



Volunteer Handbook

CASA of Sonoma County

This handbook is designed to be used in conjunction with the classroom training offered by the Sonoma County CASA program which follows the State and National CASA curriculum recommendations. During the training, specific procedures will be broken down, explained and experienced through small group discussion and role-playing.

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SECTION I: INTRODUCTION TO COURT APPOINTED SPECIAL ADVOCATES

What is a Court Appointed Special Advocate (CASA)?

A CASA is a trained volunteer child advocate appointed by the Juvenile Court to represent the best interests of children who are described by the California Welfare & Institutions Code Section 300, 602 and 100. CASAs advocate for children from birth to age 18 and in some cases may provide support for them through their 21st birthday. During the time the child is in the Juvenile Court System, the CASA investigates the child's circumstances, provides fact-based information and makes recommendations to the court while becoming a friend and source of support for the child.

The CASA program is independent of system mandates but works closely with the court, social workers, educational systems, therapists, attorneys, care providers, and other professionals involved in a child's case. The CASA volunteer works under the authority of the Juvenile Department of the Superior Court of the State of California and is supervised directly by the CASA program staff in an effort to further the child's welfare.

The CASA's ultimate goal is to move the child out of temporary placement, usually the foster care system, into a safe and permanent home. This could mean return to the parent's care, adoption, the appointment of a legal guardian, emancipation, an independent living environment or some other permanent living arrangement that satisfies the court and fulfills the child's needs.

Qualifications/ethics/requirements of a CASA

1. To sign and abide by the *Oath of Allegiance* (Exhibit A-page 35). To demonstrate an interest in children and their welfare.
2. To respect and relate to people from various backgrounds and cultures in a sensitive and caring manner. (Exhibit D-page 38).
3. To be at least 21 years of age, have a driver's license and current car insurance and be objective, open-minded and flexible.
4. To gather and accurately record fact-based information related to the people and circumstances in a child's life while maintaining confidentiality of the child's circumstance at all times.
5. To communicate effectively, both orally and in writing.
6. To understand and obey the rules of confidentiality when engaging with an outside networking organization or when in the field.
7. To maintain confidentiality regarding your own personal home phone number, work number, e-mail address, mailing address and also those of your family members.

8. To maintain confidentiality/boundaries by not engaging the children with your family and friends as well as not taking the children to your home or to the homes of other family members.
9. To be able to make at the minimum a two-year commitment and volunteer 10 to 12 hours per month.
10. To accept supervision, guidance and feedback from the CASA staff at least every 60 days by attending case review and providing monthly logs of case contacts to the agency each month.
11. To authorize and pass a security check consisting of Volunteer Select Services, DOJ & FBI fingerprints, DMV records check, and a Child Abuse Registry check (***Release of Information***-Exhibit B-page 36). The volunteer must also be able to provide the CASA staff with three letters of recommendation. If the volunteer has not lived in the State of California for the last year an FBI clearance will be conducted.
12. To provide one's own transportation with current proof of adequate liability coverage and to provide semi-annual proof of valid driver's license and insurance. Be willing to sign a document stating you will always maintain insurance and keep a current copy in your CASA file.
13. To maintain consistent communications with CASA staff as defined by the liability standards of the agency. Complete a monthly log of volunteer hours and contacts regarding your case, attend case review no less that every 60 days or contact your supervisor for private consultation, attend court no less than every 6 months and to keep your file at the CASA office updated with current information on your case status. Upon the completing of your case to return all file data to the office.
14. Once placed on your case to maintain all file information, data collected, and case materials in the office file for protection and confidentiality.
15. Once vacated from the case to return all information, file materials, photos and other identifying information to the office

Non-Discrimination Policy

The CASA program provides equal opportunity to all clients, volunteers, staff, board members, auxiliary members, and advisory board members. CASA does not discriminate based on race, religion, sex, age, ethnic origin, or sexual orientation. CASA volunteers agree to sign and abide by the ***Non-Discriminatory Statement*** (Exhibit D-page 38).

Training – 30-hour pre-assignment

The child advocate must complete 30 hours of training classes before being assigned to their case, observation in court and case review. These trainings will be conducted by the CASA staff, psychologists, attorneys, and other professionals from cooperating agencies and departments.

In addition to classroom training sessions, advocates will be asked to complete 8-10 additional hours of court room and case review observation.

A manual is provided to each CASA trainee. The trainee is expected to study and understand the material contained therein.

CASAs are required to complete additional continuing education training of at least 12 hours per year. CASAs are encouraged to keep abreast of the latest information regarding child abuse issues by attending relevant workshops and seminars offered from time to time by CASA and other organizations.

CASAs are encouraged to join the National CASA Association and to become a member of the large CASA movement on both a State and National level.

Commitment Statement/Code of Ethics

As a Court Appointed Special Advocate (CASA), I will be an ethical member of the CASA Program. I will sign and abide by the *Commitment Statement/Code of Ethics* (Exhibit E-page 40). I will perform all my work with confidentiality, disclosing information only to other officers of the court. I will act in the best interest of the child. I will collect information in a manner necessary to maintain consistent progress on my case.

I will not conduct myself outside the policies of the agency. I will seek out advice and support on an ongoing basis from the staff of the agency no less than every 60 days.

In order to meet the above-mentioned goals, I agree to do the following:

1. To read the training manual and complete the 30 hour pre-assignment training including court and case review observations.
2. To commit my time to the CASA program for a minimum of two years and 10-12 hours per month of volunteer time.
3. To work with my supervisor (see page 24 for details) and to turn in monthly volunteer logs and all court reports in a timely manner.
4. To attend ongoing training in order to maintain my court appointed status as defined by the Welfare and Institutions Code Section 100, National/State CASA standards and CASA Policies and Procedures (a minimum of 12 hours annually).

5. To attend case review prior to writing a court report in order to update and improve case knowledge and to obtain approval of any proposed recommendations by the case review advisors.
6. To communicate any concerns, issues and successes directly to my supervisor.
7. To attend all court hearings pertaining to my case particularly contested matters.
8. To maintain an open, positive attitude regarding CASA policies and procedures.
9. To create a private, secured area in my home to keep all case notes. All other records will be received and kept in the CASA office. To return all information to the CASA office once terminated from the case.
10. To strive to become a culturally skilled advocate and to communicate openly and sensitively to all people of this community. (See *Guidelines Regarding Cultural Sensitivity*-page 8).
11. To not take children to my home or engage the child I am assigned to with my family, friends and co-workers.
12. To report all issues of child abuse to the CASA office and the proper authorities immediately.
13. To keep my personal information private such as my home phone number, e-mail address, mailing address and place of employment. I will recognize the CASA agency phone number as the contact number and address for receiving correspondence.

CASAs must agree to submit to a DOJ/FBI, child abuse registry, DMV security screening process to ensure a past free of criminal convictions. You will be seeing children privately, often on a one-on-one basis, and therefore you must agree to conduct yourself in a thoughtful and ethical manner. Failure to agree to cooperate with this screening requirement will disallow your participation in the CASA program.

You must also accept that the children you will be assigned to will be children seeking shelter and families to protect and live with. You must recognize your role as different from a parent, guardian, foster parent or shelter provider. As a youth advocate your boundaries and values must be always clear.

The CASA agency is based on volunteer services. Paid and volunteer staff members are equally valued and depended upon. Volunteers are sometimes asked to contribute beyond their CASA responsibilities. If asked to help in ways outside of your comfort zone you have a right to say no, to have your feelings heard, and to have a place to communicate your concerns.

CASA personnel files will be created and all hours of time volunteered, application materials, resumes and volunteer history will be documented. Volunteers have the right and are encouraged to update, add to and review their files upon requests. We ask that you make an appointment with your supervisor to do so and you must give the CASA office 48 hours to schedule.

SECTION II: CASA PLACEMENT PROCEDURE

Case Assignment

After successfully completing the 30 hour pre-assignment training, clearing all screening requirements (DMV, Child abuse registry, DOJ/FBI) and completing the court room and case review observation the CASA is sworn in as an officer of the court and the Oath of Allegiance is signed. CASAs are typically assigned one child (or a sibling group). The volunteer supervisor will call the CASA. A placement session will be scheduled. This session will include post training interview questions and if the supervisor and the volunteer agree the CASA will be assigned to a case. The CASA will come to the office and read the court files and then choose which one he/she wishes to be assigned to.

The CASA program is committed to working with all children regardless of ethnic and cultural background. The CASA staff will make every effort to match children with child advocates of the same race and culture or with those who will take into account the context of the child's cultural background, extended family and social community. Here the CASA's role is to encourage trust between the child's family members and social workers so that the case can be resolved with the child's best interests in mind.

Criteria for Assigning CASA Cases:

CASAs are appointed to cases involving dependent children from newborn to age 18, under special circumstances support may be continued up through the child's 21st birthday. A CASA is appointed directly by the court or at the request of any interested party with court approval.

CASAs are typically assigned to one or two cases however in some circumstances volunteers may take more than cases if approved by a volunteer supervisor. At no time may a CASA volunteer be placed on more than 5 youth.

The situations described below are appropriate for the appointment of a CASA to a child's case:

1. The child has been extremely traumatized and has little or no adult support outside the dependency system.
2. Risk of repeated abuse or neglect is substantial. During the family reunification process, given the nature of the allegations, the evidence, the response of the parties, and the age of the child, there is concern that the abuse will be repeated.
3. Permanent placement is an issue. There is a clear indication that permanent placement of the child is, or may become a significant issue and must be addressed as soon as possible.

4. A child has special needs. For example: the child has special physical or psychological needs or the child is in residential treatment or a group home and return to the family of origin is unlikely.
5. Sexual molest victims. Victims who may have to testify in criminal court receive a high priority.
6. Situations in which there are a high number of adults/parties involved in the case and the child's voice is not being heard.
7. The child has had multiple placements or in Juvenile Hall for more than 3 months.
8. Children whose parents have had their parental rights terminated and are not in adoptive or pre-adoptive homes.
9. Children who have suffered severe medical neglect.
10. Circumstances where educational advocacy is needed. CASAs sometimes serve as educational surrogates for children with no parent(s) or guardian(s), or for those whose parent(s) or guardian(s) are unable or unwilling to monitor the child's educational needs.
11. Children who may soon be returned home and need additional support.
12. Children who will be turning 18 years of age and are in need of emancipation support through their 21st birthday.

Duties/Responsibilities of CASA Volunteers

1. To read any records, files and case reports from the court, social service agencies schools, hospitals, doctors, and therapists regarding the child you have agreed to represent.
2. To interview those parties involved in the child's life including, but not limited to, the child, parents, siblings, relatives, foster parents, teachers, counselors, doctors, and other care providers. To research and evaluate the facts and circumstances of the child's life.
3. To keep all information confidential, disclosing it only to the court, social worker, or attorneys involved in the case. Under no circumstances should any information regarding the case be revealed to anyone with no legal interest in the proceedings or to a minor. In cases over 18 years of age the child must release their willingness to allow CASA to disclose their circumstances and discuss their needs.
4. To keep all written data in a locked, confidential area. To use the CASA agency

address and phone number as the place to receive and disseminate case information.

5. To attend all the court hearings pertaining to the assigned case particularly contested matters.
6. To report to the court, in a concise written form, the facts and findings resulting from your investigation and to make independent recommendations to the court.
7. To ensure that all relevant facts are before the court at all hearings.
8. To communicate on a regular basis with the representatives of the various offices, agencies, and parties involved in the case.
9. To facilitate and monitor fulfillment of the orders of the court.
10. To bring to the attention of the social worker or the child's attorney, prior to the next scheduled hearing, any change in circumstances that may require modification of the court order.
11. To consult preferably monthly but no less than every 60 days with a CASA supervisor concerning the developments of the case, your findings and opinions.
12. To conduct yourself professionally at all times. To be respectful, tactful and patient while performing your duties as a volunteer child advocate, keeping in mind that you are acting under direct authority of the Juvenile Department of the Superior Court of the State of California.
13. To notify your supervisor when you are available to accept a new or additional case assignment.
14. Not to use alcohol, un-prescribed medications or controlled substances when with your assigned children or immediately prior to a visit.
15. To report any incident of child abuse or neglect, or any suspicion of such, to the Department of Human Services: Family, Youth and Children's Division, (707) 565-4300. Follow up with a written report and notification to your case supervisor.
16. To read the CASA newsletter so that you may keep up on the calendar events, news and policy information.
17. To recognize that CASA is a non-profit organization that holds ongoing fund raising projects. Your participation may be requested but will not be mandatory.
18. To be aware that CASA is a Sonoma County wide organization. The CASA staff makes every effort to assign cases within the CASA's geographic area, but from time to time you may be asked to travel outside the county due to case transfers or new placements.

19. To maintain consistent confidentiality procedures for case contact and file a disclosure when assigned to, or continuing on, a case where the child is 18 years of age or older.
20. To terminate your involvement only upon approval of the Court, CASA staff or when, in your opinion, you can no longer be considered objective.
21. Once it becomes appropriate to vacate your case, to undergo a case vacate session with staff, and to return all paperwork on assigned case to the office.

Guidelines Regarding Social, Cultural and Gender Sensitivity

The CASA program sees social and cultural sensitivity as *an awareness of one's own attitude regarding gender preferences, religious, racial and cultural differences*. An on-going self-assessment is required. The CASA must also know his/her feelings about the social-political system's treatment of homosexuals, religious groups and minorities.

The following guidelines support CASA's Non-Discriminatory policy:

1. A socially and culturally skilled CASA is one who has become aware and sensitive to his/her social and cultural attitudes.
2. A socially and culturally skilled CASA is aware of his/her own values and biases and how they may affect the individual with whom he or she works.
3. A socially and culturally skilled CASA is one who is comfortable with differences that exist between the CASA and others in terms of gender preferences, race and beliefs.
4. A socially and culturally skilled CASA is sensitive to the personal biases, ethnic identities and socio-political influences that may dictate referral of the client to a CASA of his or her own race and culture.
5. The socially and culturally skilled CASA will be able to generate a wide variety of verbal and non-verbal responses and be aware of communication and interviewing skills that are gender and culturally sensitive.

Open Door Policy for Internal and External Complaints

The Executive Directors always has an open door and will always want to meet with concerned individuals prior to the formal filing of a written concern.

The current open channel for the expression about concerns and complaints is to always make every effort to talk your concerns out with the related parties. CASA never wants to forget that we are dealing with children and their needs and confidentiality is always of the utmost concern. It is

further seen by CASA that the breakdown of communications amongst the individuals often defer the good work we are trying to do for our youth. It will be therefore our hopes that openness and respect will also play a big role in the grievance process.

Role of the State CASA Association in Grievance

Although a highly respected resource for all CASA programs there is no role for the State Association in Sonoma County grievances unless the CASA program Executive Director seeks advice or support. It is important to note that the Sonoma County CASA staff or volunteers are not supervised by the State Association. In situations where the concern is about the State Association the State Association should be contacted directly.

Sonoma County's Philosophy regarding Grievances, unethical, inappropriate or illegal activities.

CASA sees expressions of complaints as a fundamental principle of sound relations. All internal and external related individuals to the CASA program are encouraged to talk with a CASA volunteer supervisor, CASA Executive Director or on any problem, complaint, concerns regarding what one might see as unethical behavior or suggestion that may arise in the course of CASA work. We again reiterate that it is very important to always attempt to talk the problem out first.

We institute the following approach to internal and external problems:

Begin by talking over the problem before submitting a formal written complaint. Internal and external complaints are often able to be mediated early if related parties will gather and discuss their concerns, suggestions or complaints. We ask for an open and respectful interaction. If this discussion does not support resolution and understanding then,

Begin by talking over the suggestion, concern or complaint with the volunteer supervisor or when appropriate the Executive Director, and give that person the first opportunity to act on the suggestion or to settle any complaints. An appointment with the Executive Director is always available.

If you are not satisfied or there is any uncertainty in your mind that this person, whether a supervisor or an outside person is not the proper person to talk with about this situation, ask for a mediation meeting through the Executive Director.

Each volunteer or complainant has the equal availability of the Executive Director to assist in any grievance matter. When applicable, he/she will assist in resolving the situation.

No internal or external complainant will be judged or penalized if he/she seeks problem resolution through these procedures or seeks assistance from the Executive Director.

Complaint procedures:

The purpose of Complaint Review is to afford all internal and external complainants the opportunity to seek resolution on related complaints. The "Complaint Review Policy" is intended to supplement the "Open Door Policy". All complaints will be encouraged to be resolved by open discussion and respectful interaction and exchange.

CASA will attempt to treat all external and internal complaints and their investigation as confidential, recognizing, however, that in the course of investigating and resolving complaints some dissemination to others may be appropriate.

If direct and open communication does not resolve the issue a signed, written complaint will be provided to the Executive Director. The Executive Director will schedule a meeting with the complainant within ten (10) working days after receiving the written statement. The Executive Director will try to resolve the problem during this meeting. If a mutually agreeable solution is found, the case will be closed. If not then all related parties will be brought together to discuss concerns.

Should no solution be found, the Executive Director will formally investigate the concern. At the conclusion of the investigation, the Executive Director will make a decision based on the findings and meet with the volunteer regarding the complaint to communicate the decision with thirty (30) days.

The Executive Director has final rights to close the complaint.

Please note that CASA will not entertain external complaints regarding Juvenile court rulings on case related matters i.e. adjudication matters, custody, termination of parental rights, adoption findings.

Internal and External Grievance Procedures - Termination, Resignation, Grievance or Dismissal:

Advocates (CASAs) are appointed by a Juvenile Court Judge, Commissioner or Referee and serve until the court relieves them, typically when the case is terminated (i.e., dismissed from jurisdiction of the Juvenile Courts or transferred to another county).

While CASAs make a commitment to continue with a case until it is terminated there may be circumstances that require a CASA to resign. Resignations must be made in writing with all case file data attached so that the CASA office can notify all parties immediately and to assign another CASA if necessary. Exit interviews, returning files and case reassignment will be scheduled to assist the staff in whether to vacate or reassign the case. All parties and their representatives will be notified as soon as possible of the name of the new CASA it so reassigned.

There are circumstances that may require the Juvenile Court Judge or the CASA Executive Director to investigate or dismiss a CASA from a case or the program. In the event of a written grievance received by a party to the case, a conflict of interest, negligence, falsified CASA application materials, a breach of confidence, engaging in public media opportunities without prior approval of the Executive Director, criminal activities, lack of attention to an assigned case, providing confidential home numbers, addresses or work place locations, conducting oneself outside policy, court rules or law, initiating ex-parte communication with the court, child abuse allegations against the volunteer, a conflict that cannot be resolved or any other similar action that is identified which might breach your safety or that of the child's, or which may misrepresent the CASA program, the CASA Executive Director shall investigate the alleged basis for dismissal.

The CASA shall have an opportunity to respond to allegations made and present relevant evidence for consideration in the investigation. The CASA as well as the staff conducting the investigation may request that the Executive Director participate in the investigation. Please note that the Executive Director may request a member of the Board of Directors to participate in the investigation. Granting of such requests shall not be unreasonably withheld. Pending the completion of the investigation, an advocate subject to investigation may be suspended from his/her cases at the sole discretion of the CASA Executive Director. In a situation where the Executive Director is the focus of the alleged basis of investigation the President of the Board of Directors shall conduct the investigation. If the President of the Board deems that there is a conflict of interest or that the Executive Director was operating outside their discretion or the rule of the organization he/she shall determine and take the action deemed necessary.

If the alleged basis for dismissal of a volunteer is verified, the CASA Executive Director, after consultation with the CASA involved may notice the Board of Directors. The CASA shall be provided with a confidential memorandum identifying the reason(s) for the dismissal. If the CASA wishes to file a grievance regarding this decision the CASA will have 3 working days to submit a letter to the Presiding Juvenile Court Judge outlining the facts related to the dismissal. If the Judge wishes to meet with the CASA a meeting of related parties will be convened. Within a reasonable time period the Judge will inform the Executive Director of his decision. A confidential memorandum identifying the decision will be provided to the CASA.

Either the Judge or the CASA Executive Director can dismiss a CASA from a case or the program. Since CASAs serve at the discretion of the court, a dismissed advocate shall not have the right to appeal a dismissal or termination by the court. Upon dismissal, all records will be immediately returned to the CASA office.

All outside grievances by related parties to the CASAs assigned case should be put in writing to the Executive Director. There is a form with routing information available which will be accompanied by Roles and Responsibilities of CASA volunteers, however; an informal letter will be accepted including the name, contact information of the person filing the grievance, the name of the child it is related to and the name of the CASA volunteer, the issue outline including dates, times, issues and a narrative of the concerns. To assure no illegal duplication or modification of the form or letter 3 notarized original signature copies (program file, CASA volunteer, and Judge if appropriate) will need to be provided to the CASA program. Faxes will not be accepted. This

form or letter should be to the point and respect the confidentiality of the minor. Upon having received the written complaint the Executive Director will conduct the aforementioned procedures outlined in the termination, resignation or dismissal of the CASA volunteer, staff or case. Related parties to the grievance will be notified of receipt of the written grievance and a mutually agreed upon date will be set to discuss concerns.

In a situation where the Executive Director is the focus of the alleged basis of investigation the President of the Board of Directors shall conduct the investigation. If the President of the Board deems that there is a conflict of interest or that the Executive Director was operating outside their discretion or the rule of the organization he/she shall determine and take the action deemed necessary.

Case Closure/Returning of all case data

After any terminations, resignations or dismissals CASAs shall immediately return all case records to the CASA office. A *Case Closure Questionnaire* (Exhibit M-page 52) must also

be completed and submitted at this time providing proof that all steps to vacating your case from the court has been taken. CASA volunteers are asked to cooperate with the return of all case and court documents to protect the security of the child circumstances.

Case records are retained in the CASA office in locked file cabinets in a locked office after normal business hours. Case records are retained for 3 years and after this point are destroyed by shredding the files. In the case of a child that ages out of the court the record is destroyed immediately upon notice of the court unless the minor remains a transitional services case.

If the case has not been terminated the CASA staff shall appoint a new CASA as soon as possible and all parties to the case and their representatives will be notified in writing or by phone.

The case of a child aging out of the juvenile court system (age 18) may either be terminated or continued through CASA's Successful Transitions program. If the case continues, the CASA's responsibilities will remain the same with one exception--reports are submitted to the CASA office instead of to the court. All confidentiality boundaries remain the same.

SECTION III: CASA ROLES AND RESPONSIBILITIES

CASA's Responsibilities

The CASA's role is to gather facts regarding what is in the child's best interest (i.e.: services, placement, etc.) and to ensure that these facts are presented to the court. As a party to the case, the CASA has access to most of the information regarding the case to which they have been appointed (exceptions listed below). The court order appointing the CASA to the case (Exhibit G-page 43) typically is sufficient to give the CASA access to all records regarding the child including medical, psychological, and school reports. In some cases, however, a specific court order may need to be requested. Court and CASA files are open to CASAs and CASAs are allowed to take notes on any information for use in working on the case.

CASAs do not have access to the name of the reporter of the abuse which is confidential by statute or to information from federally funded drug/alcohol centers. Information regarding people other than the minor may be accessed, if available, if the person about whom the information is desired has signed a release or when the Judge/Referee/Commissioner orders the release of the information.

CASAs work cooperatively with the social worker who is assigned to the child's case. Open communication will facilitate good case planning and CASAs are encouraged to communicate frequently with social workers to relay information. It should be noted that CASAs are not the agents of the social services agency or law enforcement agencies. It is important that the CASA's investigation be independent.

In addition to reviewing all written reports about the child and the family the CASA interviews all the individuals who have knowledge of the child's situation including the child, parents, relatives, friends, teachers and others. When speaking with the child's therapist, the therapist will give general information (i.e.: the minor is attending therapy, the minor is participating and making progress). The therapist will not disclose specifically what the minor is doing or saying in therapy.

Please note that in a case circumstance where the CASA should become aware that they are related, or that they are employed in a position that might result in a conflict of interest it is necessary that the CASA bring this information to the attention of the supervisor. This will, in most circumstances, cause the CASA to be dismissed from the case. CASA's cooperation and support in easing this transition will be appreciated.

CASAs may not interview children about the specifics of the abuse that is alleged to have occurred. They rely on social workers and other persons who have expertise in conducting such interviews. CASAs are instructed to be particularly sensitive to the trauma surrounding disclosure of sexual abuse.

If the child raises the topic of the abuse/neglect and wishes to discuss it CASAs are to listen and respond appropriately but not to probe or ask questions. Any new or corroborative information disclosed to the CASA shall be relayed to the social worker and the minor's attorney (see CASA as Monitor-page 14).

CASAs may wish to observe a visit between parent and child. Generally, this is acceptable. The observation should be first arranged with the social worker and the parents (and the child, if appropriate, should be allowed to consent.)

When dependent children do not live with their parents and the social services agency wants to ensure the children's security and safety, arrangements are made for visits to be monitored. CASAs do not provide transportation or supervise these visits without approval of the CASA office and the child's social worker (*Authorization/Permission for Visitation*; Exhibit I-page 45). This form is also used for any out of county travel.

CASAs are allowed to transport children both within and outside the county limits with appropriate approval of your supervisor. (*Authorization/Permission for Visitation*; Exhibit I-page 45). When transporting a child the CASA is required to have appropriate seat belts and car seats. Automobiles must be safe and in good running order. CASAs are screened at placement and thereafter required to have a current driver's license and automobile insurance. Proof of such must be current in the CASA office. CASAs should always sign the child in and out to be sure all responsible adults are aware of the visitation and where the CASA is transporting the child to. If the CASA is running late, it is necessary to call the other responsible persons.

CASA as Advocate

CASAs gather facts on circumstances of the child's life in order to help the court determine what actions will be in the child's best interest. The information they gather will be shared with the court and used to formulate and support recommendations for disposition of the case.

After the fact finding is complete and the CASA has discussed the case with the social worker and other involved parties the CASA begins to formulate his/her recommendations. These recommendations must take into consideration the court approved service plan which outlines the requirements of the parents, the conditions they must meet in order to terminate agency and court supervision or involvement.

The CASA's recommendations and court reports may address the following concerns:

1. Jurisdiction (continued dependency)
2. Shelter placement of the child, health, mental health, academics and self esteem
3. Visitation with parents, including incarcerated parents, when the child desires
4. Mental health treatment for the child
5. Services being provided for the parent(s) to ensure the needs of the child are being met in the process of reunification
6. Return home of the child (if indicated)
7. Self Esteem and extracurricular activities
8. Number of shelters/placements
9. Health of the minor
10. Number of AWOLs
11. Independent living plan (children 15/16 and older).

CASAs are not social workers nor are they therapists and therefore do not develop the specifics of the service plan. This is the social worker's, therapist's and school advisor's areas of expertise and it is their specific responsibility to develop and implement case plans. CASAs review the service plan with workers and ask questions to ensure all the needs of the child are being met, and may also suggest additional services. CASA may make recommendations.

CASAs prepare and submit a written report of recommendations (***Court Report***; Exhibit K-page 46) prior to hearings and reviews. The executive director reviews all reports.

CASA as a Transitional Advocate (Children 16-18/19yr)/Life Connection (18/19-21yrs)

Life Connection = LCs (18/19-21yrs). No longer dependents of the court
AB12 or working with Non Minor Dependents = NMDs (18th Birthday – 21yrs)

A Life Connection is a term we want you to begin to get used to hearing. TA-CASAs can become a very meaningful part of a child's emancipation by offering the child a connection that will be there before and after the child welfare system has terminated their case.

In 1999 the CASA program began working more extensively with children transitioning out of the juvenile court process. Our goal is to help children ages 16-21 better prepare for independent living and to successfully transition out of the system they have called home. For this purpose the project Successful Transition was created.

In 2008 the CASA program extended our services to work more collectively with the transitional services programs in Sonoma County to support the development of lifelong connections for emancipating youth. This role is referred to as CASA Connections or Life Connections. Life Connections are more specific to children after they have been terminated from the system usually between the ages of 18/19-21.

In 2010 AB 12 was passed and this new law allows for, in some cases, foster youth to remain in care until their 21st birthday. They are referred to as None Minor Dependents (NMD) TA-CASA and Life Connection client will continue to be referred to as "child" even when the child turns 18 for purposes of this manual only. A TA-CASA is asked to meet with and be oriented to the new procedures and new reporting requirements with their Volunteer Supervisor when your youth turns 15yrs old. The role of the Life Connection will also be explained and reiterate when the youth turns 17 years old.

NMD-TA-CASAs gather facts on circumstances of the child's life as the child prepares to transition out of the Juvenile Court system (ages 15/16-18). The information they gather will be shared with the court and used to formulate and support recommendations for emancipation in their court reports. TA-CASAs may continue to support these recommendations up through the child's 21st birthday. Therefore, to support our recommendations, when the child terminates from the juvenile court system at age 18 he/she may remain in the CASA program, the CASA will now be referred to as a Life Connection. All the reports (volunteer logs and case review reports) are now submitted to the CASA office instead of to the courts. Life Connection CASA will have all the support and resources as that any other CASA program volunteer.

The NMD ST-CASA's recommendations address the following areas of concern:

1. Jurisdiction (discontinued court services, emancipation and independent living).
2. Physical placement of the child throughout the emancipation process and until the child turns 21.
3. Visitation with parents if the minor so desires.
4. Evaluation, support services and treatment for the child in areas such as medical, SSI, ILP, health records/history, academics, higher education, vocational services, Armed Services, Job Corp., mental health referrals, housing and transportation.

5. Services for the child to allow for continued visitation with siblings that may still be dependents of the court.
6. Adoption or return home of the child (if indicated and desirous on behalf of the child).

Life Connection CASAs do not write reports to the court because the minor is now emancipated however you still follow all the rule of a CASA and shall continue to have consultants and case reviews.

TA-CASAs do not become the “social workers” or “ILP workers” and therefore do not develop the specifics of the child’s life plan but rather support and continue to refer and/or link the child up with community services. ST-CASAs will work with the Independent Living Program to support the life plan when the child desires.

TA-CASAs prepare and submit a monthly written report via their log of hours (Exhibit H-page 43). An ST advocate continues to attend case review sessions every 60 days. Reports will be asked for approximately every 3 months or more depending upon particular funding requirements. The executive director reviews all reports prior to their submission. A summary of reports will be released when necessary and only with the prior written approval of the child.

Liability insurance will stand in effect for all TA-CASAs if all procedures outlined through-out this manual continue to be adhered to (i.e., confidentiality, safety boundaries, privacy policies and “CASA Never Should” policies).

CASA as Monitor

CASAs monitor the relevant parties' compliance with the court orders and bring to the court’s attention any significant changes in circumstances that may require modification of the court order. CASAs determine whether court ordered services are being provided and should bring to the attention of the court any failure to comply. Monitoring is performed in part by direct contact with the family and child, and in part through collateral contact (speaking with social worker, service and/or care providers and others.)

Should CASAs identify any problems such as injuries to a child or young children being left alone, they will immediately report these instances to the social worker. If the children are in imminent danger and neither the social worker nor the CASA case supervisor (field phone, (707) 332-9427), are available, the CASA will immediately contact the Department of Human

Services Family, Youth and Children’s Division, (707) 565-4300, ask to speak with the “desk worker” (the on-call or emergency social worker). If you are either unable to contact the office or feel uncertain about the response you received you may also contact the 24-hour crisis hotline, (707) 565-4304.

CASA as Facilitator

The CASA ensures that the court, social services personnel and legal counsel fulfill their obligations to the child in a timely fashion. The facilitator role is an extremely important one. The CASA helps to make sure that the child and family are kept in the system no longer than is necessary and that the child is placed in a safe, permanent home, ideally with the natural parents or with other family. CASAs do not work out problems between family members, except through recommendations to the court and/or social worker. If the CASA identifies a situation which requires immediate attention they may work with the child's attorney to call for a special hearing or a judicial review of the case prior to the next scheduled review hearing.

An important part of your support system is your supervisor. Your supervisor is an experienced CASA with whom you will work and to whom you will send your monthly statistics (Exhibit H-page 44). Your supervisor will also inform you of any administrative changes, activities for you and your CASA child, court report due dates and when to send in your volunteer logs.

Your case review session is a good place to go when you need to vent, share something exciting, or ask administrative questions. These sessions are an additional support place for you. Case review sessions should be attended no less than every 60 days and always 5-6 weeks prior to attending court. CASAs should come to case review sessions prepared, having completed the *Organizational Form for Case Review* (Exhibit J-page 45).

What CASAs Are Not:

CASAs are not social workers, therapist or attorneys. They do not provide counseling, legal advice or act as a representative of the Department of Humans Service or any other legal party to their case. CASAs do not provide legal advice, therapeutic or social worker advice or other services to the children (or their families) to whom they are assigned. CASAs are not shelter providers, foster parents or potential adoptive parents. CASAs do not take children to their homes and they do not find, place or provide shelter to the children they serve.

What CASAs Are Not:

- Counselors, therapists, social workers or attorneys.
- Parents advocates, parents aides, housekeepers or handypersons.
- Crisis counselors, 24-hour interventions workers
- Babysitters, shelter providers, home aides or nannies.

CASAs Should Never:

CASAs should never release information about their personal lives or living situations. The release of personal home phone numbers, addresses, and places of employment are not allowed by either the CASA office staff or the volunteer.

CASAs should never give their assigned child, their foster parents or any other family member money, or make loans to the family or child.

CASAs should never purchase gifts for the child they are assigned to without approval of their immediate supervisor. Please note this action may also need to be approved by the child's social worker and in some cases the foster parent or shelter provider. Birthday gifts and certain congratulatory dates may be discussed with your supervisor.

CASAs, friends or family members should never provide shelter in their homes to the children they are assigned to or any of the child's family members. CASAs should never give legal advice or act as someone who knows information of a legal nature to the child you are assigned to or their families.

In addition, CASAs should never: (including AB12 and Over 18 CASM cases)

- Take physical custody of a child (ie. Become foster or adoptive parents, take a child to their home, a hotel, camping, backpacking and/or overnight for short or long term case or visits).
- Have their assigned child to their homes or on overnight visits such as camping, or hotel stays.
- Leave a child unattended or under the supervision of another when on a visit.
- Take their husband, wife, companion, children, or friends on visits with the child.
- Take or give the child medication, including cold medicine, aspirin, etc. unless authorized by the child's care provider.
- Use alcohol or other non-prescribed controlled substances in the presence of the child, or prior to a visit. This includes youth who are emancipated.

Comparison: Responsibilities of CASA & Social Worker/Probation Officer:

CASA:

Gathers, reviews, and evaluates information and makes regular written reports to the court.

- Sees the child on a regular basis as a mentor/youth advocate and gathers information doing so to make recommendations to the court.
- Makes recommendations but has no decision making power.
- Has the goal of representing the best interest of the child, make recommendations to social worker community services.

Social Worker/Probation Officers:

Gathers, reviews and evaluates information and makes regular written reports to the court

- Manages all aspects of the case in accordance with statutory and regulatory requirements.
- Formulates case plan.
- Provides service and referrals to the child and the family.

- Shares information with appropriate parties, but never removes or places a child in a shelter.
- Attends court hearings after having attended case review to obtain supervision, guidance and feedback.
- Is responsible for placement decisions.
- Is typically represented in court by County Counsel.

SECTION IV: PROCEDURES FOR THE COURT PROCESS

The CASA must always be prepared prior to the hearing date. They must gather, outline, and begin preparation of the court report (Exhibit K-page 46) well in advance. Your monthly logs are the best resource for dates, times, case notes and names of those contacted. Always have a current log in your case file in the office.

The CASA must present a written report to the case supervisor detailing his or her findings and recommendations at least **four weeks before each hearing**. These reports are to be distributed by the CASA office to the assigned social worker, all attorneys and any other party legally entitled to receive a copy including the CASA. It is very important to have adequate time to process and distribute reports to all parties. **Six weeks prior to the scheduled hearing date**, the CASA should contact the minor's social worker to discuss their recommendations and make sure that all their information is accurate and up to date.

CASAs will need to give staff time to review, proof, check accuracy and consult with the CASA about court report content. It is very important that the CASA understand that court report content must be accurate and clear. If the staff has a concern or the CASA has not provided accurate detail and information to the CASA supervisor about the content of the report the supervisor may not submit the report or may feel it necessary to alter it. CASAs will always be contacted in advance of the submission of the report when it has been altered. The CASA will need to make sure an appropriate amount of time has been given to allow proper review, proofing and dissemination of the report. When it becomes necessary to change, add to or delete contents of a report, the CASA is asked to cooperate with this decision. When there is a conflict and the CASA wishes to grieve this staffing decision, the CASAs files will be reviewed and the case review team will gather to hear the CASAs position. The case review team will then mediate/review the concerns/data and give the CASA a decision. The CASA must have up to date, accurate and complete data to back up their grievance. The CASA supervisor will have the final decision on the content of all reports and the authority to approve or not to approve a report for submission to the court.

All CASAs will be provided legal consultation when they find it necessary outside the normal legal review of the court proceeding. However, this is by appointment only and the CASA must give the staff at least 5 working days to set up the appointment. The staff will also work to obtain any advice needed and report back to the CASA when appropriate. Legal questions can also be given to the CASA's supervisor prior to case review and research can be conducted and the answer given to the CASA at the next regularly scheduled session.

All court reports must be signed and approved by CASA staff prior to presentation before the court.

Please note that because of the dynamics of some cases CASAs have to be flexible. Never wait until the week before the court hearing to write your report. This is not in the best interest of the child. It may, however, be necessary for the CASA to write a last minute addendum to his/her report if new information is discovered. The CASA staff is here to assist you and addendums are encouraged when needed.

Procedures at Court

1. Dress appropriately (professional attire) and bring your CASA identification badge with you.
2. The CASA should arrive at the court 15 minutes before the scheduled time. Check in with the court officer and introduce yourself to the social workers, attorneys, family members and court officers prior to the calendar call. Check to see if all entitled parties have received the CASA's court report (excludes parents and foster parents).
3. When the case is called, if space allows, go to the table with all parties and attorneys, sit next to the child if the child attends the hearing and encourage the child to speak if there is anything the child wants to tell the judge or referee. In some courts you may be directed to sit in the jury box. If you are seated in the jury box and you cannot hear what is being said ask the parties to speak up.
4. When the CASA wants to speak, the appropriate remark is, "Your Honor, may I address the Court?" or when arguing a point, "Respectfully, Your Honor."
5. The CASA should assert himself or herself and request to attend all conferences in chambers.
6. The CASA should make his or her position, concerns and opinions known by asserting him or herself.
7. All hearings end with the setting of the next hearing date. The CASA should take note of this date, type of hearing and court location. All CASAs should take the After Court Report form with them to the hearing, document the hearing and send the report into the office with any other date, forms, and reports collected at the hearing.
8. When a date is being set for another hearing, the attorneys will consult their calendars. The CASA should do the same as the CASA is also a party to the hearing. If the CASA has a conflict with the proposed date, he or she should speak up and suggest another date.
9. The CASA should remind the clerk to send the minute order to the CASA office. (Minute Orders are the documents outlining the court proceedings and include the next hearing date.)
10. During and after the hearing, the CASA should fill out and send the form ***After Court Report***(Exhibit L-page 50) to the CASA office being sure to include the next hearing date,

time and location. If unable to go to the office, the CASA should mail in the form and follow up with a telephone call with the information on the next hearing. The CASA is ultimately responsible for letting the CASA office know the next court date.

11. If appropriate, the CASA should spend some time with the child and explain what has taken place in court particularly with an older child.

Definitions of Players

- **Judge or Commissioner**
Presides over hearings. Makes the rulings and the final decisions.
- **Clerk**
Courtroom Secretary for the Judge or Commissioner
- **Social Services Court Officer**
Makes sure the paperwork from social services is given to all attorneys and court paperwork is given back to the assigned social worker.
- **Contract Attorneys for Minors**
Attorney for the minor
- **County Counsel**
Represents social worker and presents case for the social services agency.
- **Public Defender**
Generally, represents one of the parents.
- **Contract Attorneys & Private Attorneys**
May represent a parent, grandparent, foster parent, or child as retained counsel, or in some situations, by court appointment.
- **Bailiff**
Maintains order in the court and assists parents who are in custody.

Definitions of Terms

- **Calendar Call**
Review by the judge of the status of all cases that are scheduled to be heard that day. Either at 9:00 a.m. or 9:30 a.m. depending on courtroom.
- **Detention Hearing**
First court hearing in dependency cases. Generally, attorneys are appointed for all parties. The Bench Officer makes findings as to whether reasonable efforts were made to prevent the removal of the child and rules as to whether the child can be returned home. Dates are set for the pre-trial and jurisdictional hearings on the petition. Visitation issues are addressed.

- **Trailing a Case**

The case was not completed on the scheduled date and/or a new date was not set. The case will continue to be heard the next judicial day.

- **Settlement Conference**

A conference in which cases are often resolved without the need for a contested hearing.

- **Contested Hearing**

When one of the parties involved on the case is not in agreement with the recommendations in the social services report, or the facts of the petition. A new date is set, to hear arguments and testimony on the issues.

It is very important for CASAs to attend these hearings.

- **Chambers**

The judge's office. When attorneys wish to discuss a matter in private they can request that the matter be heard in the judge's chambers.

Hearing Schedule

- Detention Hearing
- Settlement Conference
- Jurisdictional (dependency order made)
- Dispositional Hearing (may be combined with Jurisdictional)
- Six-month review (SMR)
- Twelve-month review (TMR)
- Eighteen-month review (EMR-permanency planning hearing)
- 366.26 hearing (hearing to terminate parental rights and to determine the best permanent placement plan for dependent child-adoption, guardianship or long term foster care.)
- Periodic review (every six months after permanent plan is implemented.)
- Placement review (issue of concern regarding placement.)
- Progress review (status on progress of any kind.)
- Termination review

SECTION V: CODE OF PROFESSIONAL ETHICS

Confidentiality

CASA volunteers have unique confidentiality responsibilities because they work with minors whose privacy rights are protected by law. The minor's rights of privacy and confidentiality must be protected at all times. To maintain confidentiality, the CASA must follow these procedures:

1. A CASA may not disseminate information about a case to members of the general public who have no legal interest in the proceeding. Information may not be repeated to the press even if it has been previously stated in the media. CASAs do not engage in PR or other media related opportunities without the permission and direction of the Executive Director or her designee.

2. A CASA does not use first or last names or reveal any other information which would identify the CASA child or family while discussing with a person not directly involved with the case. A CASA does not give out their home phone numbers and addresses.
3. All attorneys and other parties with a legal interest in the case are entitled to copies of the CASAs' reports. However, all reports must be processed and distributed through the CASA office. Reports must be approved by the Executive Director or her designee. Reports are not given to the parents. Parents should be advised to talk with their social worker
4. **Once a case terminates, and/or or CASA is no longer assigned to it, all notes and other associated paperwork must be returned to the CASA office.**
5. All CASA notes should be kept in a locked, secured area in the home or on a computer in a confidential area. All case materials are to be stored in the CASA office and returned at the close of the case assignment. **You may not use e-mail to convey any confidential information.** Please note that the CASA staff will send monthly and periodic e-mails to you as a way of communicating and keeping you informed. The e-mails and any names on these e-mails are confidential.
6. All CASAs must sign the *Pledge of Confidentiality* (Exhibit C-page 37).
7. All continuing education events, meetings with social workers, attorneys, case supervisors, or case review sessions are confidential. The information obtained from these meetings can **only** be disclosed to authorized parties. These parties must be authorized by your supervisor.

Conflict of Interest

CASA volunteers represent the best interests of the child and are dedicated to maintaining this perspective.

1. It is essential that the CASA maintain an unbiased position. The volunteer must independently assess each child's unique circumstances when formulating recommendations.
2. The volunteer must **not** use the CASA organization or its relationship to the court to express his/her own personal views on an issue.
3. The CASA program may **not** be used as a vehicle for foster parenting or adoption. Objectivity is impossible if a CASA becomes a foster parent to the assigned child. The CASA's position will be terminated.
4. Volunteers shall serve without compensation. Volunteers shall be allowed reasonable advancement or reimbursement of expenses incurred in the performance of their regular duties, if so approved by their supervisor and when the overall budget for the CASA program can warrant this. Volunteers may not be compensated for rendering services to the Corporation in any other capacity unless such compensation is reasonable and does not provide an excess benefit to the Volunteer. Volunteers may not have indirect financial interests in the leases, business transactions, or professional services of the organization.

5. The CASA may **not** use agency letterhead to express political or other personal views.
6. The case supervisor should approve all letters requesting case information.

Social Media

CASA shall utilize all appropriate and feasible social media platforms to disseminate information about its programs and activities, including its web-site, Facebook page, twitter account, and other relevant platforms, as they may become available. CASA shall use its best efforts to keep its volunteers and supporters informed about issues and initiatives that the organization is pursuing and that affect its mission.

Volunteers with CASA of Sonoma County shall refrain from posting any inappropriate material, providing links to inappropriate websites or posting undesirable comments, references or pictures anywhere on the web where the posting directly or indirectly refers to CASA of Sonoma County, to any pseudonym that is meant to refer to the organization, or to any individual associated with the organization. Volunteers found to be in violation of this policy may be sanctioned at the discretion of the Executive Director. This policy includes public postings of any electronic media, including but not limited to, internet forums, blogs, web logs, photo-blogs, or on-line web communities.

“Inappropriate material” shall be defined as postings, depictions or descriptions of illicit substances and/or their paraphernalia, underage drinking, inclusion of harassing hostile, false or confidential information, and any other acts that violates local, state, federal, or CASA of Sonoma County rules, regulations or policies. Also prohibited are prejudiced or discriminatory statements. Volunteers from CASA of Sonoma County should avoid giving the impression that their postings represent the organization or the CASA program or are anything more than their personal opinions.

SECTION VI: CASE SUPERVISION

Consulting with Supervisor

Your supervisor is here to support you, give you guidance and information and help you work through problems with any part of your case including working with problematic people. Your supervisor will support you every step of the way. It is asked that you, in support of this effort, turn in all paper work and monthly logs in a timely fashion (Exhibit H-page 44). Always keep your supervisor informed of any changes in your personal status such as your address, phone email or other related issues that might be necessary for us to stay in communications with you.

It is also necessary for you to report immediately any changes in your driving record, legal status or issues that might affect the criminal history of your standing as a court appointed special advocate. It is further asked that you become an active member of the agency by attending appropriate meetings, continuing education and case review sessions.

Your supervisor will protect your phone numbers and addresses—they will keep your personal information confidential. (Please note you should never give your home numbers or addresses out to anyone on your case without prior approval of your case supervisor...even if they ask for it...even if they become argumentative about it).

Your supervisor may also tell you if he/she thinks you are stepping over a boundary, being inappropriate or losing your objectivity.

Your supervisor will receive and advise you on all paper work and case information coming in and out of the office. Your supervisor will receive all your paperwork and incoming agency calls and relay them to your designated number in a timely fashion.

Your supervisor or another CASA staff supervisor will be at all case review sessions held each month. Day and evening sessions will be held for your convenience.

Your supervisor or a CASA staff supervisor will have 24 hour a day access to you and vice- versa.

Your supervisor can give you access to your personnel files for review or updating. CASAs are asked to put the request in writing and allow 48 hours prior to the file review.

Your supervisor and other CASA staff appreciate and respect what you are doing and will strive to treat you honestly with respect and will protect your confidentiality at all times.

Your supervisor will ask that you respect all agency policies and remember that when working on a case you are representing the CASA program, the courts and specifically the child, a member of the child welfare system. Respect and diplomacy is to be modeled at all points of contact.

Your supervisor will conduct periodic evaluations and file reviews. You are asked to support these program audits. You must keep your supervisor apprized of any changes in your DMV or involvement in any personal legal issues you might be facing while assigned to your case.

Upon the dismissal from your case you will also be asked to return your files and complete a departure interview and evaluation.

SECTION VII: TRAINING & CONTINUING EDUCATION

The training component of the program ensures the competence of the volunteers, ensures that the needs of the dependent child will be explored as effectively as possible. This training also assures the Court of receiving comprehensive and independent recommendations made in the child's best interests. 12 hours of continuing education is required annually and is to be reported on your volunteer logs each month.

Training Outline

Training is conducted in sessions totaling 30-36 hours. They may not necessarily be held in this order:

- 1. Orientation:**

- Overview of program training and support for CASAs
- Nature and role of the CASA
- State CASA Association

CASA Program Procedures, data collection
Confidentiality and Pledge of Confidentiality
Major "Dos and Don'ts" for CASAs
Example of a typical case flow
Sample write-up of a court report
Use of the office and office equipment

2. **Legal Aspects:**

Introduction to the Courts Facts and laws pertaining to Reasonable Efforts
Policy, standard laws and the responsibility of becoming sworn officers of
the court
Role and Responsibility
Accountability of CASAs
Introduction to the Judge and Referees, their needs and requirements
Dialogue between Judge and CASAs

3. **Dynamics of Child Abuse and Neglect, Child Development, and Educational
Advocacy**

Psycho-dynamics of abusive families
Socio-dynamics of abusive families
Spousal abuse
Drug and alcohol abuse
Development of infants, children, and adolescents
Individual Education Plans (IEP)

4. **Investigating and Interviewing**

Initial contacts with children and parents
"Scoping" situations or relationships
In-person techniques
Basic interviewing skills
How to interview children
How to interview offenders

5. **Social Service Systems**

Overview of Protective Service Systems
Child Welfare and Protective Services
Child abuse and neglect as defined by Social Services
Foster care procedures and options
Summary descriptions of selected agencies
Community resources for families

6. **Data Collection and Reporting**

- Primary and secondary sources
- Confidentiality of data
- Note taking, recording, filing and safe keeping
- Organization of case information, returning all file information once terminating the case
- Court appearance and reporting
 - Courtroom assertiveness
- Required final report formats
- Recommendations and procedures
- Role-play interviewing, writing a short report, and comparing notes

7. **Field Observations**

- Court room observations
- Valley of the Moon Children's Home
- Children's Village (optional)
- VOICES
- SRJC
- Case Review observations
- Viewing the CASA website
- Viewing the National CASA website
- Viewing the State CASA website

8. **Training Wrap-up**

- Ethics
- How a case comes together
- Team spirit
- Oath of Allegiance

Continuing Education

A minimum of 12 hours per year of continuing education is MANDATED by the State of California and the National CASA association for all advocates in order to maintain their court officer status. Independent education, special CASA workshops, updated and review sessions in a CASA training session all count as continuing education. Hours may not be carried over from one year to the next.

What counts as Continuing Education?

Case Review discussions, materials and handouts CASA continuing education workshops, conferences and classes Books and articles, films, videos and TV programs *that specifically relate to subjects such as:* cultural awareness and diversity, sexual, physical, spousal and substance abuse, the results of abuse, the treatment of abuse, legal information pertaining to juveniles and the Juvenile Court System and **anything else that improves the advocate's ability to function as a CASA** (CASA office work does not count as continuing education.)

How your 12 hours of Continuing Education is Recorded

If continuing education time is to be counted, it must appear at the top of the *CASA Log of Volunteer Hours* (Exhibit H-page 43) which every advocate fills out each month. The *Log of Volunteer Hours* must be received by the CASA office by the 5th of each month. The office then records this information in order to document compliance with the Law.

SECTION VIII: SAFETY

Safety for Advocates

This manual was created to help the advocate increase his or her knowledge and skills in the recognition and detection of emotionally charged situations. It seeks to teach techniques to defuse and channel other people's aggressive and hostile behaviors into non-physical and more productive actions.

Each advocate needs to think about and become accustomed to the process of safety. Many of us forget that in our daily lives we need to think ahead to make certain we have done all that is reasonable to protect ourselves and our families and ultimately the CASA clients. The following material will assist this process of thinking ahead. Some of the material may trigger feelings that the advocate needs to examine--pay attention to these feelings!

One of the basic safety measures taught to children is to *walk away* when feeling unsafe or in an unsafe situation. This seems quite simple, but it is the primary technique advocates are asked to employ. The following are some examples of triggers and suggestions to help prevent vulnerable situations from arising or to allow the advocate to *walk away* comfortably.

Field Safety for CASAs

The safety process begins with the placement interview (at the assignment of a case) by trying to ensure that the CASA and the case are as close a match as possible and by being aware of risk factors that might be involved. The advocate must consider safety in the planning of case investigation. Decisions can be made with staff as to who is going to be interviewed, when, where and why. Discussing risk factors with Program staff throughout the assignment is a good practice.

When risk factors are minimized, the advocate can obtain the information wanted without being placed in a vulnerable position. The CASA should be organized, know the purpose of an interview and be prepared to explain his or her role and interest.

Occasionally some cases and CASAs do not prove to be a good match. If the advocate begins to feel uncomfortable or has concerns those feelings will be respected. CASA staff welcomes discussion concerning placement.

Consider the following when doing casework:

1. The CASA should talk at case review or with staff about any situations encountered. It is staff who always advises CASAs on this subject.
2. The CASA should always anticipate the unexpected and form a plan of action.
3. The CASA should consider the image presented to the child and parents. A neat, well-groomed appearance enhances the impression that responsibilities are taken seriously. It is important to pay attention to the appropriateness of clothing--there is no reason to be very dressy when visiting a family. Avoid clothing that is uncomfortable or which restricts movement.
4. The CASA should take safety precautions from the beginning of a visit. For example, the CASA should stay near the door--if it is necessary to move away from the door, return as soon as possible. Keep car keys accessible. Make note of the surroundings and all possible exits.
5. The CASA should be aware when the conditions are "not normal."
6. The CASA should state clearly who he or she is and the reason for being there.
7. The CASA should never give a home or work phone number or address to any party. Channel all communication through the CASA office.
8. The CASA should use the child's and parents' names to personalize and humanize the interaction.
9. The CASA should avoid making "good" and "bad" judgments. Be culturally sensitive to the client. Eye contact for one person may be a sign of respect but, to another, a sign of disrespect. Know the client's history, culture and circumstances.
10. The CASA should be careful not to insult, intimidate or challenge clients.
11. The CASA should ask that only one person talk at a time if conversations begin to overlap or become confusing.
12. The CASA should realize that his or her physical presence may trigger a defensive reaction. Be on guard for any resentful or defensive feelings. Assure the client that the CASA's role is in a non-system capacity and is to support the child.
13. The CASA should allow people to "blow off steam." This venting diffuses the intensity of emotions. Verbal ploys to create a cooling off time, such as asking for a glass of water, are very effective.
14. The CASA should watch for signs of imminent violence. Non-verbal indicators include dilated pupils, pulsing veins, grinding of teeth, torso crouching and fist clenching.

General Preventative Guidelines

The following guidelines apply to many situations, not just when doing casework. Use them during daily activities as well.

1. Be assertive and confident, but not overly aggressive.
2. In an unfamiliar situation, wear sensible clothing which is easy to move in--no high heels, straight skirts, jewelry, etc.
3. Think ahead--don't go into questionable situations alone. Know the situation and location in order to look confident. Drive-by to check out the surroundings. Talk with your supervisor always before seeing parents in their home. Better yet meet with parents outside the home.
4. Be aware of the immediate area.
5. Make sure that your supervisor knows the location and duration of the visit and time of return. If plans change, call and let that person know.
6. If possible, travel in pairs (see your supervisor) and always know the party and environment.
7. Wear the CASA badge.
8. Carry keys separately, not in a purse. If avoidable, don't carry a purse at all. Lock it in the car trunk before starting out.
9. Always lock the car when leaving it and check the rear seat before re-entering.
10. Think about returning to the car: If the parking location is safe at 4:00 pm, will it be as safe at 9:00 pm?
11. Keep car windows up, doors locked and gears engaged in unsafe areas.
12. Do not carry a weapon--it can be turned against the advocate. Carry a whistle or some other noisemaker.
13. Keep arms free. Don't carry loose paperwork or notebooks.
14. Trust instincts. If really uncomfortable, take protective action--*walk away*.
15. Don't walk alone near places where someone can hide or in dark areas at night.
16. Don't walk through a group of people. If necessary, cross the street to pass them.
17. Never give out too much personal information about self or family, especially phone numbers and addresses. Remember that all correspondence and communications should flow through the CASA office.

18. Review the CASA Volunteer Handbook, especially the section on being a culturally sensitive CASA.

Behavioral Defenses

The advocate's own defense begins with thinking ahead and being prepared. Know the client's personality, behavior, environment, past history, etc. The best way to do this is by studying the case material, by talking with CASA staff, and by observation. When safety questions are involved, always talk directly to staff. However, as the case moves through the system remember that circumstances can change. Your confidence, assertiveness and ability to be aware and prepared is a basic part of safety and CASA success.

The following terms are behavioral defenses we all use to a greater or lesser degree of awareness:

Perception and Experience: Perception is the process of organizing and interpreting sensory data (through the eyes and ears) and is based on the results of previous experience. Experience combines memory and feelings of past history. Individual values, feelings and experiences give meaning to behavior.

Learned Behavior: This is learned early in life and is emotionally accepted or rejected. Learned behavior includes expectations of how others will behave and the kinds of behavior for which the individual anticipates being rewarded or punished. There are specific costs for deviation from the norm (sacrifice of comfort, status or peace of mind).

Fight Defenses: These include talking loudly, using abusive or threatening language, wild and uncontrolled gestures and movements, resistance during interviews or visits, the challenging of procedures, talking continuously, and the inability to sit still.

Flight Defenses: These include withdrawal from interaction, avoiding issues, intellectualizing, minimizing the situation or problem, sadness or being quiet for long periods, absence of facial expressions, tense or rigid posture, being very emotional or appearing intoxicated, rationalizing or manipulative language or behavior, and dealing with past issues excessively.

Phases of an Assault

Triggering: During this initial phase there is subtle movement away from baseline behavior (whatever is "normal" for the person). This can be difficult to detect particularly during the initial contact as the specific behaviors exhibited will vary widely from individual to individual. Most assaults occur on the spur of the moment and may seem senseless and unprovoked.

Escalation: During this phase there is a direct move to assaultive behavior and the symptoms become more noticeable and increase in intensity. With the rise in intensity there is a decreased ability to respond to intervention. Thus, action should be taken at the first indication of change in behavior.

Crisis: During the crisis phase, assaultive behavior appears and includes hostile threats of inflicting assault as well as the actual assault. Appeals to the person's ability to respond rationally are not effective in this phase. **SAFETY FIRST:** *Walk away.*

Recovery: There is a gradual return to baseline behavior as the overt manifestations begin to subside. It is important to remember, however, that adrenaline continues to influence behavior beyond the crisis phase. If the person is not allowed to set the pace for recovery, assaultive behavior may reappear. Reassuring the client of their safety expedites recovery while reducing the chance for further assault.

Post-Crisis Depression: The client is likely to regress below baseline behavior and exhibits mental and physical exhaustion. Remorse is common in this phase.

Strategies for Dealing with Hostility or Verbal Abuse

1. Remain calm. Do not show anxiety, anger, fear, etc. These emotions tend to transfer quickly to others.
2. Be quiet but firm. Do not get into a shouting match. Keep statements simple and direct.
3. Do not become defensive. Do not take statements personally.
4. Be assertive. Deal with the issues at hand. Do not allow yourself to be sidetracked with unrelated issues.
5. Offer a choice. Be direct but not authoritative. Present positive alternatives. Show respect but define the limits and stick with them.
6. Be aware of the potential for aggression. Try to get the person seated. Try to distract the person from the source of anger. If you need help, *walk away* and then get help.

Strategies for Handling Difficult Behavior

Breaking the Cycle of Learned Helplessness: In this case, the child or adult has been convinced that he or she is unable to control whatsoever and there is nothing he or she can do. The advocate should try to establish the other person's self-worth by counteracting the belief that voluntary behavior has no effect in controlling what happens. This is useful with a client who is depressed or crying, passive, confused, quiet, conforming or selfless, or overly giving and generous.

Selective Ignoring of Client Statements: This means not replying or acknowledging the abusive or destructive statement. Only reply to constructive statements. This is effective with a person who is abrupt or defensive, using obscene language or making threats or untrue statements.

Broken Record Technique: Sometimes the repetition or rephrasing of the key question or important facts and information is needed. Leave all other issues for later. This is useful with a person who is vague or avoiding issues is very talkative or constantly rambles, disoriented, distracted or mentally ill, or restless and gesturing wildly or uncontrollably.

Disarming Anger: Anger can be disarmed with a verbal contract or agreement between the advocate and a person. The discussion will center on the issues at hand and will be continued

only after the person stops the disruptive behavior. This is useful with a person who verbally threatens, refuses to follow directions or suggestions or is abusive to other people in the advocate's presence.

General Conversational and Interpersonal Techniques for Increased Participation: These techniques, both verbal and non-verbal, can be used to encourage and increase a person's participation in a discussion and also to increase understanding.

1. Reframing--This is a technique to be used to alter a person's perspective about a problem or situation. Turn it around to show the positive things that can happen, or the "flip side" or "silver lining." Example: "Now that your child has told someone, you truly can have the relief you deserve. You can now work on your own concerns which, in the long run, will be better for your child."

2. Joining Resistance or Utilizing the Other Person's Resistance--Rather than trying to break through or overpower the person's resistance to a situation or idea, simply agree. Although this almost promotes the resistance, it actually aligns the advocate with the resistor. This technique serves to weaken the effect of the resistance and takes away the need to resist. Example: "You should be upset. I'd be angry or upset, too."

3. Reflective Listening--The advocate repeats to the person what he or she has just heard. This not only recognizes the person's worth, but reconfirms what has just been said. Reflective listening or paraphrasing encourages communication and builds upon information sharing. Example: The client says, "When the social worker came by she said that it's going to be a long time before I get my kids back and it made me mad." The advocate responds, "Your kids being gone for a long time is going to be hard. It sounds like the social worker made comments that made you feel mad."

CASA Compliance and Liability Coverage

Please note that the CASA volunteer must keep staff apprised of their legal and driving records at all times and if there are new circumstance that might arise after you have been placed on a case. CASA volunteer status is assessed annually and your cooperation is required.

Once having passed all security clearances (DMV, child abuse registry, DOJ/FBI and application requirement, 30 hours of pre-training, court and case review observation) a liability insurance policy will be implemented. The CASA Program has a social services liability insurance policy which covers the advocate in any incidents related to case matters. However, *insurance coverage is contingent upon the advocate complying with CASA Policy and Procedure.*

Compliance includes the following:

1. The advocate must make all efforts to conduct a safe investigation.
2. The advocate must document all casework time monthly ***Log of Volunteer Hours*** (Exhibit H-page 43) and then must send this form to his/her case supervisor.

3. The advocate must attend required case review and placement review. Closure review includes the returning of all case data and files in your possession.
4. The advocate must complete twelve hours of continuing education each year following the year in which the advocate received initial training.
5. The advocate must provide and maintain proof of automobile liability insurance, pass DMV clearance (Exhibit F-page 42).
6. As a mandated reporter of child abuse and as a CASA program member the advocate must contact the proper authorities and CASA office (your supervisors) immediately if they should suspect or see child abuse.

CASA staff is the only individuals who can authorize an exception from a particular procedure or policy requirement. The exception must be in writing and placed in the advocate's personnel file.



MY SIGNATURE INDICATES THAT I HAVE READ THE PRECEEDING COMMITMENT STATEMENT AND SONOMA COUNTY CASA POLICY AND PROCEDURES HANDBOOK. I AGREE TO ABIDE BY CASA POLICIES AND PROCEDURES AND BECOME A SWORN OFFICER OF THE SONOMA COUNTY JUVENILE COURT.

NAME (CASAVolunteer)

(Please print)

SIGNATURE

SUPERVISOR/TRAINER SIGNATURE

EXECUTIVE DIRECTOR SIGNATURE

DATE _____

COURT APPOINTED SPECIAL ADVOCATES
OF SONOMA COUNTY

SONOMA COUNTY COURTS, STATE OF CALIFORNIA
JUVENILE COURT

OATH OF ALLEGIANCE

I, _____, do solemnly swear that in performing the duties of a Court Appointed Special Advocate, I will bear true faith and allegiance to the Constitution of the United States and the Constitution of the State of California; that I take this obligation freely, without any mental reservation or purpose of evasion, and that I will well and faithfully discharge the duties of a Court Appointed Special Advocate to the best of my ability in order to serve the best interests of the youth. As an officer of the Court and a party to the case I will be assigned to, I will respect and follow the rules of the Court Appointed Special Advocates program and the Court and will maintain fairness, impartiality and integrity in my role as advocate for the youth.

In support of this Oath I further understand that:

My role as a CASA is to aid the Court and the youth in achieving a positive outcome for the youth in the court process. In doing so,

- I will adhere to the rules of confidentiality and will keep professional boundaries in my role as a CASA volunteer.
- I will respect the roles of all other parties and professionals I will be working with.
- I will agree to provide the CASA program with monthly logs of my interactions with the youth I am assigned to and to keep my supervisor apprised every 60 days of all case circumstances.
- I will, as an outcome of my monthly logs, 60 day case review sessions, and team work with the CASA staff prepare reports for the courts based on interactions, observations and my understanding of the case circumstances.
- I will protect the privacy of the youth I serve by maintaining all case data in the CASA office.
- I will serve as a representative of the CASA program and of the Court with high regard for respect and accountability.

DATED: _____ Advocate _____

Presiding Juvenile Court Judge _____

EXHIBIT B

COURT APPOINTED SPECIAL ADVOCATES PROGRAM

RELEASE OF INFORMATION AND CRIMINAL CLEARANCE DATA

I hereby give my permission for the release of the State Summary Criminal History information maintained by the Department of Justice (Penal Code 11105), records of all convictions involving any sex crimes (Penal Code 11105.2), Department of Motor Vehicle information including the Employee Pull Notice program, and any other criminal records concerning me, to Court Appointed Special Advocates (CASA).

I understand that any involvement in sex crimes, child abuse convictions or acts related to child endangerment, registered sex offender, other crimes against children or any felony level crimes will supersede me from becoming a CASA volunteer of any sort. The Executive Director will determine this and this decision will be final.

I understand that if I have lived in the state of California for less than one year I must have a criminal clearance via the DOJ and FBI, Federal child abuse registry and DMV.

I declare, under penalty of perjury, that I have been known only by the following names:
(Print or type all aliases, including maiden name and nicknames.)

- 1. _____
- 2. _____
- 3. _____

I declare, under penalty of perjury, that I have lived in California since (year): _____

_____ I have no prior criminal history

_____ I have the following criminal history:

Signature _____

Date _____

Witness _____

Date _____

COURT APPOINTED SPECIAL ADVOCATES PROGRAM

PLEDGE OF CONFIDENTIALITY

The California Penal Code and Welfare and Institution Code emphasize the importance of keeping (Court) records confidential. As a volunteer, you will have access to confidential information about the abused or neglected child and family. It could involve prior arrest records and other pertinent information. All of this information is confidential and **CANNOT BE SHARED WITH ANYONE.**

If you are a student and you are doing this as a class project, you can report what is happening but you cannot give any information that would identify the child or other people involved. This is important to remember, as it is a misdemeanor offense to give out any of this information.

I promise that I shall hold in confidence all pertinent information. I will not violate the confidential relationships between CASA, its volunteers, related agencies, Courts and all parties interviewed. I will not remove from the CASA office any written records without written permission of the executive director.

I understand that all electronic devices/services I use must abide by, and hold high all confidentially standards to protect the youth that the CASA program serves. I.e. social media services and/or off site computer back-up systems.

I accept full responsibility for maintaining the confidential and private nature of all written and electronic records and information. I understand that I am personally responsible and liable for any violation of this agreement.

Name (please print) _____ Phone _____

Address _____

Signature _____ Date _____

Witness _____ Date _____

REPORTING LAW AGREEMENT

I have received training regarding the Child Abuse Reporting Law (W&I Code, Section 11165 et seq). I understand that current law requires that I must report known or suspected instances of child abuse or neglect. I agree to comply with the reporting requirements. When notifying authorities of such suspicions, I will also notify my supervisor so that records can be kept.

Signature _____ Date _____

COURT APPOINTED SPECIAL ADVOCATES PROGRAM

NON-DISCRIMINATORY STATEMENT

The CASA Program provides equal opportunity to all clients, volunteers, staff and board members. CASA does not discriminate on the basis of race, religion, sex, age, or ethnic origin.

Case Assignment Policy: CASA is committed to facilitating permanent solutions for all children based on an understanding of their ethnic and cultural differences. CASA will make all attempts to match advocates who share the same race and culture, who can bridge the gaps of mistrust between families and systems. The matching of a volunteer to a child's case will provide the Court with reports and recommendations that take into account the total context of the child's background, community support systems and extended family.

Cultural Sensitivity Guidelines: Cultural awareness and sensitivity is viewed by the CASA Program as a self-assessment of one's own attitude regarding cultural differences and the socio-political system with respect to its treatment of minorities. CASA, in support of its Non-Discriminatory Policy, provides the following cultural sensitivity guidelines:

1. The culturally skilled CASA is one who has moved from being culturally unaware to being aware and sensitive to his or her cultural attitudes.
2. A culturally skilled CASA is aware of his or her own values and biases and how they may affect minority clients.
3. A culturally skilled CASA is one who is comfortable with differences that exist between the CASA and client in terms of race and beliefs.
4. The culturally skilled CASA is sensitive to circumstances (personal biases, stage of ethnic identity, socio-political influences, etc.) that may dictate referral of the minority client to a member of his or her own race or culture.
5. The culturally skilled CASA must research and then use that specific knowledge and information about the particular group with whom he or she is working.
6. The culturally skilled CASA is able to generate a wide variety of verbal and nonverbal responses and is aware of communication and interviewing skills that are culturally sensitive.

Signature _____

Date _____

COURT APPOINTED SPECIAL ADVOCATES PROGRAM**COMMITMENT STATEMENT / CODE OF ETHICS**

As a Sonoma County CASA, I see myself as a valued, relied-upon member of the CASA Program. I recognize my role in the Court system as the need to act as an ethical, professional person. I will regard all my work with confidentiality, disclosing the information I obtain only to other officers of the Court. I will collect information in a manner necessary to maintain constant and consistent data to the benefit of my case. I will operate in the best interest of the child.

In order to provide and demonstrate the above, I agree to the following:

1. To attend all CASA meetings and gatherings but when unable to attend, I agree to call and update my case supervisor on the status of my case and my position as a volunteer in the program.
2. To attend ongoing educational trainings of no less than 12-15 hours per year in order to maintain up-to-date information and resources.
3. To attend 60 day case reviews to update and improve my case knowledge and relationships. I understand that case reviews are on the 2 and 4 Wednesdays each month. They are offered at 12:00 and 5:00 pm. If I can not attend, I will contact my supervisor for a one on one consultation.
4. To communicate directly to my case supervisor any concerns, issues and successes no less than every 60 days however every month is recommended.
5. To attend **all** Court sessions pertaining to my case or to contact my case supervisor for advise and understanding of how to follow up after the court session. I UNDERSTAND NOT ATTENDING COURT IS NEVER RECOMMENDED.
6. To maintain an open, positive attitude regarding CASA Policy and Procedures while performing my duties in the public.
7. To read and keep up with all CASA web site information, newsletters, emails and communications so that I keep up on calendar events, news and policy information.
8. To read the training manual, complete the 30 hour training course requirements, observe a case review session and attend court prior to being assigned a case and becoming an active CASA.
9. To commit my time to the CASA Program for a period of at least two years with an understanding that the overall goal of CASA is to develop permanent long term relationships with the youth we serve. In some cases CASA volunteers have been assigned to their cases until the youth turns 21 years old.
10. To create a private and confidential area in my home to keep all case notes and computer CDs and to keep **all** other case records in the CASA office files.

11. To be open in recognizing that CASA is a non-profit organization which holds ongoing fund raising projects and while my participation may be asked for, it will not be mandatory.
12. To be aware that CASA is a Sonoma County-wide organization and all efforts will be made to assign me to a case in my geographic area, but that from time to time I may be asked to travel throughout the county due to case transfers or new placements.
13. To always receive the written approval of the CASA staff and maybe in some cases the Department of Human Services, and/or the court when I want to take a child out of county field trip or excursion.
14. To strive to become a culturally skilled advocate allowing myself to better meet the needs of my CASA youth.
15. I understand that I shall serve without compensation in my role as a CASA. I also understand that at this time volunteers are not allowed reimbursement of expenses incurred in the performance of their regular duties, unless so approved by the Executive Director in advance, in writing and only when the budget allows. Scholarships and activities funds are available from time to time. (Please watch your Newsletter and emails).
16. As a volunteer I may not have indirect financial interests in the leases, business transactions, or professional services of the organization.

I am aware of the position and visibility of the CASA Program in the community and will conduct myself in a manner consistent with that image. Because of the responsibility the CASA Program has, I agree to submit to a DOJ/FBI, child abuse registry, DMV and security screening process to assure that my character and past is free of child endangerment and criminal charges. I realize I will be seeing children on a one-to-one basis and, therefore, will conduct myself in the **most** professional and ethical manner.

I understand that CASA is a volunteer-based, non-profit organization which values paid and volunteer staff equally. When asked to contribute outside of my CASA duties, I have a right to say no, to have my feelings heard, and to have a place to communicate my concerns. I also agree to and recognize the need to be reliable and timely in all my responsibilities and to work with the office and other volunteers in a respectful manner.

My signature acknowledges that I have read the above Commitment Statement, the CASA Policy and Procedures, and that I have completed the required training to be a sworn officer of the Sonoma County Juvenile Court.

Signature _____

Date _____

Supervisor/Trainer _____

Date _____

COURT APPOINTED SPECIAL ADVOCATES PROGRAM

STATEMENT OF AUTO LIABILITY COVERAGE

I understand that I must maintain automobile liability insurance coverage which satisfies the requirements under the Law of the State of California in order to be approved for the transportation of persons in the course of my volunteer duties with the Sonoma County CASA Program.

I presently carry automobile liability insurance which meets the minimum requirements under the Law of the State of California. I will continue to maintain such coverage as long as I am a volunteer with the CASA Program.

Insurance Company _____

Policy Number _____ Effective Period _____

Name (please print) _____

Signature _____ Date _____

**SONOMA COUNTY COURTS, STATE OF CALIFORNIA
IN SESSION AS A JUVENILE COURT
ORDER APPOINTING COURT APPOINTED SPECIAL ADVOCATE**

In the matter of
Name: {of child}

Court number: {petition number}

Birth date: {of child}

BASIS

This is to inform you that the Sonoma County Juvenile Court hereby orders the appointment of {Name of Volunteer} to function as a Court Appointed Special Advocate (CASA) in the above-entitled matter.

The above named child has been found to be a Dependent Child or Ward under Welfare and Institutions Code 300 or 600 and/or is involved in a Sonoma County Juvenile Court proceeding.

Pursuant to Welfare and Institutions Code Sections 100 et. Seq., an advocate may be appointed on behalf of the above-named child by the Juvenile Court. Application is hereby made for the appointment. Said applicant should contact their attorney or the Child Advocate's office immediately.

ORDER

The Court Appointed Special Advocate's primary responsibility is to represent the best interest of the child before the Court. This necessitates the CASA to:

1. Research and assess the placement and total circumstances of the child through interviews with interested parties and review of records pertaining to the case.
2. Attend all civil and criminal hearings in Superior Court in the matter of the child as needs dictate.
3. Submit written reports with recommendations for review by the Judge or Referee.
4. Monitor court orders and service plans to ensure the interest and needs of the child or children are met.

The Court Appointed Special Advocate shall immediately contact the dependent child at the current placement.

We the undersigned request full cooperation with the CASA in their assessment and examination of the case. This includes the release of information, evaluations, reports and records that pertain to the child.

All information regarding the above-named dependent child should be sent to:

Court Appointed Special Advocates Program (CASA)
P.O. Box 1418
Kenwood, CA 95452
Telephone: (707) 565-6375

Any questions should be directed to the CASA program office at the above phone number.

Dated: _____

Judge/Commissioner of the Juvenile Court

Dated: _____

Millie Gilson, Executive Director

EXHIBIT H

CASA LOG OF VOLUNTEER HOURS		
CASA'S Name	Month/Year	
CHILD'S Name	Date of last SW/PO contact	
Next Hearing Date	(mandatory monthly contact)	
DATE	CONTINUING EDUCATION (incl. travel time)	HOURS
	IN-SERVICE (seminar at CASA office)	
	INDEPENDENT STUDY: books, videos, etc. (describe on other side)	
	Case Review:	
	CONTINUING ED. SUBTOTAL	
DATE	CASEWORK: phone calls, visits, interviews, report writing, etc. (incl. travel time)	HOURS
	CASEWORK SUBTOTAL	
DATE	OTHER VOLUNTEER WORK: Office or event volunteer, committee, etc.	HOURS
	OTHER VOLUNTEER WORK SUBTOTAL	
	TOTAL	

New Developments: changes in placement, social worker, counsel, etc.:
Did you review the following case concerns this month?
1. MEDICAL ISSUES: Yes _____ No _____ Describe on other side.
2. EDUCATIONAL ISSUES: Yes _____ No _____ Describe on other side.
3. PREDELINQUENT BEHAVIORS: Yes _____ No _____ Describe on other side.
Please include any new contact information (phone, email, address, proof of insurance, etc):

Please contact the CASA office with any important case information, questions, or concerns.
Phone: 707-565-6375 Fax: 707-565-6379 Email to omcasa@sonomacasa.org
Mail to P.O. Box 1418 Kenwood, CA 95452

AUTHORIZATION/PERMISSION FOR VISITATION

Date: _____

I, _____, the assigned CASA on the case of _____
_____, Case # _____, request
permission to transport and take the above mentioned child (ren) on a special visitation, described
below:

Date of visitation:

Time of departure:

Time of return:

Place:

Description of event:

I understand that this child is under my supervision and in my care. I will take full responsibility for him/her.

CASA _____

Signature _____

Please obtain signatures in the following order:

CASA Supervisor _____

Social Worker _____

Guardian _____

Judge/Referee _____

cc: Judge/Referee
Social Worker
Case File

Organizational Form for Mandatory 60 Day Case Review / One on One Interview

CASA Name: _____ **Case Name:** _____

Ages of Children: _____ **Judge or Referee:** _____ **Hearing Date:** _____

Caseworker: _____ **Last Hearing:** _____ **Type of Hearing:** _____

Brief Case History: (Include reason for original detention, major changes, and current disposition.)

Mental Health / Med's Issues: (Include medications, dosage, prescribed by who and why)

Issues for Upcoming Hearing: (visitation, therapy, placement, etc.)

Specific CASA Concerns:

CASA PROGRAM RECOMMENDATIONS:

1. _____
2. _____
3. _____
4. _____
5. _____

<p><u>Staff Only:</u></p> <p>Date of Mandatory 60 Day Review: _____</p> <p>Therapist(s): _____</p> <p>Staff Facilitating Session: _____</p> <p>Notes/Comments/Follow-up: _____</p> <p>_____ _____ _____ _____</p>



CASA

Court Appointed Special Advocates
FOR CHILDREN

**Court Appointed Special Advocates
P.O. Box 1418, Kenwood, CA 95452, (707) 565-6375 • Fax: (707) 565-6379**

**COURT APPOINTED SPECIAL ADVOCATES
REPORT AND RECOMMENDATIONS
TO THE JUVENILE COURT OF SONOMA COUNTY**

DATE OF HEARING:

TYPE OF HEARING:

LOCATION:

JUDGE / COMMISSIONER:

CHILD:

CASE NO:

AGE / DOB:

FAMILY MEMBERS

AGE:

CITY, STATE:

Date assigned to case:

Total number of volunteer hours since last report:

Total number of volunteer hours since appointed to the case:

Any Absence Without Leave (AWOL):

Date of last 60 day review (meeting with CASA Supervisor):

NUMBER F PLACEMENTS:

Number of placements to date:

Any placement changes since last report:

PERSONS INTERVIEWED:

RELATION TO CHILD:

SHELTER CARE ENVIRONMENT:

VISITATION WITH SIBLINGS / FAMILY

EDUCATIONAL PERFORMANCE:

Is your youth a 11th or 12th grader and moved to a new school since the last Court report? If yes, has an AB167 assessment been completed? (All academic records transferred and AB167 meeting held? Please discuss with a Volunteer Supervisor if you are not clear what this means)

INDEPENDENT LIVING PLAN (for youth 15 and over):

In this CASA's opinion, the following points have been explained to the youth and the youth understands them:

- Independent Living Program (ILP) opportunities
- The process and legal timeframes of exiting/re-entering the juvenile court system and retaining eligibility of Non-Minor Dependent status (AB12)
- Significance and security of personal information (social security card, personal ID information, photo ID, birth certificate, proof of Citizenship or green card)
- Personal documents are kept in a secure location (if in their possession)
- Educational Records (IEP and educational certificates)
- Health Records and family medical history (medications and related concerns)
- Financial needs to live independently (budgeting, cost of living, resources explored)
- Job search information (referred to Job Link, EDD)
- Career options (Job Corp, Youth Build, Military Services, College, SRJC, Vocational training)

Together, this CASA and youth have:

- Toured VOICES
- Toured Santa Rosa Junior College Foster Care Services

Please elaborate on this section by using the following questions as a guide:

Who is the ILP worker? Have transitional housing arrangements been made for minor when reaching non-

minor dependant status (17+)? What is the minor's opinion of his current preparation for independence?

What are the minor's interests and/or career choice? Is the minor employed? California Identification obtained and driving classes/license assessed if eligible)

MEDICAL / MENTAL HEALTH CIRCUMSTANCES:

MEDICATIONS AUTHORIZED / PRESCRIBED:

SUMMARY AND EVALUATION:

RECOMMENDATIONS:

1. *Shelter to continue or not*
2. *Educational concerns*
3. *Medical/Mental health concerns or successes*
4. **CASA to remain on this case to support these recommendations.**

DATED:

RESPECTFULLY SUBMITTED:

, Court Appointed Special Advocate

APPROVED BY:

, Volunteer Supervisor

COPIES TO:

NAME:

POSITION:

Social Worker

Attorney for Child

County Counsel

Attorney for Mother

Attorney for Father

After Court Report

Immediately following the hearing, please complete and return this form to the CASA office.

You can email (omcasa@sonomacasa.org) or Fax (565-6379).

*Please note that CASAs are always asked to attend court hearings. However, if you cannot attend, please be in contact with your social/probation worker to document the hearing information.

Name of CASA: _____ Attended []
Name of Child: _____ Attended []
Social Worker/Probation Officer: _____ Attended []
Date of Hearing: _____ Type of Hearing: _____ Case No.: _____
Dependency [] Delinquency [] Court Room No.: _____

Judge or Commissioner: _____ Attorney: _____

Others in Attendance:

Name _____ Affiliation _____

Name _____ Affiliation _____

Name _____ Affiliation _____

Name _____ Affiliation _____

Summary of hearing (if you obtained paper work please attach):

Changes as a result of the hearing:

CASAs plan for follow up:

Successes and Achievements:

Please Provide the CASA Office with Next Court Date Information

Date of Hearing: _____ Time of Hearing: _____ Type of Hearing: _____

Dependency [] Delinquency [] Court Room No.: _____

Next Mandatory 60 Day Review CASA will attend: Date: _____ Time: ^{Circle One:} 12 noon or 5 pm
Mandatory 60 Day Review is held every month on the second/ fourth Wednesdays at 12pm or 5pm. CASA should attend approximately 6-8 weeks before next hearing

CASA CASE CLOSURE QUESTIONNAIRE Vacate Date: _____

*Please take a few minutes to complete the following questions. It will give you the opportunity to discuss the outcome of your case and the impact you had in working with abused or neglected children. It will also give the Agency a record of the effort you put into your case. **Thank you for your valuable time and cooperation!***

CASA _____ Child(ren) _____

1. Final Judge _____

2. Final Social Worker _____

3. When were you assigned this case? Month _____ Year _____

4. In your opinion, what was the outcome of this case for the child(ren)?

- Please mark the outcome that most closely describes the outcome:
- Reunification with parent(s)
 - Reunification with relative
 - Adoption
 - Long-term Foster Care
 - Permanent Group Home
 - Emancipation
 - Transferred Out of County
 - Homestudy Completed
 - Run-away
 - Other (specify) _____

5. Exclusive of the dependency system, do you feel you had an impact on the child(ren)? Yes ___ No ___
Please explain your involvement and/or the obstacles experienced. _____

6. Evaluate the health of the child's self-esteem before and after your involvement.

Before: Low _____ _____ _____ _____ High

After: Low _____ _____ _____ _____ High

7. In your opinion, do you feel that CASA involvement in the dependency was:

extremely helpful, helpful, not helpful.

Please make any other comments you may have on the back of this form. We really appreciate your feedback.