

CASA JEFFERSON ADVOCATE MANUAL



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This public document was published at a total cost of _____; 30 copies were printed. This document was published for CASA Jefferson, 4401 North I-10 Service Road West, Suite 200, Metairie, LA 70006 to train potential volunteer advocates under the authority of a special exception by the Division of Administration. This material was printed in accordance with the standards for printing by state agencies established pursuant to R.S. 43:31. Printing of this material was purchased in accordance with the provision of Title 43 of the Louisiana Revised Statutes.

Congratulations and Welcome



Dear Advocate,

Welcome to CASA Jefferson, Inc. Your decision to become a Court Appointed Special Advocate is a generous one and we are honored to have you with us. Advocates like you are a source of inspiration to our staff and we draw strength from you to keep on doing what we do. For that, we thank you.

Advocating for children in need of care is an important and rewarding role. It can also be a challenging one. This policy and procedure manual, in conjunction with your training manual, and of course, your Advocate Coordinator, will help make your journey as smooth as possible.

This manual sets out the policies and procedures that govern advocate activity with CASA Jefferson, Inc. This manual also provides advocates with resources and checklist that outline key responsibilities for best practice advocacy. The nature of the work that CASA Jefferson provides to the community requires integrity and professionalism at all levels of program functioning. Of primary importance is the adherence of CASA Jefferson to the standards set forth by the National CASA Association. CASA Jefferson strives to be a “best practice” program, and therefore strives to meet or exceed National CASA’s standards. To continue to achieve that goal, Advocates need understand not only what the Court and the community expects of you, but also what the CASA Jefferson program expects, as well.

Please take the time to read this manual. You will be asked to sign an acknowledgment that you have read the manual and that you agree to comply with the outlined policies and procedures. Also, you may be required to sign additional documents stating more specific guidelines related to your work with CASA Jefferson, Inc.

“Unless someone like you cares a whole awful lot, nothing is going to get better. It’s not.”

-Dr. Seuss

Thank you!

Mission and Purpose



CASA Jefferson’s *mission* is to break the cycle of child abuse and neglect through volunteers advocating for safe, nurturing, and permanent homes for foster children in our community.

Our *purpose* is to promote advocacy for the best interest of abused and neglected children; to recruit and train volunteers to serve as CASA advocates for abused and neglected children in court proceedings in Jefferson Parish; to support the education of the public, the legislature, and the courts in Louisiana regarding the status of abused and neglected children.

To achieve the mission and purpose of CASA Jefferson, the program serves the 24th Judicial District Court, which comprises the cities of Grand Isle, Gretna, Harahan, Kenner, and Westwego as well as all unincorporated areas of Jefferson Parish including but not limited to Avondale, Harvey, Jefferson, Metairie, and River Ridge.

The population we serve is more clearly defined as the children and families who are subject to the jurisdiction of the Jefferson Parish Juvenile Court based on a judicial determination that a child has been neglected or abused by a parent or caregiver. This process is known as a Child in Need of Care proceeding.

Jefferson Parish Juvenile Court Oath for Court Appointed Special Advocate

I do hereby solemnly promise and pledge
that I will faithfully execute the duties of
a Court Appointed Special Advocate
as assigned and appointed by
the Juvenile Court, Jefferson Parish, State of Louisiana.

I furthermore promise and pledge
that as a Court Appointed Special Advocate,
and carrying out my duties as such,
my paramount concern will be
the best interest of the child or children
to whom I may be assigned.

So help me God.

Program Staff

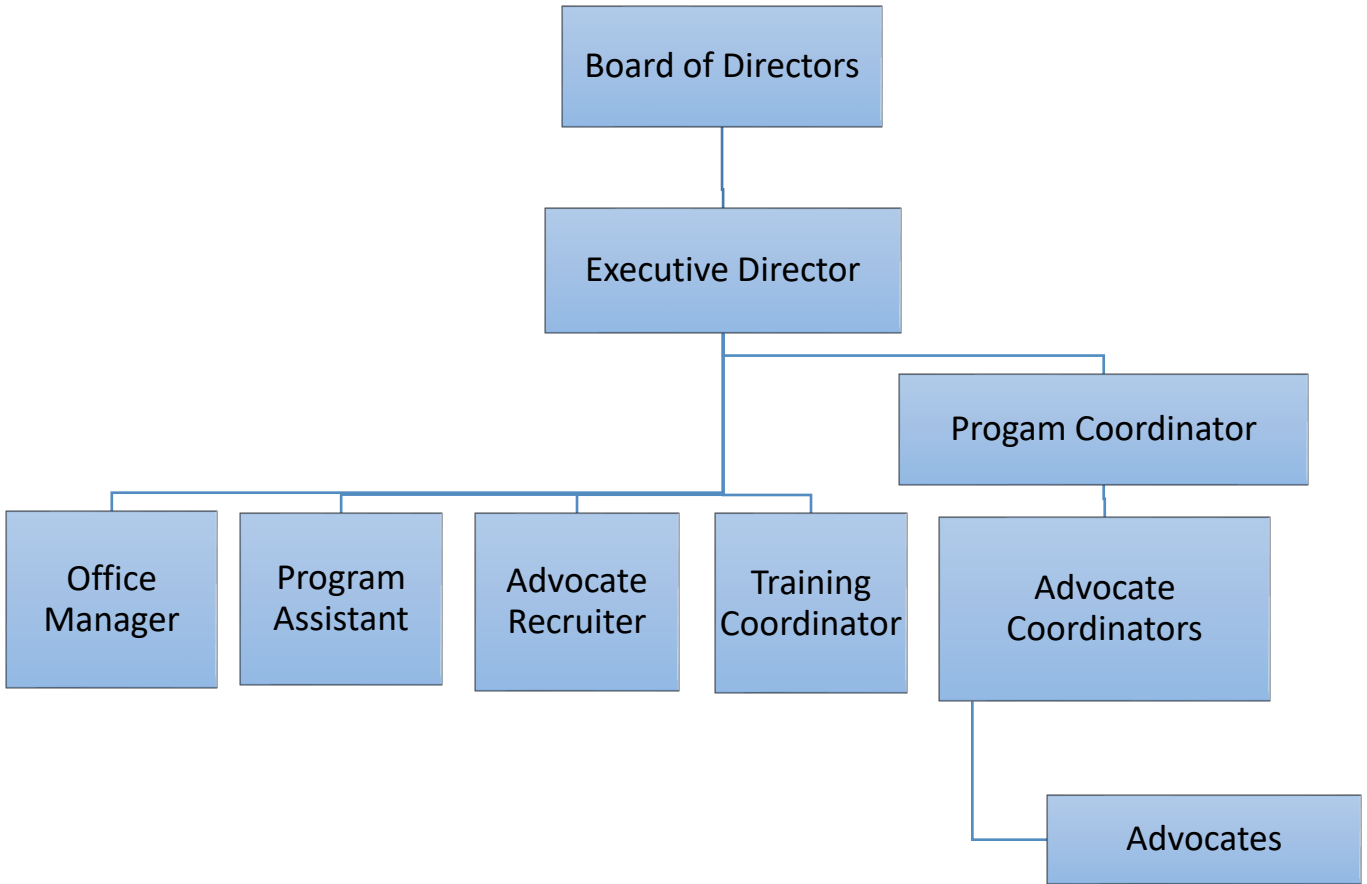


The following staff is available to assist you in the any way possible.
The main number to the CASA office is (504) 533-8757 and direct lines and email address are listed below:

Staff Person	Position	Direct Line	Email Address
Debbie Batiste Mack	Advocate Coordinator	(504) 620-5892	dbastiste@casajefferson.org
Kathleen Curtice	Program Assistant	(504) 533-8757	kcurtice@casajefferson.org
Katrina Dempsey	Office Manage	(504) 620-5891	kdempsey@casajefferson.org
Margaret Ether	Recruiter	(504) 533-8757	mether@casajefferson.org
Ramona Graham	Advocate Coordinator	(504) 620-5895	rgraham@casajefferson.org
Wendy Magee	Executive Director	(504) 620-5888	wmagee@casajefferson.org
Brittney Millet	Program Coordinator	(504) 620-5896	bbergeron@casajefferson.org
Malik Rigard	Advocate Coordinator	(504) 620-5893	mrigard@casajefferson.org
Wanda Smith	Advocate Trainer	(504) 620-5887	wsmith@casajefferson.org

The CASA Jefferson mailing address is:
4401 North I-10 Service Rd, West
Suite 200
Metairie, LA 7006

Organizational Structure



CASA in Louisiana Law



Court Appointed Special Advocates, CASA, was legislatively established by the State of Louisiana by the Children’s Code at Ch. C. Art. 424 et seq. This legislation sets forth the laws that govern all CASA programs in Louisiana.

In Jefferson Parish, the CASA program is a non-profit entity. This means that the program is administered by CASA Jefferson, Incorporated and is therefore under the direction and governance of the judges and CASA Jefferson INC., board members.

The Judges are:

Honorable Ann Murry Keller, Section A
Honorable Amanda C. Calogero, Section B
Honorable Barron C. Burmaster, Section C

Dawn Palermo is the Judicial Administrator

CASA Jefferson, INC. is incorporated as a non-profit organization whose sole purpose is to financially support the advocacy efforts of the CASA Jefferson program.

Public Law 105-19- Volunteer Protection Act of 1997

The federal **Volunteer Protection Act of 1997** (the VPA or the **Act**) aims to promote volunteerism by limiting, and in many cases eliminating, a **volunteer's** risk of tort **liability** when acting for nonprofit organizations or government entities.

Louisiana Children's Code Articles 424



Art. 424. Court-appointed special advocates (CASA); purpose

The purpose of CASA is to advocate for timely placement of children in permanent, safe, and stable homes. Acts 1991, No. 235, §4, eff. Jan. 1, 1992; Acts 1997, No. 904, §1, eff. July 10, 1997; Acts 1999, No. 275, §1, eff. July 1, 1999.

Art. 424.1. CASA; appointment

- A. The court is authorized in child in need of care proceedings, or in any certification for adoption proceedings, and adoption proceedings arising from a child in need of care proceeding, or a safe haven relinquishment, to appoint a CASA program as defined in Article 116 to assist the court in fulfilling its duties and responsibilities to children brought into court.
- B. Except as otherwise ordered by the court, the appointment of a CASA program for a child shall include subsequent proceedings through permanent placement of the child as defined by Article 603, including families in need of services or delinquency proceedings.
- C. Upon appointment, the CASA program shall designate the individual CASA volunteer for assignment to the child. The CASA volunteer shall have as his special duty and responsibility the advocacy of the best interests of the child involved in the juvenile proceeding in which he is assigned.
- D. CASA volunteers serve without compensation and at the pleasure of the court exercising juvenile jurisdiction. The judge of the court will first satisfy himself of the volunteer's qualifications, training, and ability to serve as a CASA volunteer, including his ability to represent and advocate the best interest of children assigned to him. No volunteer shall be assigned until a comprehensive criminal background check has been conducted.
- E. All CASA volunteers shall:
 - 1) Be sworn by a judge of the court.
 - 2) Swear or affirm to abide by all laws, regulations, and orders of court.
 - 3) Swear or affirm to advocate what he perceives to be in the best interest of the child for whom he is assigned in all matters pending before the court.

Acts 1999, No. 275, §1, eff. July 1, 1999; Acts 2003, No. 609, §1; Acts 2008, No. 394.

Art. 424.2. CASA; order of assignment

To accomplish the assignment of a CASA volunteer, the court shall issue an order of assignment which shall grant the CASA volunteer the authority to review all relevant documents pursuant to Article 424.6 and to interview all parties and witnesses involved in the proceeding in which he is appointed.

Acts 1999, No. 275, §1, eff. July 1, 1999.

Art. 424.3. CASA; duties

Under the supervision of the CASA program, it shall be the duty of a CASA volunteer to:

- (1) Provide independent, factual information to the court regarding the children and cases to which they are assigned.

- (2) Advocate on behalf of the children involved in the cases in which they are assigned what they perceive to be in the best interest of the children.
- (3) Monitor proceedings in cases in which they have been assigned and advise and assist the court in its determination of the best interest of the children involved.

Acts 1999, No. 275, §1, eff. July 1, 1999.

Art. 424.4. CASA; notice

- A. The CASA volunteer shall be notified by the court of all court proceedings and hearings of any kind pertaining to a child for whom he is assigned.
- B. The CASA volunteer shall be notified by the department of all administrative review hearings concerning the case to which he has been assigned.

Acts 1999, No. 275, §1, eff. July 1, 1999.

Art. 424.5. CASA; appearance; witness

- A. The CASA volunteer shall be entitled to attend all court proceedings and hearings of any kind pertaining to a child for whom he is assigned.
- B. The CASA volunteer may be called as a witness in the proceedings by any party or by the court and may request of the court the opportunity to appear as a witness.

Acts 1999, No. 275, §1, eff. July 1, 1999.

Art. 424.6. CASA; access to records; confidentiality

- A. The CASA volunteer shall be given access to all portions of the court record relating to proceedings pertaining to a child for whom he is assigned and to the child's family.
- B. Upon application to the court and notice to all parties, the court shall grant the CASA volunteer access to other information, including the department records as provided in R.S. 46:56, relating to the child and his family and to other matters involved in the proceeding in which he is appointed.
- C. All records and information requested or reviewed by the CASA volunteer in the course of his assignment shall be deemed confidential and shall not be disclosed by him except pursuant to court order. Such material will only be disclosed as directed by court order and will be subject to whatever protective order the court deems appropriate.

Acts 1999, No. 275, §1, eff. July 1, 1999.

Art. 424.7. CASA; reports

- A. The CASA program shall submit reports to the court. Except as provided in Paragraph B, it shall distribute a copy of such reports, prior to or at the same time it is submitted to the court, to all counsel of record, any unrepresented party, and the department.
- B. CASA reports may be subject to a protective order upon the request of the CASA volunteer, a party or party's attorney, or by the action of the judge.

Acts 1999, No. 275, §1, eff. July 1, 1999; Acts 2001, No. 567, §1.

Art. 424.8. CASA; request for hearing

The CASA volunteer may request a hearing before the court for any of the following reasons:

- 1) The case plan on behalf of the child is not being implemented or adhered to by any party.
- 2) The plan is not meeting the child's needs.
- 3) Other reasons in the best interests of the child.

Acts 1999, No. 275, §1, eff. July 1, 1999.

Art. 424.9. CASA; record confidentiality

All records maintained by the CASA volunteer and the CASA program shall be confidential and shall not be disclosed except as provided by Article 412.

Acts 1999, No. 275, §1, eff. July 1, 1999.

Art. 424.10. CASA; immunity

No cause of action shall exist against any CASA volunteer, director, employee, staff, or volunteer who in good faith makes a report, cooperates in an investigation by an agency, or participates in judicial proceedings. Each such person shall have immunity from civil or criminal liability that might otherwise be incurred or imposed. This immunity from liability shall not extend to:

- 1) An alleged principal, conspirator, or accessory to an offense involving the abuse or neglect or sexual exploitation of a child.
- 2) A person who makes a report known to be false or with reckless disregard for the truth of the report.
- 3) The unauthorized divulging of confidential information occasioned by the CASA volunteer's gross fault or gross neglect.

Acts 1999, No. 275, §1, eff. July 1, 1999

Policies and Procedures



Confidentiality

Everything an Advocate learns about a child and the child's family during their advocacy is confidential. You will sign a Statement of Confidentiality at pre-service training and every time you are assigned a new case. As an Advocate, start with the assumption that information cannot be disclosed to anyone. This includes information an Advocate may learn during his/her advocacy about children assigned to another Advocate. The advocate shall adhere to the following guidelines with respect to maintain confidentiality and respecting the privacy of others in all matters relating to an assigned case. The guidelines are set out below, they govern circumstances in which the CASA Advocate requests or receives information. However, these guidelines cannot cover every possible situation which may arise. If in doubt as to whether certain information can be shared, *always check with the Advocate Coordinator.*

- An Advocate may share information with the CASA Jefferson staff, other sworn Advocates, the Court and DCFS. In some instances, an Advocate may share information with the child's therapist or treating physician but check with the Advocate Supervisor first.
- An Advocate may *never* share information with a foster parent or the biological parents, or other relatives, teachers, or tutors.
- An advocate is not allowed to disseminate documents to any of the parties, their attorneys, and or collateral sources which are covered by state and/or federal confidentiality laws. These documents may include drug and alcohol evaluation/records; involuntary mental health treatment and rape crisis center information; and some criminal histories.
- An advocate should not promise a child or any party to the case that his/her statements will be kept secret or confidential.
- Cases involving parties who are known to the CASA program as being HIV positive, having AIDS and/or having other sexually transmitted diseases (STD's) are governed by an additional confidentiality protocol to which the Advocate must adhere. If, after accepting a case, the CASA advocates learn it involves a STD, the CASA advocate should immediately contact their Advocate Coordinator to obtain the protocol.
- An advocate must disclose confidential information learned during an investigation in three circumstances:
 - When consulting with CASA staff who must be provided all significant case specifics known to the CASA Advocate
 - When ordered by the court in a hearing or trial
 - When the CASA Advocate thinks that there is reasonable cause to believe that a child has suffered physical and/or sexual abuse.

Maintaining confidentiality is not an easy task, but it is vital. Remember that an Advocate is to gather information and not dispense it. When asked questions by others seeking information, politely explain that CASAs are bound by confidentiality laws.

Court Attendance and Court Reports

To properly apprise the Court of a child's situation and thereby advocate for that child's best interest, an Advocate is required to provide the Court with a written report and attend hearings so that the Advocate may testify as to his/her findings.

Court reports are due to the Court for all Disposition hearings, ASFA hearings, Permanency hearings, and most Status Reviews. Reports are due to the Advocate Supervisor three weeks prior to the court date. The Advocate Supervisor will meet with the Advocate and discuss the reports. These reports are confidential and may be presented only to the Court and the attorneys for the parties involved. This includes the attorney for DCFS, the child's attorney, and the attorney for the parents.

If there is any information included in a report that the Advocate and Advocate Supervisor believe should not be shared with all parties, then a CASA can request a protective order, which, if granted by the Court, would limit information provided.

An Advocate should always testify at a Court hearing, even if others have addressed all issues for the Court's attention. An Advocate should read all his/her recommendations into the record, so the Court will know that CASA has a position regarding the child and the child's circumstances.

Case Assignment Exception

A volunteer will not be assigned more than two sibling/family groups at a time. An exception may be granted at the discretion of the CASA staff; however, the decision to permit a high caseload shall be documented as to the justification for and reasonableness of the exception. Under the exception, a volunteer will not be assigned to more than five family/sibling groups.

Transportation of Children and Families

While an Advocate is permitted and encouraged to visit their child in a variety of scenarios, Advocates are prohibited from transporting the child in their vehicle. Additionally, Advocates may not transport family members. This falls outside the role of Advocate.

CASA Children Visiting Advocate's Home

Advocates are strictly prohibited from allowing any child appointed to the CASA Jefferson program access to their home, regardless of whether they are the Advocate appointed to the child. Advocates should not disclose their home or employment addresses to any child, biological parent, or foster parent. Doing so exceeds the scope of advocacy and is potential grounds for dismissal from the CASA Jefferson program.

Contact with the Child and Other Participants

Each advocate is required to see, face-to-face and outside the Court, *each month*, the children for whom they advocate, regardless of the child's age. Additionally, phone contact on a weekly basis is required.

An exception may be granted at the discretion of the CASA program; however, the decision to permit less frequent in person contact shall be documented as to the justification for the less frequent contact and reasonableness of the exception.

There are two reasons for this. First and foremost, an Advocate must ascertain whether a child is safe in his/her environment. This can only be achieved by seeing the child and the home in which he/she resides. This is true regardless of whether the child resides in a foster home, a treatment facility, a relative placement or their parents' home. Safety is a paramount concern, and every effort should be made to insure the child is safe and free from harm.

Secondly, a child needs to know that his/her advocate is truly there for them. Children who have been abused and/or neglected are often slow to trust anyone is there for them, wanting what is best for them. Seeing their Advocate consistently helps build trust and confidence.

One thing an Advocate must always remember: An Advocate *NEVER* takes the child to the Advocate's home, even in an emergency. This is strictly prohibited.

Advocates are required to maintain adequate contact with all other parties and participants, also known as collaterals. This includes, but is not limited to, parents, relatives, foster parents or other caregivers, the DCFS case manager, teachers, therapists, tutors, or anyone else with pertinent information regarding the child.

DCFS case managers, parents and caregivers should be contacted at least monthly, more often if the situation requires it.

Teachers, therapists, tutors and others should be contacted at least quarterly and always before a court report is written. Contact should be more often if the situation requires it.

Dual Role Policy

CASA Advocates cannot perform multiple roles in the lives of children who are under the jurisdiction of the Jefferson Parish Juvenile Court. If you are a CASA Advocate; you cannot be a foster or adoptive parent, mentor, visiting resource, or perform in another capacity that may create role confusion or a conflict of interest. Should you have an interest in serving children in addition to being an Advocate, you will be referred to another court's jurisdiction and it will be up to that agency or court to determine your suitability for service.

CASA Jefferson Identification

At no time is the CASA Jefferson identification badge to be used for any purpose other than to gather information regarding a child to whom the Advocate is currently assigned. Advocates are prohibited from representing themselves as an Advocate for anyone for whom they are not assigned, either by the CASA Jefferson program or the Jefferson Parish Juvenile Court, or from using their CASA identification in any way or in any matter to which they are not appointed.

The only exception to this policy is where an Advocate is a certified foster parent or visiting resource for a child that has been appointed to the CASA Jefferson program and to whom the Advocate is not assigned as a volunteer.

Suspected Abuse and/or Neglect

CASA Jefferson Advocates are required to report any suspected abuse and/or neglect of any child to the appropriate authorities and to their Advocate Supervisors. In Louisiana, the appropriate authority would be the Department of Children and Family Services for the parish in which the abuse or neglect occurred or any law enforcement agency of the city or parish in which the incident occurred.

Failure to report child abuse or neglect is possible grounds for dismissal from the CASA Jefferson program.

Expenses Reimbursement Policy



1. Purpose

The Board of Directors of CASA Jefferson, Inc. recognizes that board members, staff, and volunteers of CASA Jefferson may be required to travel or incur other expenses from time to time to conduct organizational business and to further the mission of this non-profit organization. The purpose of this policy is to ensure that (a) adequate cost controls are in place, (b) travel and other expenditures are appropriate, and (c) to provide a uniform and consistent approach for the timely reimbursement of authorized expenses incurred by board, staff, and or volunteers. It is the policy of CASA Jefferson Inc. to reimburse only reasonable and necessary expenses actually incurred. When incurring business expenses, CASA Jefferson, Inc. expects board, staff, and volunteers to:

- Exercise discretion and good business judgment with respect to those expenses
- Be cost conscious and spend CASA Jefferson, Inc.'s money as carefully and judiciously as the individual would spend his or her own funds.
- Report expense, supported by required documentation, as they were actually spent.

2. Expense Report

Expenses will not be reimbursed unless the individual requesting reimbursement submits a written Request for Reimbursement Form. The Reimbursement Form shall be submitted monthly or within two weeks of the completion of travel and or expense. Request for reimbursement must include:

- The individuals name and address
- If reimbursement for travel is requested, the date, origin, destination and purpose of the trip, including description of each CASA Jefferson, Inc.'s related activity during the trip.
- The name and affiliation of vendor from whom expenses are claimed (i.e., vendor where money is spent in order to conduct CASA Jefferson, Inc.'s business)
- An itemized list of all expenses for which reimbursement is requested.

3. Receipts

Receipts are required for all expenditures billed directly to CASA Jefferson, Inc. No expense will be reimbursed to the individual requesting reimbursement absent a properly completed Reimbursement Request Form with attached receipts from each vendor (not a credit card receipt or statement) showing the vendor's name, a description of the services provided (if not otherwise obvious), the date, and the total expenses.

4. General Travel Requirements

- Advanced Approval:** All trips involving air travel or at least one overnight stay must be approved in advance by the individual's supervisor; however, any out-of-state travel must be approved by CASA Jefferson, Inc.'s Executive Director. In the event that the travel is for the Executive Director, the Chairperson of the Board or his/her designee must approve any out-of-state travel.
- Necessity of Travel:** In determining the reasonableness and necessity of travel expenses, board, staff and volunteers and the person authorizing the travel shall consider the ways in which CASA Jefferson, Inc. will benefit from the travel and weigh those benefits against the anticipated costs of the travel. The same considerations shall be taken into account in deciding whether a particular

individual's presence on a trip is necessary. In determining whether the benefits to CASA Jefferson, Inc. outweigh the costs, less expensive alternatives, such as participation by telephone or video conferencing, or the availability of local programs or training opportunities, shall be considered.

- C. Personal and Spousal Travel Expenses:** Individuals traveling on behalf of CASA Jefferson, Inc. may incorporate personal travel or business with their CASA Jefferson, Inc. -related trips; however, Personnel shall not travel at a time that is less advantageous to CASA Jefferson, Inc. or involving greater expense to CASA Jefferson, Inc. in order to accommodate personal travel plans. Any additional expenses incurred as a result of personal travel, including but not limited to extra hotel nights, additional stopovers, meals or transportation, are the sole responsibility of the individual and will not be reimbursed by CASA Jefferson, Inc. Expenses associated with travel of an individual's spouse, family, or friends will not be reimbursed by CASA Jefferson, Inc.

5. Personal Cars

Personnel are compensated for use of their personal cars when used for CASA Jefferson, Inc. business. When individuals use their personal car for such travel, mileage will be allowed at the currently approved Louisiana State rate per mile. Additionally, CASA Jefferson, Inc. requires anyone traveling to conduct CASA Jefferson, Inc. business to wear a seat belt as required by state law.

- Reimbursement request forms must be typed and signed by the Requestor (Advocate or Staff) and the Requestor's Supervisor.
- Reimbursement requests will only be approved if the Mileage Reimbursement Request Form is completely filled out.
- Completed Mileage Reimbursement Request Forms must be submitted to the Requestor's Supervisor no later than the last day of the month.
- Reimbursement request forms that are not received timely or properly completed will not be approved or reimbursed.

Mileage will only be reimbursed for the following:

- Travel in connection with direct service to CASA clients.
- Travel to and from courthouse.

Mileage will not and cannot be reimbursed for the following:

- Travel that is administrative in nature (example: Meeting with Advocate Supervisor).
- First trip of the day (except for out-of-town travel in connection with a case).
- Travel to/from pre-service or in-service training.
- Travel from to/from your residence and the CASA office.

6. Parking/Tolls

Parking and toll expenses, including charges for hotel parking, incurred by board, staff and volunteers traveling on CASA Jefferson, Inc. business will be reimbursed. The costs of parking tickets, fines, car washes, valet service, etc., are the responsibility of the employee and will not be reimbursed.

7. Non-Reimbursable Expenditures

CASA Jefferson, Inc. maintains a strict policy that expenses in any category that could be perceived as lavish or excessive will not be reimbursed, as such expenses are inappropriate for reimbursement by a nonprofit, charitable organization. Expenses that are not reimbursable include, but are not limited to:

- Travel insurance.
- First class tickets or upgrades.
- When lodging accommodations have been arranged by CASA Jefferson, Inc. and the individual elects to stay elsewhere, reimbursement is made at the amount no higher than the rate negotiated by CASA Jefferson, Inc. Reimbursement shall not be made for transportation between the alternate lodging and the meeting site.
- Limousine travel.
- Movies, liquor, or bar costs.
- Spa or exercise charges.
- Clothing purchases.
- Business conferences and entertainment which are not approved by the Executive Director of CASA Jefferson, Inc.
- Valet service.
- Car washes.
- Toiletry articles
- Expenses for spouses, friends, or relatives. If a spouse, friend, or relative accompanies personnel on a trip, it is the responsibility of the personnel to determine any added cost for double occupancy and related expenses and to make the appropriate adjustment in the reimbursement request.
- Overnight retreats without the prior approval of the chairperson of the board or his/her designee.

8. Review of Policy

This policy will be reviewed at least every two years and recommendations for amendments will be approved by the board.

Political Activity Policy



CASA Jefferson, Inc. neither encourages nor discourages discussion of political beliefs or participation in political activities among its Board Members, employees, and volunteers of CASA Jefferson, Inc. However, as an organization exempt from taxation under Section 501(c)(3) of the Internal Revenue Code, CASA Jefferson, Inc. is prohibited from engaging in political activities including the participation in or intervention in any political campaign (including the publication or distribution of statements) on behalf of or in opposition to any candidate for public office.

As such, board members, employees or volunteers must ensure that views expressed with regard to political beliefs and participation in political activities are not interpreted as being those of CASA Jefferson, Inc. Personnel are prohibited from soliciting or otherwise campaigning on behalf of a candidate for public office while on CASA Jefferson, Inc. business, while on duty for CASA Jefferson, Inc., or otherwise clearly associated with CASA Jefferson, Inc. Personal endorsements of political candidates for office or political issues must not be performed in a manner which indicates a connection with CASA Jefferson, Inc., or in any other way implies an endorsement.

Further, Board members, employees or volunteers of CASA Jefferson, Inc. are prohibited from soliciting or receiving political contributions on CASA Jefferson, Inc. property or in any place occupied for any purpose by CASA Jefferson, Inc.

Conflict of Interest Policy



To avoid even theoretical conflicts of interest, CASA Jefferson imposes the following guidelines:

1. No employee or volunteer shall knowingly take any action or make any statement intended to influence the conduct of CASA Jefferson in such a way as to confer any financial or personal benefit on such individual or his/her family, or on any corporation in which he/she is an employee or has significant interest as a stockholder, director, or officer, with which he/she may serve as director or trustee or in a professional capacity.
2. In the event that there comes before the employee or volunteer a matter for consideration or decision that raises a potential conflict of interest for any employee or volunteer, the individual shall disclose the conflict of interest as soon as he/she becomes aware of it.
3. Any employee or volunteer who is aware of a potential personal conflict of interest with respect to any matter coming before CASA Jefferson shall abstain from any decision making in connection with the matter.

These guidelines are not intended to prevent or discourage any employee or volunteer from disclosing relevant information with respect to any matter to which he/she has knowledge or from answering questions or stating his/her position with respect to any such matter.

Conflict of Interest

A conflict of interest may exist when the interests or concerns of an interested party may be seen as competing with the interests or concerns of CASA Jefferson. There are a variety of situations that raise conflict of interest concerns including, but not limited to, the following:

Financial Interests – A conflict may exist where an interested party, or a relative or business associate of an interested party, directly or indirectly benefits or profits as a result of a decision made or transaction entered into by CASA Jefferson. Examples include situations where:

- CASA Jefferson contracts to purchase or lease goods, services, or properties from an interested party or a relative or business associate of an interested party.
- CASA Jefferson purchases an ownership interest in or invests in a business entity owned by an interested party, or by a relative or business associate of an interested party.
- CASA Jefferson offers employment to an interested party, or a relative or business associate of an interested party, other than a person who is already employed by CASA Jefferson.
- An interested party, or a relative or business associate of an interested party, is provided with a gift, gratuity, or favor, of a substantial nature, from a person or entity who does business, or seeks to do business, with CASA Jefferson.
- An interested party, or a relative or business associate of an interested party, is gratuitously provided use of the facilities, property, or services of CASA Jefferson

Other Interests – A conflict may also exist where an interested party, or a relative or business associate of an interested party, obtains a non-financial benefit or advantage that he would not have obtained absent his/her relationship with CASA Jefferson, or where his/her duty or responsibility owed to the organization conflicts with a duty or responsibility owed to some other organization.

Examples include situations where:

- An interested party seeks to obtain preferential treatment by CASA Jefferson for himself/herself, or a relative or business associate.
- An interested party seeks to make use of confidential information obtained from CASA Jefferson for his/her own benefit, or for the benefit of a relative or business associate, or other agency.
- An interested party seeks to take advantage of an opportunity, or enable a relative, business associate, or other organization to take advantage of an opportunity, which he/she has reason to believe would be of interest to CASA Jefferson.

Disclosure of Actual or Potential Conflicts of Interest

An interested party is under a continuing obligation to disclose any actual or potential conflicts of interest as soon as it is known, or reasonably should be known.

An interested party shall complete a questionnaire to disclose the material facts fully and completely about any actual or potential conflicts of interest. The disclosure statement shall be completed upon his/her association with CASA Jefferson and shall be updated annually thereafter. An additional disclosure statement shall be filed when an actual or potential conflict arises.

In the case of staff or volunteer with significant decision-making authority, the disclosure statements shall be provided to the Executive Director of CASA Jefferson.

The Secretary of the board of directors shall file copies of all disclosure statements with the official corporate records of CASA Jefferson.

Procedures for Review of Actual or Potential Conflicts – Generally

All staff and board members must complete and sign a Conflict-of-Interest Statement each calendar year.

Whenever there is reason to believe that an actual or potential conflict of interest exists between CASA Jefferson, Inc. and an interested party, the Board of Directors shall determine the appropriate organizational response. This shall include, but not necessarily be limited to, invoking the procedures described in Section IV, below, with respect to a specific proposed action or transaction.

Where the actual or potential conflict involves an employee of CASA Jefferson other than the Executive Director, the Executive Director shall, in the first instance, be responsible for reviewing the matter and may take appropriate action as necessary to protect the interests of CASA Jefferson. The Executive Director shall report to the Chair the results of any review and the action taken. The Chair, in consultation with the Executive Committee, shall determine if any further board review or action is required.

Procedures for Addressing Conflicts of Interest – Specific Transactions

Where an actual or potential conflict exists between interests of CASA Jefferson, Inc. and an interested party with respect to a specific proposed action or transaction, CASA Jefferson, Inc. shall refrain from the proposed action or transaction until such time as the proposed action or transaction has been approved by the disinterested members of the board of directors of CASA Jefferson. The following procedures shall apply:

- An interested party who has an actual or potential conflict of interest with respect to a proposed action or transaction of the corporation shall not participate in any way in, or be present during, the deliberations and decision making of CASA Jefferson with respect to such action or transaction. The interested party may, upon request, be available to answer questions or provide material factual information about the proposed action or transaction.
- The disinterested members of the board of directors may approve the proposed action or transaction upon finding that it is in the best interests of the corporation. The board shall consider whether the terms of the proposed transaction are fair and reasonable to CASA Jefferson and whether it would be possible, with reasonable effort, to find a more advantageous arrangement with a party or entity that is not an interested party.
- Approval by the disinterested members of the board of directors shall be by vote of a majority of directors in attendance at a meeting at which a quorum is present. An interested party shall not be counted for purposes of determining whether a quorum is present, nor for purposes of determining what constitutes a majority vote of directors in attendance.
- The minutes of the meeting shall reflect that the conflict disclosure was made, the vote taken and, where applicable, the abstention from voting and participation by the interested party.

Violations of Conflict of Interest Policy

If the board of directors has reason to believe that an interested party has failed to disclose an actual or potential conflict of interest, it shall inform the person of the basis for such belief and afford that person an opportunity to explain the alleged failure to disclose.

If, after hearing the response of the interested party and making such further investigation as may be warranted in the circumstances, the board determines that the interested party has in fact failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

Whistleblower and Non-Retaliation Policy



CASA Jefferson, Inc. requires directors, board members, employees and volunteers to observe high standards of business and personal ethics in the conduct of their duties and responsibilities. All employees and representatives of CASA Jefferson, Inc. must practice honesty and integrity in fulfilling their responsibilities and must comply with all applicable laws and regulations.

The purpose of the Whistleblower Policy and Non-Retaliation Policy of CASA Jefferson, Inc. is to encourage and enable all individuals involved with the CASA Jefferson, Inc. program to raise concerns internally and come forward with credible information of illegal practices or serious violations of adopted policies of CASA Jefferson, Inc., prior to seeking resolution outside of CASA Jefferson, Inc. In addition, these policies specify that CASA Jefferson, Inc. will protect the person from retaliation and identifies where such information can be reported. Any person who retaliates against someone who has reported a violation in good faith is subject to discipline, up to and including termination of employment.

Encourages of reporting

CASA Jefferson, Inc. encourages complaints, reports or inquiries about illegal practices or serious violations of CASA Jefferson, Inc. policies, including illegal or improper conduct by CASA Jefferson, Inc. itself, by its leadership, or by others on its behalf. Appropriate subjects to raise under this policy would include financial improprieties, accounting or audit matters, ethical violations, or other similar illegal or improper practices or policies. Other subjects on which CASA Jefferson, Inc. has existing complaint mechanisms should be addressed under those mechanisms, such as raising matters of alleged discrimination or harassment via CASA Jefferson, Inc. human resource channels, unless those channels are themselves implicated in the wrongdoing. This policy is not intended to provide a means of appeal from outcomes in those mechanisms.

Rights and Responsibilities

CASA Staff, Directors, and volunteers are encouraged to report suspected fraudulent or dishonest conduct to the Executive Director. If the suspected fraudulent or dishonest conduct involves the Executive Director, the staff member is required to report such suspected conduct to the Chair of Board of Directors. Anyone filing a written complaint concerning a violation or suspected violation must be acting in good faith and have reasonable grounds for believing the information disclosed indicates a violation. Any good faith report, concern or complaint is fully protected by this policy, even if the report, concern, or complaint is, after investigation, not substantiated. Any allegations that prove not to be substantiated and which prove to have been made maliciously or knowingly to be false will be viewed as a serious disciplinary offense. Reasonable care should be taken in dealing with suspected misconduct to avoid:

- Baseless allegations;
- Premature notice to persons suspected of misconduct and/or disclosure of suspected misconduct to others not involved with the investigation; and
- Violations of a person's rights under the law

Reports will be kept confidential to the extent possible, consistent with the need to conduct an adequate investigation. Due to the important yet sensitive nature of the suspected violations, effective professional follow-up is critical. The Executive Director or appropriate board officer will contact the person who submitted the complaint and acknowledge receipt of the complaint. All reports will be promptly investigated and appropriate corrective action will be taken if warranted by the investigation.

Staff who become aware of suspected misconduct:

- Should not contact the person suspected to further investigate the matter or demand restitution.
- Should not discuss the case with attorneys, the media or anyone other than the Executive Director, or in cases involving suspected conduct of the Executive Director, the Chair of the Board of Directors.
- Should not report the case to an authorized law enforcement officer without first discussing the case with the Executive Director, or in cases involving suspected conduct of the Executive Director, the Chair of the Board of Directors.

Protection from Retaliation

It is contrary to the values of CASA Jefferson, Inc. for anyone to retaliate against any board member, director, and employee or volunteer who in good faith reports an ethics violation or a suspected violation of law or any regulations governing the operation of CASA Jefferson, Inc. No board member, director, staff or volunteer who in good faith reports a violation of CASA Jefferson, Inc. policies, laws or regulations shall suffer harassment, retaliation or adverse employment consequences.

An employee who retaliates against someone who has reported a violation in good faith is subject to discipline, up to and including termination of employment.

Electronic Communications and Social Media Policy



CASA Jefferson, Inc. staff, board members, and volunteers shall refrain from posting inappropriate material, links to inappropriate websites, or undesirable comments, references, or pictures anywhere on the web where the posting directly or indirectly makes reference to the CASA Jefferson program, children and families served by CASA Jefferson, Inc. or any name meant to refer to the organization. Staff and volunteers found to be in violation of this policy may be sanctioned at the discretion of the CASA Jefferson, Inc. program Executive Director and the Board of Directors.

This policy includes public postings to any electronic media including, but not limited to intranet and internet forums, blogs, web logs, photo blogs, online web communities, list serves, internet diaries, instant messaging, text messaging, podcasts, amateur video sites, and all web postings – such as those in chat rooms, on bulletin boards, websites, or web pages. Wikis, public/shared email, online compilations of photographs or videos, and links to any of the foregoing items are also prohibited.

“Inappropriate material” shall be defined as postings, depictions or descriptions of illicit substances and/or their paraphernalia, underage drinking; harassing, hostile, false, or confidential information and any other acts that violate local, state, federal, or the CASA Jefferson program laws, statutes, rules, and regulations. Also prohibited are prejudiced or discriminatory statements against any individuals, businesses, government agencies or groups. Staff and volunteers within the CASA Jefferson program should avoid creating the impression that the views expressed through any electronic or social media outlet are anything more than personal opinions.

Postings which directly or indirectly make reference to the CASA Jefferson program and/or the children and families served by CASA Jefferson include, but are not limited to, postings which name CASA, the Court Appointed Special Advocate program or any name meant to refer to the organization; photographs or videos which depict the CASA name, logo, symbols, or taglines; photographs or videos which display any CASA Jefferson sponsored activities or the families and children served by CASA Jefferson; postings which link to any local, state, national, international web page referring to CASA; and usernames or email addresses which indicate an affiliation with the CASA Jefferson program.

Any instance of electronic communication or social media use that could negatively impact CASA Jefferson in any manner is covered by this policy and subject to the discretion of CASA Jefferson’s Executive Director and Board of Directors. As in any situation, all actions taken will err on the side of caution to protect the best interest and confidentiality of the families and children served by the program.

CASA Jefferson, Inc. Distracted Driving Policy



In order to increase employee safety and eliminate unnecessary risks behind the wheel, CASA Jefferson, Inc. has enacted a Distracted Driving Policy, effective immediately. We are committed to ending the epidemic of distracted driving, and have created the following rules, which apply to any employee operating a company vehicle or using a company-issued cell phone while operating a personal vehicle:

- Company employees may not use a hand-held cell phone while operating a vehicle – whether the vehicle is in motion or stopped at a traffic light. This includes, but is not limited to, answering, or making phone calls, engaging in phone conversations, and reading or responding to emails, instant messages, and text messages.
- If company employees need to use their phones, they must pull over safely to the side of the road or another safe location.
- Additionally, company employees are encouraged to:
 - Turn cell phones off or put them on silent or vibrate before starting the car.
 - Consider modifying voice mail greetings to indicate that you are unavailable to answer calls or return messages while driving.
 - Inform clients, associates, and business partners of this policy as an explanation of why calls may not be returned immediately.

Advocate Job Description



Working Title:

CASA Advocate

Program:

Court Appointed Special Advocates of Jefferson Parish

Pay Grade

Volunteer

Organization Location:

4401 North I-10 Service Rd, West
Suite 200
Metairie, LA 70006

Reports to:

Advocate Coordinator

Location of Work:

CASA program administrative office located at 4401 N I-10 Service Rd W. Metairie, LA. This position works mostly in the field in order to conduct the activities associated with advocacy. Office space is available to the Advocate to perform clerical tasks.

Hours of Work:

Advocates devote an average of ten hours of advocacy per month, including court attendance and other daytime meetings as well as some evenings and weekend visits.

Position Purpose:

CASA Advocates are appointed by the Juvenile Court of Jefferson Parish to ensure that the needs of abused, neglected and/or abandoned children are met. In order to do this, the CASA Advocate must investigate the facts of the case, facilitate resource and service provision through a collaborative relationship between all parties of the case, advocate through written reports for the court including recommendations and testimony, and monitor compliance with the court orders.

Essential Functions:

Duties will include but will not be limited to the following:

- Commit to a minimum of two years per case.
- Maintain strict confidentiality of the child's case.
- Review all records pertaining to the child's case
- Interview and gather information about the child and the child's life circumstances, including the DCFS worker, any attorneys involved in the case, family members, foster

care givers, the child, teachers, and other interested parties. These interviews are to be conducted in-person in most circumstances.

- Have regular in-person conduct with the child enough to have an in-depth knowledge of the case and make fact-based recommendations to the court. The CASA volunteer shall meet in-person with the child once every thirty (30) days at a minimum.
- Determine if a permanent plan has been created for the child.
- Determine whether appropriate services, including reasonable efforts, are being provided to the child and family.
- Submit, in a timely manner, a signed, written, fact-based report detailing the current situation of the child's case, including recommendations to the court on what placement and services are best for the child.
- Attend all court hearings.
- Understand the timetables relating to Child in need of Care proceedings and the court process.
- Maintain complete records about the case, including appointments.
- Have regular, in-person contact with the Advocate Supervisor to report progress and findings relating to the case.
- Continue to monitor the progress of the child's case until permanency is achieved.

Marginal Functions:

While the following tasks are necessary for the work of the unity, they are not an essential part of the purpose of this position and may also be performed by other unit members.

- Performs related work as required.

Necessary Knowledge, Skills, and Abilities:

- Complete an application containing information about educational background and training, employment history and experience working with children.
- Submit the names of three or more references of person unrelated to applicant.

Minimum Qualifications:

- Be screened and trained by the CASA Jefferson Program and appointed by the court to advocate for children who come into the court system primarily as a result of alleged abuse or neglect.
- Over the age of 21 and successfully pass screening, including an application, personal interview, child abuse registry check, National Sex Offender Registry Check, Social Security Verification, and FBI criminal records check as well as a local background check, and three reference checks.
- Comfortable interacting with a variety of people and who has good verbal and written communications skills.
- Has respect for a child's inherent right to grow up with dignity in a safe environment that meets his/her best interests.

- Assures that the child's best interests are represented in court at every stage of the case.
- Can devote an average of ten hours of advocacy per month, including court attendance and other daytime meetings as well as some evening and weekend visits.

ADA Compliance:

Physical Ability: Tasks involve the ability to exert very light physical effort in sedentary to light work, but which may involve some lifting, carrying, pushing and /or pulling of objects and materials of light weight (5-10 pounds). Tasks may involve extended periods of time at a keyboard or workstation.

Sensory Requirements: Some tasks require visual perception and discrimination. Some tasks require oral communications ability.

Environmental Factors: Tasks are regularly performed without exposure to adverse environmental conditions, such as dirt, dust, pollen, odors, wetness, humidity, rain, fumes, temperature and noise extremes, machinery, vibrations, electric currents, traffic hazards, toxic agents, violence, disease, or pathogenic substances.

CASA Jefferson is an equal opportunity volunteer program. Volunteers are recruited without regard to race, gender, age and disability. The sole qualification for volunteer recruitment is the individual's suitability to perform the role of a CASA. CASA Jefferson is committed to maintaining a workplace that is free of discrimination, harassment, and retaliation.

CASA Jefferson, Inc. is an Equal Opportunity Employer. In compliance with the Americans with Disabilities Act, CASA Jefferson, Inc. will provide reasonable accommodations to qualified individuals with disabilities and encourage both prospective and current employees to discuss potential accommodations with the employer.

CASA National Guidelines



A CASA Advocate is appointed by the court to advocate for children who come into the court system primarily because of abuse or neglect.

1. Advocates must be a minimum of 21 years of age.
2. An Advocate must complete an application; personal interview; reference, DCFS, and criminal record checks. Fingerprinting may be an additional requirement of the CASA program.
3. A CASA Advocate must successfully complete 30 hours of initial training and 12 hours of In-service training annually as determined by the local program.
4. A CASA program does not accept or retain Advocates if they or an immediate family member have been convicted; have prior charges; or have charges pending for a felony or misdemeanor involved in a sex offense, violent act, child abuse or neglect, or related acts that would pose risks to children or to the CASA program's credibility.
5. A CASA Advocate shall not be related to any parties or litigants involved in the case or be employed in a position and/or agency that might result in a conflict of interest.
6. The CASA program staff shall be conscious of ethnic, cultural, and religious diversity when appointing Advocates to cases and select Advocates based on experience, understanding and skills to deal with these considerations.
7. An Advocate reviews records; facilitates prompt, thorough review of the case; and interviews appropriate parties in order to make recommendations on what would be in the best interest of the child.
8. The Advocate assures that the child's best interest is being represented at every stage of the case; shall attend court hearings; and make written recommendations to the court on what decision is best for the child.
9. A CASA Advocate does not become inappropriately involved in a case by providing direct service delivery to any parties that could (a) lead to a conflict of interest or liability problems; or (b) engage in activities which are likely to result in conflict of interest or expose the program or Advocate to criminal or civil liability; or (c) cause a child or family to become dependent on the CASA Advocate for services that shall be provided by other agencies or organizations. Such activities may jeopardize the safety of the child, the integrity of the program, or the objectivity of the Advocate.
10. A CASA Advocate does not provide direct services to a child or his/her family that could (a) lead to conflict of interest or potential liability, or (b) cause a child or family to become dependent on the CASA Advocate for services that should be provided by other agencies or organizations (i.e. Sheltering a child in the home, giving legal or therapeutic advice or counseling, making placement arrangements for the child, giving money or expensive gifts to the child or family, or taking the child on an over-night outing).
11. A CASA Advocate shall keep all information that would identify parties involved in CASA cases confidential.
12. CASA Advocates shall not be assigned to more than two or three cases simultaneously unless approved by the Program Director and Program Coordinator. Exceptions may be granted as long as it does not jeopardize the integrity of the case supervision.
13. A CASA program shall not use Advocates or retain Advocates who have abused or not fulfilled their position of trust, or otherwise created a negative image for CASA.

Statement of Commitment



Upon appointment as a Court Appointed Special Advocate, I agree:

- To act in a responsible professional manner in accordance with CASA volunteer policies and procedures, Court policies and relevant laws.
- To be an independent advocate for the best interest of the child(ren) named in my assigned case(s).
- To maintain objectivity.
- To keep all matters confidential.
- To treat all persons with respect, fairness and courtesy regardless of race, religion or economic status.
- To complete all necessary court reports and documentation in a timely manner.
- To attend all hearings regarding the child and to monitor court orders in a timely manner.
- To maintain an active commitment to the child(ren) until the case has been dismissed or other disposition has been made by the Court.
- To seek and accept support and supervision from program staff.
- To participate in ongoing training. I agree to acquire 12 hours of in-service training during each calendar year of service and to attend a minimum of 3 monthly in-service meetings each calendar year of service.
- To maintain commitment to the mission statement and goals of the program.
- To remain active on a case until the child achieves permanence or two years, whichever comes first.

Code of Conduct



Becoming a Court Appointed Special Advocate means that as a youth worker, a parent, or are simply a member of a community, your goal is to create safer environments for children. One person **can** create change in a community and together, a community can create new cultural norms that nurture children and protect them from child sexual abuse.

As a CASA Advocate and a participant of the Darkness to Light Stewards of Children training, you agree to adhere to the Code of Conduct as written below.

- Not be alone with only one child during a program, where staff or other volunteers cannot observe me.
- Not leave a child unsupervised at any time.
- Not abuse children or use corporal punishment of any kind. This includes physical abuse, verbal abuse, sexual abuse, mental abuse, or neglect. Any type of abuse will not be tolerated.
- Respect the children's right to not be touched in ways that make them feel uncomfortable. A child's right to say "No" is to be encouraged and respected. Other than diapering, children are not to be touched in areas of their bodies that would be covered by a bathing suit.
- Use appropriate touch including pats on the back or shoulder, side hugs, handshakes, and high fives. Staff and volunteer will refrain from full frontal hugging, touching of personal areas, or patting of the buttocks.
- Use positive techniques of guidance, including redirection, positive reinforcement, and encouragement rather than competition, comparison, and criticism.
- Not give gifts or special favors to individual children or show preferential treatment to a child or group of children to the exclusion of others.
- Respond to children with respect and consideration and treat all children equally regardless of gender, race, religion, sexual orientation, or culture.
- Not use, possess, or be under the influence of alcohol or illegal drugs during working hours.
- Not use profanity, inappropriate jokes, sharing intimate details of one's personal life, and any kind of harassment.
- Not be alone with children I met in CASA Jefferson, Inc. programs outside of CASA Jefferson, Inc. This includes babysitting, sleepovers, and inviting children to a home.
- Report any suspicion of abuse to the proper authorities and I am required to read and sign all policies relating to identifying, documenting, and reporting child abuse and attend prevention training.

Terms of Dismissal Policy



Because of the nature of the work the CASA Program undertakes and the level of responsibility in the program, it is necessary to outline actions which may result in immediate dismissal of a CASA Advocate. These violations include but are not limited to:

- Falsifying information on the application or misrepresenting facts during the screening process
- Breach of confidentiality
- Failure to report child abuse
- Pending allegations of child abuse or neglect against the advocate
- Falsifying information in a court report
- Representing the program in a public forum without prior permission from the Executive Director
- Speaking with the judge about a case without the accompaniment of the Advocate Coordinator
- Acting without program or court approval which endangers a child or is outside the role or responsibility of the CASA Program
- Violation of program policies, state or local laws
- A conflict of interest arises that cannot be resolved
- Endangering a child (CASA child or other)
- Engaging in ex-parte communication (contact with the judge outside of a Court proceeding)
- Failure to complete the required training

When an advocate has been found to violate one of the above policies, (s)he will have the opportunity to provide an explanation of the behavior. Where vulnerable children are involved, judgment calls will be made by the Program Coordinator on the basis of protecting the child's best interest.

Poor performance as an advocate may also be grounds for dismissal. Examples of poor performance are:

- Failure to demonstrate an ability to effectively carry out assigned duties
- Failure to keep adequate documentation
- Failure to submit court reports and activity sheets on time
- Failure to attend court hearings
- Failure to meet in service training requirements
- Not accepting feedback or supervision
- Failure to maintain consistent contact with your CASA child(ren)
- Failure to maintain firsthand information

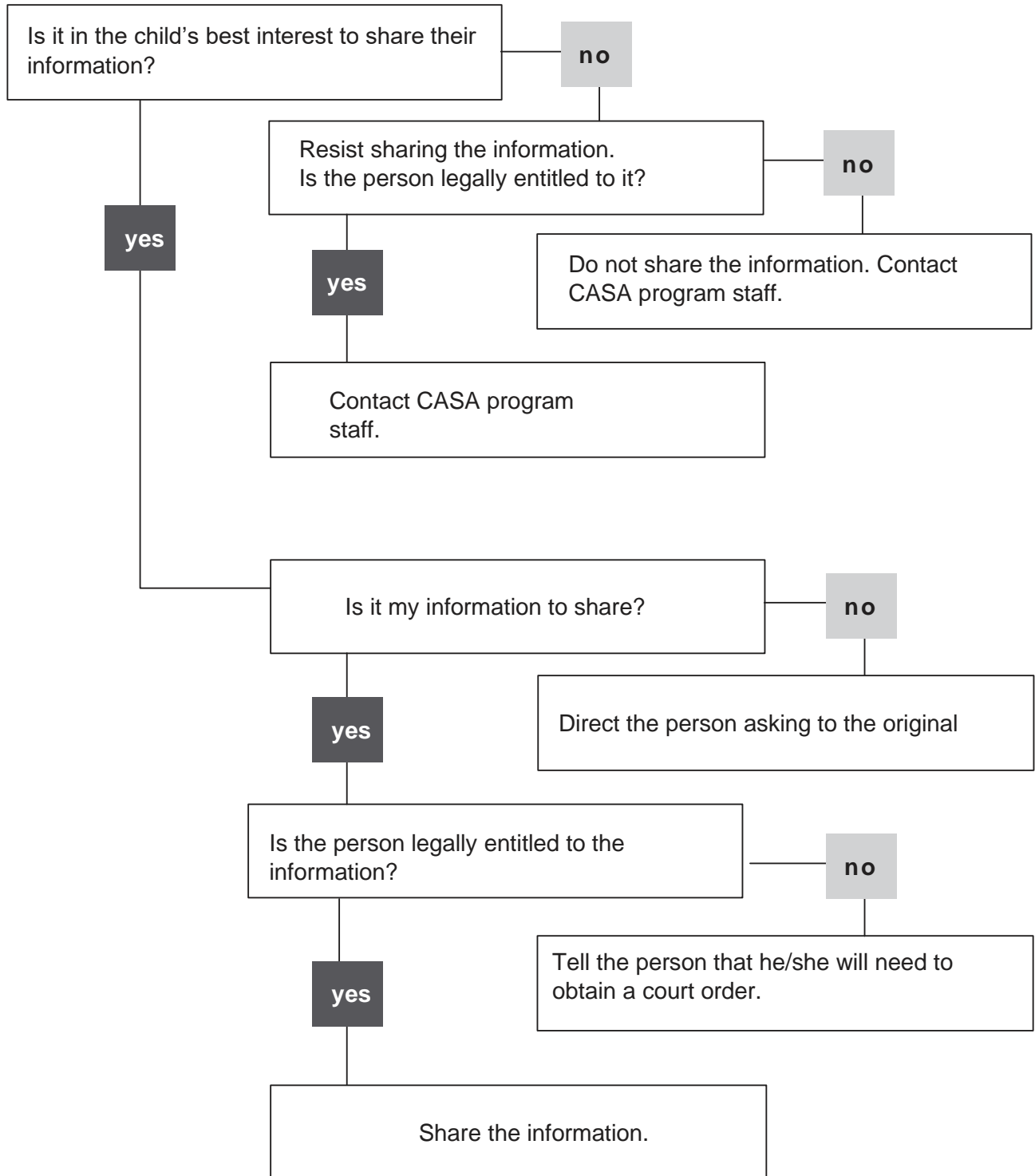
In the event of prolonged lapse of performance, the program can explore other options to prevent dismissal of the advocate. These options include:

- Increased supervision and guidance from the Advocate Coordinator
- The advocate may attend upcoming training sessions related to the deficiencies
- Reassignment to other volunteer opportunities within the CASA Program

CASA Advocates may also be subject to CASA Jefferson, Inc. Policies and Procedures.

A CASA Advocate shall inform their supervisor if (s)he determines that they are unable to adequately perform their duties.

Should I Share Information with Someone Else About This Child or This Case?



Monthly Coaching Policy



In accordance with National CASA Standard 7D, CASA Jefferson Inc. has developed the Monthly coaching policy for advocates in order to ensure compliance and understanding of the CASA roles and responsibilities.

Monthly coaching sessions is the best way for an advocate to learn advocacy. The pre-service training teaches an advocate what to do. Coaching is the ongoing support and guidance for the term of your case. The amount of coaching an advocate is individualized. For example, the length of time an Advocate has had a case, the number of cases an Advocate is assigned to and how comfortable an Advocate is with her/her advocacy.

Each newly sworn Advocate will meet with their assigned Advocate Coordinator, face to face monthly at minimum. The Advocate and Coordinator will maintain weekly contact (via email or phone) to ensure that advocates are held accountable for their performance of assigned duties and responsibilities as outlined by National CASA Standard 7. For new volunteers, to assure their understanding of their roles and responsibilities, Advocate Coordinator will accompany the new Advocate on the initial home visits with children and all initial meetings with collaterals. The Advocate Coordinator will also assist the Advocate in reviewing the Department of Children and Family Services (DCFS), Court and school records of the child. Through monthly coaching, advocate coordinators will review case progress and contact logs recorded by the advocate on each case and review the written case record.

An Advocate Coordinator will always provide whatever assistance requested by the Advocate during his/her advocacy.

Ongoing communication and coaching between the Advocate and Advocate Coordinator will help develop action steps/plans for advocacy of the assigned children. The action steps/plans will outline the course of action that the Advocate will take regarding the needs of the child or children involved and will outline the support and guidance provided by the Advocate Coordinate.

Advocates and Advocate Coordinators are required to document in the data management system, OPTIMA, monthly coaching information and case fact gathering. Furthermore, advocates and Advocate Coordinators must document the guidance provided by CASA Advocate Coordinator and the plan of action for future advocacy. Failure to document monthly coaching sessions and pertinent case information can find the Advocate and or Advocate Coordinator non-compliant with the National CASA Standard. Further consequences may apply – see Terms of Dismissal Policy.

In-Service Training Policy



CASA Jefferson expects their Advocates to be well-informed regarding a variety of children’s issues so that the Advocate can provide exceptional advocacy. To assist the Advocate in this, the CASA Jefferson program provides in-service training monthly for all Advocates

The in-service trainings are currently on the third Wednesday of every month.

All Advocates must receive at least 12 hours of in-service training each calendar year. The in-service hours may be acquired by various means, including attending provided in-service, watching previously approved videos, or reading previously approved books. The Advocate Supervisors can more fully explore this with each Advocate on an individual basis.

The CASA Jefferson program provides Court report writing and Court testimony clinics. The clinics are **mandatory for all newly sworn Advocates** and for any other Advocate if deemed necessary by the Advocate Supervisor. All others are encouraged to attend. These clinics count toward in-service hours.

Per National CASA Standard 7. C. Volunteer Training

2. The training consists of at least 30 hours of required pre-service training and 12 hours of required in-service training per year. The number of in-service training hours required for newly trained volunteers will be adjusted (or prorated) dependent on the time of year the volunteer is trained.

For example, a volunteer completing training in February will be responsible for 8 hours of in-service training.

Case Record Information Policy



As per National CASA Standard 7 and 11: CASA advocates will obtain firsthand a clear understanding of the needs and situation of the child by conducting an ongoing review of all relevant documents and records and interviewing the child, parents, social workers, teachers, and other persons to determine the facts and circumstances of the child's situation.

In order to ensure that CASA advocates are properly documenting their advocacy efforts and maintaining clear and complete case records – including all appointments, interviews, and information gathered, CASA Jefferson, Inc. will institute the case record information policy outlining the responsibility that each CASA volunteer and Advocate coordinator has as it relates to ensuring completion of case record information.

CASA Jefferson, Inc. subscribes to the data management system called OPTIMA. Optima is a tool that helps volunteers keep notes and track of their advocacy efforts and activities as they are completed. OPTIMA is used to track case information such as child placement, school, case plans, biological information, and overall advocacy outcomes. OPTIMA is also utilized to maintain Advocate information about screening, pre-service training, in-service training, and other case & non-case related information.

Advocate are required to enter their activities pertaining to their case into OPTIMA as the activity is being conducted. Advocates are assigned individual log in information to enter data. Current contact entries (events) include everyday activities such as correspondence with associated parties, home visits, court hearings, casework, data entry etc.

Advocacy activity should be entered by the Advocate into OPTIMA as the activities are conducted or within 48 hours of the activity and no later than the 25th of each month.

Additionally, CASA program shall maintain complete, accurate and current records of each child served, which includes current contact entries and periodic progress notes or summaries.

Periodic progress notes or case summaries are notes on the progress of a case. Summary notes should include specific case information relevant to the case and usually include case assessment and supervision activities. Case summary notes shall include a summary of what is happening on the case, advocacy provided by the volunteer, issues that have arisen in the case, clear assessment of what is going on in the case and a plan of action.

If the case summary notes are due the same month as a court report, the case summary note will refer to the CASA court report for case summary info, however, the supervisory guidance will be required to be documented.

The OPTIMA case management system is also a communication tool between the Advocates and CASA staff. In addition to the case management components of OPTIMA, CASA Jefferson Inc. program depends on the data collection of the cases/outcomes to document the advocacy service provided by CASA Advocates.

If you need technical assistance with the OPTIMA case management system, please send an email wimagee@casajefferson.org

For CASA Jefferson to continue to provide services to children in need, CASA Jefferson must provide data analysis and outcomes to the program funders. Funding is often based on the performance of a program and reports documenting services provided are vital to the survival of the CASA Jefferson, Inc. program. Therefore, each Advocate must document their advocacy efforts/activities being conducted on behalf of the children an advocate is assigned to.

Documentation of the activities are mandatory and necessary. All activities on behalf of children must be reported by the CASA Jefferson, Inc. program to the Louisiana Supreme Court - CASA Assistance Program in addition to other funders.

Advocate Responsibilities



WEEKLY

Speak to your children **weekly** on the phone. Please, no less than every other week. The phone call doesn't have to be long. Just "check in." It's true that many of you work with teenagers who sometimes aren't terribly talkative on the phone. At least not with you! Keep it short and sweet if you feel they don't want to talk. But make the effort to call; this lets them know you are still there.

For nonverbal children, the weekly phone call will be to the caretaker.

Speak to the **foster parents** at least **bi-weekly**. Preferably more often if the situation warrants. You know your cases and know what level of supervision is needed. If there is a problem in the home, call more often. If things are moving along smoothly, then less frequently will be fine. But always, no matter what, speak to the foster parent monthly. If there are two parents, speak to both. Get feedback from both. There have certainly been situations where foster parents differed in their vision and version of their foster child.

MONTHLY

There are several things that you as an Advocate are expected to do as you work your cases. You need to have **face-to-face** contact with **each** child **each** month. There should be few exceptions to this. If there is a reason why you can't accomplish this activity with regularity, please let your coordinator know. This is one of the most important things you do as an advocate.

Speak to the **DCFS** worker at least **monthly**. Again, if things are in turmoil, if the placement is in danger, etc. then speak to her/him more often. If you have a good working relationship with your DCFS worker, this shouldn't be a problem. If you do not have a good relationship, this may make it better. Just let them know you are checking in. If you can't reach the worker after a few tries, call their supervisor. Let the supervisor know you are trying to reach so-and-so and was wondering if they were out sick...or whatever. Then ask the supervisor to have the worker call you or ask the supervisor what's going on with the case.

You must meet with you **advocate supervisor face-to-face at least monthly**. Newer advocates will see their supervisor more frequently. Seasoned advocates will see their supervisor as often as required, more often if wanted or needed. All advocates must meet with their supervisor when a court report is due so that you may discuss what should be included in the report. The meetings are very important. During these meetings the advocate and supervisor will develop an action plan, make sure that DCFS is following their court-approved/court-ordered case plan, and determine what is in the best interest of the child.

QUARTERLY

Speak to the **teacher, counselor, tutor or any other collaterals** in the child's life at least **quarterly**. This should be done more frequently if the situation demands it. Again, you know your case. Call whenever you think is appropriate. This is a minimum.

Complete **case summary notes** in case file, this shall include a snapshot of what is going on in the case. Include advocacy efforts on behalf of the advocate – what has the advocate done in the past month. Case summary notes shall include information on issues that have arisen, outcomes and or plans of actions and should include the guidance provided by CASA advocate coordinators to advocates. See Case Summary Form on page 44.

Contacting these individuals is crucial. This is the only way you can get independent information. The teacher can discuss the child’s grades, behavior, appearance, attendance, whatever, with you directly. It is not interpreted and filtered through someone else.

In the event the CASA advocate is faced with challenges to visit with his/her assigned CASA child during the month, the CASA should communicate with the assigned advocate coordinator in efforts to assist with the challenges. Advocate Coordinators shall assist the CASA advocate in visiting the child.

Face to Face Exception Policy and Procedure

CASA Jefferson, Inc. can grant a Face-to-Face Exception to any volunteers who is unable to visit monthly with his/her assigned child due to special circumstances.

The Court Appointed Special Advocate (CASA) shall meet in person with the child once every thirty (30) days at a minimum. An exception may be granted at the discretion of the CASA program; however, the decision to permit less frequent in person contact shall be documented as to the justification for the less frequent contact and reasonableness of the exception. (National CASA Standard 1.A.4).

A Face-to-Face exception may be granted to the advocate in the event:

- Placed in a facility or home located more than 90 miles from the court’s jurisdiction
- The child has been hospitalized in a secured facility
- The child’s whereabouts are unknown- for example the child is on runaway
- By recommendation of treatment team (if in a psychiatric facility)

Once the justification has been established, the Advocate coordinator and Advocate shall develop a plan of action that includes what type of future face to face, and other contact will occur between the Advocate and the child. The plan shall include a face to face in person meeting between the child and the assigned advocate at least on a quarterly basis.

Face to Face Development Plan

A Face-to-Face Development Plan is completed when the CASA Advocate was unable to visit the child during a specific month. A Face-to-Face Development Plan differs from a Face-to-Face Exception Plan because the Development Plan outlines the factors as to why a child was not seen for one month. It describes the reason why a child was not seen (i.e., child illness or volunteer illness) and is not a justification for the less frequent in person contact with the child. The CASA Advocate and the Advocate Coordinator shall complete the questionnaire and develop a plan to ensure that the child is seen within 30 days of the previous month in accordance with the National CASA standards and with the assignment within the Jefferson Parish CASA program.

Individualized Advocacy & Action Plan



The CASA advocate volunteer will be busy advocating for the child's needs, advocating for services for the child and family, monitoring the service plans, monitoring placements, communicating with everyone involved with the child's care and well-being, gathering information from the child's service providers and from the parent's service providers, looking for family connections and advocating for permanency.

Part of gathering information will involve contacting school personnel and viewing the educational portfolio, contacting mental health providers, contacting health providers, and accessing the child's health passport, contacting relatives and anyone with a relationship to the child, and making recommendations to the court based on the information learned.

The CASA VOLUNTEER agrees to:

- Conduct a thorough, independent investigation based on independently obtained information.
- Create a specialized advocacy plan based on the unique needs of the child(ren) and family.
- Maintain confidentiality of all information regarding the case.
- Complete required documentation including records of contact, regular contact with program staff, monthly reports to CASA and Court Reports.
- Utilize support and supervision provided by program staff.
- Always follow the CASA program's policies and procedures.

Medical Advocacy



Ways CASA Volunteers Can Provide Medical Advocacy for Youth

Recommend or facilitate a needed medical evaluation or assessment, including optical, dental or hearing. Verify a child's medical file is complete by ensuring the CPS caseworker has access to their Health Passport.

- Recommend to the court special medical treatments or assessments based on specific concerns (FASD, developmental delay, etc.)
- Act as liaison to facilitate communication between caseworkers, caregivers, and medical providers (maintaining case confidentiality). Follow-up in placement to ensure the child is taking prescribed medications is receiving occupational therapies (not including medication).
- Request a psychiatric review of prescribed medications to address concerns about possible overmedication and incorrect medication.
- Express concerns to a therapist regarding a child's needs or known issues related to emotional, behavioral, or social functioning.
- Confirm the therapist has current mental health care records or materials needed to provide services. Provide first-hand knowledge of daily-life or weekly-life background information to a therapist, information only you can provide.
- Challenge the current treatment plan if it does not meet a child's therapeutic needs or targeted outcomes. Advocate for a new therapist for a child if needed.
- Recommend training or recommend a community resource for foster parent training related to the psychological or emotional needs of the child in their care as well as issues related to grief and loss.
- Act as liaison to facilitate communication between caseworkers, caregivers, and psychological providers (maintaining case confidentiality).
- Recommend to DCFS and/or the court psychological services that may be helpful in meeting additional needs of the child.
- Act as a liaison to ensure children 16 and older have the services they need to prepare for independent living.

Educational Information

Educational information should be a collection of educational documents and information designed to follow each foster child regardless of whether their residence changes. This is important because one of the factors that place foster children at risk is frequent school disruptions and Portfolio is intended to mediate the impact of these changes.

The goal of having the educational information is to ensure that the child, caregiver, and caseworker always have access to the latest educational records.

The information should facilitate the enrollment of children when they experience placement changes. It also serves the purpose of ensuring that the child is placed appropriately in their new school and receives needed services.

It is the responsibility of the Department of Family and Children to keep the educational information updated and ensure that it is complete. The caseworker is required to ensure that this information is transferred to the child's case file. The CASA volunteer should be able to access this information through both the foster parent directly and through the child's caseworker.

Educational information should include following basic items for all children:

- report cards
- transcripts
- immunization records
- placement authorization form
- list of medications the child takes during the school day
- standardized testing scores
- school withdrawal authorization

In addition, to the basic information contained in the educational portfolio, children who receive **special education** services are also required to have these documents in their portfolio:

- The child's Individualized Education Plan (IEP)
- 504 Accommodation Plan
- Documentation of any services received
- Individual Transition Plan or Summary of Performance

Ways CASA Volunteers Can Provide Educational Advocacy for Youth



Assist teachers and principals in understanding the foster care system- It is important that school officials understand the myriad of challenges that children in foster care face and the multiple systems they must maneuver.

Maintain contact with the school- It is essential that school personnel have a sense that someone will advocate for the child, and you also can serve as a resource for helping them better understand how to meet the child's needs.

Encourage older children to take an active role in maintaining their educational information- It is crucial that they learn to manage their own educational information and advocate for their educational needs. These skills will assist them as they transition out of foster care into independent living.

Work with your local CASA program to develop good relationships with local school systems- If advocating for a child placed outside your local program's jurisdiction, your local CASA staff can inquire about knowledge and working relationships with the school in their area.

Take an active role in assuring the educational information is complete, current and utilized.

Attend school meetings if your CASA child is in special education- Encourage the foster parent serving as the surrogate parent to take a very active role in the child's education or serve as a surrogate parent particularly for children in residential treatment settings.

Encourage children to talk about their school experiences and aspirations- School friendships and extra-curricular activities can be a very positive support for a child in foster care.



Sample Case Summary Notes Form

Case name: _____

Date: _____

Advocate name: _____

Docket #: _____

Please provide **details** on the following areas regarding your assigned CASA child: (*Refer to your Advocate manual for guidance on specific questions if needed*). Case summary notes shall include a summary of what is happening on the case, advocacy provided by the volunteer, issues that have arisen in the case, clear assessment of what is going on in the case and a plan of action.

Placement Stability:

Sustaining Family Connections:

Medical:

Behavioral health:

Educational:

Advocate's concerns:

Plan of action:

Advocate signature: _____ Date: _____ Coordinator's Initials: _____

ACKNOWLEDGEMENT OF RECEIPT OF VOLUNTEER POLICY AND PROCEDURE MANUAL

I hereby acknowledge that I have received a copy of the CASA Jefferson, Inc. Advocate Manual. I further acknowledge that I am responsible for familiarizing myself with all information contained therein. Should I have any questions or concerns about any of the contents of the CASA Jefferson, Inc. Advocate Manual, it is my responsibility to speak to my Advocate Coordinator or the designated CASA Staff including the Executive Director, for clarification.

I have received my personal copy of the CASA Jefferson Advocate Manual. My signature certifies that I will read and become familiar with the provisions contained in this Advocate Manual. Furthermore, I fully acknowledge that any or all portions of this manual may be modified or deleted at any time, without notice, at the company's sole discretion. Also, I agree to conform to the rules, policies, procedures, and directives of CASA Jefferson and its authorized representatives.

Advocate Name: _____

Advocate Signature: _____

Date: _____