

# New Program – New Member Support



NATIONAL CASA/GAL ASSOCIATION

## 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, as appropriate; partners such as staff from the state organization; and outcome measures to complete the items below.

## COMMITMENT TO DIVERSITY, EQUITY AND INCLUSION

Develop a **Diversity, Equity, and Inclusion Plan**, including data collection, staff, volunteer recruitment, and annual training for staff, volunteers, and members of the administrative authority working with the program.

## STAFFING A CASA/GAL PROGRAM

Ensure there are written policies for recruiting, screening, training, supervising, evaluating, and developing staff.

- The program should develop a Staff Recruitment Plan detailing the type and number of staff required to accomplish program goals and objectives (given funding and capacity restraints) or review/adopt administrative authority document for alignment with Standards.
- Develop Staff Job Descriptions and Standardized Recruitment Packet.
- Organizational Chart showing management structure and lines of accountability.
- Staff Screening Process - Written/signed authorizations for background checks, documentation of background screening, interview, and references.
- Review the need for Key Staff Succession Plan, including the **Program Director Succession Plan**.

- **Staff List** should be submitted to the National CASA/GAL.

## STAFF MANAGEMENT

Personnel policies should be written in a Human Resources Policies Manual or Handbook (or adopt the administrative authority Human Resources Policies Manual or Handbook) 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.

- Draft program's **Human Resources Policies Manual or Handbook** or review/adopt administrative authority document for alignment with National CASA/GAL Standards.
- If the program is considering permitting staff to transport children, review National CASA/GAL Standards and develop a policy regarding transporting children in conjunction with administrative authority
- Develop Staff Orientation introducing the National CASA/GAL Association Core Model, National CASA/GAL Standards, Role of the Local Program, and the program's policies and services.
- Training and Professional Development Plan – Staff and Program Director.
- 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.
- Process for maintaining a confidential file or record for each staff person (include process for how staff can access their file; and addition and correction of information in the file).
- Process for Program Director Evaluation by the administrative authority (as applicable), as appropriate 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 National CASA/GAL Standard 7.E.3.

## FINDING, TRAINING AND KEEPING VOLUNTEERS – VOLUNTEER ADMINISTRATION

### RECRUITMENT

- Develop 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 the community; and audience.
- Develop a **Volunteer Job Description** and Volunteer Application and Standardized Recruitment Packet (role of a CASA/GAL volunteer, qualifications; time commitment, equal opportunity statement).

### SCREENING

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

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## 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. 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, working with the program.

## VOLUNTEER MANAGEMENT

- Discuss National CASA/GAL Standard 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 and draft the process for maintaining a confidential file or record for each volunteer (include process for how volunteers can access their file, including addition and correction of information in the record).
- Draft the program's **CASA/GAL Volunteer Policies and Procedures**.
- Develop 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, and **Social Media Policy** (including Email Communication Policy). The program may draft or adopt the administrative authority policies.
- If the program is considering permitting volunteers to transport children, review National CASA/GAL Standards and develop policy and procedures regarding transporting children.
- Review approved template/outline of Court Reports for the program's jurisdiction.

## RETENTION

Develop a Volunteer Retention Plan (including volunteer recognition).

## FISCAL MANAGEMENT AND FUNDING REVIEW

### FINANCIAL MANAGEMENT

- Review **Budget** from Foundation Building-update as needed.
- Review National CASA/GAL Standard 6.C. regarding audits. Review National CASA/GAL Standard 6.C. regarding audits, financial compilations and financial review requirements.
- Review financial reports due to the administrative authority (i.e., quarterly reports).
- Annual Report. The program or its administrative authority should ensure that an annual report is developed, which includes financial, statistical, and service data summary information.

## RISK MANAGEMENT

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

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## 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

- Develop a plan for communicating and actively engaging with stakeholders and the general public to provide information and build support for the CASA/GAL mission. Develop a Plan for Public Information, Outreach, and Education.
- 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.
- Crisis Management Plan. 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.

## 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.
- Ensure the program understands the need for a Logic Model and has one in development.
- Draft a Records Retention Policy and Schedule.
- Discuss the process for maintaining a confidential child and case information record.
- Develop a **Policy Review Schedule**.

## ADMINISTRATIVE AUTHORITY TRAINING AND DEVELOPMENT

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

## NETWORK AND MEMBERSHIP

- Understand the Membership Renewal Process
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