



ADVOCATE HANDBOOK

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Welcome!

Welcome to training to become a Court Appointed Special Advocate of Orange County (CASA OC). This is the first step toward an experience that many of our advocates have said is the most meaningful and rewarding challenge that they have ever taken on. As an advocate, you will accept a special role designed to make a positive difference in the life of a child who has come before the Juvenile Dependency Court as a result of abuse, abandonment, or neglect.

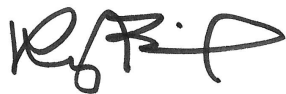
More than once I have heard our judges say, "A CASA volunteer is often the difference between success and failure in a child's life." And time and again we see advocates truly making a life-changing difference for these youth.

We are aware that CASA training requires a significant amount of your time and we appreciate your willingness to make that commitment. This advocate handbook provides information on your role, as well as CASA OC program policies and guidelines for effective CASA advocacy. The training and handbook are designed to formally prepare you for the work you are about to do. Much of the information contained in the training and handbook are policies and procedures outlined and required by California Rule of Court 5.655 and National CASA Standards. We encourage you to use your training and the handbook as a reference and resource as you navigate your role as a CASA.

We also know that not every CASA situation fits neatly into a handbook or training curriculum. Much of the real training and learning will occur as you begin to work with a youth and discover all the things that are not covered during the initial 32 hours of training or neatly outlined in the handbook. To assist you in the ongoing learning process, you will have a trained Advocate Supervisor who will be there to provide assistance, support, and encouragement.

Our goal is to create a match between a caring adult and a child in the foster care system which will promote and protect the best interests of the children. To that end, we will continue to work with all of you during the course of training and beyond to be sure this work is the right partnership for you and the youth. If at any time you have concerns, please share them, and together we will seek resolution.

Again, thank you for your commitment to these most vulnerable children!



Regan Dean Phillips
CASA Chief Executive Officer

Program Mission and Purpose

Mission Statement

CASA provides a powerful voice and a meaningful connection for children who have experienced abuse, neglect, and abandonment.

Vision

Every child in foster care has an advocate they can depend on to help them reach their fullest potential.

Values

- We are **CHILD FOCUSED** we put the good of the child first, always.
- We are **CONNECTORS** we use the power of connection to optimize outcomes.
- We are **TENACIOUS** we are relentless in our efforts to identify solutions and overcome obstacles.
- We are **ACCOUNTABLE** we set goals, measure progress, and deliver results to our stakeholders.
- We conduct ourselves with **INTEGRITY** we operate with character, honesty, consistency, and reliability.

The CASA Organization

Board of Directors

CASA of Orange County is governed by a volunteer Board of Directors that is comprised of business and civic leaders throughout Orange County who lend their expertise in the fields of law, public relations & marketing, human resources, accounting, business and more to the operations of CASA. A current board roster can be found on the [CASA OC website](#).

CASA Organization Departments

CASA is comprised of four departments: Development, Program, Strategy/Marketing, and Operations.

- **Development-** The Development team is responsible for developing, managing, and administering the fundraising plan for all organizational revenue including major gifts, grants, government funding, event

revenue, an endowment campaign, corporate giving, planned giving, sponsorships, direct mail, and e-philanthropy.

- **Program-** The Program team is responsible for the recruitment, training, and supervision of all active CASA volunteers. The program team oversees mentoring and advocacy efforts on behalf of the youth served by the CASA program.
- **Strategy/Marketing-** The Strategy/Marketing team is responsible for all CASA public relations efforts, building and sustaining CASA's reputation for quality work, and raising community awareness of CASA's mission through a variety of outreach efforts.
- **Operations-** The Operations team manages the day-to-day effectiveness of CASA, including finance, office management, and human resources.

CASA Program Team Overview

The CASA program team collaborates to recruit, train, and support CASA volunteers in their role as mentors and advocates for children in the foster care system. It is comprised of five sub-departments:

- **Volunteer Recruitment-** The recruitment team identifies, recruits, and screens potential applicants to become CASA volunteers. Their volunteer-centered recruitment strategy has a special emphasis on expanding the diversity of our advocate base to reflect the demographic of the children that we serve to include increasing the number of male and Spanish-speaking advocates.
 - Volunteer Recruitment & DEIB Manager
 - Diversity Recruitment Coordinator
 - Recruitment Screening Coordinator
- **Training-** Our training team plans and facilitates our 32 hour pre-service training program requirements as well as our continuing education training program, including our annual CASA Conference.
 - Training Manager
 - Training Coordinator
 - Training Associate
- **Mentor/Advocate-** In our largest department, our Advocate Supervisors and Program Management Team work to provide ongoing support and supervision for our active advocates.
 - Advocacy Program Managers
 - Advocate Supervisors
 - Program Operations Manager and Program Associate
- **Waitlist-** Our Waitlist Manager oversees all cases while on the waitlist, including gathering case updates and information from the social workers, court, child/caregiver, and other professionals on the child's

team. The waitlist team also oversees the matching process for new advocate/child matches.

- Waitlist Manager
 - Waitlist Program Associate
- **Family Finding-** Our Family Finding team of specially trained court-appointed advocates searches for, finds, and connects family members and other important persons to our CASA youth to provide lifelong, caring support. This program is led by:
 - Family Finding Manager
 - Family Finding Specialist

Inclusiveness and Diversity

Guidelines for Diversity, Equity, and Inclusion

CASA views cultural sensitivity as an awareness of one's own attitude and sensitivity about racial, religious, ethnic, sexual orientation, and/or cultural differences.

Following are guidelines for culturally sensitive advocates:

- Be aware of and sensitive to personal attitudes, values, and biases and how they may affect persons with whom advocates may interact.
- Be understanding of the cultural differences that exist between advocates and others.
- Support the youth in developing their cultural identity as they define it.
- Be open to learning specific information about the particular cultural identity that your youth defines as important to them.
- Be able to generate a wide variety of verbal and nonverbal responses and be aware of communication and interviewing skills that are culturally sensitive.
- Request assistance or support from your Advocate Supervisor when unsure about sensitive issues.

Disproportionality

CASA OC is committed to addressing racial disproportionality issues within the local child welfare and court systems and their impact on the children we serve. Training on disproportionality issues is provided to all advocates during pre-service training and continuing education training, to increase awareness and understanding. In addition to training, CASA staff participate in key county initiatives that address racial disproportionality, such as an eliminating racial disparities advisory group, and steering committees designed to improve the child welfare system, including addressing racial inequities in the system.

Diversity Committee

CASA's staff-led Diversity Committee aims to identify recruitment opportunities and activities to intentionally engage communities that reflect the demographics of the youth that we serve. The current goal is to increase the number of male, Latinx, and Spanish speaking volunteers in our program, to better mirror the demographics of the youth that we serve, and be able to provide more holistic advocacy.

Policy Against Discrimination And Harassment

CASA OC is committed to providing a work and volunteering environment that is free of unlawful discrimination and harassment and requires all board members, employees, and volunteers to treat each other with dignity and respect. In keeping with this commitment, CASA OC maintains a strict policy prohibiting unlawful harassment and discrimination in the workplace and volunteer screening, onboarding, and training processes, including sexual harassment, by any employee or supervisor, board member, or volunteer and by any third parties such as contractors, guests, or vendors. In addition, any discrimination or harassment on the basis of race (including traits historically associated with race, such as hair texture and protective hairstyles), religion and religious creed, color, national origin, ancestry, physical disability, mental disability, medical condition, genetic information, marital status, sex, gender, gender identity, gender expression, age, military status, veteran status, uniformed service member status, sexual orientation, transgender identity, citizenship status, pregnancy, or any other consideration made unlawful by federal, state, or local laws is also strictly prohibited. Harassment can come in many forms, including verbal harassment (e.g., epithets, derogatory comments, or slurs), physical harassment (e.g., assault, touching, impeding, or blocking movement, or any physical interference with normal work or movement), or visual harassment (e.g., images or gestures) directed towards an individual on the basis of a protected characteristic.

Advocate Overview

What is a Court Appointed Special Advocate?

A CASA is a trained volunteer appointed by the Juvenile Court to represent the best interests of children who are dependents of the Court. Advocates monitor their youth's circumstances, provide fact-based information and make recommendations to the Court, and also serve as a mentor and source of support for their assigned youth. They work cooperatively with the other professionals involved in the case to supplement their role. They provide independent assessments of the youth's situation to determine whether court-ordered services are being provided and bring any gaps in service to the attention of the Court and social services agency. An advocate meets regularly with their youth to build a relationship and provide consistent support.

CASA programs and advocates are governed by [California Rule of Court 5.655](#) and National CASA Standards. Advocates serve at the discretion of the Court, are considered officers of the Court, and are bound by all court rules.

Advocate Qualifications

CASA volunteers should be able to:

- Make a minimum 2-year commitment to the program.
- Enjoy working with children and individuals from various backgrounds and cultures.
- Display sensitivity and objectivity.
- Gather, accurately record, and present fact-based information about the youth.
- Communicate effectively both verbally and in writing.
- Demonstrate basic computer skills, including case note entry in the program database and the ability to complete written Word document reports.
- Meet report deadlines and requirements.
- Maintain the confidentiality of case information at all times.
- Accept supervision and seek feedback from CASA staff.
- Provide one's own transportation.
- Have a valid California driver's license and a safe driving record for a minimum of three years.
- Be at least 21 years of age.

Advocate Training

Advocates are required to complete pre-service training before being sworn in and appointed as CASA volunteers. CASA training is designed to give

volunteers a solid base of knowledge and skills to begin their volunteer work. Training areas include child abuse and neglect, court process and report writing, child welfare laws and regulations, understanding family dynamics, child development and the impact of trauma, diversity, equity and inclusion, educational advocacy, and other topics related to the CASA role. As part of the pre-service training process, advocates also observe a Juvenile Dependency Court hearing prior to attending court for the first time on their assigned case. Each advocate must take an oath of confidentiality and be sworn in by a Juvenile Dependency Bench Officer as an officer of the court.

By the end of the CASA pre-service training, advocates will:

- Understand the CASA role, duties, requirements, and policies.
- Have a basic understanding of the Child Dependency System and Court Process.
- Apply a trauma-informed approach to working with CASA youth.
- Set appropriate boundaries with the CASA youth and other parties on the case.
- Have a solid grasp of both mentorship and advocacy in the CASA role.
- Apply diversity, equity, and inclusion principles.

To be eligible to graduate and be sworn in as a CASA, advocates must:

- Complete all screening and training paperwork.
- Complete all pre-service training.
- Successfully complete and clear all background checks.
- Observe dependency court proceedings (prior to attending the first hearing on the assigned case).
- Be available to accept a CASA appointment for a child within 60 days of being sworn in.

Advocate Continuing Education

Advocates are required to attend a minimum of 12 hours of continuing education for every year they remain active as a CASA. Continuing education hours are accumulated during CASA's fiscal year (October 1- September 30) and are pro-rated for new advocates in their first year of service. Hours earned in excess of 12 hours per fiscal year are not rolled over into the next year. The goal of continuing education is for advocates to add knowledge and keep current with new information, services, policies, and legislative changes that impact their role as an advocate. All content should be related to work as an advocate.

This training may be obtained in various ways:

- Attending CASA-hosted continuing education classes.

- Attending relevant classes in the community.
- Completing independent learning activities via books, films, webinars, etc.

Training Type	Allowable Credit
Articles in magazines, journals, and newspapers	Maximum of one hour per article
Books	Maximum of 2 hours per book
Film or TV program	Length of film or program
Online training/webinar	Amount of time spent taking the course
Podcast	Length of webinar/podcast
Conference/workshop/seminar	Length of relevant conference session(s)
College course	Length of relevant class time
CASA OC Hosted Training	Length of continued education course

At least six of the twelve hours of required continuing education must be accrued via CASA hosted continuing education opportunities. Advocates are required to enter their own training hours in the Optima Database.

CASA maintains a list of recommended community classes, online learning, books, films, etc. CASAs should confirm continuing education eligibility of all non-CASA classes and independent learning with their Advocate Supervisor.

Advocate Case Assignments

Advocates are appointed to cases involving dependent children from newborn to 21 years of age. Advocates are appointed at the Court's request or the request of any interested party with Court approval. After acceptance to the CASA program and being sworn in as an officer of the Court, advocates meet with their assigned Advocate Supervisor to review a potential case file. Advocates are usually assigned to only one youth at a time. Occasionally, advocates are appointed to a pair of siblings, if deemed necessary and appropriate by CASA staff. These siblings would typically be close in age and living in the same placement.

Because CASA does not have the resources to serve every youth who needs an advocate, children are placed on a waitlist, and cases are assigned according to the priority of need. Examples of high-priority cases include children with a history of extreme trauma, multiple placements, increased vulnerability (such as medical or mental health needs), children involved in

criminal testimony, children with few or no consistent adults in their lives, and young adults approaching emancipation and in need of additional support with independent living skill development. Each child's situation is assessed on an individual basis for CASA assignment.

Advocate Supervision

Each advocate is assigned to an Advocate Supervisor for the duration of their CASA involvement. Advocate Supervisors provide supervision, support, guidance, information, and collaboration to CASAs to help them navigate their youth's case. As an advocate builds their relationship with the youth, as well as the professionals on the youth's team, the Advocate Supervisor can aid the advocate in identifying areas of advocacy to pursue for the youth.

Advocates are expected to communicate with their Advocate Supervisor at least once per month to share updates on their work, the case, and their interactions with their youth. Advocates are also required to submit contact logs documenting their case activities, information gathered, and case/training hours in the program database. Advocate Supervisors edit CASA court reports, attend court hearings and case meetings with their advocates, and also serve as a general resource to CASA volunteers.

Advocate Roles and Responsibilities

Core Model

CASA of Orange County models the basic operations of our program to be in line with National CASA's core model: Learn, Engage, Recommend, Collaborate and Report.



Guiding Principles

CASA provides best-interest advocacy for children as reflected in our guiding principles which recognize the importance of family preservation and reunification, equity, diversity, inclusion, and collaboration.

1. Recognizing the importance of family preservation and/or reunification:
 - a. It is in the child's best interests to remain with their family of origin when safely possible.
 - b. Children experience trauma when separated from their family of origin.
 - c. If a child is removed from their family of origin, it is in the child's best interests to be reunified with their family of origin as soon as safely possible.
 - d. If a child is removed from their family of origin, the child should be placed with a relative whenever safely possible and in the child's best interests.
 - e. Strengthening families, through recommendations for services, supports, visitation and communications is in the child's best interests to achieve stability and/or reunification.
 - f. Requires and demonstrates respect for the parents and all parties associated with the case.
 - g. Ensures that information regarding the child's wishes is incorporated into court reports.
 - h. When a court determines a child cannot be safely reunified with their family of origin consistent with legal mandates, another permanent placement is in a child's best interests.
2. Recognizing the importance of diversity, equity, and inclusion:
 - a. All children regardless of age, race, ethnicity, national origin (ancestry), color, religion (creed), gender, gender expression, sexual orientation, disability, or physical challenge should be safe, have a permanent home, and an opportunity to thrive.
 - b. Acknowledges the existence of implicit bias and takes steps to minimize and/or eliminate implicit bias.
 - c. Demonstrates an understanding of disproportionality impacting children who have experienced abuse or neglect.
3. Recognizing the importance of collaboration:
 - a. All CASA staff and advocates cooperate and coordinate with other volunteer and public service agencies, the courts, community groups, families, and individuals to:
 - Improve services for individual children and their families.

- Advocate for needed change in the conditions which adversely affect the children served.

Key Responsibilities of the CASA

- Reports any incident or suspicion of child abuse or neglect to the appropriate authorities and the CASA program as soon as possible.
- Obtains, first-hand, a clear understanding of the needs and situation of their youth by reviewing relevant documents and records, meeting with and gathering information from the child, parents, social workers, teachers, and other important persons on the case regarding the child's situation.
- Identifies and advocates for the child's best interests.
- Assists the youth with understanding their [Foster Youth Bill of Rights](#) while in the dependency system.
- Collaborates and coordinates with legal, child welfare, and other partners to ensure the child is receiving the necessary services and support.
- At every statutory hearing, provides a written report to the Court and all parties which includes information and recommendations about the child's needs and best interests.
 - Discusses all recommendations concerning the case with the Advocate Supervisor prior to submitting recommendations to the Court.
- Appears in court to advocate for the child's best interests and provides testimony when necessary.
- Maintains minimum monthly contact with their Advocate Supervisor and participates in case reviews with the supervisor.
- Maintains complete records about the case, including appointments, interviews, and information gathered about the child and the child's life circumstances.
- Makes recommendations for services for the child and the child's family.
- Seeks information about whether a permanency plan has been created for the child and makes recommendations concerning permanency.
- Monitors implementation of service plans and court orders and assesses whether court-ordered services are implemented in a timely manner.
- Informs the Court and social worker promptly of important developments in the case through appropriate means as determined by court rules or statutes.
- Returns case file and notes to the CASA program when the advocate's assignment concludes or the case closes.
- Completes a minimum of 12 hours of CASA Continuing Education training per year.

National CASA Standards **prohibit** CASA volunteers from engaging in the following activities:

- Taking the youth to the advocate's home or the home of the CASA advocate's friends or family.
- Giving legal advice or therapeutic counseling.
- Making placement arrangements for the child.
- Giving money or expensive gifts to the child, the child's family, or the caregiver.
- Interviewing the youth about specifics of the abuse that is alleged to have occurred. If the youth raises the topic of abuse/neglect and wishes to discuss it, advocates should listen and respond appropriately, but not probe or ask questions. Any new or corroborative information disclosed to the advocate should be discussed with their Advocate Supervisor. A child abuse report may also be required. Refer to CASA policies regarding Mandated Reporting for more information.

Any requests from the social worker, attorney, judge or other member of the team that falls outside of CASA OC policy must be first discussed and approved by the Advocate Supervisor.

Monthly Case Conferences

In compliance with National CASA Standards, CASA requires a minimum of once/month case conferences with the Advocate Supervisor. Case conferences are an opportunity to keep your Advocate Supervisor apprised of your work on the case, gain assistance in developing advocacy action items, or get new ideas on how to engage your youth during outings.

Monthly case conferences may include discussion on:

- Progress made on advocacy goals.
- Changes in placement, school, health/mental health, education, social workers, or other service providers.
- Coaching on mentorship/relationship building with the youth, setting boundaries, self-care, or any other guidance needed on the case.

While CASAs are required to maintain a minimum of one contact per month with their Advocate Supervisors, please be proactive in reaching out for support and guidance whenever needed on your case. Advocate supervisors are available for consultations as needed, and supervisor coverage or management support can also be available as needed. Please be sure to notify your supervisor of any planned time off that you will not be available for youth outings or contact from your supervisor. Please also keep CASA up to

date with your preferred contact information, including preferred phone number, mailing address, and email contact.

Advocates should notify their Advocate Supervisor of any changes in names, addresses, and phone numbers for all individuals involved in their youth's case. Advocates should also notify their Advocate Supervisor in advance of times and locations for any meetings (CFTs, IEPs, etc.).

If an advocate fails to comply with the minimum monthly contact requirements, the Advocate Supervisor will make three attempts to reach the CASAs - including phone, email, text, and written letter if necessary. If upon the third contact the CASA is still unresponsive, they will be relieved from the case and resigned from the program.

Case Notes

Thorough and accurate documentation of the advocate's work is essential to effective advocacy. CASAs must maintain complete records about the case, including summaries of any contact with the youth and information gathered about the child and the child's life circumstances. CASA utilizes an electronic program database to organize and store all case-related information in a secure system.

CASA case notes are entered as Contact Logs, which are electronic records of each contact with the child and other relevant parties, in the program database. These notes should include:

- The amount of time spent "working" the case, including but not limited to: visits with the child, making phone calls/emailing to gather information, reviewing or drafting reports, attending case meetings or court hearings, etc.
- The type of advocacy being done.
- A general summary of the visit/meeting/hearing as well as any information gathered or exchanged regarding the child and case.

It is expected that advocates enter their case notes as soon as possible, but no later than 72 hours after the contact was made or information received.

Advocate notes in the database should be detailed and include information such as observations or statements describing specific behaviors or facts, ideas/opinions expressed by others, and decisions, plans, or actions.

Case notes should **not** include:

- The CASA's subjective thoughts or "processing" notes. Processing the case is critical in understanding information and developing the next

action steps, but these comments should not be included in the child's official case documentation in the database, as they can be highly subjective.

- Diagnoses suggested by the advocate, regardless of the advocate's professional background. Only diagnoses from a case professional should be documented in the database.
- The CASA's interpretations or personal feelings about issues on the case or parties involved.
- Statements that cannot be supported by fact.

Although rare, CASA case notes may be subpoenaed by the Court for review. Please keep this in mind when entering information into the database.

Case notes contain confidential information about the youth and/or their families. Both electronic and hard copies of notes must be properly secured in accordance with CASA confidentiality policies. When a CASA case is closed or the advocate is no longer assigned to the case, the advocate must return all hard copy case notes and information to the CASA office and delete any electronic copies.

Court Reports and Hearing Attendance

CASA court reports and hearing attendance are an important component of the CASA volunteer advocacy efforts. CASAs are expected to attend the statutory, six month review hearings throughout the duration of their case and volunteer assignment. CASAs are also expected to submit a full court report at each of these six month review hearings to update the Court and professionals. The Court report is the primary vehicle for the CASA to provide the Court and professionals with an independent update on what is happening in the youth's life and to advocate for needs/services for the youth. Failure to attend court hearings and submit the required court reports could result in disciplinary action up to and including termination from the CASA volunteer role. More detailed information on the court process, court reports, and the CASA's role in court proceedings will be covered during pre-service training.

CASA Visitation Policies

CASAs are required to visit with their youth twice per month. Visits are arranged with the child's caregiver in advance and in coordination with the child, caregiver, and CASA's schedule. CASAs should not make unannounced visits to the child's home.

Advocates should plan to be reliable and consistent in their visitation schedule. This is crucial in establishing trust and rapport with the child and caregiver. Communicate as soon as possible in advance if an outing needs to be rescheduled. Any challenges with scheduling visits should be discussed with the Advocate Supervisor. As building a relationship with the youth and learning about their individual needs is a crucial aspect of the CASA role, an advocate may be resigned from the CASA program if they fail to keep routine visits with their youth.

Visitation guidelines:

- Advocates will meet in person with their youth twice per month and not to exceed once per week.
 - An exception may be granted for less frequent visits if the youth has been placed outside of Orange County or for other approved reasons, such as a youth over 18 or a short term case.
 - CASAs who would like to request this exception must obtain permission from their Advocate Supervisor, documenting the justification for and reasonableness of the exception in the program database case record.
 - Advocates who fail to maintain a minimum level of contact/visits with their youth may be subject to removal from the case.
- Advocates **should**:
 - Start slow in building their relationship/trust with their youth.
 - Take the youth on outings away from their placement.
 - Conduct one-on-one outings only with their youth.
 - Be patient, go at the youth's pace, and explore the youth's interests.
 - Be mindful of activity choices and child safety/trauma triggers.
 - Talk with the caregiver, social worker, and Advocate Supervisor for activity ideas.
 - Always carry their CASA identification badge and a copy of the court appointment.
 - Document each outing, with a summary of what occurred in the program database within 72 hours of the outing.
 - Plan free or low-cost activities.

- Advocates ***should not***:
 - Include anyone besides their CASA appointed youth on outings. This includes the advocate's own family and friends, as well as their youth's family members, significant others, or friends.
 - Provide transportation on a routine basis for their youth for activities or appointments outside of the CASA twice-a-month visits.
 - If an advocate is being asked to transport a youth to appointments or non-CASA related activities, consult with the Advocate Supervisor.
 - Provide expensive gifts or take CASA youth on expensive activities during outings.
 - Please limit spending to a maximum of \$25 on the child during outings.
 - CASAs are not permitted to routinely give the child gifts of any kind. When celebrating a special occasion with a gift, CASAs should not spend more than \$25-50 on the gift. Consult with your Advocate Supervisor prior to purchasing a gift for your youth.
 - Keep in mind the feelings of the caregiver, the child's family, and the other youth in the home when considering outings and gift ideas.
 - Involve their youth in religious services or events unless initiated by the youth. Discuss whether a youth-suggested religious activity is permitted with your Advocate Supervisor before engaging in the activity with your youth.
 - Plan overnight visits with their youth.
 - All activities prohibited by local dependency court and social services agency are prohibited for advocates to engage in with their youth, including:
 - Permitting the youth to alter their appearance or body (i.e. haircuts, temporary or permanent tattoos, body piercing, acrylic fingernails).
 - Waivers, permission slips, and liability forms cannot be authorized by an advocate.
 - Outings outside of Orange County must have prior notice to the youth's social worker and caregiver.
- Advocates are prohibited from engaging with their youth in swimming and other water-related activities without prior approval from their Advocate Supervisor and the social worker. A lifeguard must be on duty for swimming-related activities to be approved.
- As a general policy, pets are not permitted on outings. Any exception to this policy must be approved by the Advocate Supervisor.
- Advocates are strictly prohibited from using alcohol, tobacco, or other controlled substances in the presence of the CASA youth and/or

immediately prior to a visit with a CASA youth. Failure to abide by this policy will result in termination from the CASA program.

- Inappropriate and/or unsafe behavior by an advocate in the presence of their CASA youth may lead to disciplinary action up to and including termination of the advocate role.

Transportation Policy

Transporting CASA Youth

All advocates must have a valid California driver's license, demonstrated history of safe driving for a minimum of three years, and current insurance coverage that meets California state minimum requirements. Advocates are required to provide updated copies of proof of insurance and license to the CASA office to show uninterrupted licensure and insurance coverage. Failure to do so will result in loss of driving privileges and the advocate will be prohibited from transporting their youth until proper documentation has been obtained.

Driving Safety

The safety and well-being of our advocates and youth is of critical importance to CASA. CASAs are required to drive in a safe, courteous manner and in conformance with all applicable laws when transporting their youth. In addition, advocates will be expected to follow all the safety procedures below when driving to/from CASA related business:

- All advocates and youth are expected to wear seat belts, or CASA youth ride in age-appropriate car seats, at all times while in a moving vehicle being used for CASA business, whether they are the driver or a passenger.
- Use of handheld devices while behind the wheel of a moving vehicle is strictly prohibited. This includes the use of making or receiving phone calls, sending or receiving text messages or emails, and downloading information from the web. If an advocate needs to engage in any of these activities while driving, they must pull over to a safe location and stop the vehicle prior to using any device. The use of hands-free technology may be warranted in emergency circumstances only.
- The use of alcohol, drugs, or other substances including certain over-the-counter cold or allergy medications that in any way impair driving ability is prohibited.
- All advocates are expected to follow all driving laws and safety rules, such as adherence to posted speed limits and directional signs, use of turn signals, and avoidance of confrontational or offensive behavior while driving.

- Advocates should never allow anyone to ride in any part of the vehicle not specifically intended for passenger use and/or any seat that does not include a working seat belt.
- If an advocate is involved in an automobile accident while on CASA business, they must immediately report the accident to law enforcement and their Advocate Supervisor or CASA program management immediately. Advocates should request and obtain a police report and police investigation at the scene of the accident. Advocates should not admit liability or guilt under any circumstances, even if they believe they are at fault.
- Advocates are also required to report any moving or parking violations received while driving on CASA business to their Advocate Supervisor.

Additionally, advocates:

- Must immediately report any major moving violations, including DUI, to the CASA staff. Any advocate who has received a DUI will be prohibited from being assigned a youth for a minimum of five years.
- Are not permitted to allow their youth to drive their vehicle.
- Are not permitted to transport anyone other than their assigned CASA youth without permission from the Advocate Supervisor.
- Are responsible for transporting the youth to and from appropriate responsible adults and keeping the youth under supervision at all times.

Any exception to the Transportation Policy needs to be discussed with your Advocate Supervisor.

Child Safety Seat Policy

CASA volunteers are expected to follow all local laws regarding the use of child safety seats while transporting their CASA youth.

Current California Law as of October 2022: Current child safety seat belt laws can be found online here: [CHP Child Safety Seat Information](#)

- Children under 2 years of age shall ride in a rear-facing car seat unless the child weighs 40 or more pounds OR is 40 or more inches tall. The child shall be secured in a manner that complies with the height and weight limits specified by the manufacturer of the car seat. (California Vehicle Code Section 27360).
- Children under the age of 8 must be secured in a car seat or booster seat in the back seat.
- Children who are 8 years of age OR have reached 4'9" in height may be secured by a booster seat, but at a minimum must be secured by a safety belt. (California Vehicle Code Section 27363.)

- Passengers who are 16 years of age and over are subject to California's Mandatory Seat Belt law.

Advocates should not use car seats that are more than five years old, were installed in an automobile that has been involved in any collision, or if the complete history is unknown. If the vehicle is older than the model year 1996, the car seat may require a locking clip to ensure that the lap portion of a lap-shoulder belt does not become slack. There are two ways to secure a car seat to the rear seat bench of the automobile: seat belts and latch. Booster seats are only secured with seat belts.

If there are any concerns about the installation of any seat, the advocate can request an appointment to have the seat installation checked by a California Highway Patrol officer at a local office: [CHP Find an Office](#)

When can a child graduate to a booster seat?

California law does not address graduation time from a five-point harness to a booster seat. In the interest of safety, do not rush to move a child into a booster seat before they are ready. Each time you “graduate” a child to the next seat, there’s a reduction in the level of protection for the child. Keep a child in each stage for as long as possible.

A child is ready for a booster seat when they have outgrown the weight or height limit of their forward-facing harnesses, which is typically between 40 and 65 pounds. Read the forward-facing car seat’s owner’s manual to determine the height and weight limits, and keep the child in a harnessed seat for as long as possible.

Children at this stage are not yet ready for adult safety belts and should use belt-positioning booster seats until they are at least 4’9" and between 8 and 12 years old. Safety belts are designed for 165-pound male adults, so it’s no wonder that research shows poorly fitting adult belts can injure children.

CASA safety seat availability

If your CASA youth requires a child safety seat during transportation to and from your outings, you must provide the necessary restraint in your personal vehicle. First, ask the caregiver if you are able to borrow the child safety seat for the duration of your outing. This is especially easy to do if your child requires a booster seat that is easy to switch from one vehicle to another. If your child requires a safety seat that must be tethered to your vehicle and it is not feasible to borrow one from the caregiver, contact your Advocate Supervisor for assistance in obtaining the required child safety seat for use during your CASA outings. All safety seats must be returned to the CASA

office upon the termination of your case, or when that particular type of seat is no longer needed by your CASA youth.

Working with Nonminor Dependents

A nonminor dependent (NMD) is a young adult between the ages of 18 and 21 who has chosen to keep their dependency case open. An NMD must consent in writing to a CASA being appointed even if the CASA was appointed before the youth was 18. Your supervisor will provide you with the NMD consent form to give to your youth, once they have turned 18.

If you are working with an NMD, embrace a collaborative approach to advocacy, and slowly build their skills and independence to perform their own self-advocacy. Keep in mind that an NMD makes their own decisions and sets their own goals, as all young adults must learn to do. You can be a supportive person to help the young adult accomplish those goals and provide guidance along the way, no matter the decision the young adult chooses or the outcome.

It is important to remember that young adults own their personal information, including information about their physical health/mental health and education. Consult with the NMD and your Advocate Supervisor prior to releasing any information to anyone.

Educational Rights Holder

For most children, their biological parents retain the right to make decisions about their child's educational or developmental needs and services, even if the child is not currently in their physical custody. This includes requesting and agreeing to special education services and assessments. In some instances when a parent is not present or able to make important educational and developmental decisions for their child, an educational rights holder may be assigned by the Court.

An educational rights holder investigates the youth's educational needs and determines whether those needs are being met. They "stand in the shoes of a parent" and make educational decisions based on the best interest of the child. Educational rights holders must be involved in major educational decisions, like requesting educational assessments and services, changing schools, and/or school disciplinary actions.

Although all advocates will support and advocate for their youth's educational needs, advocates are not automatically appointed as Educational Rights

Holders. If you are asked to hold educational rights for your youth, discuss this responsibility with your Advocate Supervisor before agreeing to do so. Appointment requires Advocate Supervisor approval as well as additional training and court appointment.

CASA Youth Photograph Policy

CASA of Orange County's Memorandum Of Understanding (MOU) with the Court acknowledges that CASAs are permitted to take photographs of the CASA children for the sole purposes of:

- Inclusion with the specific youth's CASA report to the court, at the discretion of the CASA agency.
- To create a memory book for the CASA child.

Any use of photos outside the reasons listed above must be specifically approved by the court. CASAs are prohibited from using photos of the child for social media, marketing, or personal use. The photos taken by the CASA must be regarded as part of the confidential CASA file and should not be shared with others unless the youth chooses to do so. A nonminor dependent has the ability to provide their own consent for use of photos.

Medication Policy

CASA policy requires that proper written authorization and instruction from the caregiver is needed before any prescription or over-the-counter medication is administered to a CASA youth during an outing. This written authorization should then be uploaded to the database. Efforts should be made to avoid the CASA being responsible for regular medication administration on outings.

The Advocate Supervisor can provide a Medication Form that can be used for this purpose or it can be handwritten. If handwritten, it would need to include the following information:

- Date
- Medication
- Dosage
- Time to be administered
- Any special instructions
- Caregiver/Placement staff signature

- Time advocate administered medication

The medication should be kept in the possession of the advocate, not the youth, at all times.

Religion, Politics, and Personal Beliefs Policy

As a private, independent, non-profit organization working in close partnership with the local court and social services agencies, the CASA organization, including staff and volunteers, may not, at any time, advance, promulgate, or proselytize any particular religious faith, political belief, or personal cause. Advocates are expected to abide by the following:

- Advocates may not, at any time, discuss their own religious, political, or other personal beliefs (or lack thereof) with their youth, the youth's families, or other parties to the case.
- Advocates must be open and objective about the beliefs of others.
- An advocate may not distribute any materials pertaining to their personal beliefs to their youth, the youth's families, or other parties to the case.
- An advocate may not attempt to persuade their youth to change their beliefs.
- Advocates may not involve their youth in religious services or events unless initiated or specifically requested by their youth. Even then, advocates must discuss whether a youth-suggested religious activity is permitted with their Advocate Supervisor before engaging in the activity.

Ethical Conduct and Confidentiality

Conflict of Interest

It is essential that advocates maintain an unbiased position in independently assessing their youth's circumstances and that there be no real or perceived conflict of interest. Advocates ***may not***:

- Be related to any parties involved in an assigned case or be employed in a position or by an organization that might result in a conflict of interest involving the youth. The advocate must disclose to CASA staff any past, present, or newly discovered relationships that may pose a conflict of interest.

- Use the CASA organization or its relationship to the Court as a means to express personal views or a cause beyond the advocate role.
- Use the CASA program as a vehicle for gaining access to foster parenting or adoption. Becoming an adoptive/foster parent while active in the CASA role is not permitted. If an advocate decides to become an adoptive/foster parent, the advocate will be asked to resign from the program.
- Use agency letterhead to express political or other personal views.
- Identify as a CASA while acting as a spokesperson for another program/cause.

Confidentiality

Few areas are as sensitive to the Juvenile Court as the youth's rights to confidentiality. Advocates have access to highly sensitive and confidential case information about the child and the family to whom they are assigned. CASAs are charged with the responsibility of upholding the confidentiality of these cases. Prior to getting assigned to a case, advocates are sworn in by a judge and take an oath of confidentiality to protect case-related information. In doing so, advocates are agreeing that they will not discuss the identity of these youth with any persons other than those individuals who are rightfully involved in the case.

Your role as a CASA volunteer requires you to gather information and then use that information to advocate for your child's best interests, needs, and services. You must do so within the context of confidentiality. In general, you can think of your role as an "information gatherer." You can gather as much information as you are able to and is needed for the scope of your work. However, you cannot freely share the information.

To maintain confidentiality, advocates must follow these procedures at all times:

- Upon being sworn in, advocates must sign an oath of confidentiality which is filed with the Juvenile Dependency Court.
- Advocates must sign a statement of confidentiality upon the acceptance of each case.
- Advocates may not give detailed case information to anyone other than:
 - The social worker
 - The Juvenile Dependency bench officer
 - The child's attorney
 - CASA staff
- Advocates may not use the youth's last name or reveal any other information that would identify the youth and/or family to an individual not directly involved with the case; *including the advocate's own family.*

- The youth's attorney and other legally entitled parties are given copies of the advocate's court reports. These court reports must be distributed through the CASA office. All information contained in the court report must be approved by the Advocate Supervisor, Advocacy Program Manager and/or Chief Program Officer.
- All meetings related to the youth, family, or case are confidential. Information obtained from these meetings can only be disclosed to authorized parties.
- The CASA youth's case file is the property of the CASA agency. Any copies of case information, electronic or hard copy, shared with the advocate must be kept in a secured location to maintain confidentiality (ie: locked file cabinet or password-protected electronic document). This includes all information received by advocates, such as school and medical records, and the advocate's case notes.
- When a youth's case is closed, the advocate must return all hard copy case information to the CASA office and delete any electronic case information.
- Photographs of the youth are the property of the youth and can only be displayed by the youth. See the CASA Youth Photography Policy for more details.

As part of the CASA role, advocates have the ability to access privileged or confidential information, such as information regarding a child's medical, mental health, or educational needs. When seeking confidential information from professionals about a dependent youth, the court order appointing the advocate and a cover letter explaining the role of the advocate are usually sufficient to gain access to the desired information.

Exceptions to Confidentiality

While confidentiality is one of the most important tenets of a CASA volunteer, there are times when CASAs must disclose detailed information about the child, in particular, if/when child safety is a concern. Below are examples of exceptions to confidentiality:

- The child is at risk of harming themselves or someone else.
- There is reasonable suspicion that a child is being abused or neglected or at risk of being abused or neglected (refer to the Mandated Reporter section below).
- There is a court order requiring you to release specific information.
- If you are appointed as an Educational Rights Holder (ERH), you may consent to sharing of educational documents and information for the purposes of assessments and developing appropriate educational service plans. As an ERH, however, you are not permitted to release information beyond the scope of education.

- A nonminor dependent consents to you releasing information.

Confidentiality for Electronic Communication

To keep electronic communication confidential, advocates must adhere to the following procedures:

- Advocates must use an email account that they alone can access for all CASA case communication. Email accounts that can be accessed by others (including business accounts and personal accounts shared with family members) *are strictly prohibited for CASA casework*.
- Advocates must refer to their youth by only their first name or initials, never their full name, in emails to their Advocate Supervisor or any other professional on the case.
- No personal identifying information about the child or their family should be communicated via email.
- Documents that contain personal identifying information and/or case-specific details (such as CASA court reports) may be emailed only if the document is password protected.

Mandated Reporter Policy

All CASA volunteers and CASA staff are mandated reporters. This means that advocates are required by law to report any known or suspected child maltreatment to the county child welfare department (SSA) or law enforcement agency that they encounter in their capacity as an advocate. Suspicions of child maltreatment must be reported **immediately, or as soon as practically possible by phone**, concerning the incident (CA Penal Code 11166 (a)). If you suspect, you must report it.

Reporting Procedure

1. Report any suspicion of abuse, neglect, or threats and/or acts of self-harm **immediately** to your Advocate Supervisor, or during non-office hours, the CASA emergency phone number: (714)794-2484.
2. If a report is required, or if you are unable to consult with a CASA staff member right away, you must immediately contact the Child Abuse Registry, CAR, (714)940-1000, followed by a formal written report within 36 hours. CASA staff can assist you with filing the written report.
3. As soon as possible or within the next business day, inform the current social worker and attorney for the child.
4. In an emergency, dial 911, report to the appropriate law enforcement agency, and then complete the steps above to report the incident.
5. DO NOT question the person disclosing the abuse/neglect. It is not your responsibility to determine if the allegations are true.

6. DO NOT inspect the child's body for marks, bruises, or physical evidence.

As a mandated reporter, you are not liable for reporting under most circumstances, regardless of whether the allegations are substantiated or inconclusive. California Penal Code, § 11172 (e) gives mandated reporters who report suspected cases of child abuse absolute immunity, both civilly and criminally, for making such reports. However, **it is a crime not to report suspected abuse** and is a misdemeanor with a punishment not to exceed six months, \$1,000, or both. As a mandated reporter you are required to give your name when reporting; however, child protective agencies are required to keep the mandated reporter's name confidential unless the Court orders the information disclosed.

CASA Sexual Reproductive Health Care Policy

Expectation of Advocates

In 2016, the California Department of Social Services updated guidelines to assist county agencies, and in particular, child welfare agencies, to support youth in understanding their sexual reproductive health care rights. They developed more specific guidelines on how to talk with youth about sexual reproductive health care and how to ensure they are receiving needed and appropriate services with the goal of better preventing unintended pregnancy among California's foster youth. CASAs have a role in ensuring foster youth rights are protected, including their rights around sexual reproductive health care. Below are CASA policies and resources to guide this work:

- Be knowledgeable about youth/nonminor dependent's (NMD) sexual reproductive health care (SRHC) rights.
 - See [Know Your Sexual and Reproductive Health Rights](#)
- Honor youth/NMD's right to confidentiality and do NOT disclose information to anyone, other than the Advocate Supervisor, without youth/NMD's consent. Discussing the matter with your Advocate Supervisor is mandatory to determine if the sexual activity falls within potential safety concerns.
- Advocates may not impose personal bias/opinion in regard to a youth's/NMD's SRHC.
- Advocates are NOT permitted to directly access birth control/health care services for the youth/NMD, including providing transportation and scheduling appointments.

Role of the Advocate

Educate:

- Inquire if the youth's social worker has addressed and given them SRHC rights and resources.
- Educate the youth about their social worker's responsibility to support their rights and access to birth control/health care, etc. Ensure that the youth has access to and understands their protected rights.
- Advocates can provide information by giving the youth a copy of [Know your Sexual & Reproductive Health Rights](#).

Advocate:

- If the youth gives permission to their advocate to discuss the matter with their social worker, the advocate should support the youth by advocating for the requested needs and services with the social worker.
- If the youth does *not* give consent to their advocate to discuss the matter with any parties, the advocate should encourage the youth to confide in a therapist, school counselor, trusted adult, or Social Services Agency's designated nurses who will handle matters confidentially.
- If the youth is unwilling to confide in anyone other than their advocate and sexual reproductive health care services are necessary, the advocate must address this with their Advocate Supervisor to ensure the youth is supported appropriately regarding SRHC needs.
- *If the advocate suspects the youth is the victim of an exploitive, coercive, nonconsensual, or abusive relationship you must report this to your Advocate Supervisor and follow standard Mandated Reporter policies.*

Emergency Procedures for Advocates

The CASA office is open from 8:30am-5:00pm to provide support. If a CASA needs immediate support during non-business hours, follow the below procedure:

1. Always call 911 in the case of an emergency and/or if the youth is in imminent danger.
2. In cases where law enforcement, fire department, or paramedics are involved, always follow their instructions.
3. Contact the CASA OC Emergency Line at (714)794-2484 to reach a program manager.
4. Immediately notify the youth's placement and follow their protocol
 - If unable to reach the child's placement, call the Orangewood Children and Family Center (OCFC) control desk (available 24 hours) at (714)935-7584. Notify the Officer on Duty.
 - If Orangewood is unable to assist, call the Child Abuse Hotline for after-hours social worker support: (714)940-1000
5. Notify your Advocate Supervisor within the next business day of the incident. Your Advocate Supervisor may instruct you to file a CASA incident report and will walk you through the steps, if necessary.
6. Notify the youth's social worker within the next business day.

Please note that it is not the advocate's role to respond in-person to crisis situations. Do not meet or transport youth in crisis situations - this includes if the child has absconded from their current placement. The advocate may stay in contact with their youth via phone to provide support. Always follow up with the Advocate Supervisor and the youth's social worker to inform them of the situation and necessary information within the next business day.

Advocate Safeguards

CASA Liability/Insurance

The Federal Volunteer Protection Act of 1997 exempts volunteers from personal liability for their acts or omissions if they are acting within the scope of the volunteer's responsibility in the nonprofit organization, excluding any harm caused by willful or criminal misconduct or by gross negligence on the part of the volunteer. The law does not exempt volunteers from liability for injury caused while operating a motor vehicle.

CASA carries liability insurance that provides coverage for staff, board, and volunteers for actions in accordance with CASA policies, procedures, and prescribed roles. To protect against concerns that may arise about youth in their care, it is imperative that advocates must report any injuries to CASA

staff, *no matter how minor*, that occur to the youth while the youth is in the advocate's care.

Advocates must follow these steps:

1. Upon returning the youth to the caregiver, describe the incident and examine the injured areas (knee, finger, etc.)
2. Immediately notify the Advocate Supervisor and file a CASA incident report.
 - a. Outside of CASA office hours, contact the CASA Emergency Line: (714)794-2484.
 - b. The Advocate Supervisor will assist with the steps needed to complete the CASA incident report.
3. Notify the social worker about the incident. A copy of the CASA incident report may be required to be sent to the social worker and the youth's attorney, depending on the circumstances.
4. If an advocate learns that a CAR has been filed against them:
 - a. Report immediately to the Advocate Supervisor
 - b. If an Advocate Supervisor is not available, an advocate can speak with an Advocacy Program Manager, and/or the Chief Program Officer by calling the CASA office at (714)619-5151.
 - c. Outside of CASA office hours, contact the CASA Emergency Line: (714)794-2484.
 - d. Cooperate with social services during the investigative process.

CASA Volunteer Safety

The CASA program makes efforts to evaluate cases for safety when accepting referrals and assigning CASA matches. The CASA program will not accept cases that raise safety concerns for our volunteers or staff. CASA volunteers are expected to exercise caution in their role as a CASA as they would in their personal life. If you have any safety concerns during your work as a CASA volunteer, please discuss them immediately with your Advocate Supervisor or a CASA staff member/management.

Case Closure/Advocate Separation

Child Case Closure

A youth's CASA appointment closes when dependency is terminated, a youth no longer wants an advocate, or the youth is deemed to be in a stable environment and no longer in need of CASA involvement. The Advocate Supervisor will discuss with the advocate the specific reasons for case closure and what the next steps will be.

Following case closure for any reason, advocates must immediately return all hard copy case records to the CASA office and delete all electronic case records. Advocates in good standing will be encouraged to take another CASA appointment or remain involved in another volunteer capacity with the organization.

Advocate Resignation

While advocates make a 24 month commitment, there may be circumstances that require an advocate to resign. Advocates must contact their Advocate Supervisor to discuss the resignation and develop a plan of transition. The advocate is required to return their CASA badge, and return all case records in their possession. The CASA office will then notify all parties involved and may assign another advocate to the case if necessary.

If an advocate resigns from the program and then at a later date wishes to return to active status, they will at a minimum need to submit to new background checks and paperwork and may also have to repeat some or all of the initial advocate training, depending on the length of time the advocate has been resigned and the advocates' performance while active as a CASA volunteer.

Advocate Leave of Absence

CASA volunteers may request to take a leave of absence from case assignments if they have served for at least 12 months and are considered to be in good standing. This can be a helpful rest period for volunteers who need to step back from the intensity of the role but who wish to return to case assignment at a future date. Discuss with your Advocate Supervisor whether you are eligible for a leave of absence, and if so, what your anticipated return date is. Advocates are typically granted a 3-6 month period of leave. Anything beyond 6 months must be approved by both the Advocate Supervisor and their manager. A leave that extends beyond 12 months will be considered a resignation from the program, and you will need to complete training and/or all background check requirements should you choose to return in the future.

During a leave of absence:

- You must keep your Advocate Supervisor apprised of your return date, and any need to extend your leave.
- You must continue to engage in the continuing education requirement of 12 hours/year.
- You must continue to submit updated auto insurance and driver's license documentation.

- You must continue to be enrolled in our subsequent arrest and DMV pull program.
- Depending on the length of time you are on leave and your standing with the organization when you took a leave of absence, you may be asked to complete additional training prior to resuming a case assignment.
- If you do not return for a new case at the end of your leave, and your Advocate Supervisor is unable to reach you, you may be resigned from the CASA program and required to repeat training and/or background checks should you choose to return in the future.

Advocate Involuntary Resignation

Advocate misconduct is evaluated on a case-by-case basis. The course of action regarding advocate misconduct varies depending on the nature and severity of the advocate's misconduct. In instances of continued or severe advocate misconduct, an advocate may be relieved from their case and involuntarily resigned from the CASA program. The Advocate Supervisor, Advocacy Program Manager, and if appropriate, Chief Program Officer, will discuss the situation and evaluate how to proceed with addressing the challenge. Advocate Supervisors and Advocacy Program Managers will use the following guidelines in making this determination:

- The unique circumstances of the situation and advocate involvement, including feedback obtained from the CASA and youth's professional team.
- Whether or not the challenge can be addressed through routine coaching or if coaching has failed to address the current challenge.
- The CASA's training and experience.
- Extent of the harm or potential harm to the youth and/or family.
- Extent of the harm or potential harm to the CASA program's reputation.

Examples of misconduct by an advocate include but are not limited to:

- Commits, is arrested or convicted of a crime other than a minor traffic offense, or other minor citation.
- Becomes involved in dependency proceedings in which the advocate or a member of the advocate's immediate family is alleged to have committed child abuse or neglect.
- Transports a youth without a valid driver's license, insurance, and/or the use of proper safety restraints.

- Provides placement to a youth (takes a youth home on a temporary basis or is in the process of becoming the appointed youth's adoptive parent/legal guardian/resource parent).*
- Gives money or expensive gifts to the youth or family.*
- Gives legal advice or therapeutic counseling.*
- Violates the CASA conflict of interest policy.*
- Violates the CASA oath of confidentiality.*
- Fails to follow mandated reporting protocol.
- Violates the CASA code of conduct including:
 - Having inappropriate boundaries.
 - Engaging in discriminatory, harassing, or other unprofessional behavior with their youth, CASA staff members, other CASA volunteers, or a member of the youth's team.
 - Fails to meet the minimum requirements of the advocate role (e.g. attendance at court hearings, timely and complete court reports, and monthly visits with youth). *
- Failure to respond to their supervisor's guidance and coaching.
- Failure to maintain contact with their Advocate Supervisor at least once in a 30-day period.
- Failure to abide by any of the policies outlined in this advocate handbook.

** Expressly prohibited in California Rules of Court 5.655*

Based on the above considerations and team discussion, the Advocate Supervisor may use the following tools (including a combination of these tools) to address the misconduct:

- Advocate CASA Policy Plan
- Formal warnings to the advocate
- Probation status for lack of contact with the CASA office
- Immediate relief and resignation

Grievance Procedure

If a conflict arises between an advocate and an Advocate Supervisor, both parties are encouraged to discuss the issue together and try to come to a resolution. If a conflict still remains, it should be discussed with an Advocacy Program Manager. If still unresolved, the Chief Program Officer will make the final decision about the matter. If the advocate is still not satisfied, they may be put in contact with the Chief Executive Officer.

Below is a copy of the Grievance Procedure included in the advocate's

assignment order/notice. All advocates will receive a copy of this information at each new case assignment.

CASA of Orange County is committed to creating an environment that values excellence in all aspects of its mission. At any time a caregiver, community partner, or child believes any volunteer or employee of CASA has not acted in a manner that reflects that value, the following procedure may be used to address the concern.

Grievance by an individual against the CASA program:

Email the Chief Program Officer at grievance@casaoc.org or phone at (714)619-5150. Upon receiving the information, the Chief Program Officer will determine the next step.

Grievance by an individual against a volunteer:

- First, attempt to resolve the concern with the volunteer's direct supervisor. If you do not know the name of the volunteer's supervisor, call the main CASA number at (714)619-5151 and ask the administrative assistant who the volunteer's supervisor is.
- If there is not a satisfactory resolution with the volunteer's supervisor, the Advocacy Program Manager can be contacted at the office number above.
- The third level of resolution is the Chief Program Officer.
- If a grievance is brought against a volunteer, that information, including the outcome of the action, will be retained in the volunteer's file as well as in the database.

Grievance by a volunteer against a party to the case:

- If the two individuals are unable to reach a resolution, the volunteer will discuss the matter with their Advocate Supervisor who will determine the next step.

Grievance of a volunteer against a CASA staff:

- If the two individuals are unable to reach a resolution, the volunteer will discuss the matter with the next person in the chain of command. The CASA Chain of Command is as follows:
 - Advocate Supervisor
 - Advocacy Program Manager
 - Chief Program Officer
 - CEO
 - Board of Directors

Depending on the circumstances, at any point in the procedure you may be asked to put your concern in writing.

All concerns will be addressed by CASA of Orange County in a timely manner.

Social Media

Social media can be an effective tool of communication, but can also present challenges in the advocate role in regard to maintaining confidentiality, privacy, and appropriate boundaries. We encourage our staff, volunteers, and board to use social media platforms to highlight the important contribution of our CASA work in the community while remaining aware of the risks and responsibilities associated with an open public forum.

General Policy

Advocates and staff shall refrain from posting inappropriate material, links to inappropriate websites, or undesirable comments, references, or pictures anywhere online where the posting directly or indirectly makes reference to CASA or any name meant to refer to the organization. Anyone found to be in violation of this policy may be sanctioned at the discretion of CASA management staff.

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

Online Communications and Social Media Expectations

Maintain appropriate CASA boundaries. In the interest of upholding confidentiality and maintaining appropriate boundaries between advocates and youth, do not connect with/friend/follow your youth on your personal social media platforms.

- Do not search/monitor the social media accounts of CASA youth or others involved in the case using your personal social media account.
- Do not private message your CASA youth or others involved on social media using your personal social media account.

- Do not post pictures of your CASA youth on social media.
- Do not “check in” (share your location on social media) at your CASA youth’s placement, when you are in court for a hearing, or when on an outing with them.
- Do not discuss your CASA youth, providers on the case, or details related to the case on social media.

Never reveal confidential information. Sharing stories that illustrate the value of CASA advocacy for children is often the most powerful way to engage the public in our cause. However, the sharing of confidential information about the children and families CASA serves is prohibited. This includes names, ages, locations, case-specific details, time-specific statements, and photographs. Additionally, it is prohibited to post and share publicly internal reports, policies, procedures, or other internal confidential communications from your work as a CASA.

If a CASA chooses to connect with their youth online via a separate account created specifically for the purpose of CASA business, standard confidentiality guidelines with regard to personal, private, or case-related information must be followed at all times. This account should only be used for CASA business, clearly identify you as an advocate, and contain no identifying information about you and/or your CASA youth. You may not create this account without prior approval from and discussion with your Advocate Supervisor.

If advocates and CASA staff or others involved in an assigned youth’s life are connected through a social networking site, the site should never be used to communicate confidential case information.

Use good judgment. Refrain from including any inappropriate content, providing links to inappropriate websites, or including any inappropriate photos in postings or comments directly or indirectly referring to CASA, any individual associated with CASA, or your role with the organization. Inappropriate material includes depictions or descriptions of illicit substances and/or their paraphernalia; underage drinking; harassing, hostile, false, or confidential information; and any other acts that violate local, state, or federal law and/or CASA statutes, rules, and regulations. Prejudice or discriminatory content is also prohibited. When using social media in connection with your capacity as an advocate take a moment to consider all online comments with respect to the above framework before posting.

Be transparent. Your online comments represent only your personal opinions. Never present yourself as a spokesperson for CASA of Orange County or a spokesperson to address a statewide policy or legislative issue. Always be clear and open about the nature of your association with CASA and when necessary make it clear that your views do not represent those of the organization or anyone else associated with the organization.

Protect your own confidentiality. Prior to starting your first case, consider whether you want to limit/protect personal information available via social media sites for your own confidentiality.

Violation of Social Media Policy

Online content produced by CASA staff, volunteers, or board members in conflict with the above guidelines or including discriminatory remarks, harassment, and threats of violence or similar inappropriate or unlawful conduct will not be tolerated and may result in disciplinary action up to and including termination from your role with CASA of Orange County.

Furthermore, retaliation or any negative action against any staff, volunteer, or board member for reporting a possible deviation from this policy or for cooperating with an investigation will result in disciplinary action up to and including termination from your role with CASA of Orange County.

Statements to the Public/Media

The CASA organization spokesperson shall at all times be the Chief Executive Officer (CEO) or the Chair of the Board of Directors. All inquiries from the media (television, radio, press, digital press) or the public, court, agencies, and/or community organizations shall be referred to the CEO. This includes inquiries related to a CASA case, active or closed, and/or inquiries related to CASA policy, procedures, issues, or matters considered sensitive.

If advocates are contacted by a media representative for comment on behalf of CASA, advocates are expected to comply with the following policy:

1. Say, "I am not an authorized spokesperson for CASA OC, but I can refer you to the right person. May I have your contact information to pass on to CASA?"
2. Next, the advocate must provide the reporter's contact information to the CEO. The CEO will forward the information to the appropriate individual who will follow up with the media representative.

Advocates may never contact the media in order to attract attention to a case, even if it appears that a serious injustice has been done. Advocates may not repeat information to the press even if it has been previously stated in the media.