**Advocacy and Volunteer Management Checklist**

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| **Document** | **TAC requirement** | **Notes** |
| 1.Volunteer Recruitment and Retention Plan (could be part of the Strategic Plan, please note) | **377.113(a)(7)**-procedures for volunteer recruiting, screening, training, and appointment to cases;  377.113.(b)1)A local volunteer advocate program must have a maximum volunteer-to-supervisor ratio of 30:1 and a maximum case-to-supervisor ratio of 45:1. |  |
| Volunteer Policy and Procedure | **377.113(a**)- (7) procedures for volunteer recruiting, screening, training, and appointment to cases;  (8) policies for support and supervision of volunteers;  (9) a grievance procedure for employees, volunteers, and community members.  **377.113.(b)(1**)A local volunteer advocate program must have a maximum volunteer-to-supervisor ratio of 30:1 and a maximum case-to-supervisor ratio of 45:1.  **377.113 (b)(3)** A local volunteer advocate program must endeavor to be an inclusive organization whose employees, volunteers, and directors reflect the diversity of the children and community that the program serves in terms of gender, ethnicity, and cultural and socio-economic backgrounds  **377.113.(f) Liability.**  (1) A person is not liable for civil damages for a recommendation made or an opinion rendered in good faith, while acting in the official scope of the person's duties as a board member, staff member, or volunteer of a local volunteer advocate program.  (2 Volunteers, employees, and directors of local volunteer advocate programs must abide by the conduct, confidentiality, and conflict-of-interest requirements outlined in this section, as well as all other laws and regulations governing the prescribed conduct and activity.  **377.115(a)**- Application Process.  (1) Prospective volunteers, employees, and directors must complete:  (A) a written application;  (B) personal interview(s); and  (C) consent and release forms for appropriate background investigations.  (2) New employees must also complete employee handbook acknowledgment forms.  **377.115-(b)** Volunteers.  (1) A volunteer must be at least 21 years of age.  (2) A volunteer may:  (A) review applicable records;  (B) facilitate prompt and thorough review of a case;  (C) interview appropriate parties, including service providers and persons with knowledge of the case, in order to make recommendations regarding the child's best interests;  (D) attend court hearings; and  (E) make written recommendations to the court concerning the outcome that would be in the child's best interest.  (3) A volunteer may not:  (A) take a child to any location not pre-approved by the advocate program;  (B) give legal advice or therapeutic counseling;  (C) make placement arrangements for a child;  (D) give or lend money or expensive gifts to a child or family;  (E) take a child on an overnight outing; or  (F) allow a child to come into contact with someone the volunteer knows or should know has a criminal history involving violence, child abuse, neglect, drugs, or a sexual offense as described under Chapter 21 of the Texas Penal Code.  (4) A volunteer may, on an individual basis, obtain written permission from the local volunteer advocate program, for an exception to an action listed under paragraph (3) of this subsection. If a request for an exception is made, a volunteer must disclose whether anyone who resides with the volunteer, or with whom the child may come in contact through the volunteer, does not meet the background requirements of §377.117 of this subchapter (relating to Local Volunteer Advocate Program Personnel Background Checks). The basis for electing whether to grant an exception must be documented in the child's case file.  (5) A volunteer must not be concurrently assigned to more than two cases, unless the assignment is approved by the local volunteer advocate program's executive director or caseworker supervisor.  (6) A volunteer must not provide foster care to a child in the managing conservatorship of DFPS unless the volunteer is related to the child. This prohibition does not apply to:  (A) a volunteer with whom DFPS placed a child prior to June 30, 1999; or  (B) a volunteer with whom a child has been placed by an agency or person other than DFPS and the child is not in the managing conservatorship of DFPS.  (7) A volunteer may not be assigned to any case in which the volunteer is related to any party.  **377.115** (e) Training.  **-** (1) A local volunteer advocate program must plan and implement a training and development program for employees and volunteers, and must inform employees and volunteers about:  (A) the background and needs of children served by the local volunteer advocate program;  (B) the operation of the court and the child welfare system; and  (C) the nature and effects of child abuse and neglect.  **377.115 (e) (3)** A local volunteer advocate training program must consist of at least 30 hours of pre-service training and 12 hours of in-service training per year.  **377.109(E)** provide, at a minimum:  (i) independent and factual information regarding the child, in writing, to the court and to counsel for the parties involved;  (ii) advocacy through the courts for permanent home placement and services for the child;  (iii) monitoring of the child to ensure the child's safety and to prevent the unnecessary relocation of the child to multiple temporary placements;  (iv) reports in writing to the presiding judge and to counsel for the parties involved;  (v) community education relating to child abuse and neglect;  (vi) referrals to existing community services.  (vii) procedures to safeguard the confidentiality of records or information relating to the child.  (viii) a volunteer recruitment and training program, including adequate screening procedures for volunteers; and  (ix) compliance with the standards adopted under Texas Family Code §264.602. |  |
| Code of Conduct stand-alone (may be in VPP, EP and BP | **377.113(c)** Conduct.  (1) All volunteers, employees, and directors must conduct themselves in a professional manner.  (2) Volunteers, employees, and directors may not discriminate against any individual on the grounds of race, color, national origin, religion, sex (including pregnancy), age, disability, or other legally protected classes.  (3) A local volunteer advocate program may terminate a relationship with a volunteer, employee, or director who:  (A) does not act in accordance with the policies of the local volunteer advocate program; or  (B) has abused or neglected a position of trust. |  |
| Pre-Service Training agenda that consists of 30 hours including complete agenda, topics, hours for both in person and pre-work | **377.115(e)(3)** A local volunteer advocate training program must consist of at least 30 hours of pre-service training and 12 hours of in-service training per year. |  |
| Volunteer Job Description | **377.113-(a)(6)** job descriptions for employees, directors, and volunteers; |  |
| Social Media Policy (note if included in VPP) | NA |  |
| Conflict of Interest Policy (note if included in VPP) | **377.113(e)** Conflicts of Interest. Each local volunteer advocate program must have a written conflict-of-interest policy that:  (1) prohibits any personal, business, or financial interest that renders a volunteer, employee, or director unable or potentially unable to perform the duties and responsibilities assigned to that volunteer, employee, or director in an efficient and impartial manner; and  (2) prohibits a volunteer, employee, or director from using the position for private gain, or acting in a manner that creates the appearance of impropriety. |  |
| Confidentiality Policy (note if included in VPP) | **377.113** (d)Confidentiality.  (1) Each local program must counsel volunteers, employees, and directors on what constitutes confidential information.  (2) A volunteer, employee, or director may not communicate any confidential information pertaining to an individual being served by a local volunteer advocate program to a person who is not authorized to possess the confidential information. |  |
| In-Service training calendar that consists of 12 hours of in-service training per year. | **377.115 (e)(3)** A local volunteer advocate training program must consist of at least 30 hours of pre-service training and 12 hours of in-service training per year.  377.115(e)(5) The statewide volunteer advocate organization may review all training and training materials for volunteers, employees, and directors |  |
| Provides Cultural Diversity training for volunteers on an annual basis (may be included in in-service training, please note) | **377.115(e)(4)** A local volunteer advocate program must provide cultural diversity training for volunteers, employees, and directors on an annual basis. |  |
| Visitation exception Policy (could be in VPP, please note) | NA |  |