations provided by volunteers to collect this information and make regular tweaks to times, places, modes and formats of required training.

□ **Volunteer Exit**

As volunteers leave your program, regardless of the reason, you are presented with a rich opportunity to gain insight and feedback about their experience. Develop an exit survey, conduct one on one interviews when possible and make it easy for volunteers "moving on" to tell you the *real* reasons they are leaving your program.

Sample Volunteer Survey of CASA Program

A primary goal of our CASA program is to support all volunteers in the best way possible as they advocate for the children they are assigned. This brief survey will allow you to give valuable feedback to our program staff and board and will help us improve our overall service to children. Your answers are confidential and you will not be asked to provide your name with the survey. Thank you again for helping to strengthen our program and for the critical role you play in the lives of abused children.

1. How long have you served as a CASA Volunteer?

- Less than 1 year
- 1-2 years
- 3-4 years
- More than 4 years

2. Please rate the following elements of the CASA program:

	Strongly Agree	Agree	Disagree	Strongly Disagree
I feel adequately trained to serve as a CASA volunteer.				
I receive adequate supervision and support from CASA staff				
My CASA supervisor respects my role and knowledge of my case.				
I am comfortable making recommendations about my case.				
I feel prepared to write court reports and testify at court hearings.				
I believe the judge reads and considers my court reports.				
I feel like my opinions are taken seriously by parties to the case.				
I am able to work well with CPS staff.				
I feel I am making a difference for the children I work with.				

Comments:

3. Please rate the following elements of the CASA program:

	Strongly Agree	Agree	Disagree	Strongly Disagree
CASA staff are responsive to my needs as a volunteer.				
Communication with CASA staff is timely and professional.				
I feel comfortable bringing a problem or concern about the program to CASA staff.				
CASA staff keeps me informed of resources and information that may be helpful to me.				
I feel challenged to grow and develop further within my CASA program.				
I feel valued by my CASA program staff.				
I feel valued by my CASA program board of directors.				

Comments:

4. What changes or improvements would you like to see in the CASA program?

5. Please indicate your overall satisfaction with the CASA program:

- Very Satisfied
- Satisfied
- Somewhat Dissatisfied
- Very Dissatisfied

Comments:

Recruitment 360° Assessments

RECRUITMENT 360° **Telephone Assessment**

Exchange program phone numbers with another team. One person on each team will place a phone call to each other's program. If the phone has speakerphone capability, use it so your team can listen.

If you are able to speak directly with someone, tell them you heard about CASA from an AARP magazine article and you were interested in getting some information about becoming a CASA volunteer. Please note the following during the call:

1. How many rings until the phone was answered?
2. Was the phone answered by a person or a machine? (If person, skip to question number 7. If machine, answer the following four questions.)
3. Were you able to clearly understand the voice message?
4. Would you rate the message as short, medium or long in length?
5. Was it easy for you to reach the extension you wanted?
6. If the message directed you to leave a message because no one was able to answer the call, did it give you a website address for more information?
7. If the message directed you to leave a message, did it indicate when your call would be returned? (If the machine directed you to leave a message, hang up and skip to question)
8. Was the voice answering the call warm, friendly and easy to understand?
9. Were you directed to another person after your request?
10. Describe what happened next:
11. Thank them and tell them you will be in touch. Do not ask for anything to be mailed to you.
12. What was your overall impression of the call? Would you be willing to take another step with this program?

RECRUITMENT 360°

Website Assessment

Content

Logo/Name Recognition

Does the website use the new logo (blue man with heart)? Yes No

Is the word CASA used on the website? Yes No

Mission Statement

Is a mission statement on the homepage? Yes No

If present, is the mission statement clear and easy to understand? Yes No

If present, is the mission statement on the home page? Yes No

Donations/Fundraising

Does the website provide easily accessible donation information? Yes No

Contact Info

Is contact information, including telephone and email listed and highly visible? Yes No

Facebook Accounts

Does the website link to a Facebook page? Yes No

Volunteer Information

Is information for potential volunteers prominent on the website? Yes No

Does the website include a job description or roles and responsibilities for volunteers?

Yes No

Does the website include a downloadable application for volunteers? Yes No

Does the website clearly identify the next steps a potential volunteer should take?

Yes No

Volunteer Training

Does the website describe pre-service training for volunteers? Yes No

Does the website include a training calendar or dates of upcoming training? Yes No

Does the website have information about in-service training? Yes No

Resources

Does the website include a resource section for current volunteers? Yes No

“Real Life” Features

Does the website feature actual volunteer stories or children’s stories? Yes No

Does the website feature actual stories via video? Yes No

Usability

Navigation

Does the website have a search feature? Yes No

Does the website include links to National CASA and Texas CASA? Yes No

Are links on the website all working and appropriately named? Yes No

User Control

Does the website have easy to load pages, with limited large pictures or graphics?

Yes No

Web Accessibility

Does the website offer both PDF and Microsoft Word versions of any downloadable documents?

Yes No

Language and Content

Does the website avoid the use of organizational jargon? Yes No

User Feedback

Does the website include a way for users to provide feedback via the internet?

Yes No

Does the website have automatic emails to staff? Yes No

Website Architecture and Visual Clarity

Are pages on the website easy to read, with appropriate text divisions and appropriate breaks in text to increase readability? Yes No

Number of Boxes Marked Yes

Number of Boxes Marked No

Recruitment 360° **Virtual Office Visit**

People make judgments about your program based on many things. But one very important and often overlooked thing is your office space. We are trained to think with our eyes, ears and nose.

Visualize your CASA office. If you have more than one, split them up within your team. Imagine approaching your office from a parked car to your office door and then inside. Include individual offices, volunteer space, kitchen, training area and restrooms. Identify 5 positive things you see and 5 things that could be perceived negatively.

Positive

- 1.
- 2.
- 3.
- 4.
- 5.

Negative

- 1.
- 2.
- 3.
- 4.
- 5.

Questions to Consider:

- Is your office easy to find? If not, can you make it easier? Include a prominent landmark, or directions with every communication.
- When someone parks their car, is it very clear where they are supposed to go next?
- If you asked 10 strangers to rate the safety of the location of your office between 1-10, what do you think your average rating would be?
- What is the first thing someone sees when they enter your offices?
- Non-profits typically office in old and run-down spaces. If that describes your office, is it at least clean? Does it smell inviting?
- What do the individual offices and desks say about the professionalism of your organization?

List 3 things your team could do in the next 30 days to improve your office space.

- 1.
- 2.
- 3.

Volunteer Recruitment Team Considerations

Forming a Volunteer Recruitment Team or Committee is one way to accomplish a great deal with limited resources. Recruitment plans are best created by teams of people who understand the CASA role, the desired attributes of the CASA volunteer and creative ways to reach their audience. Even in programs where paid recruitment positions exist, recruitment planning can and should occur within the context of a team. The team dynamic further emphasizes the concept that recruitment isn't a "job" within a CASA program, but an integrated, shared and ongoing set of strategies, practices within a volunteer-centered culture that's critical for finding and keeping the very best CASA volunteers.

Team Formation-Who

Team members can include the ED, PD or recruitment staff, board members and volunteers. You can also consider members of your community that might be able to assist; a representative from a faith community, media or PR people and perhaps others who can't be a CASA volunteer or board member but are interested in seeing your program grow. Your board may be able to generate ideas for members.

Programs engaged in growth planning will already have assembled such a team for the purpose of planning for growth in the critical area of Community Engagement. These same people may be the perfect team members for the ongoing Recruitment Team, or you may need to recruit additional people for this longer commitment.

Team Formation-How

Forming a Recruitment Team can happen in a number of ways. The board may choose to appoint a board committee to this task, and invite additional outside members to serve. Or they may create an advisory committee, with board membership, but without the structure of a formal board committee. An ED may choose to convene the Recruitment Team and recruit members, including staff, board and volunteers. Regardless of how the team is formed, it will require clarity in purpose, expectations of service and lines of authority for the work to be valued and effective in achieving recruitment success.

Note – Some programs may choose to convene one team for both recruitment and retention, as there are many activities that can serve both purposes. Consider the amount of work needed in the area of recruitment alone as part this decision. Programs with ambitious recruitment goals may be better served by maintaining the recruitment only objective of the team.

Recruitment Team Charter

As with any committee or team formation, a clear scope of work and responsibility is important. A charter serves to outline the objectives, roles, responsibilities and accountability for the Recruitment Team. The charter should include:

- Purpose statement- what is the primary purpose of the team?
- Expectations of membership- time and effort expectations including length of service, time commitment per month/frequency of meetings, sample activities and actions
- Team structure- size, leadership

Commitment statement
Clear definition of time commitment, including the number and frequency of meetings
Texas CASA Strategic Growth Planning Assistance Timeline

The charter or scope of work document should also include reporting expectations and a statement clarifying the interaction between the GPC, staff members and the board as they carry out their work.

Sample Charter Language

Purpose:

The Recruitment Team of CASA of XYZ is formed for the purpose of planning and implementing effective recruitment strategies, designed to increase the number of volunteers serving children in our community.

Membership:

The Recruitment Team is made up of CASA of XYZ staff members, board members, volunteers and outside stakeholders, as selected by _____. Members commit to serving on the team for a period of 12 months, at which time members may opt to serve an additional 12 month term.

Responsibilities:

The Recruitment Team will be responsible for the following activities:

1. Provide ongoing assessment of organizational functions as they impact recruitment
2. Using the training and organizational event calendar, select and recommend effective recruitment strategies to support the annual recruitment goals (i.e. word of mouth, media, events, advertising)
3. Assist with implementation of approved recruitment plan activities

50 Recruitment Best Practices from R360°

1. Annual training calendar
2. Next training date on everything; email signature, voicemail, newsletters, Facebook
3. Review and update all print materials-are they professional looking? Enough but not too much information?
4. Earned media; letters to the editor, news hooks, events, human interest stories
5. Don't just speak to groups- become a member, or find a member who will do the speaking
6. Recruitment and retention team that meets regularly and includes staff, volunteers and board members
7. Task oriented planning
8. Targeted recruitment strategies; identify what you are looking for versus warm body
9. Kappa Alpha Theta
10. State agencies
11. CEUs for teachers and education professionals
12. Omega Delta Phi
13. Texas Nurses Association
14. Corporate partners of CASA in Texas: Blue Cross Blue Shield, Time Warner, Grande Communications, Wells Fargo, Southwest Airlines, IBM, AT&T Pioneers, Superior Healthplan
15. Train on WOM every year
16. Conduct a different 360° assessment every month and make changes
17. Signage!
18. Review and update your website
19. Use social media to its fullest
20. Bill inserts
21. Bright, eye catching t-shirts with website in large letters
22. WOM cards
23. WOM practice sessions for board members
24. Engage board members in recruiting!

25. Large group orientation sessions to thin the herd
26. Track every recruitment contact; ask how they heard; follow-up
27. Review and update your recruitment packet -application, info sheet, forms
28. Host an open house and invite the "neighbors"
29. Party with a purpose, and invite others to do so
30. Incentivize recruitment! Hold contests, have prizes, keep tallies, publish winners
31. Develop non-advocacy volunteer opportunities within your program
32. Evaluate your training; attend TOF; survey for effectiveness
33. Offer training at different times, places, length
34. Ask your judge to recruit volunteers
35. Invite everyone to swearing-in ceremonies
36. Have "bring a friend" night to an interesting in-service training
37. Co-CASAs
38. Mentoring or support programs for new volunteers
39. Recognize employers of current volunteers with certificates, awards
40. Pre-stamped postcards
41. Send out DVD with info packet
42. Coffee talks
43. Street banners
44. Local airing of PSAs
45. Do a live radio segment each week/month
46. Develop a CASA story to tell
47. Review and revamp your pre-training interview process
48. Strive for professionalism in your program-it's attractive to those choosing among many worthy organizations
49. Get your board members busy recruiting
50. Share and discover best practices within the CASA network

Targeted Volunteer Recruitment Campaign

Note: This campaign includes a variety of samples and tips as part of a targeted volunteer recruitment campaign designed to increase volunteer recruitment within the African American populace. It can be tailored to any demographic group as your program determines its needs.

Step 1: Identifying Your Need

Determine a specific demographic to target by first examining your program's data. Take the necessary time to analyze and compare the children in care in your community and your CASA volunteers.

1. How many **CHILDREN** is your program currently serving? ###

Male: ###, Female: ###

- a. Hispanic: ###
- b. African-American: ###
- c. Caucasian: ###
- d. Asian: ###
- e. Other: ###

2. How many **VOLUNTEERS** are in your program? ###

Male: ###, Female: ###

- a. Hispanic: ###
- b. African-American: ###
- c. Caucasian: ###
- d. Asian: ###
- e. Other: ###

Compare the numbers and percentages to see where your program struggles the most. It's most effective to focus on volunteer recruitment in only one ethnic group, as this type of targeted recruitment involves a great deal of unique strategizing. However, targeting both an ethnic group AND males is encouraged.

Sample Statewide Demographic Analysis

	Children in Care	CASA Volunteers	% in Care	% in CASA	Ratio (child/advocate)
Hispanic	6,545	928	38%	13%	7.05
African-American	5,199	588	30%	8%	8.84
Caucasian	5,044	5,339	29%	75%	0.94
Asian	59	69	0%	1%	0.86
Native American	51	25	0%	0%	2.04
Other	285	72	2%	1%	
Unknown	0	56	0%	1%	
Total	17,183	7,077	100%	100%	

For every 1 Hispanic Advocate, there are 7.05 Hispanic children in care.

For every 1 African-American Advocate, there are 8.8 African-American children in care

For every 1 Caucasian Advocate, there are .94 Caucasian children in care.

For every 1 Asian Advocate, there are .85 Asian children in care.

For every 1 Native American Advocate, there are 2 Native American children in care.

Step 2: Target Market Research

Once you have identified the target market, you need to gain a better understanding of the audience. You will want to understand their current perceptions of the CPS system, CASA children and families. You also want to gain more insight into the best approaches to engaging with the community.

There are two approaches to gaining more insight into your target audience. For both, you must first identify influential leaders and active members in the community. These are the people you want to connect with first. Remember you are only LISTENING right now. You are not trying to recruit volunteers yet. However, you are still trying to build relationships and put your best foot forward.

In-Depth Interviews

These can be done by phone or in-person, although in-person is preferable. Even though you are not trying to pitch CASA yet, you are trying to build relationships. In-person interviews allow for you to really get to know the person and engage with them. Over the phone is fine if the person is unable to meet in person.

In-depth interviews are one-on-one and best if you have personal questions to ask. Respondents may be more honest and open when they are just talking to one person. The more interviews you do the more perspectives you gain. Aim for at least nine individual, in-depth interviews if this is the only form of research you are using.

Ask open ended questions about their opinions of CPS, if they have heard of CASA, what was said about the program and so on. A script is provided but interviews are flexible. A participant may answer multiple questions before you even ask them. Also be an active listener. Ask follow up questions to their answers. Interviews often veer from the script but this is a good thing as long as you are gaining insights about the community. It means you are having an actual conversation with the participant and learning more about their community.

Focus Groups

The purpose of focus group is to bring many of the leaders and members of the community together to discuss their opinions. This approach is beneficial because you get many insights in a short amount of time. Also, the members of the focus group often feed off of each other and may become more open and comfortable in a group setting of their peers. Keep questions general and open to everyone.

Focus groups sometimes require more effort. Make sure that all participants are actually participating. Occasionally there is one person who becomes a **dominator** of the conversation. Do not let this person become the only one to respond as they may force their opinions onto the others. It is fine to ask **direct follow up** questions like “do you agree?” or “what is your take on the suggestion?” to certain people. Pay attention to those who are more reserved and try to engage with them.

Focus groups should have at least five participants but no more than ten. It is best to have at least two separate focus groups but you can mix and match strategies: one focus group of six people with one or two in-depth interviews. Because you are interviewing multiple people at one time, you need to ask fewer questions than in an in-depth interview. Try to pick the most important questions.

For an in-depth interview, 30-45 minutes is a good time frame. For a focus group with more people, you should aim for an hour.

Make sure all interviewees sign a release form but let them know their names will not be reported or released. The sessions are strictly for the program’s benefit.

Tip: Come prepared with a long list of questions but mark or rank them from most important to least important to ask. This allows you to be more flexible. If you start running out of time, you know which questions you can skip and which to focus on.

Tip: For both types of interviews, it is best to record the discussion. Any recording device is fine but make sure you tell the interviewees that the session will be recorded.

Focus Group Script

Hello, my name is *your name* and I am the *your position* at *your CASA program*. I will be leading today's focus group. To start off, I want to thank all of you for donating your time. Your insights and opinions will help us gain a better understanding of the African-American (*or other demographic*) community.

At *CASA program*, we are developing a new outreach campaign to reach the African-American community. We are trying to gain more insights into the best methods and channels we need to use to effectively reach this audience. We will be asking open ended questions to the group. Please feel free to add on to other people's answers or to ask your own questions. This is an informal discussion and all contributions are welcome. Also, if at any time you feel uncomfortable by a particular question you are free to refuse to answer it.

We estimate that the session will last 45 minutes to an hour. The session is also being recorded. This is for our program's use only and will not be released.

Now I would like to start by having everyone introduce themselves. Please state your name, occupation and organization you are a part of.

Thank you again for joining us. I will now open up the discussion. I will start with a question and you are free to answer however you wish, whether it is fact or opinion, and we will let the conversation start from there.

Questions:

1. Outside of your home and work, where do you spend most of your time?
 - a. Why that place?
 - b. How did you find out about this place?
2. What is your main news source? (newspaper, TV, online, magazines, etc.)
 - a. Where/when do you most often look at the news?
 - b. Are you more interested in local, state or national news?
 - c. What kind of stories are you most likely to read all the way through?
3. Whose recommendations/opinions do you most listen to? (co-worker, boss, neighbor, spouse, reverend, etc.)
 - a. Why do you trust their recommendations?
4. Have you ever been approached by a nonprofit organization?
 - a. Were they seeking donations or volunteers?
 - b. Did you participate? Why or why not?
5. Have you ever participated in volunteer work?

- a. When? For how long? Why that organization? Are you still there? Why or why not?
 - b. How did you find out about the volunteer work?
6. How would you like for an organization to approach you? (more than just by the phone, in-person or through the mail; looking to see what channels appeal to the audience the most)
7. Where would you like an organization to approach you?
8. In your opinion, what is the most effective way for an organization to spread their message?
 - a. Why?
9. Have you ever heard of Court Appointed Special Advocates before this focus group?
 - a. What do you know?
 - b. Where did you hear about it?
 - c. Based on what you know, what do you think the organization's strengths and weaknesses are?
10. What are your opinions on Child Protective Services (CPS)?
 - a. Why?
 - b. How did you come to those opinions?

In-Depth Interview

Follow script above but make it more conversational since this a one on one discussion. If you are doing the interview by phone, condense the interview to 20-30 minutes. Also since this is one on one, you may ask more personal questions but do not make them direct.

Examples:

1. Do you know of anyone who has been involved with CPS?
 - a. What do you know of their story?
2. When you hear about CPS, what emotions/attitudes/thoughts come to mind?

Evaluation

For both in-depth interviews and focus groups, the evaluation process is relatively the same. Look over the transcripts and pull any information that you feel is important. These become your **key insights**. These insights are specific observations from the interviews that may impact the campaign. Insights can be new information or act as support for your own preconceived notions. There is no limit to the number of insights you identify.

From your list of key insights, look for trends or general statements that have a big impact. These become your **critical issues**. Critical issues act as barriers that keep you from attaining your goals. Later on, we will use different strategies to overcome these barriers.

Sample Evaluation

Key Insights:

1. Many of the interviewees knew of someone who had been involved with CPS.
2. When discussing CPS, the interviewees expressed negative opinions.
3. Few of the participants previously knew of CASA and the program's mission.
4. Many of the interviewees are active members of churches.

Critical Issues:

1. The African-American community knows very little about CASA and their mission.
2. The African-American community values recommendations from close friends and family above other channels.

Step 3: Develop Goals and Objectives

You need to decide what you are trying to achieve through this campaign. This will help you benchmark where you currently are so that you can see if the campaign is effective. To do this you will set goals and objectives for the campaign.

Goals:

Goals are more overarching with a unifying aim. They ask, "What do you want to achieve?" These are often more general but act as the base of the campaign. You want to have 2-3 goals and everything you do within the campaign should relate to your goals.

Examples:

1. Spread awareness about CASA among the African-American community and leaders.
2. Recruit more volunteers for CASA that better reflect the children served.

Objectives:

Objectives relate back to goals but are quantifiable and can be short term or long term. Don't be afraid to set high objectives. It is better to aim higher than to aim low.

Examples:

Short Term:

1. Recruit 30 new volunteers by end of campaign.
2. Increase percentage of African-American volunteers by 10 percent by end of campaign.

Long Term:

3. Retain 50 percent of our new volunteers for a second year.
4. Balance percentage of male and female volunteers over next 3 years.

Step 4: Strategies

Strategies are how you will achieve your goals and objectives. Some can be quick and simple while others will be more detailed and time consuming. We encourage you to use as many of the following, as well as developing your own. Make sure your strategies are working towards your goals and objectives.

Strategy 1: Publicize CASA's need for volunteers through media outlets that target our audiences.

Types of Media:

- **Print:** Community Newspapers and Magazines
- **Online Media:** Community news pages, organizational websites, community event pages
- **Radio:** Most effective with Hispanic community, but great way to share PSAs and stories

Newspapers:

The following tips come from an African American owned newspaper in Dallas called Elite News:

- Send information in e-mail form.
- **Reciprocity:** If you are trying to get your message into an African-American community you will need to be supportive of the community. This includes the newspaper.
- Be very clear of who you are - person telling the story needs to know the history of your organization.
- Remember: Who, What, When & How.

- If making announcements, make the story personal.

Radio:

- Be Persistent, Be Smart & above all, **Be Nice**.
- Be very creative – Remember this is radio so sound is very important.
- You need to be **the expert** on what your organization does.
- Know who to contact (radio editors will assign events).
 - Don't call the General Manager
 - Find out the best way to correspond (phone, e-mail, fax, etc.)
 - Be timely – Notify radio stations **at least 2 months in advance** of an event.
- News coverage stations may be easier to get on.
- You will receive the most coverage during the hours of 5a-1p. You will have to get up early!!!
- If you see something in the news that relates to your organization – CALL. For example, if there is recent coverage about abuse in your city.
- Know what press releases attract attention- submit press releases at least 3 weeks in advance for the radio station to research.
- PSA's – radio station may do interview or even cover the event.
- Develop relationships-make a list of contact people.

Tactics for Reaching Media:

- **News releases:** Use the template provided and add your CASA's information. The focus should be on volunteer recruitment and your launch of the campaign.
 - **Stay away from biased language and adjectives. Often news releases get ran "as is" so you want to make the reporter's job as easy as possible.**
 - **Use this to announce the launch of the campaign or for hosting an event.**
- **Pitch Letters** are used if you have a story you want the media to use. Make sure the CASA volunteer and people involved in the story provide release forms before you pitch the story.
 - **Use for a story or for your event.**
 - **Offer the media something of value like an interview with the volunteer. suggest photos. They do not have to be the real children from the case.**
- **TIP:** With both the news release and pitch letter, also send a media facts sheet. It shows the problems in your community and offers information to the journalist in a fast, easy read instead of taking away from your story.

- **Phone Calls** are also a great substitute to news releases and pitches. This way you can give the reporter options on what they want to write about. This also helps build a relationship so that you can continue to work with them in the future.

Sample News Release

FOR IMMEDIATE RELEASE
(DATE SENDING OUT)

CONTACT INFORMATION:
YOUR NAME
Executive Director
YOUR Phone number
YOUR email

(NAME) recruiting African-American volunteers to serve abuse and neglected children

City, State --- (Your CASA Program name), a local nonprofit that speaks up for abused and neglected children in foster care, is launching a new campaign to reach more volunteers to help African-American children in care.

(Your CASA name) will be launching a new campaign to recruit African-American and male volunteers in an effort to provide each child with a Court Appointed Special Advocate or CASA that they can connect and relate to on a better level.

A CASA or Court Appointed Special Advocate is a volunteer who serves the child by providing the judge with information about what is in the very best interest of the child. Each CASA acts as the eyes and ears for the judge but also provides a voice for the child.

“We want each child to have a voice and solid role models they can relate to. Right now, the numbers are not on our side, especially when it comes to the African-American children in the system,” says (executive director’s name), the executive director of (CASA name).

Statewide, of the children in foster care, 21.3 percent are African-American and 50.9 percent are male. Of the 7,000 CASA volunteers, only 8 percent are African-American and 18 percent are male, numbers that the program would like to improve over the next year.

“The impact of being in the system without a CASA is devastating for these children,” said (E.D.’s last name). “Studies have shown that African-American children in the system are at a huge disadvantage compared to their Caucasian peers.”

These disadvantages include: being in foster care longer, having more placements and fewer services when in care, lower graduation rates and overall, being less prepared for adulthood.

(CASA name) is currently reaching out to influential leaders and groups in the African-American community as well as to churches and parishes within the county. The organization will be kicking off their year-long campaign with a recruitment event to be held **DATE and TIME** and XXXX (location).

“We at (CASA name) know we can make a difference in these children’s lives so we need more volunteers to make that a reality,” said (E.D.’s last name).

For more information about the CASA program and about becoming a volunteer, please visit: (your program website and number) and BecomeACASA.org.

SAMPLE PITCH LETTER

YOUR CASA PROGRAM
ADDRESS
CONTACT INFORMATION

DATE

Media Contact's Name (John Smith)

Title (Editor)

Publication (The Daily)

Address

Dear Mr. Smith:

A happy moment for one mother turned into a nightmare when her newborn daughter was taken by Child Protective Services, but through the support of a Court Appointed Special Advocate (CASA), the mother and child's life were forever changed.

The mother had previously lost custody of her three children before turning her life around. Years after overcoming her addictions and finding a stable job and home, she found herself pregnant once again. During her delivery, she mentioned her history with CPS who was then called by a nurse. The newborn baby was taken into custody and placed with a foster family.

The baby was assigned a CASA named Linda Brown who became a support system for the mother. Brown was there to offer encouragement to the mother as she worked to meet every requirement set by CPS. After several months, the mother was reunited with her baby. She still remains in contact with the CASA and CASA program. She is now in college and has even reconnected with her other children.

This story of reuniting a family is just one story of how a CASA can make a difference in a child's life. I strongly believe this story will resonate with your readers for its heartfelt struggle and happy ending. CASA of ___ is proud of the work we have done to help more families like the one above. In 2011, we served XXX children in our community. At CASA we are the eyes and ears for the judge but most importantly the voice for the child.

Your paper centers on community news and CASA is a perfect fit. I can arrange an interview with Linda Brown or another CASA volunteer to discuss some of their experiences with the program. Please contact me if you need any assistance. My phone number is ###-###-####.

I will call you on (Date and time) to see if I might be of any help on a possible CASA of ___ story. Thank you for your time and consideration. For more information on CASA, please visit our website XXXX and BecomeACASA.org.

Sincerely,

Your name

Title

For the above pitch letter, use a story from your own CASA program but follow the highlighted sections. It is important to offer them **an interview** or some access to the program so they can make the story their own. Also mention that you are aware of the paper and its audience. Make sure it is a good fit. We do **not** want to send this to a sports writer or a hard news journalist. This is soft news that needs to go to the right journalist with the right audience.

Tip: Ask your volunteers what local papers or magazines they read to get an idea of what fits with CASA.

You can also write the pitch letter about the volunteer recruitment event. This would be similar to a news release but more personal and casual.

Tip: Shape the event into a story and again offer them interviews with the speakers after the event.

Example: This Wednesday, CASA of ___ County will be hosting an event to recruit more volunteers to help African-American children in care. The event will bring together influential African-American leaders in the community to discuss the issues of child abuse in our own county. I would like to invite you to the event to learn more about the CASA program and what we are doing locally to help children in care. At the event, we will have such speakers as ___ and ___ but the real story comes from Jane, who was in foster care and had a CASA. Jane will tell her story of how having a CASA made an impact in her life for the better. After the event, I can arrange for an interview and photographs with Jane.

It is best to know who your speakers are, especially the CASA volunteers and former youth. These are the interviews that have a real story in them so be sure to highlight that in the pitch. Give enough details to make them interested and then **follow up with them** a few days after you send the pitch.

Sample Media Fact Sheet

Last year **65,948** children were confirmed as victims of abuse and neglect. **60 percent** of those children were **under the age of 6**.

More than **46,000** were in the care and custody of the state of Texas.

That means every **8 minutes** in the state of Texas, a child was a victim of abuse and neglect. By the end of the day, that is **180** children abused and neglected.

Last year, **239** children died from abuse or neglect in Texas. That means every day and a half (or 36 hours) a child in Texas dies from abuse or neglect. There were **### deaths in Your County**.

Any County Facts

3,716 children in state's care

1,478 children served by Any CASA—699 are African-American

Leaves 60% of the children without a CASA

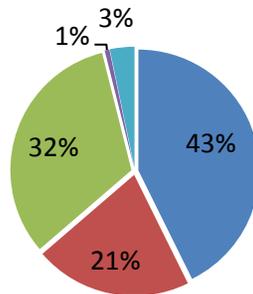
Children were served by 540 Any County volunteers – 98 are African-American

African-American Numbers

In Any County, **1,586** children were removed from their homes. **677** of these children were African-American.

Any County Children Removed in 2011

■ African-American ■ Anglo
■ Hispanic ■ Native American
■ Other



Fact sheets were created using DFPS Databook FY 2011 and FY 2011 Texas CASA Report

Using the numbers provided, we enhanced them to show the true impact. Numbers stick with people better when placed in context. Saying over 65,000 children were confirmed victims of abuse and neglect sounds like a lot but what does it really mean? It means that every **8 minutes** last year, a child in Texas became a victim of abuse and neglect. That is **180 children** each day. Putting numbers into context this way makes the numbers more effective and memorable. The example was based on state wide numbers. It is possible to do similar facts with your county's numbers.

**Be sure to add your information and CASA logo to the data sheet before sending to the media.

Strategy 2: Reach out to organizations and groups that are made up of your audiences.

Building a relationship with an organization helps the program create a stronger network. With the African-American community, you cannot approach them and immediately start pitching CASA. By creating a relationship with the organization, you will gain more than a few volunteers in the short term by instead looking to the long term. You can continue to gain support from the organization for events, promotions and continue volunteer recruitment after the campaign.

There are various professional groups, nonprofits and organizations in each county that you can reach out to. The challenge is identifying these potential networks. Start by first making contact with the head of the organization and making a connection with him/her before speaking with the entire group. This allows you to get to know the organization better so you can cater your presentation to them.

Tip: Never go in empty handed. Bring lots of informational handouts like brochures and fact cards to distribute.

Professional Groups:

These are various groups within the community or region that bring together professionals. There are different professions as well as ethnicities among groups. The members are often ideal volunteers because they are successful and established in their careers while being active in the community. Some organizations pick various nonprofits and charities to work and fundraise with.

To identify groups, start by creating a list of professions: engineers, nurses, lawyers, and so on. From there, search online or through another source for groups within the professions. Often the searches may take you to national organizations but many will have state and local chapters.

Nonprofits:

Other nonprofits are a great resource for recruiting volunteers and combining efforts. Look for organizations that work with the same demographic you are attempting to recruit volunteers. Organizations that also work with children are good contacts when spreading general awareness. Organizations that are community focused are also good candidates for volunteer recruitment.

Strategy 3: Connect with community churches.

The best way to assert your program into the African-American community is through churches. Churches are their own communities with a wide variation of people, unlike the groups and

organizations that were formed with a common interest or purpose. We will need to reach out on a personal level first. Call the pastor and set up a meeting with just him/her. This is not the time to show the power point or give a lecture on CASA. This is about making a **new connection**.

Tip: If the head pastor is not available, make an appointment with another pastor at the church. Most churches have more than one pastor and the bigger churches may have an outreach pastor. Do not limit yourself by only wanting to speak with the head pastor. Relationships take time to build and cultivate from the ground up.

When meeting with the pastor, make it a conversation. Do not show up with a sales pitch. Be sincere and passionate about your program. Also be sure to bring along brochures and rack cards. Let these tools show the facts while you speak from the heart. Bring enough for the pastor to share with the congregation if she/he so chooses.

After speaking with the pastor, ask if you can speak with the congregation. It is recommended to bring along an African-American volunteer to speak at the end of the presentation. The Chadwick PSA and video are also good tools to use.

Tip: If you have a volunteer speak, do not have them focus on their cases but instead discuss how they became a CASA and the process they went through from interviewing to training to being sworn in.

Identifying Churches:

Start by talking with your volunteers and seeing if they are already members of a certain church. This will make it easier to reach out to the pastors and congregations.

Additional Tips:

- Know protocol
- Respect beliefs
- Build relationships
- Follow up and **follow through**
- Maintain visibility

Strategy 4: Social Media

Start by selecting the main social media platforms you want to utilize: Facebook, Twitter, Google+, Pinterest, YouTube, PhotoBucket and so on. If you are already on these sites then you need to make sure they are up to date, consistent and engaging. Just posting announcements is not enough to raise awareness.

Key Elements:

Engagement:

You want to share with the public information that they can use. Publicizing events and fundraisers only work if you are bring in viewers first. Posting open ended questions are a good way to get people involved. People want to interact and share their opinions, so stay away from controversial topics. The main goal is to get people talking.

Tip: In the beginning, post questions on different days and track the number of responses. This may show that you get more responses on a certain day at a certain time.

Consistency:

It is important to be consistent with your content. Not posting anything for a week or two and then suddenly posting five different topics in one day can be confusing to viewers. They need to know when the best time to check your site instead of randomly trying. If your content is engaging and consistent then your viewers will also be consistent.

Responding:

Viewers will post comments about your program, so be prepared. Comments can be negative and positive or just simple questions. No matter what, it is important to respond, especially if there is a negative comment. Social media is about being open and transparent with your audiences so you need to be willing to address any complaints. This way you show other viewers that you are involved and you are here to listen.

Tactics:

Facebook: The fastest growing demographic on Facebook is men and women ages 45 and older. When posting, make sure you keep your audience and demographic in mind. Link to interesting articles, ask for people's thoughts on the article or a new statistic, share pictures and possible stories. Also look for other organizations and groups that you can "like." Comment on their posts and engage with them as well.

Twitter: This platform can be difficult to use if you do not have a specific approach. If you are interested in sharing stories, then focus on Facebook. With Twitter, you are limited to 140 characters so use it to link back to your Facebook page.

Pinterest: This is a new but growing platform. You start by creating boards that focus on a certain topic. Then you "pin" links to your boards. Pinterest is largely used by the female demographic of all ages. Be creative! Look at other boards and use them for inspiration.

Step 5: Record/Report

Recording and reporting the outcomes is important so that you can move forward and make adjustments to better recruit and retain volunteers. Keep track of when your program appears in the media. Look to see if there is an increase in calls or visits to the program's website in the days following the story.

The most basic way to start reporting is during presentations and meetings with organizations and churches. Instead of having a sign in sheet, bring a large bowl or box for people to drop business cards into. This way, we know that they are interested in learning more about CASA.

Tip: Some people, especially at churches may not have business cards with them. Set out stacks of basic note cards for people to write down their names and contact information.

Social media sites have tracking analysis for businesses and organizations. It is up to you to keep up with these sites and see who and how many are engaging with your program.

Additional Reporting:

It is important to track people as they move through the process of becoming a volunteer. This can be crucial if a pattern starts to develop. If you have 10 people training to become a CASA volunteer but in the end only 4 are sworn in, it is important to see the demographics. Looking at the gender and ethnicity of the people who did or did not complete the process can show insight into the volunteer process itself.

Sample Plan with Strategies, Goals, Objectives and Critical Issues

1. Publicize CASA's need for volunteers through media outlets that target the audiences.

Why: There are newspapers, magazine, radio stations, etc. that cater to specific demographics. If you are reaching out to African-Americans, look into newspapers or weekly distributions.

Goal 1: We are building overall awareness of CASA among our chosen target market through the media.

Critical Issue 2: Awareness is low among our chosen target.

2. Reach out to organizations and groups that are made up of the audiences.

Why: Similar purpose as number 1. Reaching out to other organizations, helps you connect with potential volunteers and donors. Most groups are going to consist of ideal volunteers who are community leaders.

Goal 1 and Objectives 1, 2: We are specifically trying to recruit from these groups, not just building awareness.

Critical Issue 3: The African-American community can be very connected. We need to build relationships with groups instead of trying to reach individuals. By reaching the groups, we gain more credibility and have more people to speak on our behalf.

3. Connect with community churches. **This strategy is more specifically targeted to African-American recruitment**

Why: Connecting with churches is a great way to recruit volunteers. Make sure you reach out to the pastors first and then they can introduce you to their church.

Goal 1 and 2: Pastors are often influential community leaders. We need to gain their support before reaching out to the community as a whole. This gives us more credibility and allows for us to be more effective in recruiting volunteers.

Critical Issue 1 and 3: By associating the program with churches, we can distance the program from the community's negative perception of CPS. Also, church members may be more likely to want to volunteer and help children in the community.

4. Social Media

Why: Social media sites are a great way to showcase your program while engaging with volunteers, potential volunteers and the general public.

Goal 1: We are using the sites to spread our message and the CASA mission.

5. Host a recruitment event for your area.

Why: An event is a great way to bring in community leaders as well as the media.

Sample Annual Community Engagement Planning Calendar

Annual Community Engagement Planning Calendar														
Annual Events	2013	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	2014
Pre-Service Training														
Fundraisers														
Other														
Communications														
Paid Print Advertising														
Radio/TV PSA														
Earned Media														
Billboards														
Social Media Outreach														
Print Marketing														
Website														
Newsletter														
Other														
Recruitment Strategies														
Annual Assessment initial contact, interview, office space, written materials, follow-up														
WOM														
Targeted Community Presentations														
Online Recruitment														
Partnership Recruitment (teachers, state workers, nurses, business groups, churches)														
House Parties														
Contest/Incentive														
Open House events														
Board involvement														
Other														

Sample State Agency Service Letter

March 22, 2011

Susan Jones
Director
Texas Water Development Board

Dear Ms. Jones:

I am writing to let you know about a new state law that could give your employees a unique opportunity to make a meaningful difference in the lives of abused and neglected children, and in their own lives. Many state agencies, including the University of Texas, Texas A&M, Texas State, and Texas Tech have made this available for their employees and we are hoping you will join them.

The 2009 Texas Legislature passed a law that provides: **“A state employee may be granted leave not to exceed five hours each month to participate in mandatory training or perform volunteer services for Court Appointed Special Advocates (CASA) without a deduction in salary or loss of vacation time, sick leave, earned overtime credit, or state compensatory time.”** HB 1462 of the 81st Legislative Session; Tex. Gov't Code § 661.921.

CASA volunteers can do most of their work during non-work hours (visiting the child and family, writing court reports, talking to other parties in the case). However, some of their duties necessarily take place during the workday. These include going to court, mediation, and meetings at school, the doctor's office, and Child Protective Services. These are the kinds of activities for which we are asking you to consider giving your employees limited leave.

We appreciate you considering this new opportunity to assist CASA in its mission to help abused and neglected children find safe, permanent homes. Attached is more information on the difference your employees can make as CASA volunteers. Please don't hesitate to contact me if you have any questions about CASA or this law.

Sincerely,

Facebook Recruitment Advertising Sample

Speak up for a Child

Become a Volunteer Advocate - Be the Difference for an Abused Child.
speakupforachild.org/volunteer

Lost in the System

Help an Abused and & Neglected Kid Find A Loving Home. Volunteer with CASA.
speakupforachild.org/volunteer

Help Abused Children

Become a Volunteer Advocate: Become The difference for Tarrant Children.
speakupforachild.org/volunteer

Abused in Tarrant County

Help Abused Kids Find Safe Homes. Become a CASA volunteer Advocate.
speakupforachild.org/volunteer

400 Kids Are Waiting

Make a Difference for Abused and Neglected Kids in Tarrant County.
speakupforachild.org/volunteer

Can't Be a Foster Parent?

Help Foster Kids Find Loving Homes As a Volunteer Advocated for CASA.
speakupforachild.org/volunteer

Can't Adopt or Foster?

We Still Need You Desperately. Become a CASA Volunteer Advocate
speakupforachild.org/volunteer

You Can Help An Abused Child

Become a volunteer Advocate for CASA of Tarrant County.
speakupforachild.org/volunteer

Google Recruitment Advertising Sample

CASA of Tarrant County



We speak up for abused and neglected kids in Tarrant County.
Help us find them safe homes.

 Like · 1,129 people like this.

CASA of Tarrant County



Support CASA of Tarrant County to help abused and neglected kids find loving homes.

 Like · 1,129 people like this.

CASA of Tarrant County



Help other Tarrant County Kids find homes as loving As yours. 400 abused kids Are waiting.

 Like · 1,129 people like this.

Board Member Matrix

Use this tool to analyze your current board and needs for recruitment. Indicate whether current representation, importance, and priority in each area is **high, medium, or low**.

AREA or TRAIT	Current Board Representation	Importance of Area or Trait for our Board	Priority for Recruitment Based on Need
	(H, M,L)	(H,M,L)	(H,M,L)
DEMOGRAPHICS			
AGE			
Under 30			
30 - 44			
45 - 59			
60 - 70			
Over 70			
GENDER:			
Male			
Female			
ETHNICITY			
African American/Black			
Asian/Pacific Islander			
Caucasian			
Hispanic/Latino			
Native American/Indian			
Other:			
GEOGRAPHY			
Central			
East			
West			
North			
South			
Rural			
SKILLS			
Fundraising			
Advocacy			
Financial Management			
Gov/Public Sector Relations			
Law/Legal			
Marketing/PR			
Graphic Design			

Grant Writing			
Technology			
Real Estate			
Event Planning			
Mission Specific 1:			
Mission Specific 2:			
FUNDRAISING/RESOURCES			
Personal Contributions			
Personal Major Gift Contacts			
Foundation Contacts			
Time available for Fundraising			
Time available for Volunteering			
In Kind Services			
Special Events Experience			
Grantwriting Experience			
Capital Campaign Experience			
COMMUNITY CONNECTIONS			
Foundations			
Corporations			
Small Business			
Media			
Nonprofit			
Faith-based			
Academic			
Government			
Political/ Government			
Social Services			
Other:			
Other:			

Board Member Brief Self-Assessment Tool

To complete this assessment, review the key board responsibilities listed below and rate your performance in each.

Responsibilities	Strong	Adequate	Weak	Don't Know
Participate in Board discussions to determine organization mission and purpose(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Support the Executive Director and review his/her performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide proper financial oversight	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Act as an ambassador for the organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Periodically assess Board's performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Make a personal financial contribution to the organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Actively participate in the Board's annual evaluation and planning efforts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monitor programs and services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Volunteer for and willingly accept assignments and complete them thoroughly and on time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ensure organization has adequate financial resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Raise funds to support organization (secure sponsors, solicit donations, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ensure legal and ethical integrity and maintain accountability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recruit and orient new board members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Regularly attend scheduled Board meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Actively participate on at least one Board committee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Sample Board Self-Evaluation Questionnaire

Board Self-Evaluation Questionnaire

Guidelines on How to Best to Use This Tool

This tool is designed to be used as an annual board evaluation. It seeks to help a board answer the question: *what are we as a board now doing well and what can be do better?*

The tool is designed for organizations large enough to employ staff, those with someone in an executive director or CEO role. The concept and many of the questions may also be of value to totally volunteer-run organizations.

Section D on the **Performance of Individual Directors** provides an opportunity for board members to personally reflect on their own performance. This portion of the questionnaire, once completed, should be retained by each board member, although board members may feel comfortable sharing their overall rating for this section at the bottom of the page or what one of the issues identified they most want to improve upon

This version (Version II) includes a new but optional section, Section E, that seeks to provide feedback to the Chair of the board.

The rating scale at the bottom of each page (“My Overall Rating”) asks that board members add up the total of the numbers circled on the page. This number is intended as a rough interpretation of the results of each section. The range of numbers will change with the number of questions asked and answered in the section.

We would encourage boards to use this as a source of ideas to inform the development of their own board self-evaluation tool. Your board can complete this assessment as an “experiment” and then develop a customized version based this experience.

Remember that this tool is best used to stimulate reflection and discussion; it is not a scientific survey instrument that has been tested on a large number of boards and for which there are average results.

Boards should consider bringing in an **independent person** to conduct the evaluation and compile, summarize and report on the results. This will insure that individual responses are kept confidential and may result in more honest answers. If you choose to do this then completed copies of Section D could be passed on for that person to compile.

Ask that board members complete the questionnaire at home before bringing it to a meeting. The space for a board member’s name on the front cover is meant for distributing the questionnaire rather than for collecting it and compiling the results. Directors may want to hand back only Sections A, B, C and E.

- Consider evaluating other things such as the effectiveness of committees or board “follow-through”. Avoid questions that compare individual board member performance; keep the focus on the whole board.
- If your board relies on an **Executive Committee** which meets between full board meetings a separate section might be needed to assess its relationship to the board (to be answered by everyone), its relationship to the Executive Director and the conduct of Executive Committee meetings. Questions for such a section could be drawn from the other sections.
- Section C on the **Board’s Relationship with the Executive Director** is **not** intended as an evaluation of the Executive Director but rather an evaluation of the quality of the board’s relationship with the Executive Director as judged both by the board and by the Executive Director. The items evaluated here should focus on matters that the board can change about its performance.
- Board evaluation can be done at any time of the year and should be put on the board’s annual agenda. It may be best not to schedule it at the same time of the year that the board is conducting an evaluation of the Executive Director or preparing for the AGM.

Profit Sector Leadership Program
College of Continuing Education

VERSION II



Board Self-Evaluation Questionnaire

Questions should be answered by all board members. When completed individually the results of Sections A, B and C should be compiled, shared and discussed by the whole board to determine an average group answer to each question and an overall section rating. Section D should be answered by board members alone but not shared with the group. Sections A, B and C should also be completed by the **Executive Director or CEO**. This version also includes Section E, which provides feedback to the Chair of the Board.

*Circle the response that **best** reflects your opinion. The rating scale for each statement is: Strongly Disagree (1); Disagree (2); Maybe or Not Sure (3); Agree (4); Strongly Agree (5).*

A. How Well Has the Board Done Its Job?

- | | | | | | |
|--|---|---|---|---|---|
| 1. Our organization has a three to five-year strategic plan or a set of clear long range goals and priorities. | 1 | 2 | 3 | 4 | 5 |
| 2. The board’s meeting agenda clearly reflects our strategic plan or priorities. | 1 | 2 | 3 | 4 | 5 |
| 3. The board has insured that the organization also has a one-year operational or business plan. | 1 | 2 | 3 | 4 | 5 |
| 4. The board gives direction to staff on how to achieve the goals primarily by setting or referring to policies. | 1 | 2 | 3 | 4 | 5 |
| 5. The board ensures that the organization’s accomplishments and challenges are communicated to members and stakeholders. | 1 | 2 | 3 | 4 | 5 |
| 6. The board has ensured that members and stakeholders have received reports on how our organization has used its financial and human resources. | 1 | 2 | 3 | 4 | 5 |
| 7. _____ | 1 | 2 | 3 | 4 | 5 |

My overall rating (add together the total of the numbers circled):

- Excellent (28+)
 Very Good (20-27)
 Good (15-19)
 Satisfactory (12-18)
 Poor (7-11)

B. How Well Has the Board Conducted Itself?

*Circle the response that **best** reflects your opinion. The rating scale for each statement is: Strongly Disagree (1); Disagree (2); Maybe or Not Sure (3); Agree (4); Strongly Agree (5).*

- | | | | | | |
|--|---|---|---|---|---|
| 1. Board members are aware of what is expected of them. | 1 | 2 | 3 | 4 | 5 |
| 2. The agenda of board meetings is well planned so that we are able to get through all necessary board business. | 1 | 2 | 3 | 4 | 5 |
| 3. It seems like most board members come to meetings prepared. | 1 | 2 | 3 | 4 | 5 |
| 4. We receive written reports to the board in advance of our meetings. | 1 | 2 | 3 | 4 | 5 |
| 5. All board members participate in important board discussions. | 1 | 2 | 3 | 4 | 5 |
| 6. We do a good job encouraging and dealing with different points of view. | 1 | 2 | 3 | 4 | 5 |
| 7. We all support the decisions we make. | 1 | 2 | 3 | 4 | 5 |
| 8. The board has taken responsibility for recruiting new board members. | 1 | 2 | 3 | 4 | 5 |
| 9. The board has planned and led the orientation process for new board members. | 1 | 2 | 3 | 4 | 5 |
| 10. The board has a plan for director education and further board development. | 1 | 2 | 3 | 4 | 5 |
| 11. Our board meetings are always interesting. | 1 | 2 | 3 | 4 | 5 |
| 12. Our board meetings are frequently fun. | 1 | 2 | 3 | 4 | 5 |

My overall rating:

- Excellent (50+) Very Good (40-49) Good (30-49)
 Satisfactory (20-29) Poor (10-19)

C. Board’s Relationship with Executive Director

Circle the response that **best** reflects your opinion. The rating scale for each statement is: Strongly Disagree (1); Disagree (2); Maybe or Not Sure (3); Agree (4); Strongly Agree (5).

1. There is a clear understanding of where the board’s role ends and the Executive Director’s begins.	1	2	3	4	5
2. There is good two-way communication between the board and the Executive Director.	1	2	3	4	5
3. The board trusts the judgment of the Executive Director	2	3	4	5	
4. The Board provides direction to the Executive Director by setting new policies or clarifying existing ones.	1	2	3	4	5
5. The board has discussed as communicated the kinds of information and level of detail it requires from the Executive Director on what is happening in the organization.	1	2	3	4	5
6. The board has developed formal criteria and a process for evaluating the Executive Director	1	2	3	4	5
7. The board, or a committee of the board, has formally evaluated the Executive Director within the past 12 months.	1	2	3	4	5
8. The board evaluates the Executive Director primarily on the accomplishment of the organization’s strategic goals and priorities and adherence to policy.	1	2	3	4	5
9. The board provides feedback and shows its appreciation to the Executive Director on a regular basis.	1	2	3	4	5
10. The board ensures that the Executive Director is able to take advantage of professional development opportunities.	1	2	3	4	5
11. _____	1	2	3	4	5

My overall rating:

- Excellent (45+)
 Very Good (39-44)
 Good (29-38)
 Satisfactory (20-28)
 Poor (11-19)

D. Performance of Individual Board Members (Not to be shared)

Circle the response that **best** reflects your opinion. The rating scale for each statement is: Strongly Disagree (1); Disagree (2); Maybe or Not Sure (3); Agree (4); Strongly Agree (5).

1. I am aware of what is expected of me as a board member.	1	2	3	4	5
2. I have a good record of meeting attendance.	1	2	3	4	5
3. I read the minutes, reports and other materials in advance of our board meetings.	1	2	3	4	5
4. I am familiar with what is in the organization's by-laws and governing policies	1	2	3	4	5
5. I frequently encourage other board members to express their opinions at board meetings.	1	2	3	4	5
6. I am encouraged by other board members to express my opinions at board meetings.	1	2	3	4	5
7. I am a good listener at board meetings.	1	2	3	4	5
8. I follow through on things I have said I would do.	1	2	3	4	5
9. I maintain the confidentiality of all board decisions.	1	2	3	4	5
10. When I have a different opinion than the majority, I raise it.	1	2	3	4	5
11. I support board decisions once they are made even if I do not agree with them.	1	2	3	4	5
12. I promote the work of our organization in the community whenever I had a chance to do so.	1	2	3	4	5
13. I stay informed about issues relevant to our mission and bring information to the attention of the board.	1	2	3	4	5

My overall rating:

- Excellent (55+) Very Good (45-54) Good (32-44)
 Satisfactory (20-31) Poor (13-19)

E. Feedback to the Chair of the Board (Optional)

Circle the response that **best** reflects your opinion. The rating scale for each statement is:
Strongly

Disagree (1); Disagree (2); Maybe or Not Sure (3); Agree (4); Strongly Agree (5).

- | | | | | | |
|--|---|---|---|---|---|
| 1. The board has discussed the role and responsibilities of the Chair. | 1 | 2 | 3 | 4 | 5 |
| 2. The Chair is well prepared for board meetings. | 1 | 2 | 3 | 4 | 5 |
| 3. The Chair helps the board to stick to the agenda. | 1 | 2 | 3 | 4 | 5 |
| 4. The Chair ensures that every board member has an opportunity to be heard. | 1 | 2 | 3 | 4 | 5 |
| 5. The Chair is skilled at managing different points of view. | 1 | 2 | 3 | 4 | 5 |
| 6. The Chair can be tough on us as a group when we get out-of-line. | 1 | 2 | 3 | 4 | 5 |
| 7. The Chair knows how to be direct with an individual board member when their behavior needs to change. | 1 | 2 | 3 | 4 | 5 |
| 8. The Chair helps the board work well together. | 1 | 2 | 3 | 4 | 5 |
| 9. The Chair demonstrates good listening skills. | 1 | 2 | 3 | 4 | 5 |
| 10. The board supports the Chair. | 1 | 2 | 3 | 4 | 5 |
| 11. The Chair is effective in delegating responsibility amongst board members. | 1 | 2 | 3 | 4 | 5 |
| 12. _____ | 1 | 2 | 3 | 4 | 5 |

My overall rating:

- Excellent (45+) Very Good (35-44) Good (25-34)
 Satisfactory (20-33) Poor (11-19)

Sample: Strategic Diversity Plan

Mission:

To expand the volunteer pool by recruiting and retaining a diverse population of advocates through increasing the knowledge and awareness of, and appreciation for, cultural differences among our board, staff, and advocates.

RECRUITMENT

Goal 1: To develop recruitment materials that reflect community diversity.

Objective A: Identify community population demographics.

Action Step 1: Assign someone in your office to gather county demographics.

Primary Responsibility:

Deadline:

Action Step 2: Compare community population demographics to volunteer advocate demographics.

Primary Responsibility:

Deadline:

Objective B: Identify demographics of children served.

Action Step 1: Document demographics of children served on a quarterly basis.

Primary Responsibility:

Deadline:

Objective C: Identify community leaders of underrepresented populations, including representatives of civic groups, businesses, religious groups, associations, and mass communication outlets (i.e. newspapers, radio stations, etc.).

Action Step 1: Brainstorm with staff members and/or volunteer advocates from different groups to identify these representatives.

Primary Responsibility:

Deadline:

Action Step 2: Put together a plan on how to address/or meet individuals from these groups. For example, what can be done in 24 hours; 72 hours; 30 days; etc.

Primary Responsibility:

Deadline:

Objective D: Create brochures, pamphlets, flyers, banners, billboards, displays, etc. that mirror our community population.

Action Step 1: In a community with a large Spanish speaking population, create brochures, PSA's, and other materials that are bi-lingual (Spanish and English); include pictures of children and volunteers that are representative of the targeted population.

Primary Responsibility:

Deadline:

Action Step 2: Ensure that someone in the CASA office can communicate with Spanish speaking individuals. (Although, a person may be bi-lingual, sometimes it is easier to understand in their

primary language.)

Primary Responsibility:

Deadline:

Goal 2: To promote a culturally diverse agency.

Objective A: Identify cultural biases and “hot buttons” that exist among your program staff, board, and advocates.

Action Step 1: Conduct pre- and post- tests as part of training to staff, board members and advocates to assess cultural competency.

Primary Responsibility:

Deadline:

Objective B: Help address these identified cultural biases and “hot buttons”.

Action Step 1: Provide cultural competency training opportunities on a routine basis.

Primary Responsibility:

Deadline:

Objective C: Review agency anti-discrimination and harassment policies to ensure they appropriately protect individuals against biases, for example, race, color, national origin, age, disability, gender, religion, political affiliation, sexual orientation, and socio-economic status.

Action Step 1: Develop, review or revise policies as needed.

Primary Responsibility:

Deadline:

Action Step 2: Promote diversity through hiring practices.

Primary Responsibility:

Deadline:

Objective D: Establish a visually diverse agency environment.

Action Step 1: Hang pictures that are representative of community demographics and/or targeted groups.

Primary Responsibility:

Deadline:

Goal 3: To build alliances with diverse groups.

Action Step 1: Arrange a reception (i.e., “Meet and Greet”) inviting individuals from different groups to provide an introduction to CASA and volunteer information.

Primary Responsibility

Deadline:

Action Step 2: Design and implement a plan to conduct public speaking engagements to targeted audiences at a minimum of once a month.

Primary Responsibility

Deadline:

Objective B: Identify, collaborate and/or participate in organizations, agencies, and coalitions of underrepresented groups.

Action Step 1: Request to post recruitment messages in church bulletins.

Primary Responsibility:

Deadline:

Action Step 2: Reciprocate with participating churches by encouraging program supporters to participate in the church's community activities, for example, donating coats to their annual coat drive.

Primary Responsibility:

Deadline:

Objective C: Collaborate and participate in culturally-oriented community activities, festivals, holidays, fairs, etc. For example, Juneteenth and Cinco de Mayo celebrations, gay and lesbian pride events.

Action Step 1: Develop a diversity calendar to track these community activities.

Primary Responsibility:

Deadline:

Action Step 2: Provide a display booth at events that is relevant to the targeted population.

Primary Responsibility:

Deadline:

Objective D: Develop targeted public awareness messages for individual groups.

Action Step 1: Provide statistics, information, personal stories, etc., that relate to and reflect the needs, concerns and interests of groups targeted for recruitment. For example, pieces targeting a predominantly male group should tell the CASA story from the perspective of a male advocate.

Primary Responsibility:

Deadline:

EVALUATION

Goal 1: To identify increases or decreases of diversity within the volunteer pool.

Objective A: Compare and document demographics after one year of diversity recruitment.

Action Step 1: Establish demographic baseline.

Primary Responsibility:

Deadline:

Action Step 2: Establish quarterly tracking of new volunteer advocate demographics.

Primary Responsibility:

Deadline:

Action Step 3: Design a check list to determine best response to recruitment efforts.

Primary Responsibility:

Deadline:

Goal 2: To evaluate retention of diverse volunteer advocates.

Objective A: Document and compare retention rates of new volunteer advocates.

Action Step 1: Compare retention of diverse volunteer advocates over time to an established baseline.

Primary Responsibility:

Deadline:

Action Step 2: Compare newly established retention efforts to previous efforts to determine their efficacy.

Primary Responsibility:

Due Date:

50 Retention Best Practices from R360°

1. Cards and letters from everyone; staff, ED, board, judge, CPS
2. Ongoing volunteer management and coaching training for staff
3. CASA 201
4. Food at every training, gathering or event
5. Incentivize mundane (but critical) reporting duties
6. Provide dedicated space in the office for volunteers to work
7. Movie night
8. Design an individual plan for professional growth for every volunteer
9. Volunteer surveys; annual, case closure, exiting the program
10. Take pictures of volunteers often and share them on your website, newsletter, around the office
11. Closed case celebrations
12. Name badge for court with cases closed markers (stars, number, etc.)
13. Regular program related communication
14. Professional, interesting e-newsletters with volunteer pictures, bios, etc.
15. Simplify routine tasks as appropriate (online submission)
16. Ask and train volunteers to help with pre-service and in-service training
17. Use volunteers to speak to groups or to sit at a booth for CASA
18. Have volunteers on your recruitment and retention team
19. Offer advocacy tracks- PMC, 0-3
20. Earned media- volunteers like reading about the program they support
21. State agencies-make sure your current volunteers employed by the state know about policy
22. CEUs for teachers and education professionals
23. Train volunteers on WOM every year
24. Conduct a different 360° assessment every month and make changes
25. Acknowledge special achievements: testifying, travel, adoption
26. Use social media to stay in touch
27. Bright, eye catching t-shirts with website in large letters and other branded giveaways
28. Develop goals with volunteers related to tenure- one plus one more (1 case plus 1 more when that one closes)
29. Give permission for "break" in serving and keep your work

30. Connect with volunteers who have left your program
31. WOM practice sessions for board members
32. Provide skill building education in valued areas- conversational Spanish, public speaking, Microsoft Office
33. Regular and spontaneous demonstrations of appreciation; mix it up and be authentic
34. Recognize the employers of volunteers with certificates, awards, letters
35. Ask a massage therapist to provide discounted or free services at next in-service
36. Candy thank-you (kisses, grand bars, mints, milky way)
37. Honor your tenured volunteers in a special way
38. Start a mileage reimbursement program
39. Offer non-advocacy volunteer opportunities within your program
40. Texas CASA Annual Conference scholarships
41. Ask your judge to help with retention; in court, court practices, out of court
42. Develop an annual in-service calendar
43. Offer interesting in-service opportunities at a variety of times, and in a variety of places
44. Co-CASAs
45. Resume builder-provide volunteers with a cut and paste description of CASA responsibilities for their resume
46. Provide in-service credit for appropriate reading, online study, films and regularly provide list of resources
47. Coffee talks
48. Volunteer business cards
49. Strive for professionalism in your program-it tells your volunteers they picked a great organization
50. Share and discover best practices within the CASA network

Volunteer Supervisor Self-Assessment

Listed below are statements that describe the attitudes and actions of effective supervisors of CASA volunteers. Please rate yourself on each of the statements using the following scale:

4 = always 3 = frequently 2 = occasionally 1 = rarely or never

Attitudes and Beliefs

1. I fully understand and embrace the CASA mission as it relates to volunteers advocating on behalf of abused and neglected children. _____
2. I believe volunteers can make a real difference in a child's life. _____
3. I understand that my relationship with volunteers is a key component of their experience with our program and the advocacy they provide children. _____
4. I want to improve my skills and understanding of how best to work with volunteers. _____
5. I believe my job is to work with the volunteer and the volunteer's job is to work the case. _____

Supervisor/Volunteer Relationship

6. I express my passion and commitment to the CASA mission with volunteers. _____
7. I reflect a caring attitude toward the volunteers I supervise, individually as well as collectively. _____
8. I am accessible to the volunteers I work with. _____
9. The volunteers I work with would describe me as approachable. _____
10. I provide volunteers with frequent feedback regarding their work. _____
11. I understand my influence over volunteer performance, satisfaction and tenure. _____
12. I am comfortable with volunteers with different backgrounds than myself (age, gender, race and ethnicity, experience) _____
13. I make an effort to get to know each volunteer and allow them to get to know me. _____

Expectations

14. Volunteers I work with would say they understand completely what is expected of them. _____
15. I utilize our program's policies and procedures related to supervising volunteers. _____
16. I assume responsibility for advocacy outcomes at the same time I empower volunteers to lead advocacy efforts. _____
17. I demonstrate competency in all areas of child advocacy. _____

Training

18. I have completed the same pre-service training curriculum as the volunteers. _____
19. I play a role in my program's pre-service training as a way to get to know incoming volunteers. _____
20. I participate in periodic reviews of our pre-service training to ensure new volunteers receive the information they need to successfully advocate for children. _____
21. I assume responsibility for providing ongoing training resources as appropriate for the needs of the volunteers. _____
22. I keep a copy of the professional development plan (continuing education) for each of the volunteers. _____

Effective Coaching/Supervision

23. The caseload I am required to supervise allows me enough time to provide excellent advocacy coaching to volunteers. _____
24. I view advocacy decision making as a collaborative process between myself and the volunteer. _____

- 25. I utilize advocacy planning tools (case reviews, contact logs, decision trees) to guide the work of volunteers. _____
- 26. I allow volunteers to work independently; I do not need to accompany volunteers to every meeting or visit. _____
- 27. I understand volunteers differ in their need for supervision and I adapt accordingly. _____
- 28. I share case pertinent information with volunteers in a timely manner. _____
- 29. Volunteers communicate directly with case stakeholders; I do not step in unless appropriate. _____
- 30. I am prepared when I have contact with volunteers; I act with awareness of their time. _____
- 31. I ask volunteers to go beyond the Minimum Expectations of Service to a Case. _____
- 32. I provide volunteers with case specific resources to enhance their knowledge and understanding of advanced advocacy issues. _____
- 33. I work with volunteers to submit effective reports to the court; I do not re-write them. _____

Effective Communication

- 34. I respond promptly to all written, telephone and email messages from volunteers. _____
- 35. I have a system for sending reminders to volunteers for court dates, reports, and meetings. _____
- 36. I respect the volunteer’s preferred mode of communication whenever appropriate. _____
- 37. I make a point to engage volunteers at events, trainings and program meetings. _____
- 38. I don’t rely on email to communicate sensitive or performance related messages. _____

Performance Problems

- 39. When working with new volunteers, I discuss my approach to dealing with performance issues. _____
- 40. I deal promptly and directly with all concerns about volunteer performance. _____
- 41. I understand program policies and state and national standards as they relate to performance. _____
- 42. I approach performance problems with professionalism and fairness. _____
- 43. I seek consultation with my supervisor if I am uncertain about a performance related issue. _____
- 44. I maintain professional documentation of all performance related issues as program policy directs. _____

Evaluation

- 45. I consider volunteer retention to be a critical responsibility and measure and track my own performance and effectiveness by retention goals. _____
- 46. I perform evaluations on the work of volunteers in accordance with program policy. _____
- 47. I provide volunteers a way to evaluate their satisfaction in accordance with program policy. _____
- 48. I provide tools and resources based on needs identified in the performance evaluation of volunteers. _____
- 49. I seek additional education and training based on needs identified in the performance evaluations by volunteers. _____
- 50. I include impact stories in the evaluations of volunteers. _____

Appreciation and Ongoing Support

- 51. I am authentic and varied in how I express appreciation to volunteers. _____
- 52. I emphasize both actions (effective testimony, frequent contact with child) and characteristics (perseverance, calm under fire) when acknowledging volunteers. _____
- 53. I participate in organized appreciation events in our program. _____
- 54. I understand and respect the differing needs for appreciation of volunteers. _____
- 55. I “check-in” regularly with volunteers regarding their experience, paying attention to signs of struggle or difficulty. _____
- 56. I offer support when volunteers are experiencing particular difficulties in a case, or in their personal lives. _____
- 57. I work to problem solve with volunteers who ask for time-off or ask to be dismissed from a case. _____
- 58. I understand the effect of secondary trauma on volunteers and provide resources to assist. _____
- 59. I respect that volunteers may ultimately choose to leave a case early; I work to minimize this loss on both the child(ren) and the volunteer. _____

Sample CASA Job Descriptions

The following pages include sample job descriptions for the additional staff that may need to be added during program expansion and growth:

- Team Leader
- Team Manager
- Development Director
- Recruitment and Training Director
- Volunteer Recruitment Specialist
- Volunteer Recruiter
- Special Events and Marketing Coordinator

CASA of Travis County Job Description

Job Title: Team Leader Child Advocacy Specialist

Date: January 1, 2010

Reports To: Program Director

General Summary:

The Team Leader is a member of the Leadership Team for CASA of Travis County's Program Services staff. Team Leaders will lead a team of Child Advocacy Specialists, providing supervision on cases, support, guidance and ensuring accountability. Additionally, the Team Leader will motivate, empower, guide and supervise CASA volunteers as they advocate in the best interest of abused and neglected children in protective care. The Team Leader will ensure that the mission of CASA of Travis County is carried out, in accordance with CASA's values, policies, and standards.

Essential Responsibilities and Duties

As a member of the Leadership Team the Team Leader will share the responsibility to ensure that the CASA program is carried out in an efficient, thorough and responsible manner that reflects the mission, values, policies and standards of CASA of Travis County. Those responsibilities include, but are not limited to the following:

- Providing leadership by reflecting the goals and values of the agency with the staff, demonstrating productive cooperation with all parts of the organization
- Working collaboratively as part of the Team, helping other Team members when needed
- Participating actively as needed in decision-making that affects the organization and/or the staff
- Assuming responsibility for making decisions and solving problems in the absence of other members of the Leadership Team
- Taking initiative to identify organizational and/or staff needs or challenges and to develop ideas for solutions
- Contributing to a positive morale and work environment and serving as a positive role model for others
- Supporting the work of the Program Director and Executive Director when asked
- Being familiar with the CASA annual budget, the personnel policies and other policies and practices so as to be able to assist the Program Director and Executive Director in responding to agency or staff needs or questions

Responsibilities unique to the Team Leader role are as follows:

1. *Assumes responsibility for the training, supervision and reporting for a team of Child Advocacy Specialists*

- Provides and/or coordinates the training and orientation for Child Advocacy Specialists assigned to Team
 - Ensures completion of Child Advocacy Specialist training within three months, by completing CASA training check list and submitting a copy to the Program Director to be filed in the Child Advocacy Specialist's personnel file
 - Ensures availability for supervision of Team members monthly as scheduled and documented and as needed by Child Advocacy Specialists
 - Assumes responsibility for ensuring coverage at specific hearings, meetings, etc., when the Child Advocacy Specialist has conflicts or is absent
 - Monitors and signs all timesheets of Team member and request for vacation or other leave, ensuring timely submission
 - Monitors and signs all mileage and expense reimbursements, ensuring timely submission
 - Conducts periodic audits of files of Team members for the purpose of quality control, ensuring that each Team member has a selection of their files audited annually
2. *Assists the Program Director in the planning for and execution of the mission of CASA of Travis County*
- Attends regularly scheduled Leadership Team meetings with the Program Director
 - Communicates program issues directly to Team members individually and through meetings
 - Assists Program Director with program development and evaluation
 - Reads and signs court reports in conjunction with other Team Leaders and the Program Director for the purpose of training Child Advocacy Specialists and ensuring the consistent quality of the CASA court report
 - Assists Program Director with monitoring dockets that effect CASA's assignment to cases
 - Communicates with the presiding judges concerning CASA's ability to accept new assignments each week
 - Assigns new cases to Child Advocacy Specialists
 - Observes the courtroom presentations of CASA Advocates and Supervisors. Records feedback as needed and communicates with the appropriate Child Advocacy Specialist.
3. *Participates with the Program Director in hiring and evaluations of Child Advocacy Specialists*
- Reviews applications and resumes of applicants for the position of Child Advocacy Specialist
 - Participates in interviews and in the process of selection for Child Advocacy Specialist position
 - Regularly communicates with the Program Director regarding the performance of Team members.
 - Prepares employee evaluations for Team members and conducts annual reviews with the Team members and the Program Director

Other Responsibilities

1. *Assists with volunteer recruitment efforts and events, as needed.*
2. *Assists with fund-raising events and with marketing activities, as needed.*
3. *Attends and participates in community meetings as needed by Program Director or Executive Director*

The Team Leader shares the following responsibilities of the Child Advocacy Specialist, with a reduced caseload:

1. *Supervises Advocates in their role as “Court Appointed Special Advocates” (CASA) and GAL for the children to whom CASA of Travis County is appointed*
 - Attends and participates in staff and case-related meetings including, but not limited to, Permanency Conferences, Treatment Meetings and ARD’s
 - Attends and participates in all related court hearings, providing assistance and supervision of Advocate court reports, court attendance and testimony
 - Provides to the Advocate information and professional contacts regarding community resources and placements
 - Participates in placement selections by reading home placement studies and consulting as decisions are made
 - Assists the Advocate in identifying permanency planning issues for children while steadily moving the case forward toward the goal of a safe and permanent placement
2. *Provides informed and consistent guidance to Advocates as well as encouragement and praise*
 - Provides timely notification of staffings, meetings, and court hearings to Advocates
 - Provides guidance, assistance and review of Advocate reports to the court
 - Participates in and assists with new Advocate training and Advocate continuing education, as needed with Team Leaders specifically teaching Lesson 9
 - Provides consistent contact in the process of maintaining and fostering relationships with the Advocate, clients and other professionals in legal, social welfare, educational and therapeutic areas/organizations
 - Enhances the opportunity for retention of the Advocate for other cases, by coaching new skills, evaluating the Advocate’s experience, and by matching the Advocate with future cases that are matched to his interests and skills
3. *Ensures the high standard of performance of services of CASA of Travis County*
 - Participates in regular and periodic supervision with the Program Director
 - Supports Team members, by providing backup for meetings and court hearings and with their Advocates as needed
 - Maintains accurate and complete client case records
 - Maintains accurate case and Advocate statistical data according to state and national standards for CASA
 - Maintains a professional, organized environment
 - Assists with office and program demands as needed
 - Attends and participates in continuing education opportunities

Knowledge, Skills and Experience

1. Education

- A minimum of a Bachelor's Social Work or related field required
- Master's Degree in Social Work or related field is preferred

2. Critical areas of qualifications include the following:

- Knowledge of the mission of CASA
- Proven ability to lead calmly with knowledge and compassion for the stress of the job
- Experience in providing staff or volunteer supervision and ability to manage people
- Understanding of child and family advocacy issues that include child placement options, therapeutic intervention/assessment/needs for children and families, legal intervention and rights regarding children and families, permanency planning, adoption issues and systems, advocacy in child protection cases and in social, medical and mental health fields
- The ability to concisely and clearly convey and interpret information to and from others orally and in writing
- The ability to clearly identify permanency planning issues for children and provide effective advocacy to move a case through the system
- The ability to work under time constraints, be goal-oriented and maintain productive and effective performance and interaction with the Child Advocacy Specialists, Advocates and clients
- Has strong interpersonal skills

3. Spanish/English fluency is considered an advantage.

4. Experience at CASA of Travis County and the support and trust of Child Advocacy Specialists are considered a plus.

Physical Requirements and Work Environment

The Team Leader will be expected to have daily transportation to attend court hearings, staffings, visitations, fundraising events, etc. The position requires a flexible schedule as visits with Advocates may occur in the evenings or on weekends. He/she will spend some time in the office that could involve intermittent physical activities including bending, reaching, sitting and walking during working hours. Additionally it is anticipated that the person may spend several hours of each day seated at a PC. Reasonable accommodations may be made to enable a person with physical disabilities to perform the job.

Team Manager

Location: CASA, San Antonio, TX 78212

Employment Type: Full time

Pay Rate: TBD

Reports to: Vice President of Programs

Supervises: Volunteer Coordinators

FLSA: Exempt

Job Description

The Team Manager implements CASA's strategic plan by translating the broad goals and objectives into specific goals and action plans. Managers ensure adherence to National and Texas CASA standards. Provides clear directions, motivates and challenges direct reports and volunteers. The Team Manager keeps abreast of community resources available to foster children and knowledge about current foster care, child abuse, and child advocacy issues. Delegates effectively. Applies clear and consistent performance standards. Supervises volunteers in their role as advocates for children. Demonstrates and champions alignment with company's vision, mission, and values in daily work actions. Demonstrates a commitment to and support of diversity by complying with CASA's EEO policies, regulations, and procedures. Participates in community awareness efforts to include fundraising and volunteer recruiting. Accepts all other duties, as assigned.

Leadership

- Provides staff with a clear map to follow in their activities.
- Plans, implements and leads change management initiatives to facilitate attainment of CASA's goals.
- Inspires a shared vision, appeals to employee's values and motivates them to execute CASA's mission.
- Promotes the alignment of all staff and volunteers with CASA mission, vision, values and strategic plan.
- Conducts weekly meetings with staff.
- Develops and guides staff to ensure organizational goals and outcomes are achieved.
- Monitors employee development goals and addresses as needed for the improvement of the individual and team.
- Sets a personal example of what is expected from others, identifies and celebrates accomplishments, and shares technical knowledge with others.
- Creates an encouraging environment that results in employee retention and growth.
- Recognizes the positive influence of diversity and proactively builds a diverse and inclusive team.

- Encourages employees to learn and grow by challenging them to try new and innovative approaches to their work.
- Ensures strong interpersonal relationships between coordinators and volunteers.

Management

- Collaborates with Development Department and demonstrates a willingness to procure participants for Tour of Champions presentations.
- Defines tactical tasks to help staff understand how they contribute to CASA, including redefining relationships between agency departments.
- Plans and coordinates program initiatives, including external communication and relationship building with key program stakeholders.
- Requests/accepts assignment of cases from court.
- Regulates the number of new cases accepted to ensure the optimum efficiency of staff and volunteers.
- Conducts monthly team case conferences.
- Clearly communicates job expectations and changes that affect employees' work.
- Ensures employees have the materials, equipment and development opportunities and other resources to learn, grow, and be successful.
- Effectively handle and documents employee disciplinary issues in an effective manner. Focuses on coaching for improved performance.
- Completes employee performance evaluations, conducts performance discussions and submits required paperwork to HR on time.
- Effectively and efficiently use of limited organizational resources to achieve organizational goals and increase productivity.

Supervises Volunteer coordinators to ensure the following:

- Appropriate, timely, and professional work in the best interests of the children.
- Monthly contact with assigned volunteers, at minimum.
- Continuous support and monitoring of active volunteers.
- Ensures appropriate coaching of volunteers in preparation for court.
- Accompany volunteers, or ensure supervisor coverage when they cannot attend court hearings, home visits, staffings, and meetings.
- Monitors court report process, including timeliness of emails to Assistant District Attorney's and caseworkers, tracks numbers of reports submitted.
- Executes external communication (with current and potential stakeholders and partners) to promote the achievement of program objectives.
- Knowledgeable of all program statistical reporting, including data needed for grant reports or requests.
- Monitors and documents progress on relationship building efforts with program stakeholders: courts, the Texas Department of Family and Protective Services (TDFPS), and Ad Litem.

Training and Development

- Selects, evaluates and develops CASA staff in order to maintain a competent, committed, highly productive staff.
- Develops direct reports to ensure program activities are executed with effectiveness, reporting standards are met through the monitoring of quality assurance and other internal data gathering processes and program administration priorities (filing systems, database use, etc.) are effectively managed.
- Collaborates with Volunteer Recruiting/Training Manager to assist in achievement of the following:
 - Ensures development and implementation of training materials and programs for new volunteer training within the guidelines set by Texas and National CASA programs.
 - Ensures development and implementation of ongoing training materials for staff, board, and volunteers within the guidelines set by Texas and National CASA programs.

Recruitment

- Participates in recruitment strategies and monitors effectiveness of those strategies. Makes necessary adjustments to those strategies as necessary
- Participates in applicant interviews.

Volunteer Retention

- See Volunteer Coordinator job description.

Quality Assurance

- Ensures compliance with National and Texas CASA, OVAG, VOCA, United Way, and Kronkosky grant reporting, as well as, other grants received, as necessary.
- Establishes, improves, and refines as necessary, CASA internal control procedures, including compliance with established procedures and best practices.
- Conducts and participates in quality assurance on a quarterly basis.

Volunteer Coordination

- See Volunteer Coordinator job description.

External Contacts

- Collaborates with the TDFPS to facilitate a smooth relationship between TDFPS personnel, CASA staff and volunteers.
- Maintains and enhances relationships with judges and court personnel.
- Participates in Family Group Decision making and Circles of Support, as necessary.
- Maintains and enhances relationships with Child placement agency personnel, parents, and service providers.

Self Development

- Participates in a minimum of 12 hours of on-going self development training per year.

Physical Effort

- Position routinely requires lifting of moderately heavy items such as laptop, training manuals, or arranging tables for training classes (up to 40 pounds) and/or very long periods of standing for training and recruiting on a routine basis.

Additional Duties

- Collaborates on writing the monthly newsletter.
- Tracks referred and non-referred cases.
- Assists with new volunteer orientation and on-going training.
- Represents CASA at TDFPS trainings.
- Provides information for grant request purposes.
- Brainstorms on procedural modifications in an effort to increase efficiency.
- Covers the telephones when the support staff is otherwise occupied.
- Responds to complex telephone and walk-in requests that require more skill or information than the support staff is equipped to handle.

Qualifications

- Bachelor's Degree from an accredited institution of higher learning in Social Work, Social Welfare, Social Services, Psychology, Sociology, Education, Criminal Justice, or Law Enforcement or related transferable work experience.
- Five years of experience in a private or public agency in the field of human services with experience in providing services to children and their families.
- One year of supervisory/managerial experience.
- Strong ability to build and maintain effective working relationships.
- Excellent communication and organizational skills required.
- Effective problem solving and decision making skills.
- Ability to multi-task, prioritize work, and meet deadlines.
- Demonstrated leadership qualities a must.
- Personable professional whose strengths include cultural sensitivity and an ability to build rapport with a diverse workforce in multicultural settings.
- Solid working knowledge of MS Office applications.

Knowledge, Skills, and Attitude

- *Problem Solving Expertise* – This area focuses on the rational approach to the processes involved in identifying and defining problems, generating and selecting solution strategies, and reducing performance gaps through implementation and problems prevention. It includes theoretical, complex, longer-term problem solving and operational, shorter-term problem solving methodologies as well as effective decision making skills. (E.g. problem identification, risk analysis, solution generation, prioritization, goal setting, conflict resolution, data gathering, problem prevention).

- Planning Skills- Analyzes current strategies for effectiveness and creates new strategies if necessary to achieve goals. Monitors the effectiveness of current planning methods and revises methods as needed. This area focuses on the skills used to establish, monitor and schedule short-term and long-term plans including realistic goal setting for volunteers individually or for the agency as a whole as well as assisting volunteers in setting realistic goals for their cases. This area also includes being able to set and meet deadlines for self and for volunteers; envisioning ways to improve what we do as an agency and collaborating on steps to arrive at these goals. Knowledge of volunteers, their particular strengths and weaknesses and issues involved with the cases are to be considered when matching volunteers with cases.

- Influencing Capabilities- Initiates, facilitates and engages in open, productive communication to advance the mission and promote values alignment. This area deals with the skills involved in accomplishing work results by interacting and having positive influence on colleagues and supervisees. It includes: managing and developing supervisees on a day-to-day basis; providing supportive skills and methods, including listening, asking open-ended questions, ensuring reinforcement of behaviors such as role clarification, demonstrating, establishing timelines, praising, coaching, asking for in-put, team building, delegating, and collaborating.

- Technical Expertise- Demonstrates leadership capability through job performance and values alignment. This area focuses on the specific technical expertise required to be a supervisor. This includes knowledge about the field of child protection and the issue surrounding the various forms of abuse. It also includes experience and up to date information about the Texas Dept. of Family and Protective Services policies, procedures, agency structure, and key personnel. It requires knowledge of the Abuse and Neglect court systems, procedures, and processes. It requires awareness of community resources. It also requires training and experience dealing with issues of basic human development and psychology as well as with the typical population with whom Child Advocate volunteers will be interacting.

- Self Management Capabilities- Exhibits behavior on a daily basis that reflects professionalism, maturity and overall alignment with values. This area focuses on the degree to which an individual appropriately modifies their natural behaviors and actions to most effectively fit the situation they are dealing with. It includes; “Fitting ourselves to the Job” versus “fitting the job to ourselves”; taking the self initiative to continuously improve ourselves (e.g. How you adapt, listen, speak, question, seek feedback, manage time and take initiative).

Employee’s signature

Date

CASA OF THE SOUTH PLAINS, INC.

JOB DESCRIPTION – Development Director

TITLE: Development Director

CLASSIFICATION AND STATUS: Exempt- Full Time

REPORTS TO: Executive Director

PRIMARY RESPONSIBILITY: Leadership to ensure a sustained effort of identifying, soliciting, cultivating, and retaining individual, corporate, and foundation donors. The Development Director will implement a major gifts program, conduct an annual giving campaign, and solicit capital and planned gifts.

JOB ACTIVITIES:

1. Responsible for all donor relations, acknowledgement, and stewardship.
2. Cultivate, train and support the Board and other volunteers in fundraising.
3. Plan and lead an annual fund development retreat with the Board and Executive Director.
4. Attend Board of Directors meetings and present monthly reports to the Board of Directors.
5. Establish and maintain relationships with individuals, foundations, and corporate donors and prospects.
6. Research and develop diversified fundraising strategies to meet defined financial goals.
7. Develop and manage a portfolio of major gift prospects. Assist in the monitoring of portfolios for the Executive Director and the Board to steward.
8. Meet individual, foundation and corporate donors and prospects in face-to-face visits to cultivate, solicit and steward support for CASA.
9. Oversee the management, accountability and reporting of all donor information; ensure that donors' records are up-to-date and secure.
10. Supervise the planning and execution of fundraising events and donor recognition.
11. Supervise all event sponsorship solicitation.
12. Supervise the development and implementation of all public awareness and marketing campaigns.
13. Assist the Executive Director in the development of branding and marketing guidelines.
14. Assist the Executive Director in all grant requests and reporting.
15. Recommend fund development policies and procedures based on best practices.
16. Assist the Executive Director in establishing performance measurements for all fund development and evaluate the effectiveness and results for all fund development activities including fundraising events.
17. Additional duties as required.

QUALIFICATIONS:

1. Mature with a great ability to lead.
2. Excellent attention to detail.
3. Prior experience in the fundraising profession preferred.
4. Prior staff supervision experienced preferred.

5. Excellent oral and written communication skills with previous experience writing successful proposals, grant applications, and in delivering presentations to groups of various sizes.
6. Persistent and diplomatic in encouraging volunteers to reach fundraising goals.
7. Self starter with minimal guidance.
8. Bachelor's degree in public relations, marketing and/or related field required.
9. Clear criminal background check.
10. Highly organized.
11. Vision and skill to see potential and opportunity.
12. Able to work collaboratively in a team environment.

Revised October 25, 2011 by JAH

Development Director

Classification: Exempt

Reports To: Executive Director

Qualifications:

The Development Director will demonstrate strong communication skills and expertise in managing, directing and implementing development strategies. The Development Director supports the Executive Director in implementing a major gifts program, conducting the annual giving campaign and in soliciting capital and planned gifts. This position provides leadership ensures a sustained effort of identifying, soliciting, cultivating, and retaining individual, corporate, and foundation donors.

The Development Director must believe in and promote the CASA's mission and act in accordance with the CASA's policies and procedures. Reporting to the Executive Director, Development Director is a member of the agency's senior leadership team.

Essential duties and responsibilities of the Director of Development are to:

- Responsible for all donor relations, acknowledgement, and stewardship.
- In conjunction with the Executive Director, provide leadership to the Board. Cultivate, train and support the Board and other volunteers in fundraising.
- Establish and maintain relationships with individuals, foundations and corporate donors and prospects.
- Research and develop diversified fundraising strategies to meet defined financial goals.
- Maintain and manage a portfolio of major gifts prospects. Assist in the monitoring of portfolios for the Executive Director and the Board.
- Set up and coordinate with Executive Directors meetings for individual, foundation and corporate donors and prospects in face-to-face visits to cultivate, solicit and steward support for the CASA.
- Oversee the management, accountability and reporting of all donor information; ensure that donors' records are up-to-date and secure
- Participate in the planning and execution of fundraising events and donor recognition and seek sponsorships for these events.
- Maintain an annual calendar of fundraising and grant-management including submission of grant requests and grant reporting.
- Recommend fund development policies and procedures based on best practices.
- Implement donor tracking software system.
- Write existing foundation grants and seek out new foundation sources.
- Establish performance measurements that monitor results and evaluate the effectiveness of the CASA's fund development program.

Requirements:

- Minimum of 3 years comprehensive experience in the fundraising profession or 5 years comprehensive experience in the sales profession.
- Demonstrated supervisory skills in a nonprofit organization: interviewing, hiring, and training employees; planning, assigning, and directing work; appraising performance; rewarding and disciplining employees; addressing complaints and resolving problems.
- Demonstrated track record in essential development skills: annual fund, capital campaigns, planned giving, foundation grants, corporate sponsorships and special events.
- Enjoy working with many different types of individuals and projects simultaneously.
- Able to work collaboratively in a team environment.
- Experienced at prospect research and developing contact/networking strategies.
- Proven track record of increasing donations, longevity and motivation of donors and candidate's specific responsibility in that effort
- Vision and skill to see potential and opportunity.
- Extremely organized and motivated problem solver with solid execution
- Creative thinking with a willingness to examine current strategies and consider the potential for new and updated fundraising programs and events
- Highly developed interpersonal skills that include meeting people with ease, integrity, assertiveness, confidence, and an ability to thrive on challenges while retaining a sense of humor under pressure.
- Persistent and diplomatic in encouraging volunteers to reach fundraising goals.
- Knowledge regarding social media in relation to fundraising and marketing.
- Experience with strategic planning.
- Strong understanding of basic nonprofit accounting and financial management, including planning and budgeting.
- Ability to capitalize on marketing efforts for both funding and recruitment of CASA volunteer advocates.
- Excellent written and oral skills with direct experience writing successful correspondence, proposals, and grant applications and in delivering presentations to groups of various sizes.
- Ability to work in Microsoft Office Suite applications.
- Ability and experience in using donor or client tracking software.
- Proven ability to work independently.

Preferred Qualifications:

- Bachelor's degree (B. A., B. S, BBA) preferred, but not required.
- Certified Fund Raising Executive.
- Knowledge of the philanthropic community in the Corpus Christi area.
- Mathematical skills necessary for preparing budgets, analyzing financial reports, projecting revenues and expenses, and reviewing grant reports.
- Experience working with Board committees and volunteers.

This position is a 30 hour per week position with potential to grow to full time. Benefits are provided as follows: health insurance, retirement at 3 years vested, paid holidays and paid leave. Position to start mid January 2012.

EQUAL OPPORTUNITY STATEMENT – It is the policy of CASA of the Coastal Bend to implement affirmatively equal service to applicants without regard to race, religion, sexual orientation, group, age, gender, or national origin.

CASA OF THE SOUTH PLAINS, INC.

JOB DESCRIPTION – Recruitment and Training Director

TITLE: Recruitment and Training Director

CLASSIFICATION AND STATUS: Exempt – Full Time

REPORTS TO: Executive Director

PRIMARY RESPONSIBILITY: Responsible for the recruitment and training of Lubbock County volunteers and the coordination of all agency recruitment activities.

JOB ACTIVITIES:

A. Recruitment:

1. Serve as the leader for CASA’s Recruitment Team composed of board, staff, and volunteers;
2. Work with the Recruitment Team to create an annual volunteer recruitment and retention plan for the agency based upon strategies created in the agency’s strategic plan;
3. Responsible for the implementation of all recruitment and retention strategies developed by the Recruitment Team for Lubbock County;
4. Ensure the Recruitment Team meets quarterly to evaluate the agency’s recruitment and retention strategies;
5. Serve as the point of contact for all Lubbock county prospective volunteers by providing information on a one to one basis, answering any questions, and providing information on upcoming trainings;
6. Maintain a volunteer database documenting all volunteer inquiries and follow-up;
7. Develop recruitment materials that are distributed to all prospective volunteers;
8. Ensure all prospective volunteers are notified of upcoming volunteer trainings and other agency events;

B. Preservice Training:

9. In coordination with the Volunteer Recruitment Specialist, create and implement a volunteer application, background screening materials, and preservice interview questions that adhere to agency and Texas CASA standards;
10. Conduct all required preservice screening on all Lubbock County prospective volunteers and determine if they meet agency qualifications;
11. Schedule and facilitate all Lubbock County preservice volunteer trainings;
12. Ensure all prospective volunteers have completed the necessary preservice training and screening prior to case assignment;
13. Assist the Administrative Coordinator in obtaining all necessary information for each volunteer’s agency file;

C. Inservice Training:

14. In coordination with the Volunteer Recruitment Specialist, develop an annual inservice training schedule;
15. Coordinate and facilitate all Lubbock County inservice trainings;

D. Other Duties:

16. Responsible for the maintenance of volunteer specific materials on CASA's website;
17. Provide the Executive Director with monthly progress reports on volunteer recruitment activities;
18. Assist in the development of CASA's Volunteer Manual and ensure its compliance with agency policies and Texas and National CASA standards;
19. Promote and maintain congenial relationships with other professionals;
20. Perform additional duties as requested.

QUALIFICATIONS:

1. Mature with a great ability to lead.
2. Strong organizational skills and administrative skills.
3. Great relationship skills.
4. Good communication skills both verbal and written.
5. Self starter with minimal guidance.
6. Bachelor's degree in social work and/or related field required.
7. Prior experience in volunteer recruitment, screening, and management preferred.
8. Prior experience in facilitation or course instruction preferred.
9. Ability to work with a variety of individuals.

Prepared November 17, 2011 by JAH

CASA OF THE SOUTH PLAINS, INC.

JOB DESCRIPTION – Volunteer Recruitment Specialist

TITLE: Volunteer Recruitment Specialist

CLASSIFICATION AND STATUS: Exempt – Full Time

REPORTS TO: Executive Director

PRIMARY RESPONSIBILITY: Responsible for the recruitment and training of Hale, Hockley, Terry, Yoakum, and Cochran volunteers.

JOB ACTIVITIES:

A. Recruitment:

1. Work with the Recruitment Team to create an annual volunteer recruitment and retention plan for the agency based upon strategies created in the agency's strategic plan;
2. Assist the Recruitment and Training Director in the implementation of all recruitment and retention strategies developed by the Recruitment Team for Hale, Hockley, Terry, Yoakum, and Cochran counties;
3. Serve as the point of contact for all Hale, Hockley, Terry, Yoakum, and Cochran county prospective volunteers by providing information on a one to one basis, answering any questions, and providing information on upcoming trainings;
4. Maintain a volunteer database documenting all volunteer inquiries and follow-up for Hale, Hockley, Terry, Yoakum, and Cochran county prospects;
5. Assist the Recruitment and Training Director in the development of recruitment materials that are distributed to all prospective volunteers;
6. Ensure all prospective volunteers are notified of upcoming volunteer trainings and other agency events;

B. Preservice Training:

7. In coordination with the Recruitment and Training Director, create and implement a volunteer application, background screening materials, and preservice interview questions that adhere to agency and Texas CASA standards;
8. Conduct all required preservice screening on all Hale, Hockley, Terry, Yoakum, and Cochran county prospective volunteers and determine if they meet agency qualifications;
9. Schedule and facilitate all Hale, Hockley, Terry, Yoakum, and Cochran county preservice volunteer trainings;
10. Ensure all prospective volunteers have completed the necessary preservice training and screening prior to case assignment;
11. Assist the Administrative Coordinator in obtaining all necessary information for each volunteer's agency file;

C. Inservice Training:

12. In coordination with the Recruitment and Training Director, develop an annual inservice training schedule;

13. Coordinate and facilitate all Hale, Hockley, Terry, Yoakum, and Cochran county inservice trainings;

D. Other Duties:

14. Assist in the maintenance of volunteer specific materials on CASA's website;

15. Provide the Executive Director with monthly progress reports on volunteer recruitment activities;

16. Assist in the development of CASA's Volunteer Manual and ensure its compliance with agency policies and Texas and National CASA standards;

17. Facilitate all necessary background screening for CASA staff, volunteers, and board members;

18. Promote and maintain congenial relationships with other professionals;

19. Perform additional duties as requested.

QUALIFICATIONS:

1. Mature with a great ability to lead.
2. Strong organizational skills and administrative skills.
3. Great relationship skills.
4. Good communication skills both verbal and written.
5. Self starter with minimal guidance.
6. Bachelor's degree in social work and/or related field preferred, Associate's degree required.
7. Prior experience in volunteer recruitment, screening, and management preferred.
8. Prior experience in facilitation or course instruction preferred.
9. Ability to work with a variety of individuals.

Prepared November 17, 2011 by JAH

CASA of El Paso, Inc.
VOLUNTEER RECRUITER
JOB DESCRIPTION

Job Summary

In a manner consistent with the mission and values of CASA of El Paso, Inc., the Volunteer Recruiter/Supervisor engages in community outreach activities and recruits prospective highly qualified volunteers to serve as Child Advocates.

Qualifications/Skills

- Undergraduate degree or commensurate education and work experience combination will be considered in lieu of an undergraduate degree
- 2-3 years experience in sales or marketing. Creative thinker with innovative recruitment ideas
- Experience with nonprofit and working with volunteers
- Measurable experience in cold calling and initiating contacts
- Experience coordinating presentations and booking special events
- Proven skills in organizing and managing information, events and meetings
- Outstanding written and verbal skills
- Proven ability to speak to groups of all sizes
- Proven experience in juggling multiple tasks and prioritizing deadlines
- Needs to be confident, flexible and responsible
- Computer and collection of data experience
- General knowledge of children services

Responsibilities and Duties

- Responsible for development of Annual Recruitment Plan.
- Achieves stated strategic planning for the recruitment of a diverse array of volunteers by using a pro-active and innovative approach to educating interested persons and companies about CASA of El Paso, Inc.
- Actively recruits potential volunteers outside of the CASA office.
- Assists with the development of creative pieces that target potential volunteers. (Website, postcards, direct mail pieces, flyers etc.).
- Completes screening procedures on all potential and active volunteers.
- Researches and implements creative ways to promote the mission of CASA of El Paso, Inc. and implement a soft-sell recruitment approach at all appropriate CASA of El Paso, Inc. special events.
- Coordinates the CASA of El Paso, Inc.' Speakers Bureau. This includes speaker's training, and securing speaking engagements.
- Coordinates all media activities including print, television and radio.
- Develop and maintain database of volunteers, donors and staff as well as Texas CASA master list.
- Provides the Executive Director monthly progress reports on recruitment and public relations activities and Evaluates the impact of outreach and recruiting efforts.
- Assists in developing agency goals.
- Follows procedures as set out in the agency's casework manual of policies and procedures.
- Participates in the staff meetings, providing appropriate recruitment and public relations data and information.

CASA OF THE SOUTH PLAINS, INC.

JOB DESCRIPTION – Special Events and Marketing Coordinator

TITLE: Special Events and Marketing Coordinator

CLASSIFICATION AND STATUS: Nonexempt – Part Time (20 hrs/wk)

REPORTS TO: Development Director

PRIMARY RESPONSIBILITY: Organize and manage all fundraising events for CASA of the South Plains with guidance from the Development Director. The position is responsible for diversifying and expanding current fundraising strategies with an emphasis on third party and special events coordination.

JOB ACTIVITIES:

1. Coordinate and oversee special events and third-party fundraising programs serving as the main point of contact for all event inquiries.
2. Negotiate and maintain special event and third party contracts, ensuring compliance with CASA guidelines and applicable laws.
3. Organize and coordinate planning meetings for committees and volunteers involved in events. Attend all committee meetings and keep committees apprised of event status.
4. Assist with publishing a fundraising newsletter on a bi-annual basis.
5. Assist the Development Director in securing corporate sponsorships for all fundraising events.
6. Prepare and monitor event expense and income budgets for fundraising events.
7. Provide accounting for fundraising events to the Development Director.
8. Maintain event and other fundraising related items on the CASA website.
9. Coordinate volunteers for all special events.
10. Work with the Development Director on public relations and media for all events.
11. Work with the Executive Director and Development Director to establish CASA of the South Plains branding guidelines and develop print materials that adhere to these guidelines.
12. Secure in-kind donations for events as well as CASA operations.
13. Assist the Development Director in the maintenance of CASA's donor database including all donor data entry.
14. Assist the Development Director in all donor correspondence and accounting of received donations including processing donation receipts, end of year tax acknowledgements, and bank deposits.
15. Identify and present the Development Director with new events for diversification of fundraising.
16. Additional duties as required.

QUALIFICATIONS:

1. Bachelor's degree in public relations, marketing, and/or related field preferred.
2. Strong organizational skills to plan, implement, and administer fundraising events.
3. Strong interpersonal communication skills.

4. Prior experience with public relations or marketing preferred.
5. Preferred experience with event management.
6. Clear criminal background check.
7. Ability to work with a variety of individuals.

Created October 25, 2011 by JAH

Sample New Employee Orientation Checklist

EMPLOYEE INFORMATION			
Name:		Start date:	
Position:		Manager:	
FIRST DAY			
<input type="checkbox"/> Provide employee with New Employee Handbook.			
<input type="checkbox"/> Assign "buddy" employee(s) to answer general questions.			
POLICIES			
<input type="checkbox"/> Review key policies.	<ul style="list-style-type: none"> • Anti-harassment • Vacation and sick leave • FMLA/leaves of absence • Holidays • Time and leave reporting • Overtime • Performance reviews • Dress code 	<ul style="list-style-type: none"> • Personal conduct standards • Progressive disciplinary actions • Security • Confidentiality • Safety • Emergency procedures • Visitors • E-mail and Internet use 	
ADMINISTRATIVE PROCEDURES			
<input type="checkbox"/> Review general administrative procedures.	<ul style="list-style-type: none"> • Office/desk/work station • Keys • Mail (incoming and outgoing) • Shipping (FedEx, DHL, and UPS) • Business cards • Purchase requests 	<ul style="list-style-type: none"> • Telephones • Building access cards • Conference rooms • Picture ID badges • Expense reports • Office supplies 	
ADMINISTRATIVE FORMS			
<input type="checkbox"/> Process administrative forms: payroll, tax, status, eligibility, benefits (health, 401(k), life and disability).			
INTRODUCTIONS AND TOURS			
<input type="checkbox"/> Give introductions to department staff and key personnel during tour.			
<input type="checkbox"/> Tour of facility, including:	<ul style="list-style-type: none"> • Restrooms • Mail rooms • Copy centers • Fax machines 	<ul style="list-style-type: none"> • Bulletin board • Parking • Printers • Office supplies 	<ul style="list-style-type: none"> • Kitchen • Coffee/vending machines • Cafeteria • Emergency exits and supplies
POSITION INFORMATION			
<input type="checkbox"/> Introductions to team.			
<input type="checkbox"/> Review initial job assignments and training plans.			
<input type="checkbox"/> Review job description and performance expectations and standards.			
<input type="checkbox"/> Review job schedule and hours.			
<input type="checkbox"/> Review payroll timing, time cards (if applicable), and policies and procedures.			
COMPUTERS			
<input type="checkbox"/> Hardware and software reviews, including:	<ul style="list-style-type: none"> • E-mail • Intranet 	<ul style="list-style-type: none"> • Microsoft Office System • Data on shared drives 	<ul style="list-style-type: none"> • Databases • Internet

Administrative Competency Self-Assessment

Understanding the range of administrative competencies needed will help prepare your program for change. It is important to thoroughly assess the current competencies and strengthen where needed. This ensures that growth is managed well, and that the needed structures, policies and procedures are in place. Use the following checklist to assess your current administrative capacity and use the results to inform staffing and structure changes that may be needed for successful and sustained growth.

Accounting and Budget

	Who Does This	Always	Sometimes	Rarely	Never
Payroll processing and payroll taxes					
Receivables/Payables					
Accounting software					
Regular reports					
Accounting policies and procedures, including separation of duties					

Grant Management

	Who Does This	Always	Sometimes	Rarely	Never
Timely submission of RFRs					
Grant related spend down occurs as required					
Grant applications and grant budgets					
Time sheets for staff and volunteers					
VOCA statistics submitted as required					

Human Resources

	Who Does This	Always	Sometimes	Rarely	Never
Employee handbook reviewed annually					
Current job descriptions					
Performance management process					
Personnel files					
Hiring and selection process					
Employee orientation					

Risk Management

	Who Does This	Always	Sometimes	Rarely	Never
Program insurance (fidelity bond) needs reviewed annually					
Document retention policy					
Crisis planning					
Open records review annually with staff and board					

Building Operations

	Who Does This	Always	Sometimes	Rarely	Never
Conduct office inventory annually					
Routine building maintenance					
Vendors					
Clean office space					
Safety					

Case and Volunteer Data

	Who Does This	Always	Sometimes	Rarely	Never
Quarterly statistical data is submitted to Texas CASA on time					
Quarterly statistical data is accurate, has supporting documentation and does not require correction					
Cross-training in data submission					
Case management database					
Volunteer files					
Case files					

Information Technology

	Who Does This	Always	Sometimes	Rarely	Never
IT equipment (both hardware and software) are adequate for our needs					
IT problems are remedied in a timely manner with minimal disruption of work					
IT security and backup					

General Administration

	Who Does This	Always	Sometimes	Rarely	Never
Office and phones are staffed during office hours					
General correspondence					

Sample Organization Self-Evaluation Checklist

Board of Directors

- The Board of Directors is elected by a membership that represents the community that the organization serves.
- The Board of Directors is elected by a membership that represents the people who use or benefit from the programs and services of the organization.
- New Board members are given an information package on assuming their position that includes:
 - Board minutes from the previous two years
 - Financial statements from the previous two years
 - Annual report and Auditor's report for the previous two years
 - A copy of the Constitution and By-Laws
 - An organization chart
 - Summaries of all programs/services
 - Copies of any program/service evaluations from the previous two years
 - A list of key staff and their positions
 - Brief biographies of all Board Members.
- New Board members are given an orientation to the organization within their first month on the Board.
- Board job descriptions covering all Board positions are provided to all Board members.
- The Board meets at least quarterly.
- Written agendas are sent out before meetings.
- Minutes are sent out shortly after Board meetings.
- The Board sets annual goals for its own work.
- The Board evaluates its performance annually.
- The Board evaluates the C.E.O. annually.
- The Board has a process for handling emergencies between meetings.

Policy Management

- The organization has a Values Statement that is reviewed regularly.
- The Mission Statement is reviewed by the Board at least every two years.
- The Constitution and By-Laws are reviewed by the Board at least every three years.
- In addition to the standard sections, the By-Laws have policies covering Board member conflict of interest, Board members who apply for jobs with the organization, Board member absenteeism, and Board member liability.
- The Board sets annual goals for the organization.
- The organization has a Strategic Plan that is reviewed regularly.

- Every program/service that the organization provides has a set of measurable objectives/outcomes that are approved by the Board or its delegate committee.
- The Board controls signing authority

Financial Management

- The organization has a realistic annual budget and a plan for achieving it.
- Financial statements are presented to the Board at least quarterly.
- Financial statements provide comparative information for the previous year and for the current budget.
- The Board Treasurer is skilled at financial analysis.
- The organization has unrestricted operating reserves to cover a minimum of three months' operating costs.
- The cost of fund raising does not exceed 25% of funds raised.
- At least 75% of all expenses are directed to the Charitable Objects of the organization.
- The organization has an annual independent audit.

Risk Management

- Limits are put on over-spending without Board approval.
- All staff/volunteers who are in regular contact with vulnerable people or who are in a position of authority over vulnerable people are screened by police.
- The organization carries Directors and Officers liability insurance.
- The organization carries a minimum of \$2 million liability insurance.
- The organization has, regularly educates its staff and volunteers on, and enforces policies on discrimination and harassment.
- The organization has, and enforces policies on, confidentiality where appropriate.
- The organization has policies on the use of office equipment.
- The organization makes all mandatory government filings and payments on time.
- Fund raising activities follow the ethical guidelines set out by the Canadian Society of Fund Raising Executives and/or the Canadian Centre for Philanthropy.
- Independent contractors meet all the requirements of the Canada Revenue and Customs Agency for independent contractors.

Human Resources Management

- Staff are hired on a competitive basis through a formal process.
- The organization has a written personnel policy.
- The personnel policy is provided to all staff.

- The organization has a written volunteer policy.
- The volunteer policy is provided to all volunteers.
- Every staff person and volunteer has an up-to-date job description.
- Staff/volunteers are provided with a comprehensive orientation to the organization within one week of arriving.
- Staff/volunteers are evaluated annually.
- Evaluations are growth oriented.
- Staff/volunteers are provided with opportunities to upgrade their skills.
- Staff/volunteers are provided opportunities for promotion and/or change in assignment.
- The organization recognizes staff and volunteer achievement.
- Administrative staff turnover is under 15% annually.
- Program staff turnover is under 15% annually.

Program Delivery

- Programs are delivered to meet identified needs.
- Goals that cover output and outcome are set for every program/service.
- Individuals from all levels of the organization participate in planning processes.
- Programs are physically accessible.
- Programs are culturally accessible.
- Programs are provided by staff and volunteers with appropriate training and expertise.
- The organization communicates regularly with its stakeholders.

Evaluation

- Every program is evaluated against its output and outcome goals annually.
- Program and administrative evaluations are compiled and published annually.
- The results of all evaluations are used in annual planning.
- Service users are involved in evaluations.

Adapted from The Non-Profit Organization Self-Evaluation Checklist by Ginsler and Associates Inc.

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