

# Expansion - New Member Support

## PUBLICLY ADMINISTERED PROGRAMS

Upon completion of New Member Support, the program's reviewed documents and policies support the program's alignment with the *National CASA/GAL Association Standards for Local CASA/GAL Programs*. **Bolded documents must be reviewed by National CASA/GAL Association during the New Member Support component of the National CASA/GAL Program Membership Process.**



Where applicable, the prospective program should adopt the administrative authority policies.

## DEVELOP A WORK PLAN

Develop a current year plan to continue program development, including objectives and strategies; responsible program staff/administrative authority; partners such as staff from the state organization; and outcome measures to complete the items below.

## COMMITMENT TO DIVERSITY, EQUITY AND INCLUSION

Work with the program to update/develop a **Diversity, Equity and Inclusion Plan**, including data collection; staff, volunteers, members of the administrative authority working with the program; and annual training - include demographics of the expanded service area.

## STAFFING A CASA/GAL PROGRAM TO INCLUDE EXPANDED SERVICE AREA

Ensure there are written policies for recruiting, screening, training, supervising, evaluating, and developing staff to reflect the expanded service area.

- The program should develop a Staff Recruitment Plan for the expanded service area detailing the type and number of staff required to accomplish program goals and objectives (given funding and capacity restraints).
- Update Staff Job Descriptions and Standardized Recruitment Packet to reflect expanded service area.
- Review/Update Organizational Chart showing management structure and lines of accountability.
- Review/Update Staff Screening Process - Written/signed authorizations for background checks, documentation of background screening; interview; and references.

- Discuss the need for Key Staff Succession Plan, including the Program Director Succession Plan. Update as needed.
- Updated **Staff List**.

## STAFF MANAGEMENT

Personnel policies should be written in a Human Resources Policies Manual or Handbook (this may be developed by the administrative authority), with copies made available to staff. Because the legal ramifications of personnel policies and practices are significant, consider review by an attorney familiar with employment law.

- Review/Update **Human Resources Policies Manual or Handbook**.
- If the program is considering permitting staff to transport children, review requirements and develop a policy regarding transporting children.
- Review/Update Staff Orientation introducing the National CASA/GAL Association Core Model, Standards for Local CASA/GAL Programs, Role of the Local Program, and the program's policies and services to include the expanded service area.
- Review/Update Training and Professional Development Plan – Staff and Program Director.
- Review/Update process for completing Staff Evaluations. A staff evaluation is communication regarding performance at stated intervals (annually) and should be signed; clearly state future objectives; include self-evaluation and recommendations for further training and skill-building.
- Review/Update process for maintaining a confidential file or record for each staff person (include process for how staff can access their file; addition and correction of information in the record).
- Process for Program Director Evaluation by the administrative authority that provides for participation by the Program Director, the ability for the Program Director to provide written comments and sign.
- If the program is considering the Peer Coordinator Model - review the requirements of Standard 7.E.3.

## VOLUNTEER ADMINISTRATION

### RECRUITMENT

- Develop/Update a Volunteer Recruitment Plan. Set recruitment goals with the integration of the Diversity, Equity and Inclusion Plan. Consider the number of volunteers needed; capacity to supervise within National CASA/GAL standards; avenues for promoting the program to expanded service area; and audience.
- Update **Volunteer Job Description** to include expanded service area and Volunteer Application and Standardized Recruitment Packet (role of a CASA/GAL volunteer, qualifications; time commitment, equal opportunity statement). Discuss Volunteer Recruitment Plan to reflect the demographics of the expanded service area.

### SCREENING

The screening process for CASA/GAL volunteers includes written/signed authorizations for background checks, documentation of background screening; interview; 3 references.

---

## TRAINING

Ensure the Program Director or identified trainer has completed the National CASA/GAL Pre-Service Training and Training of the Facilitators (TOF) training or as required by National CASA/GAL Standard 8.5.C. Determine training modality, schedule; documentation process; and court observation plan for the expanded service area. Include a plan for continuing in-service training (12 hours per year). Include how pre-service and in-service training will be documented for staff, volunteers, and administrative authority members who work directly with the program.

## VOLUNTEER MANAGEMENT

- Discuss National CASA/GAL Association ratio of 1 supervisor for every 30 volunteers (or a maximum of 45 cases). If the supervisor has other responsibilities, the time should be prorated. Discuss the need for additional staff for the expanded service area.
- Review/Update the process for maintaining a confidential file or record for each volunteer (include a process for how volunteers can access their file, addition, and correction of information in the record).
- Review/Update the program's **CASA/GAL Volunteer Policies and Procedures** – consider changes needed for the expanded service area.
- Review/Update Volunteer Performance Evaluation Process (this can be part of Volunteer Policies and Procedures).
- Upon selection and before assignment of a case, the volunteer must provide a signed acknowledgment of the following policies: **Conflict of Interest Policy**, Confidentiality Policy, **Social Media Policy** (including Email Communication Policy), and CASA/GAL Volunteer Policies and Procedures. Review/Update as needed.
- If the program is considering permitting volunteers to transport children, review/update requirements and develop a policy regarding transporting children.
- Review approved template/outline of Court Reports for the program's expanded service area.

## RETENTION

Review/Update Volunteer Retention Plan (including volunteer recognition).

## FISCAL MANAGEMENT AND FUNDING REVIEW (CONTINUED FROM FOUNDATION BUILDING)

### FINANCIAL MANAGEMENT

- Review **Budget** from Foundation Building-update as needed.
  - Review National CASA/GAL Standard 6.C. regarding audits, financial compilations and financial review requirements. Consider if requirements change based on the addition of the expanded service area.
  - If applicable, review renewal requirements for state approval to raise charitable funds (Charitable Registration Requirements).
  - Annual Report (financial, statistical, and service data summary information). Review state requirements and administrative authority requirements.
-

---

## RISK MANAGEMENT

Review/Update Purchasing and Inventory Control Policy/Policies. The program should develop or adopt the administrative authority purchasing and inventory guidelines.

## RESOURCE DEVELOPMENT

As applicable or permitted, continue the review of resource development needs and draft a Financial Resources Plan. Include topics such as resources, targeted communications, funding goals; methods; diverse funding sources; and current resources.

## PUBLIC EDUCATION AND ENGAGEMENT

- Ensure the program has a plan for communicating and actively engaging with stakeholders and the general public to provide information and build support for the CASA/GAL mission in the current and the expanded service area. Review/Update Plan for Public Information, Outreach, and Education (or as determined by administrative authority) to include expanded service area.
- Communication Plan. Outline appropriate contact with the media and an escalation protocol for state or national media inquiries, identification of who communicates with the public, and describes when to reach out to state organization and National CASA/GAL. Communication of expansion to stakeholders - court, funders, volunteers, staff, and department (as determined by administrative authority).
  - Discuss how the program will pursue partnerships in the expanded service area and educate the public regarding the program's mission in the expanded service area.
  - Discuss the plan for building an online presence for volunteer recruitment, child welfare issue education, and promotion of National CASA/GAL and program mission to include expanded service area.
- Crisis Management/Communication Plan (or as determined by administrative authority). Addresses issues that may have a significant impact on the credibility, reputation, or funding at the local, state, or national level. This crisis management plan provides information sharing between the program, administrative authority, and national, state, and local CASA/GAL organizations within 24 hours, subject to confidentiality limitations. Review/Update the plan to include the expanded service area.

## DATA GOVERNANCE AND LOGIC MODEL

Discuss a system of collecting, reviewing, and reporting accurate data to guide the direction of the program. Discuss how data is maintained and reported. Discuss any state policies/requirements regarding data collection.

- Review requirements for the National CASA/GAL Annual Survey and Six-Month Surveys. Expand the system of collecting, reviewing, and reporting accurate data for the expanded service area.
  - Ensure the program understands the need for a Logic Model to ensure outcomes for expanded service area are included.
  - Review/Update program's Records Retention Policy and Schedule (may adopt administrative authority policy and schedule).
-

- 
- Discuss the process for maintaining a confidential child and case information record.
  - Review/update a **Policy Review Schedule**.

#### ADMINISTRATIVE AUTHORITY TRAINING AND DEVELOPMENT

- Review/update Administrative Authority Orientation; Develop Administrative Authority Training and Development Plan, as applicable.

#### NETWORK AND MEMBERSHIP

- Understand the Membership Renewal Process
-