



INTERSTATE VOLUNTEER RETENTION AT CASA: REVIEW & RECOMMENDATIONS

Applied Policy Project

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DISCLAIMER

The author conducted this study as part of the program of professional education at the Frank Batten School of Leadership and Public Policy, University of Virginia. This paper is submitted in partial fulfillment of the course requirements for the Master of Public Policy degree. The judgments and conclusions are solely those of the author, and are not necessarily endorsed by the Batten School, by the University of Virginia, or by any other agency.

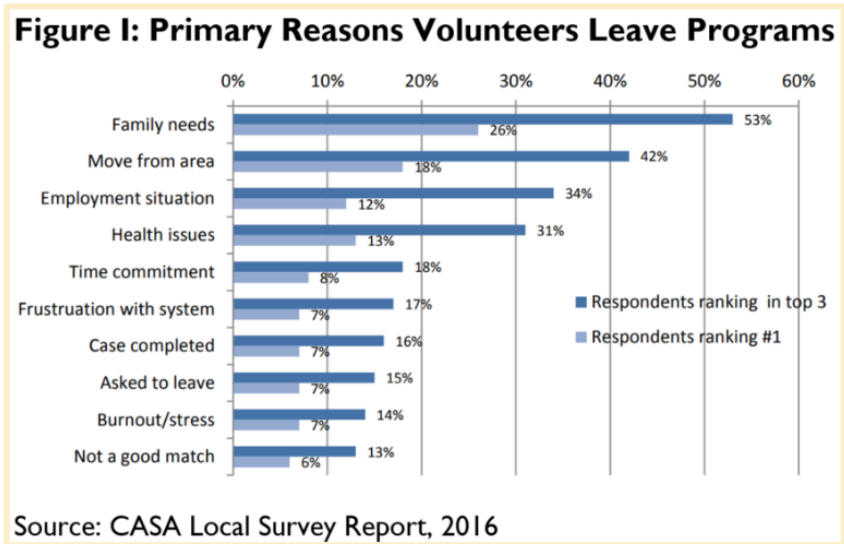


Image source: <http://spencercountycasa.org/>

BACKGROUND

The National Court Appointed Special Advocate (CASA) Association has nearly 90,000 volunteers spread among the organization's roughly 1,000 state and local member programs. Each year over six million volunteer hours are spent serving more than 250,000 children that are abused or neglected in the United States.¹ Yet, as CASA's 2016 Annual Report notes, 400,000 children still needed a court-appointed CASA volunteer/Guardian ad Litem (GAL) to advocate on their behalf. Each year thousands of CASA volunteers leave the organization, which results in children that could be beneficiaries of CASA advocacy left without a volunteer to promote their best interests. Thus, in addition to training new volunteers, volunteer retention is critical to the non-profit organization's ability to serve children in need.

According to CASA's most recent Local Survey Report, more than 24,000 new volunteers were trained in 2016, while 16,650 volunteers left the program.²



Reasons for departure are presented in Figure I. From 2013 to 2016 the top three reasons for volunteer attrition nationwide were family needs, moving from current area, and changes in a volunteer's employment situation.³ Since 2013, an increasing number of CASA programs have ranked "move from area" as the number one reason why they stop volunteering: 15 percent in

¹ CASA Annual Report, 2016

² CASA Local Survey Report, 2016

³ CASA Local Survey Report, 2013-2016

2013, 16 percent in 2014, 17 percent in 2015, and 18 percent in 2016.⁴ See Appendix A for a detailed overview of volunteers' reasons for leaving from 2012 to 2016.

Becoming a CASA volunteer is a time-consuming endeavor, particularly for those who were trained and served in a different state previously. These are volunteers who have already served on cases and undergone the extensive 30-hour pre-service training program sponsored by state and local CASA programs prior to case assignment as a CASA volunteer/GAL.

However, **National CASA does not have comprehensive training guidelines for advocates who transition to a new state.** The 2012 Local CASA Program manual has two statements about transferring volunteers:

- 1. A qualified CASA volunteer who transfers to a new program must complete, at a minimum, training regarding the local court, laws, program policies and procedures, investigation and report writing (Standard 7B, number 2).⁵*
- 2. A qualified CASA volunteer who transfers to a new program must complete the full application and screening process. (Standard 7B, number 15).⁶*

While these standards do not require volunteers who move to repeat the entire 30-hour pre-service training, many programs have erred on the side of caution by requiring retraining. In a 2018 CASA program survey, 146 programs required transferring volunteers to complete the full 30-hour training.⁷ This likely prevents a significant number of volunteers from joining the local program in their new area.

The primary study on CASA volunteer retention, titled “Reasons for discontinued service among Guardians ad Litem,” reviewed case files from previous Guardians ad Litem and found

⁴ CASA Local Survey Report, 2013-2016

⁵ CASA Standards For Local CASA/GAL Programs, 2012

⁶ CASA Standards For Local CASA/GAL Programs, 2012

⁷ CASA Survey Data, received 4/26/18

that 24% of volunteers discontinued service due to relocation (Bright et al., 2016). While the study was limited to a single Florida judicial circuit's volunteer attrition rate from 2012 to 2014, the results are disconcerting. Though volunteers may be dismayed that their training does not transfer, the true loss is for the children who could benefit from GALs' advocacy. **In order to retrain volunteers, it is imperative that CASA programs ensure valued volunteers are inclined to remain a part of the organization after relocating.**

NATIONAL CASA PRE-SERVICE TRAINING OFFERINGS

Below is an overview of the topics covered during the 30-hour pre-service training. Of the fourteen topics listed, only one, "d," is geographically specific.

Pre-Service Training Topics

- a.) *Roles and responsibilities of a CASA/GAL volunteer.*
- b.) *Court process.*
- c.) *Dynamics of families including mental health, substance abuse, domestic violence and poverty.*
- d.) *Relevant state laws, regulations and policies.*
- e.) *Relevant federal laws, regulations and policies, including the Adoption and Safe Families Act (ASFA), the Child Abuse Prevention and Treatment Act (CAPTA), the Indian Child Welfare Act (ICWA) and the Multi Ethnic Placement Act (MEPA).*
- f.) *Confidentiality and record keeping practices.*
- g.) *Child development.*
- h.) *Child abuse and neglect.*
- i.) *Permanency planning.*
- j.) *Community agencies and resources available to meet the needs of children and families.*
- k.) *Communication and information gathering.*
- l.) *Effective advocacy.*
- m.) *Cultural competency.*
- n.) *Special needs of the children served*

WHY RETENTION IS IMPORTANT

Volunteer retention is crucial both for nonprofit organizations' success and for volunteers. The financial benefits are vast. Organizations can save considerable funds by retaining volunteers, rather than recruiting new members, and having volunteers supplement paid employees work rather than having to hire additional personnel.⁸ One recent study estimated that each volunteer hour is worth \$24.14.⁹ Furthermore, philanthropy survey responses indicate that in 50% of cases, volunteers are inclined to give more financial support to an organization when they volunteer there.¹⁰

In addition to the financial benefits to organizations that rely on volunteer service, volunteers also enjoy a variety of benefits from an extended relationship with an organization. A literature review on why individuals volunteer is available in Appendix B. In academia, numerous scholars contend that volunteering has socioemotional and health benefits.¹¹ One study found that amongst older adults who volunteered, more than 30% reported that they were "a great deal better off" because of volunteering, and almost 60% identified a benefit to their families.¹² Thus, it appears that volunteering is mutually beneficial for both organizations and individuals who are donating their time.

NATIONAL CASA TRAINING STANDARDS

The CASA Board of Directors approved twelve *National CASA Standards* in 1997 ranging from governance to inclusiveness and diversity. The volunteer training standards applicable to this analysis are presented below (a complete list of standards is presented in Appendix C).

⁸ Handy et al, 2008

⁹ Independent Sector, 2017

¹⁰ Fidelity Charitable, 2014

¹¹ Hao, 2008; Piliavin & Siegl, 2007; Poulin, 2014; Salt et al, 2017; Tang et al, 2010

¹² Morrow-Howell et al, 2009

Staff/Volunteer Training, Supervision and Management: The CASA member program follows written policies for the recruitment, selection, diversity, training, retention and supervision of its staff and volunteers. Requirements for volunteers include:

- A volunteer must be 21 years of age and must have passed all screening requirements including a written application, personal interview, references and checks of criminal records, child protective services records and sex offender registries.*
- Before being assigned to advocate on behalf of a child, the CASA volunteer must complete at least 30 hours of pre-service training using the National CASA Volunteer Training Curriculum or its equivalent, and the volunteer must observe court proceedings if allowable. Each year thereafter, the volunteer must complete 12 hours of in-service training.*
- The CASA program must provide close supervision of its volunteers. Each full-time staff member can supervise no more than 30 volunteers or 45 cases to ensure high-quality advocacy for children.*
- Each CASA volunteer receives a written job description from the local program with responsibilities outlined. CASA volunteers should not be assigned more than two cases at a time unless an exception has been granted by the program.*
- A CASA member program must have a clear conflict of interest policy and guard each child's confidentiality in the handling of the case.*
- In those cases in which a member program makes the decision to allow volunteers to provide transportation to children, there must be strict policies in place governing same as well as a motor vehicles division records check, a safe driving record, appropriate insurance, staff oversight and guardian consent.*
- The CASA volunteer does not engage in the following activities: taking a child home; giving legal advice or therapeutic counseling; making placement arrangements for the child; or giving money or expensive gifts to the child or family.¹³*

¹³ National CASA Association Standards and Quality Assurance System for Local CASA/GAL Member Programs

While the standards listed above do not mention policies for volunteers who relocate, the *2012 Local CASA Program Manual* provides some guidance—albeit conflicting guidance—to CASA programs about transfer volunteer management. The document states:

- *A qualified CASA volunteer who transfers to a new program must complete, at a minimum, training regarding the local court, laws, program policies and procedures, investigation and report writing (Standard 7B, number 2).*¹⁴
- *A qualified CASA volunteer who transfers to a new program must complete the full application and screening process. (Standard 7B, number 15).*¹⁵

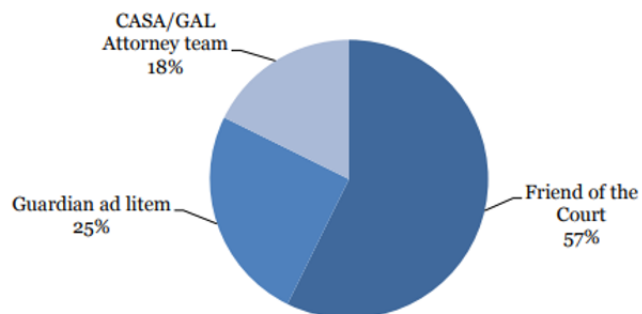
In future versions, CASA should consider updating the Program Manual to explicitly state how volunteer transfer requirements can be fulfilled. The alternatives suggested in this paper could be incorporated to fill the existing void.

VOLUNTEER VARIATIONS: GAL VOLUNTEER VS. FRIEND OF THE COURT VS. CASA/GAL ATTORNEY TEAM

A CASA volunteer's title and role is dependent on the state's statute in which the volunteer was trained. Each grouping carries a different level of authority. Guardians ad Litem which accounted for 25% of programs in 2016, are granted the most authority, followed by Friends of the Court (57% of programs) and CASA/GAL Attorney Team models (18% of programs).

Figure 2 provides a visual depiction of the volunteer models. Below is a summary of the three titles ascribed to volunteers that serve under the CASA National umbrella.

Figure 2: Volunteer Model Type



Source: CASA Local Survey Report, 2016

¹⁴ CASA Standards For Local CASA/GAL Programs, 2012

¹⁵ CASA Standards For Local CASA/GAL Programs, 2012

GUARDIAN AD LITEM (GAL) VOLUNTEER

GAL Volunteers and CASAs are generally interchangeable terms. However, the “volunteer” term differentiates GALs, who are attorneys, from GAL Volunteers, who do not need to be attorneys and are strictly volunteers.

FRIEND OF THE COURT

In the Friend of the Court Model, volunteers directly make recommendations on behalf of the child to the court.

COURT APPOINTED SPECIAL ADVOCATE (CASA)/GAL ATTORNEY TEAM

CASAs work with the local program’s GAL attorneys to advocate on behalf of the child in court. When not in court, the CASA typically operates independently of the GAL attorney.

CASA PRE-SERVICE TRAININGS OVERVIEW

NATIONAL TRAINING PROGRAM

The National Pre-Service Volunteer Training program was last updated in 2017 and is currently used by 40% of programs. The remaining programs are using the 2007 edition and are required to transition to the 2017 edition by the end of 2018.¹⁶ National Pre-Service Volunteer Training is a classroom-based training created by CASA National which, “serves as the foundation of which every CASA/GAL volunteer learns the principles of best interest advocacy.”¹⁷ The program was developed by the National CASA Curriculum Development Committee in conjunction with some of the organization’s top training talent across the country.

¹⁶ National CASA, John Trainor 3/5/18

¹⁷ CASA, 2017 Pre-Service Volunteer Training Curriculum Version 2

FLEX LEARNING

Flex Learning launched in 2011 with eight programs and has since expanded nationally. As of 2014, 17% of programs offered Flex Learning.¹⁸ This format provides trainees as well as CASA/GAL program staff more flexibility with how they allocate training time. Rather than exclusively offering pre-trainings in a classroom, Flex Learning adopts a blended online and classroom approach that occurs in five sessions. Unlike the classroom-based sessions, where the majority of work occurs in the classroom, participants complete half of the work on their own (approximately three hours per session) and half in-person.¹⁹

INDEPENDENT STUDY EDITION

The Independent Study Edition (ISE) is an online, electronic file-based program used annually by approximately 11% of CASA/GAL programs.²⁰ While it is the National CASA Association and the Curriculum Advisory Committee's preference that volunteers are trained in-person, this training style is not always feasible particularly in smaller or more rural programs. Thus, ISE was developed to meet the need of these programs. Some other CASA/GAL programs have also found ISE useful for volunteers who have missed a classroom-based session and need to "make up" the training.²¹

¹⁸ CASA Local Survey Report, 2014

¹⁹ Paragraph adopted from CASA "Flex Learning: Volunteer Training Curriculum"

²⁰ CASA Local Survey Reports, 2013 and 2014

²¹ CASA Independent Study Edition

PROJECT OVERVIEW

This report proposes, analyzes, provides, and evaluates several policy options to retain CASA volunteers who transfer from one state to another. The subsequent sections contain evaluative criteria that were used to assess the proposed policy alternatives. The remainder of the report offers four policy options that National CASA may recommend local programs adopt. An overview of each of these options is provided as well as some relevant case studies, a section related to how these examples can be applied to CASA, an implementation guide, and an assessment summary. The final section provides a recommendation based on a comprehensive comparison of the presented policy options.

EVALUATIVE CRITERIA

All of the proposals will be evaluated on three criteria: volunteer retention, quality of volunteer service, and administrative feasibility.²² Each of these criteria are further elaborated below.

- 1. Volunteer Retention**
- 2. Quality of Volunteer Service**
- 3. Administrative Burden**

VOLUNTEER RETENTION/ NUMBER OF ADDITIONAL CHILDREN SERVED

Each of the proposed policy alternatives is designed to retain volunteers. However, some options are likely to retain more volunteers than others. While it is difficult to quantify, for the purpose of this paper, retention is measured as follows:

No additional training required: very high retention

Minor additional training required (1 to 10 hours): high retention

Some additional training required (10 to 15 hours): medium retention

Major additional training required (25+ hours): low retention

Retention is directly correlated with the number of additional children served. If CASA programs can retain all volunteers who transfer, it is estimated that as many as 6,900 additional children could benefit from having a CASA advocate.²³

²² While additional criteria were considered such as equity and cost, the three included in this paper were the most salient criteria to the National CASA contact, John Trainor.

²³ *High estimate:* 6,900 was calculated as follows using data provided from the 2016 CASA Local Survey Report: 16,650 (the number of volunteers that left the program) × 18% (the programs listed “moved from area” as number one reason why volunteers left) = 2,997; 2,997 × 2.3 (number of children represented on average given 1.3 cases) = 6,893, rounded to 6,900

Low estimate: 146 programs (require full retraining) × 6 volunteers (number of volunteers who leave or are dismissed each year) × 18% (the programs listed “moved from area” as number one reason why volunteers left) = 158; 158 × 1.3 cases = 205, rounded to 200

QUALITY OF VOLUNTEER SERVICE

It is crucial that CASA continue to have volunteers that are knowledgeable, helpful, professional, and qualified representatives of the organization. This criterion serves to gauge whether a volunteer is adequately trained to the same level (or higher or lower) as they would be under the status quo (completing the entire training curriculum), and that the transferred volunteers are high quality CASA partners that serve the organization well. This qualitative evaluation has three groupings: high, average, and low.

ADMINISTRATIVE BURDEN

Policy options require varying levels of engagement both at the National CASA level as well as on a state and local level. This criterion evaluates the burden on CASA program administrators nationally and in local level programming. Feasibility is divided into three groupings: minimal (annual administrative attention should be sufficient), considerable (requires monthly administrative attention), extensive (requires weekly administrative attention).

POLICY ALTERNATIVES

Below are four proposals National CASA can present to local programs around the country in an effort to retrain volunteers who have moved to new states. Each of the following recommendations are in addition to volunteers fulfilling the following standards, as well as adhering to all applicable state and local regulations.

Transferring Volunteer Standards

1. Complete local CASA program application
2. Agree to screening process/new background check
3. Receive endorsement from the previous CASA volunteer coordinator
4. Transition within 1yr of serving actively on a case (can be applied to in-service training requirement)
5. Fulfillment of all annual in-service training requirements
6. Observation of court proceedings in new locale

While the four options are presented individually, elements of each could be combined by programs at the state and local level based on their individual objectives and National CASA's approval. The options are as follows:

POLICY OPTIONS

Option 1: Status Quo (Existing Policy)

Option 2: Supplemental State/Local Training

Option 3: Shadowing Program with Incoming/Current Volunteers

Option 4: Statute Based Reciprocity

OPTION 1: STATUS QUO, RETAIN 30 HOUR TRAINING REQUIREMENT

OVERVIEW

After moving to a new state, transferring volunteers are required to participate in the same 30-hour pre-service training program that first time CASAs complete prior to beginning advocacy work in their new location.

However, according to the January 2018 National CASA Survey, some programs are willing to accept recently active transferring volunteers if they partake in local training or do courtroom observations. As one program in New Mexico noted, “We get quite a few CASA transfers from other states and are very grateful.”²⁴ In order to assimilate the new volunteers, the New Mexico program requires a cultural training, education on community resources and partners, and feedback on reporting and advocacy requested by a local judge. Other programs are willing to accept transfers if they have been advocating for some time, have good references, and recently volunteered, especially if the advocate is transferring within their current state of residence. Ultimately these decisions are left to the new program to decide since no national guidance exists on the subject other than what is provided in the *2012 Local CASA Program Manual* which states that:

- *A qualified CASA volunteer who transfers to a new program must complete, at a minimum, training regarding the local court, laws, program policies and procedures, investigation and report writing (Standard 7B, number 2).*²⁵
- *A qualified CASA volunteer who transfers to a new program must complete the full application and screening process. (Standard 7B, number 15).*²⁶

²⁴ CASA Survey Data, received 4/26/18

²⁵ National CASA Association Standards and Quality Assurance System for Local CASA/GAL Member Programs

²⁶ National CASA Association Standards and Quality Assurance System for Local CASA/GAL Member Programs

ASSESSMENT SUMMARY

VOLUNTEER RETENTION/ NUMBER OF ADDITIONAL CHILDREN SERVED: LOW.

Pros

- Volunteers who are really committed to CASA's work may be willing to go through training again. Litmus test of commitment.

Cons

- Volunteers who have relocated are often faced with new responsibilities (family, job, etc.). Having an inflexible, classroom-based program with set meeting times may inhibit them from volunteering even though they may be flexible at other times.
- Some volunteers may express frustration with CASA for requiring them to go through training that they have already completed. Consequently, they may find other organizations to devote their time to.
- Children who could have an experienced advocate are left unserved.

QUALITY OF VOLUNTEER SERVICE: AVERAGE.

Pros

- Retraining may reinforce concepts that have been forgotten.
- Ensures fairly consistent local CASA program volunteer work.

Cons

- Classroom based instruction does not guarantee comprehension and internalization of presented concepts and lessons.

ADMINISTRATIVE BURDEN: MINIMAL.

Pros

- No additional accommodations necessary to onboard a transferring volunteer (e.g. researching statute differences)

Cons

- Negligible additional burden for in-person trainings since preparation will likely not vary much with the addition of a single participant.

OPTION 2: SUPPLEMENTAL STATE/LOCAL TRAINING

OVERVIEW

Transferring CASA volunteers learn about state and local laws and regulations that are relevant to their new roles. This supplemental training can range from simple online tutorials with competency-based quizzes, to in-person consolidated trainings that new volunteers would receive during the state and local portion of the National Training.

EXAMPLES OF SPECIALIZED STATE/LOCAL TRAINING PROGRAMS

Numerous organization have programs in place where training is a combination of national and state, local, or population specific training. Below are three examples of organizations that have successfully integrated national and more localized programming:

EXAMPLE 1: ONLINE TRAINING, READING AND QUIZ

One of CASA's own programs, CASA of Arizona, currently offers online training. These trainings are publicly available on the organization's website and include lessons such as one on the Indian Child Welfare Act. Given that Arizona has the second largest American Indian population in the United State, having a population specific training is crucial.²⁷ Interested parties can take this, as well as seventeen other, text-based lessons. Following each module, a quiz is available that can be applied to a volunteer's annual credit requirements. Once the self-scoring test is complete, a passing score certificate is issued and is available for download. Additionally, an email with quiz results is sent to the student to share with their CASA Supervisor.²⁸

²⁷ Arizona Experience, American Indian Tribes and Communities in Arizona

²⁸ CASA of Arizona, Training Courses

CASA of Arizona also offers video trainings such as James D. Stoehr's *Addiction and Recovery: Methamphetamine Use and the Brain* presentation. While these video trainings do not currently have a quiz component, volunteers seeking credit can complete an In-Service Credit Form and submit to their CASA administrator for credit hours.

EXAMPLE 2: ONLINE TRAINING, VIDEO MODULES AND QUIZZES

The Ohio's Attorney General's office has created an online training platform where elected officials and interested parties can be educated on the state's specific Sunshine Laws. While the "Sunshine Law" name varies from state to state, these laws are state-specific regulations related to the public's availability to access records. In Ohio, the Sunshine Laws specifically refer to Ohio's Public Records Act and Ohio's Open Meetings Act.²⁹

Ohio's online Sunshine Laws Training is a three-hour program which consists of an introduction, thirteen video training lessons, and a training evaluation at the end. Each portion can be completed at the trainee's leisure. After all of the lessons and quizzes are completed, a course certificate is available for printing.

The Attorney General's office first launched the online training by recording a live presentation. The online version was well received and consequently the team decided to make a more professional version.³⁰ The undertaking was time consuming but has paid off; since the online training was instituted in 2016 fewer in person trainings are now required and programmatic costs have decreased. In 2017, 817 people participated in the 10 live presentations and a total of 1,431 people signed up for the online training.³¹ Prior to implementing the online training, the Ohio Attorney General's office estimates that they had twice as many live presentations which resulted in a considerable cost since attorneys often had to travel to remote parts of the state to conduct the trainings even if there were low attendance rates. Overall, they are glad to have instituted the online program, despite how time consuming it was to put together, and

²⁹ Ohio State Bar Association, What You Should Know about Ohio's "Sunshine Laws"

³⁰ Ohio Attorney General's Office, Damian Sikora, 4/26/18

³¹ Ohio Attorney General's Office, Damian Sikora, 4/26/18

believe that it has resulted in a larger audience taking the course now that they have the online version.³²

EXAMPLE 3: IN PERSON TRAINING

The National Association of Counsel for Children offers state-specific, classroom based, in-person training. Below are examples of two state-specific trainings that are listed on the organization's website:

Child Welfare Appellate Law and Practice

This training covers writs, appeals, strategy, time limits, structuring an argument, brief writing, and oral argument. The course is customized to cover state-specific appellate rules. Trainees will engage in a mock appellate oral argument.³³

Reports and Records of Abuse and Neglect

This training provides an in-depth analysis of state-specific confidentiality rules as they relate to reports and records of abuse and neglect. Trainees will learn to navigate the law and make well-reasoned decisions about disclosure and information sharing. The training covers attorney-client privilege, psychotherapist-patient privilege, FERPA, substance abuse treatment records, confidentiality statutes, HIPPA, school records, and professional rules of conduct.³⁴

CASA APPLICATION

The case studies mentioned above could each be applied to CASA's supplemental trainings, particularly at the state statute level. Below is an overview of how some of the examples can

³² Entire paragraph from call with Damian Sikora, 4/26/18.

³³ Entire "Child Welfare Appellate Law and Practice" text borrowed from the National Association of Counsel for Children's Child Welfare Training page

³⁴ Entire Reports and Records of Abuse and Neglect text borrowed from the National Association of Counsel for Children's Child Welfare Training page

be applied in a CASA-specific context. Particular emphasis is placed on online options since implementation is likely consistent from state to state.

STATE MODULES

Depending on the state's resources, these modules could range from basic to high tech.

BASIC: TEXT AND QUIZ

Provide the text of the state specific statutes from the Child Welfare Information Gateway, a service of the Children's Bureau, the Administration for Children and Families, and the U.S. Department of Health and Human Services on a website.³⁵ Then, have modules covering topics such as Child Abuse and Neglect, Child Welfare, and Adoption, each with subtopics. At the end of each topic have a quiz to confirm the volunteer's understanding of the state-specific material.

ADVANCED: ONLINE ROLE-PLAY SIMULATION

Provide video modules with avatars of the state specific statutes from the Child Welfare Information Gateway, a service of the Children's Bureau, the Administration for Children and Families, and the U.S. Department of Health and Human Services on a website.³⁶ Then have a quiz at the end of each video, or module, to confirm understanding of the state-specific material.

LOCAL TRAINING

Depending on where a CASA program is located, there may also be some locally focused material that volunteers should be especially aware of (as in the CASA Arizona case outlined above). Depending on the locality, topics could range from "Service as a CASA Volunteer in an urban environment" to the cultural intricacies of a particular region. Depending on how much

³⁵ The Child Welfare information Gateway website has a drop down of state specific statutes. Visit <https://www.childwelfare.gov/topics/systemwide/laws-policies/state/>

³⁶ Website with drop down of state specific statutes: <https://www.childwelfare.gov/topics/systemwide/laws-policies/state/>

local-specific information there is, this program area specific information could be presented in a similar format as the online material, verbally when the transferring volunteer is onboarding, and/or via a handout for the volunteer's future reference.

IMPLEMENTATION REQUIREMENTS

The following actions would be necessary in order to implement the above-mentioned state and local training recommendations:

1. A CASA program in each state assumes responsibility for state training programming, hereafter referred to as The State Program In Charge (TSPIC).
2. TSPIC determines how they wish to run state trainings—online based, in person training, or other.
 - a. Basic: copy state-specific text from the Child Welfare Information Gateway and insert a quiz after each topic (or at the appropriately determined frequency).³⁷ Then have the trainings available on a password protected CASA website.
 - b. Medium: partner with experts to record videos on state or locally focused material, similar to CASA of Arizona's video approach.
 - c. Advanced: state partners with an organization such as Kognito, "a health simulation company that believes in the power of conversation to inspire and inform, impact how people think and act, evoke empathy and change lives."³⁸ Kognito created the Office of Juvenile Justice and Delinquency Prevention's virtual training simulation modules which use avatars.
3. Transfer volunteer granted access to site, undergo training and take quizzes.
4. Local program devises locally focused material.

³⁷ The Child Welfare Information Gateway's compilation of state-specific statutes can be found at <https://www.childwelfare.gov/topics/systemwide/laws-policies/state/>

³⁸ Kognito, About page

5. Local CASA volunteer coordinator reviews fulfillment of online training, educates volunteer on any local intricacies, discusses any questions or concerns, and provides volunteer with a copy of both state statutes and locally focused material.

ASSESSMENT SUMMARY

VOLUNTEER RETENTION/ NUMBER OF ADDITIONAL CHILDREN SERVED: ANTICIPATE HIGH RETENTION DUE TO MINOR ADDITIONAL TRAINING.

Pros

- Training flexibility.
- Valued volunteers do not feel like they are wasting time they could be advocating for a child in need.
- More children have experienced advocates.
- Could contribute to as many as 6,900 children/year having CASAs that currently do not.

Cons

- Lack of community among other volunteers during training period.
- Older volunteers may not be comfortable with using online technology.

QUALITY OF VOLUNTEER SERVICE: AVERAGE.

Pros

- Quiz component verifies understanding of state and local-specific material.
- State/local element allows CASA programs to be more responsive and attentive to their jurisdiction's unique needs.
- Potential for mass trainings, especially with technology, allows experts to share their knowledge with large audiences.

Cons

- Not as extensive as 30-hour training should volunteers need to be refreshed on all the material or a different advocacy model.

ADMINISTRATIVE BURDEN: MINIMAL.

Pros

- Variety of implementation approaches from basic to advanced, or somewhere in between depending on available resources.
- Could be incorporated into current trainings both for volunteers new to CASA and volunteers new to the area.
- Could also be used for programs that participate with Interstate Compact Cases in order to educate CASAs/GALs about relevant state/local regulations, when the child they are serving is not currently a resident of the CASA Program's state.

Cons

- Increased administrative requirement in order to monitor program and ensure compliance when any relevant state regulations change.
- Likely not feasible to have all local training in a similar format, would require additional local-specific training.
- NOTE: it is assumed that CASA would have a third party volunteer their time to film/provide online tutorials. Consequently, this "set-up" administrative burden would not be placed on CASA. If however, CASA undertook the initial effort, it would likely be a considerable initial administrative burden.

OPTION 3: SHADOWING PROGRAM WITH INCOMING/CURRENT VOLUNTEERS

OVERVIEW

Transferring CASA volunteers are paired with existing CASA volunteers in their new area in order to “shadow” them and better understand the unique aspects of advocacy in their new jurisdiction. Numerous scholarly articles have found that mentor programs are beneficial as a training strategy and social network development.³⁹ Many organizations find the benefits of instituting shadowing programs to be invaluable. As Rebecca Rainey, the Program Director at Metropolitan Center For Women and Children, stated, shadowing is “more important than any curriculum.”⁴⁰

EXAMPLE OF SHADOWING PROGRAMS

A variety of organizations from a wide range of fields have shadowing programs as part of their training. Organizations that offer shadowing programs range from medical schools to non-profit organizations. Below is an example of a non-profit organization that requires shadowing during their volunteer onboarding process.

EXAMPLE: VICTIM OUTREACH

Victim Outreach is a Colorado based non-profit committed to promoting the “healing of people impacted by crime and trauma.”⁴¹ The organization’s Volunteer Victim Advocates are “trained to offer emotional support and crisis counseling to crime and trauma victims” in addition to providing people in need with “information about the criminal justice system, community referrals, and aid in acquiring emergency shelter and other immediate needs.”⁴²

³⁹ Schelbe et al., 2017; Schmidt, 2007; Tauet et al., 2000

⁴⁰ Metropolitan Center For Women and Children, Rebecca Rainey, 2/28/18

⁴¹ Victim Outreach Incorporated, Volunteer

⁴² Victim Outreach Incorporated, Volunteer

Other responsibilities include:

- Provide advocacy and crisis counseling for victims of crime.
- Assess immediate victim needs and provide referrals.
- Act as a liaison between victims and the criminal justice system.
- Ensure that victims are aware of their rights under the Colorado Crime Victims' Compensation Act and the Colorado Constitution, and assist in applying for appropriate funds.
- Provide victims with information about court proceedings.
- Complete necessary reports documenting services rendered and activities performed.
- Represent law enforcement agencies and VOI in a positive and professional manner when contacting victims or citizens.
- Be available for 4-6 pager shifts/per month (minimum 4 first pager shifts).
- Attend monthly volunteer meetings/in-services.
- Participate in a ride-along with an officer a minimum of once every 4 months.⁴³

The program is very intensive and volunteers are “on call” from police dispatch via pagers for four to six shifts a month during evenings, weekends, and holidays; in sum, whenever the office is closed.

No experience is necessary in order to become a volunteer. However, new volunteers must participate in 40 hours of classroom training in addition to shadowing a seasoned volunteer. Meghan, a Victim Advocate and the organization's Volunteer Coordinator noted that the shadowing phase enables volunteers to “get their feet wet and feel comfortable while a seasoned advocate assists them.”⁴⁴ These “trainer” volunteers, or mentors, are selected by the Victim Outreach volunteer coordinator.

⁴³ All bullets adopted from: Victim Outreach Incorporated, Volunteer

⁴⁴ Victim Outreach Incorporated, Meghan, 2/28/18

The mentors are experienced volunteers who express a willingness to train new volunteers. New volunteers rotate between volunteer trainers which allows numerous bonds to form, and new volunteers to adopt different ways of doing advocacy from the volunteers they shadow; new volunteers can then curate their own best practices. Every time the team goes on the scene, both the mentor and trainee complete their own volunteer log report. While both reports ask similar questions, the seasoned volunteer's report also asks some questions about the trainee. Questions include:

- Did the trainee show up on time?
- Did they dress professionally?
- Did they ask good questions?
- Was their feedback correct?

These questions help the volunteer staff recognize where trainees could use assistance and helps ensure the quality of volunteers is high and consistent. Meghan recommends that other organizations considering implementing a shadow program “be open minded but with a set [of] criteria.”⁴⁵ In other words, be specific about what you expect from trainers, but open about how they meet it.

While Victim Outreach trainees are welcome to shadow for as long as they wish prior to going out on their own, shadowing typically lasts about four months. After training and shadowing is complete, however, the training and volunteer community building continues. The organization brings everyone together the third Monday of every month for a monthly meeting. During these meetings, volunteers are celebrated, cases are discussed and debriefed, and information is provided on any updates to laws that have changed.

⁴⁵ Victim Outreach Incorporated, Meghan, 2/28/18

CASA APPLICATION AND IMPLEMENTATION REQUIREMENTS

The following actions would be necessary in order to implement the above-mentioned proposal:

1. Devise mentor handbook (provide example in exhibit such as Mentor handbook: <https://www.beamentor.org/coordfrms/Training%20for%20Mentors.PDF>).
2. Create a match-up process (e.g. star CASA volunteer with transfer CASA volunteer; CASA volunteer in need of leaving the program with replacement CASA volunteer, etc.).
3. Advise current CASA volunteers of new pairing program, gauge interest in being shadowed.

Upon transfer CASA volunteer's acceptance into adopted CASA program

1. Select possible match.
2. Contact current CASA volunteer to ensure that they are willing to be shadowed.
3. Introduce CASA volunteers at CASA program office.

ASSESSMENT SUMMARY

VOLUNTEER RETENTION/ NUMBER OF ADDITIONAL CHILDREN SERVED: LIKELY HIGH.
ANY ADDITIONAL TIME COMMITMENT IS AT THE TRANSFERRING VOLUNTEER AND
VOLUNTEER SUPERVISOR'S DISCRETION.

Pros

- Creates bond between CASA volunteers.
- More children have experienced advocates.
- Could also help with volunteers transitioning out, new volunteer becomes involved in case prior to another volunteer's departure.
- Could contribute to as many as 6,900 children/year having CASAs that currently do not.

Cons

- If used to replace volunteers who can no longer serve, and program is not rotational, the benefits of transitioning CASA forming a bond with current CASA are unrealized.
- CASA kids benefit from continuity. Would need to communicate that the shadowing situation is temporary with the child and all relevant stakeholders (logistical challenges).

QUALITY OF VOLUNTEER SERVICE: HIGH, ESPECIALLY BY PICKING UP SEASONED VOLUNTEERS' "BEST PRACTICES."

Pros

- Allows further screening of transferring volunteers in the advocacy environment.
- Volunteers can pick up "best practices" if shadowing is rotational.
- "Best practices" spillovers to in-state volunteers.
- Transferring volunteer could shadow for a prolonged period of time if they, and the local program team, find it necessary.

Cons

- Some of the best seasoned volunteers—the ideal people to shadow—may be dissuaded from taking on additional responsibilities.

ADMINISTRATIVE BURDEN: CONSIDERABLE, WILL LIKELY RESULT IN WEEKLY REVIEW OF REPORTS ON THE TRANSFERRING ADVOCATE.

Pros

- Lessons learned from shadowing could contribute to future improvements of the National CASA curriculum.

Cons

- Program staff will need to match transferring volunteers with seasoned volunteers and monitor the new volunteers progress via seasoned volunteers' reports.
- If volunteers' personalities clash, could result in negative fallout and administrative intervention.

OPTION 4: STATUTE-BASED RECIPROCITY

OVERVIEW

Have a reciprocity agreement in place for programs that have similar CASA statutes, so full training is not required. Groupings could resemble the models presented on page 9 (i.e. Guardian ad Litem, Friend of the Court, and CASA/GAL Attorney teams).

EXAMPLES

Numerous professional organizations have established guidelines to create more transparency into licensure requirements for professionals that relocate to a new state. Below are examples of efforts in the legal and teaching communities to make licensure more portable.

EXAMPLE 1: ATTORNEYS – THE UNIFORM BAR EXAMINATION (UBE)

In 2011, the National Conference of Bar Examiners (NCBE) released the Uniform Bar Examination (UBE). The exam, taken in place of the bar, “tests knowledge of general principles of law, legal analysis and reasoning, factual analysis, and communication skills to determine readiness to enter legal practice in any jurisdiction.”⁴⁶ There are numerous personal and professional benefits for both the law school graduate and the profession at large. The NCBE cites the following as primary benefits⁴⁷:

Student Benefits

- Increases consistency in subjects tested on the bar exam across jurisdictions
- Maximizes job opportunities—UBE scores that are failing in the testing jurisdiction are transferable to UBE jurisdictions that have a lower passing score requirement

⁴⁶ National Conference of Bar Examiners, Understanding the Uniform Bar Examination

⁴⁷ National Conference of Bar Examiners, Understanding the Uniform Bar Examination

- Reduces actual costs and opportunity costs of preparing for and taking the bar exam in multiple jurisdictions

Professional Benefits

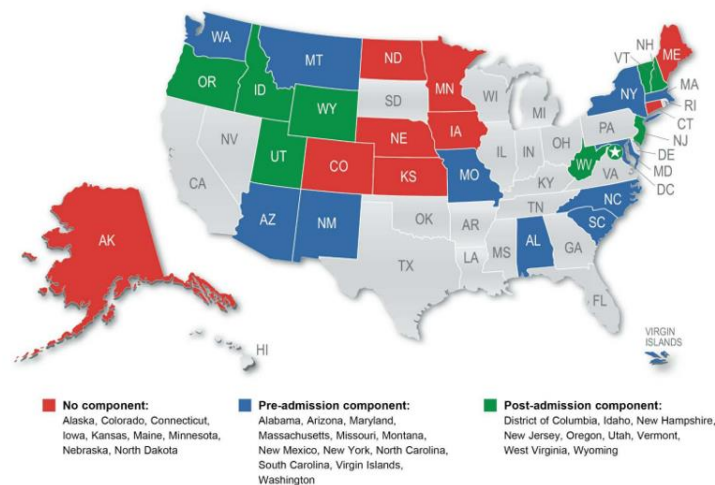
- Acknowledges a shared core of legal knowledge and lawyering skills
- Assures a high-quality, uniform system of assessment of minimum competence
- Recognizes the reality of multi-jurisdictional or cross-border practice

Should an attorney who has taken the UBE wish to move to another state there are minimum score requirements and, depending on the state, jurisdiction-specific training requirements.

Figure 3 provides an overview of UBE states' requirements. In addition to this, the UBE does not offer portability for the rest of an attorney's career; scores are only portable for between two and five years. See Appendix D for a comprehensive overview of state-specific UBE transfer requirements.

After the UBE transfer time has elapsed, attorneys should investigate state reciprocity rules to determine if they are eligible to be Admitted on Motion into another state. See Appendix E for an overview of states that allow Admission on Motion and their corresponding requirements.

Figure 3: UBE Jurisdiction-specific Law Component Requirements



Source: National Conference of Bar Examiners, Local Components

EXAMPLE 2: TEACHER LICENSING

The teacher model is especially important to understand since “teacher” is cited as the most common career type of all CASA volunteers (CASA Local Survey Reports, 2016). For teachers that relocate to a new state, requirements vary. Below is a snapshot created by the Education Commission of the States of how teacher reciprocity currently works:

- Six states offer full teacher license reciprocity for all eligible, fully licensed teachers. In these states, fully licensed out-of-state teachers, regardless of experience, are immediately eligible to receive a standard teaching license and are subject to few or no additional requirements.
- Thirty-five states plus the District of Columbia (D.C.) established differing requirements for experienced and inexperienced teachers, limiting licensure barriers for candidates meeting established experience requirements. Fourteen states plus D.C. require candidates with classroom experience provide evidence of effectiveness in past performance, oftentimes limiting barriers for candidates who can demonstrate success.⁴⁸

There has been a national push lately to simplify teacher license reciprocity. These efforts have been led by the National Association of State Directors of Teacher Education and Certification (NASDTEC). In NASDTEC’s *Interstate Agreement for Educator Licensure 2015-2020*, categories of teacher licensure are described in stages ranging from Stage 1 to Stage 4. Figure 4 provides a snapshot of a few states and how each state’s certifications fit within the NASDTEC licensure framework. This overview enables states to easily understand how their certifications compare with others, which could then be used to ascertain the equivalent of a transferring teacher’s credentials. For example, if a teacher in Hawaii had a Hawaii Standard License, and was moving to Virginia, the equivalent license is the Collegiate Professional License. In this case,, these states could offer NASDTEC Stage 3 license reciprocity.

⁴⁸ Education Commission of the States, Teacher License Reciprocity, 2017

Figure 4: NASDTEC Educator License Groupings

Types of Teaching Licenses/Certificates		NASDTEC Stage 1 License A license issued to an individual who holds a minimum of a bachelor's degree, met approved program admission requirements, but has not met the jurisdiction-specific requirements of the issuing Member Jurisdiction.	NASDTEC Stage 2 License A license issued to an individual who holds a minimum of a bachelor's degree, who has completed an approved program, but has not met the jurisdiction-specific requirements for a Stage 3 license of the issuing Member Jurisdiction.	NASDTEC Stage 3 License A license issued to an individual who holds a minimum of a bachelor's degree, has completed an approved program and has met all jurisdiction-specific requirements beyond those required for the Stage 3 License of the issuing Member Jurisdiction.	NASDTEC Stage 4 License A license issued to an individual who holds a minimum of a master's degree or the equivalent, has completed an approved program and has met all jurisdiction-specific requirements beyond those required for the Stage 3 License of the issuing Member Jurisdiction.
Alabama	Jurisdiction Equivalent	No comparable license.	No comparable license.	Class B Professional Educator Certificate	Class A Professional Educator Certificate or Class A Professional Leadership Certificate
	Duration			5 years	5 years
Connecticut	Jurisdiction Equivalent	Durational Shortage Area Permit	Temporary 90 Day Certificate, 1 Year Residency Certificate (alternate routes) Nonrenewable Interim Initial Educator Certificate, Interim Initial Educator Certificate Nonrenewable Interim Provisional Educator Certificate, Interim Provisional Educator Certificate	Initial Educator Certificate Provisional Educator Certificate	Professional Educator Certificate
	Duration	1 year permit (can be issued up to 3 times, if eligible)	Differ in Duration	Three Years	Five Years
Hawaii	Jurisdiction Equivalent	None, although an Emergency Hire permit is issued to an individual who is unlicensed but employed as a public school teacher. A bachelor's degree is required and the person must obtain a license within three years.	Hawaii Provisional License	Hawaii Standard License	Hawaii Advanced License
	Duration	Awarded one year at a time, up to three years.	3 Years	5 years	10 years
Indiana	Jurisdiction Equivalent	no stage one license	Reciprocal permit	Initial practitioner	Practitioner
	Duration		one year; renewable for one year	2 year; renewable	5 year; renewable
Maryland	Jurisdiction Equivalent	NA	N/A	Professional Eligibility Certificate	Advanced Professional Certificate
	Duration			5 years	5 years
Massachusetts	Jurisdiction Equivalent	Preliminary Valid for five years of employment.	N/A	Initial	Professional
	Duration		N/A	Valid for five years of employment.	Valid for five calendar years.
Virginia	Jurisdiction Equivalent	Provisional License 3 years*	Provisional License 3 years*	Collegiate Professional License 5 years	Postgraduate Professional License 5 years
	Duration				

Source: NASDTEC, Interstate Agreement for Educator Licensure 2015-2020

CASA APPLICATION

Elements of both the attorney and teacher certification models presented above can be applied in a CASA context. While the National Conference of Bar Examiners, the group that issues the UBE, emphasizes that the exam results in “portable scores, not portable status,” the portability concept can be applied to CASA. In place of the UBE, CASA volunteers who have received the National Pre-Service Training can have a portable training that can transfer nationally.

Alternatively, CASA could institute a policy similar to NASDTEC’s licensing grouping stages where stages could be replaced with CASA volunteer models or child welfare statute groupings. For example, those states that are Friends of the Court would be in one grouping, CASA volunteers would be in another, etc. Then, when a volunteer from another state applies to the program in their new state, similar programs could offer reciprocity for transferring volunteers. Volunteers would still need to have access to state and local specific rules, however, since they are experienced volunteers, a 30-hour retraining does not have to be the norm.

IMPLEMENTATION REQUIREMENTS

The following actions would be necessary in order to institute a reciprocity program:

1. Have an attorney review state-specific child welfare statutes. A comprehensive list is available on the Child Welfare Information Gateway’s website.⁴⁹ This could potentially be conducted with the assistance of one of CASA’s law school partnerships (e.g. Emory).
2. Create a document with groupings based on statute/program similarity.
3. Share document with CASA programs so they can use it as a reference tool.

⁴⁹ The Child Welfare Information Gateway’s compilation of state-specific statutes can be found at <https://www.childwelfare.gov/topics/systemwide/laws-policies/state/>

ASSESSMENT SUMMARY

VOLUNTEER RETENTION/ NUMBER OF ADDITIONAL CHILDREN SERVED: HIGH.

Pros

- Low barrier to (re)entry due to minimal retraining if coming from a comparable program.
- More children have experienced advocates.
- Could contribute to as many as 6,900 children/year having CASAs that currently do not.

Cons

- None.

QUALITY OF VOLUNTEER SERVICE: LOW/AVERAGE.

Pros

- Familiarity and practice with comparable statutes and advocacy models.

Cons

- May be some variation in statutes that could result in incorrect information presented to children or other parties involved in the case.
- If statutes have changed from time of initial training to time of transfer, volunteer may not be adequately educated.

ADMINISTRATIVE BURDEN: MINIMAL.

Pros

- Quick reference sheet could help volunteer coordinators quickly assess the level of training that is necessary for transferring volunteers, if any.
- Work could be outsourced to a law school clinic.

Cons

- Volunteer supervisor may have to occasionally compare statutes if legal team does not provide comprehensive comparisons.

EVALUATIVE CRITERIA: OUTCOMES MATRIX

Criteria	Policy Alternatives			
	Option 1: Status Quo (Existing Policy)	Option 2: Supplemental State/Local Training	Option 3: Shadowing Program with Incoming/Current Volunteers	Option 4: Statute Based Reciprocity
Volunteer Retention/ Number of Additional Children Served⁵⁰	Low	High	High	High
Quality of Volunteer Service	Average	Average	High	Low/Average
Administrative Burden	Minimal	Minimal	Considerable	Minimal

⁵⁰ For a detailed explanation of number of additional children served see page 12

RECOMMENDATION AND CONCLUDING REMARKS

OPTION 2: SUPPLEMENTAL STATE/LOCAL TRAINING

TRANSFERRING CASA VOLUNTEERS RECEIVE TRAINING, AND ARE TESTED ON, STATE AND LOCAL LAWS AND REGULATIONS THAT ARE RELEVANT TO THEIR NEW ROLES. THIS SUPPLEMENTAL TRAINING CAN RANGE FROM SIMPLE ONLINE TUTORIALS WITH QUIZZES TO IN-PERSON, CONSOLIDATED TRAININGS THAT NEW VOLUNTEERS WOULD RECEIVE DURING THE STATE AND LOCAL PORTION OF THE NATIONAL TRAINING.

Each of the four options were analyzed in terms of the number of additional children served, volunteer retention, quality of volunteer service, and administrative feasibility. Given Option 2's potential to serve thousands of additional children, the high likelihood of volunteer retention, the standard quality of volunteer service, and minimal administrative burden, National CASA should encourage local programs to offer supplemental state/local training for volunteers transferring both within a state and interstate.

Although Option 3, a shadowing program with incoming/current volunteers, had similar benefits, it was not selected due to the considerable administrative burden. Volunteer coordinators would have to frequently solicit and review feedback from seasoned volunteers on transferring advocates which could be a time-consuming task for staff members that already have numerous duties. However, for programs that do have time to allocate to a shadowing program, this option could offer tremendous benefits and could also be incorporated into the standard training program. By picking up best practices from seasoned volunteers, trainees will likely become high quality advocates.

Option 4 was not selected due to the low/average quality of volunteer service. While this option would likely result in more children having a CASA volunteer advocate on their behalf, high volunteer retention, and minimal administrative burden, the barrier to entry for an advocate is not high enough to ensure a sufficient level of advocacy work. Additionally, even with a document listing states with similar statutes, local CASA program staff will likely still

need to review the statutes of the state that a volunteer is transferring from to ensure that the statutes are indeed similar.

Option 1, the status quo, was not selected because volunteer retention is low, which results in thousands of children not benefitting from having CASA representation. While it ensures that all of a program's volunteers receive the same basic level of training, and having an additional volunteer enrolled in training does not pose an additional administrative burden, this training is largely redundant for CASAs that have already undergone the National Training. Instead, the hours could be spent advocating on behalf of a child in need.

Based on this analysis, I recommend that National CASA institute a supplemental state/local online training component for transferring volunteers. This state/local training with quizzes can be piloted in a few states similar to how other online trainings, such as Flex-Learning, were initially tested.

IMPLEMENTATION: EXAMPLE OF OPTION 2 VOLUNTEER TRANSITION PROCESS

Below are steps that programs could follow in order to transition a CASA volunteer from one program to another with a supplemental state/local training requirement. Note, these steps can be applied to both intrastate and interstate transitions.

AT DEPARTURE

1. If the CASA is a valued volunteer, the volunteer's current CASA program volunteer coordinator connects the volunteer with the appropriate contact at the new locality. The previous coordinator can also mention any additional areas in which they recommend the transferring volunteer receive additional training.
2. Future CASA program contacts volunteer and provides a welcome note, link(s) to locale activities/guides, and overview of transfer certification requirements (i.e. report from previous program, active status, interview, required training, and court observation).

FOLLOWING RELOCATION

3. CASA program in new locality follows up with volunteer.
4. If volunteer wishes to continue service in new locale, the volunteer coordinator and the transferring volunteer meet at the local CASA office. The volunteer is then provided a packet with an overview of specific state/local regulations, an updated national training packet (if theirs is outdated), a checklist of necessary steps to serve in the new jurisdiction (e.g. background check), and directions on how to complete the required training.
5. Volunteer supervisor confirms that transferring volunteer has completed the required training.
6. Transfer complete. Volunteer assigned to a case.

APPENDIX

APPENDIX A: CASA VOLUNTEERS' REASONS FOR LEAVING 2012-2016

Primary Reasons Why Volunteers Leave, 2012

Reason for leaving	Percent mentioning in top 3	Percent ranking it #1
Family needs	46%	21%
Move from area	39%	16%
Employment situation	39%	14%
Health issues	32%	13%
Time commitment	24%	12%
Frustration with system	19%	8%
Case satisfactorily completed	19%	8%
Asked to leave	15%	7%
Burnout/stress	13%	6%
Not a good volunteer position match	11%	5%
Other reason	11%	5%

Source: CASA Local Survey Report, 2012

Primary Reasons Why Volunteers Leave, 2013

Reason for leaving	Percent mentioning in top 3	Percent ranking reason #1
Family needs	48%	24%
Move from area	38%	15%
Employment situation	41%	15%
Health issues	31%	11%
Time commitment	24%	10%
Frustration with system	19%	10%
Case satisfactorily completed	18%	9%
Asked to leave	15%	8%
Burnout/stress	12%	4%
Not a good volunteer position match	11%	6%
Other reason	11%	7%

Source: CASA Local Survey Report, 2013

Primary Reasons Why Volunteers Leave, 2014

Reason for Leaving	Percent Mentioning in Top 3	Percent Ranking Reason #1
Family Needs	53%	25%
Move from Area	39%	16%
Employment Situation	45%	15%
Health Issues	34%	13%
Time Commitment	19%	8%
Frustration with System	18%	8%
Case Satisfactorily Completed	19%	10%
Asked to Leave	14%	7%
Burnout/Stress	13%	5%
Not a Good Volunteer Position match	11%	5%
Other Reason	10%	6%

Source: CASA Local Survey Report, 2014

Primary Reasons Why Volunteers Leave, 2015

Reason for leaving	Percent mentioning in top 3	Percent ranking reason #1
Family needs	52%	25%
Move from area	40%	17%
Employment situation	36%	13%
Health issues	29%	12%
Time commitment	18%	9%
Frustration with system	16%	7%
Case satisfactorily completed	15%	6%
Asked to leave	13%	6%
Burnout/stress	15%	5%
Not a good volunteer position match	12%	5%

Source: CASA Local Survey Report, 2015

Primary Reasons Why Volunteers Leave, 2016

Reason for leaving	Percent mentioning in top 3	Percent ranking reason #1
Family needs	53%	26%
Move from area	42%	18%
Employment situation	34%	12%
Health issues	31%	13%
Time commitment	18%	8%
Frustration with system	17%	7%
Case satisfactorily completed	16%	7%
Asked to leave	15%	7%
Burnout/stress	14%	7%
Not a good volunteer position match	13%	6%

Source: CASA Local Survey Report, 2016

APPENDIX B: LITERATURE REVIEW

Extensive research has been conducted on the subject of volunteer retention. Alicia Sellon has written one of the most recent comprehensive articles on the subject (Sellon, 2014). Her article focuses primarily on older adults, which is reflective of CASA volunteer demographics. Sellon and other volunteer retention scholars have repeatedly identified three areas which contribute to volunteer tenure: meaningfulness, flexibility, and support from staff.

MEANINGFULNESS

Many CASA volunteers initially agree to serve because they support the organization's mission statement: to support and promote "court-appointed volunteer advocacy so every abused or neglected child in the United States can be safe, have a permanent home and the opportunity to thrive" (CASA Mission Statement). However, volunteers often derive meaningfulness, or a sense of purpose, from their experiences in a variety of ways. Clary et al. provided one of the most comprehensive frameworks which is supported by a variety of other scholars and further substantiated by the Florida CASA retention study (Clary et al., 1998). The framework consists of five ways in which volunteers derive purpose from their service, each of which is discussed

below. By better understanding volunteers' motives, and crafting their experiences to better fulfill their goals and expectations, CASA can increase the likelihood of volunteers' service being a key component of their lives for years to come.

Volunteering allows expression of "values related to altruistic and humanitarian concern for others." This is often cited as the primary reason people initially volunteer (Carpenter et al., 2010; Ryan et al., 2001; Nichols & King, 1999; Allen & Rushton, 1983; Anderson & Moore, 1978). It is also identified as the primary reason why GALs in the single Florida jurisdiction initially signed up to serve. Volunteer files indicated that 41% of GALs primary reason for joining the organization was "to make a difference" (Bright et al., 2015).

Another way volunteers derive meaning is through learning. Opportunities to learn may take shape in numerous forms ranging from learning about oneself to learning about different people, places, skills, to learning for the enjoyment of learning (Yamashita et al., 2017). This can occur when volunteers wish to satisfy an intellectual curiosity (Gidron, 1978) or in the case of the Florida GALs, to better understand the legal or child welfare systems.

Additionally, some volunteers may derive meaning by participating in volunteer work that they think others may value. In essence, it is peer pressured altruism; people volunteer to fit in with their social group. This was not one of the goals documented in the Florida CASA organization's files.

Other volunteers derive meaning when they believe their service will benefit their career. A Junior League study exhibited that members volunteered in order to maintain their career relevant skills or to transition to a new career (Jenner, 1982). A similar phenomenon can be seen in the Florida example. In the particular Florida office, the second most commonly cited goal for becoming a GAL (second to making a difference) was to gain experience (13%)(Bright et al., 2016). Given that this particular Florida jurisdiction was near a university, it is likely that volunteers were younger than CASA volunteers nationally. Consequently, some of the

volunteers may have participated in order to enhance their resumes. However, exact data was not provided in order to validate this hypothesis.

Finally, some volunteer out of guilt, as a method of coping with their inner struggles (Frisch and Gerard, 1981), or to build their self-esteem through personal development and enhancing their ego (Clary et al., 1998).

FLEXIBILITY

Particularly among older volunteers, CASA's core volunteer group, scholars have found that volunteers place high value on role flexibility (Hong and Morrow-Howell et al. 2013; McBride et al. 2012; Tang et al., 2009). These studies show that level of flexibility, or freedom to adjust one's volunteer schedule and activities, also appealed to volunteers of every ethnic background. This is a particularly important takeaway as CASA has launched targeted volunteer recruitment efforts for racial and ethnic diversity in order to better represent all of the children that the organization serves.

SUPPORT FROM STAFF

Representing an organization as a volunteer can be intimidating for many volunteers, especially for CASA volunteers starting a new case. A 2013 study by Young and Janke discovered that when starting in a new role, the greatest concern for volunteers fifty and older is their ability to carry out activities (Young and Janke, 2013). While these findings were restricted to the primary volunteer age group, mature adults, the value of volunteer support is well documented (Kupersmidt & Rhodes, 2014; DuBois et al., 2013; Boezeman and Ellemers. 2008; Tang et al., 2009). Grossman and Furano put the need for support into context by stating that, "When professional staff spend more time interacting with volunteers, the volunteers have better 'attendance' and do a better job than do volunteers without supervision" (Grossman and Furano, 1999). They noted that when volunteers begin their assignments, the support and instruction is especially valuable and that "access to either professional staff or other experienced volunteers can help volunteers get through the rough spots that might otherwise lead to frustration and departure" (Grossman and Furano, 1999). This, however, is contrary to

DuBois and Neville's finding that increased contact between mentors and Big Brothers and Big Sister staff resulted in lower ratings of emotional closeness with youth (DuBois and Neville, 1997). One possibility is that the increase in staff involvement was a result of underperforming mentors. However, the study did not explore this possibility since data was mentor provided via survey responses. In the future, CASA could conduct their own ongoing survey in order to make sense of these contradictory claims and determine the right amount of volunteer coordinator involvement in order to increase volunteer retention at CASA.

RETENTION SUMMARY

There are numerous recommendations for general volunteer retention strategies. By emphasizing the meaningfulness of the volunteers' work, creating a flexible environment, and ensuring the staff are supportive, volunteers feel valued and are more inclined to stay. These principles can be applied to CASA not only to improve morale among current volunteers, but also to retain volunteers who relocate. The purpose of this project is to identify and offer options that are easy to implement while increasing volunteer retention, specifically for volunteers who move to a new state. Examples will be offered that reflect other CASA stakeholders' relocation policies, namely, how a variety of organizations train and retrain volunteers. By extracting relevant takeaways and learnings, new policy options can be explored, giving CASA the opportunity to retain more high-quality volunteers.

APPENDIX C: NATIONAL CASA ASSOCIATION STANDARDS AND QUALITY ASSURANCE SYSTEM FOR LOCAL CASA/GAL MEMBER PROGRAMS

Executive Summary

The National CASA Association was established to promote, assist and support the development and growth of quality Court Appointed Special Advocate (CASA) and volunteer Guardian ad Litem (GAL) programs. We believe that a commitment to quality is a commitment to the children served. The primary purpose of the National CASA quality assurance (QA) system is to support our mission of quality volunteer advocacy to help ensure that each child will thrive in a safe, permanent home. The QA system assesses member program operations and management based on the *Standards for Local CASA/GAL Member Programs*. The National CASA standards and QA system ensure that member programs share a common mission and

are consistent nationwide in upholding core standards.

As a judge who appoints CASA volunteers to advocate for children, there are certain facets of the standards and QA system with which you should be familiar:

Standards: *Standards for Local CASA/GAL Member Programs* were initially approved by the National CASA board of directors in March 1997 and revised in September 2002 and again in April 2006. The document contains standards and requirements for CASA member programs. A member program is required to meet National CASA standards and requirements as well as those of the state CASA program, if a state CASA organization exists and has standards or requirements in addition to those of the National CASA Association.

The 12 program standards encompass the following areas of program management:

- Mission and Purpose
- Governance
- Program Development and Implementation
- National Affiliation
- State Affiliation
- Human Resources Management
- Volunteer Management
- Financial, Facility and Risk Management
- Public Relations
- Planning and Evaluation
- Record-Keeping
- Inclusiveness and Diversity

Of particular import to judges involved with CASA/GAL programs are the following:

- **CASA Mission:** The purpose of a CASA member program is to provide court appointed volunteer advocacy to abused and neglected children. The program's goal is a safe, permanent and nurturing home for every child it serves.

The child population is clearly defined as abused/neglected children.

The program provides trained and qualified community volunteers to advocate for the best interests of children who come before the court as a result of abuse or neglect.

The program ensures that volunteers have regular and sufficient in-person contact with the child to enable them to have in-depth knowledge of the case and make fact-based recommendations to the court. The CASA volunteer should meet in person with the child once every 30 days at a minimum unless an exception has been granted by the program.

The CASA program has been granted the legal authority to operate through state or local statute, executive or judicial order or court rules.

The nonprofit or publicly administered CASA program must have a written agreement, which must be renewed every four years, with the juvenile or family court it serves that defines the working relationship between the program and the court.

- **Governance:** The CASA/GAL member program must have a governing body responsible for overseeing the program's compliance with all applicable laws and regulations, adoption of policies, definition of services, guidance of program development and ensuring the program's accountability to the courts and community. The program must have access to legal counsel for advice in the governing of its operation, procure sufficient financial resources and manage them prudently. High standards of ethical conduct are required in the operation of a CASA member program as are clear lines of accountability and authority.
- **Program Development and Implementation:** The CASA member program engages in a comprehensive planning and implementation process that guides development. Included in the planning process are gaining the support of the court and other community leaders, creating a steering or planning committee, completing a needs assessment and developing a comprehensive plan that includes specific program development activities.
- **Affiliation With the National CASA Association and State CASA Organization:** A CASA member program is a member of the National CASA Association and meets its standards, requirements and policies. In addition, a CASA program is a member of or affiliated with the state CASA association, if one exists, and communicates, collaborates and shares information with its fellow programs in the state.
- **Staff/Volunteer Training, Supervision and Management:** The CASA member program follows written policies for the recruitment, selection, diversity, training,

retention and supervision of its staff and volunteers. Requirements for volunteers include:

A volunteer must be 21 years of age and must have passed all screening requirements including a written application, personal interview, references and checks of criminal records, child protective services records and sex offender registries.

Before being assigned to advocate on behalf of a child, the CASA volunteer must complete at least 30 hours of pre-service training using the National CASA Volunteer Training Curriculum or its equivalent, and the volunteer must observe court proceedings if allowable. Each year thereafter, the volunteer must complete 12 hours of in-service training.

The CASA program must provide close supervision of its volunteers. Each full-time staff member can supervise no more than 30 volunteers or 45 cases to ensure high-quality advocacy for children.

Each CASA volunteer receives a written job description from the local program with responsibilities outlined. CASA volunteers should not be assigned more than two cases at a time unless an exception has been granted by the program.

A CASA member program must have a clear conflict of interest policy and guard each child's confidentiality in the handling of the case.

In those cases in which a member program makes the decision to allow volunteers to provide transportation to children, there must be strict policies in place governing same as well as a motor vehicles division records check, a safe driving record, appropriate insurance, staff oversight and guardian consent.

The CASA volunteer does not engage in the following activities: taking a child home; giving legal advice or therapeutic counseling; making placement arrangements for the child; or giving money or expensive gifts to the child or family.

- **Financial, Facility and Risk Management:** The CASA/GAL member program must manage its operations in accordance with generally accepted financial and risk management practices and applicable federal, state and local requirements.
- **Public Relations:** The CASA member program must communicate with its community and other service providers about the program and the needs of the children it serves as well as cooperating with other agencies to plan for needed programs or services for children.
- **Planning, Evaluation and Record-Keeping:** The CASA program must maintain management information and data necessary to plan and evaluate its services. The program must also maintain complete, accurate and current case records and follow written policies for the acceptance and assignment of cases.
- **Inclusiveness and Diversity:** The CASA program must demonstrate that inclusiveness and diversity are essential components of quality advocacy for the children it serves. The program must adopt and implement an ongoing written plan to guide and measure progress in diversifying its governing body, staff and volunteers.

Monitoring: Compliance with standards will be assessed periodically by National CASA. In the first phase, the focus is on program self-assessment. A local team of individuals from the CASA program will complete the self-assessment and submit it for an independent review, scoring and a report of the program's compliance. The judge in the court the program serves will receive a copy of the letter indicating when the program is in compliance with standards. National CASA may add a second phase which will involve a system of program monitoring/onsite review.

APPENDIX D: UBE TRANSFER REQUIREMENTS

UBE jurisdiction	Date of first Uniform Bar Examination (UBE) administration	What is your time limit for accepting a UBE score (i.e., maximum age of the UBE score)?	What is the minimum passing UBE score?	Do you require completion of a jurisdiction-specific component [†] before admission?		Do you require passage of the MPRE? [‡]		Do you allow concurrent application for admission by transferred UBE score? ^{**}		What is the application fee for admission by transferred UBE score?
				Yes	No	Yes	No	Yes	No	
Alabama	July 2011	25 months	260	X		X			X	\$575††
Alaska	July 2014	5 years	280		X	X			X	\$800
Arizona	July 2012	5 years	273	X		X			X	\$675
Colorado	February 2012	3 years / 5 years	276		X	X			X	\$810
Connecticut	February 2017	3 years	266		X	X			X	\$750
District of Columbia	July 2016	5 years	266		X	X			X	\$418††
Idaho	February 2012	37 months	272		X	X			X	\$600 / \$800
Iowa	February 2016	2 years / 5 years	266		X	X			X	\$900
Kansas	February 2016	36 months	266		X	X		X		\$1,250
Maine	July 2017	3 years	276		X	X		X		\$900††
Maryland	TBD	TBD	TBD	X			X		TBD	TBD
Massachusetts	July 2018	36 months	270	X		X		X		\$815
Minnesota	February 2014	36 months	260		X	X			X	\$950
Missouri	February 2011	24 months	260	X		X			X	\$1,240
Montana	July 2013	3 years	266	X		X		X		\$155†† / \$410††
Nebraska	February 2013	3 years	270		X	X		X		\$925
New Hampshire	February 2014	3 years / 5 years	270		X	X		X		\$725
New Jersey	February 2017	36 months	266		X	X			X	\$675
New Mexico	February 2016	36 months	260	X		X		X		\$500 / \$1,000
New York	July 2016	3 years	266	X		X		X		\$250 / \$750
North Carolina	February 2019	3 years	270	X		X			X	\$1,275 / \$1,500
North Dakota	February 2011	2 years	260		X	X			X	\$400††
Oregon	July 2017	36 months	274		X	X			X	\$625 / \$1,050
South Carolina	February 2017	3 years	266	X		X			X	\$1,000 / \$1,750
Utah	February 2013	24 months / 5 years	270		X	X		X		\$550 / \$850
Vermont	July 2016	3 years / 5 years	270		X	X			X	\$525
Washington	July 2013	40 months	270	X		X			X	\$585 / \$620††
West Virginia	July 2017	3 years	270		X	X			X	\$750††
Wyoming	July 2013	3 years	270		X	X			X	\$600††
Virgin Islands	July 2017	3 years	266	X		X		X		\$1,100††

^{*}Jurisdictions may accept transferred UBE scores prior to their date of first UBE administration. See Chart 6, pages 21–22, for which jurisdictions currently accept UBE scores from other jurisdictions.

[†]A jurisdiction-specific component is a separate test, course, or some combination of the two that is administered by a UBE jurisdiction to assess candidate knowledge of jurisdiction-specific law. The component can be offered live or online. See Chart 5, page 18, for possible other pre-admission requirements.

[‡] See supplemental remarks for time parameters governing acceptance of MPRE scores.

^{**} Concurrent application for admission by transferred UBE score means that an applicant is applying to take the UBE in one jurisdiction and applying for admission by transferred UBE score in another jurisdiction before the UBE score has been earned.

^{††} Plus NCBE report fee.

Source: National Conference of Bar Examiners, 2018 Bar Admissions Guide

APPENDIX E: ADMISSION BY MOTION STATE REQUIREMENTS

Note: As used in this chart, "on motion" denotes admission without any additional testing except, where required, the MPRE.

Jurisdiction	Do your rules provide for admission on motion?		What is the number of years of practice required for admission on motion?	Your definition of practice for purposes of admission on motion includes:					Must an applicant for admission on motion be a graduate of an ABA-approved law school?		Admission on motion fee
	Yes	No		Law teaching	Gov't agency	Military	In-house corporate	Judicial court of record	Yes	No	
Alabama	X		5 of past 6	X	X	X	X	X	X		\$875*
Alaska	X		5 of past 7	X	X	X	X	X	X		\$1,500
Arizona	X		3 of past 5	X	X	X	X	X	X		\$1,800
Arkansas	X		5 of past 7	X	X	X	X	X	X		\$1,500
California		X									
Colorado	X		3 of past 5	X	X	X	X	X	X		\$1,800
Connecticut	X		5 of past 10	X	X	X	X	X		X	\$1,800
Delaware		X									
District of Columbia	X		None							X	\$418*
Florida		X									
Georgia	X		5 of past 7	X	X	X	X	X	X		\$600†
Hawaii		X‡		X		X			X		\$500*
Idaho	X		Varies	X	X	X	X	X	X		\$1,000
Illinois	X		3 of past 5	X	X	X	X	X	X		\$1,250
Indiana	X		5 of past 7	X	X	X	X	X		X	\$875
Iowa	X		5 of past 7	X	X	X	X	X		X	\$900*
Kansas	X		5 of past 7	X	X	X	X	X	X		\$1,250
Kentucky	X		5 of past 7	X	X	X	X	X	X		\$1,500
Louisiana		X									
Maine	X		3 of past 5	X	X	X	X	X	X		\$900*
Maryland		X									
Massachusetts	X		5 of past 7	X	X	X	X	X		X	\$1,015*
Michigan	X		3 of past 5	X	X	X	X	X	X		\$800*
Minnesota	X		5 of past 7	X	X	X	X	X	X		\$950
Mississippi	X		5	X	X	X	X	X	X		\$1,500*
Missouri	X		5 of past 10	X	X	X	X	X	X		\$1,240
Montana	X		5 of past 7	X	X	X	X	X	X		\$2,500†
Nebraska	X		3 of past 5	X	X	X	X		X		\$925
Nevada		X									
New Hampshire	X		5 of past 7 / past 3	X	X	X	X	X		X	\$1,225
New Jersey	X		5 of past 7	X	X	X	X	X	X		\$1,500
New Mexico	X		5 of past 7	X	X	X	X	X	X		\$2,500**
New York	X		5 of past 7	X	X	X	X	X	X		\$400
North Carolina	X		4 of past 6	X	X	X	X	X		X	\$2,000
North Dakota	X		4 of past 5	X	X	X	X	X	X		\$400*
Ohio	X		5 of past 10	X	X	X	X	X	X		\$1,500*
Oklahoma	X		5 of past 7	X	X	X	X	X	X		\$2,000*
Oregon	X		5 of past 7	X	X	X	X	X		X	\$1,050†
Pennsylvania	X		5 of past 7	X	X	X	X	X	X		\$1,325
Rhode Island		X									
South Carolina		X‡		X					X		\$400
South Dakota	X		Past 5		X	X	X	X	X		\$450†
Tennessee	X		5 of past 7	X	X	X	X	X	X		\$1,100*
Texas	X		5 of past 7	X	X	X	X	X	X		\$890
Utah	X		5 of past 7	X	X	X	X	X	X		\$850
Vermont	X		5 of past 10 / past 3		X	X	X			X	\$800*
Virginia	X		3 of past 5		X	X	X	X	X		\$2,500
Washington	X		3 of past 5	X	X	X	X	X		X	\$620*
West Virginia	X		5 of past 7	X	X	X		X		X	\$2,000*
Wisconsin	X		3 of past 5	X	X	X	X	X		X	\$850
Wyoming	X		5 of past 7	X	X		X	X	X		\$600*
Guam		X‡			X				X		\$500**
Northern Mariana Islands		X‡									
Palau		X‡			X					X	\$1,000 / \$200
Puerto Rico		X									
Virgin Islands	X		5 of past 7	X	X	X	X	X		X	\$100*†

*Plus NCBE report fee.
†Plus other fees (such as for separate character and fitness applications and/or investigations).
‡Although admission on motion is generally unavailable, it is permitted on a limited basis.
**Includes NCBE report fee.

Source: National Conference of Bar Examiners, 2018 Bar Admissions Guide

Jurisdiction	Is admission on motion based on reciprocity (that is, is it limited to candidates from some or all jurisdictions offering admission on motion)?		Is an attorney initially admitted by diploma privilege eligible for admission on motion?		Attorneys' Exams			
	Yes	No	Yes	No	Does your jurisdiction offer an Attorneys' Exam?		To qualify for the Attorneys' Exam, must an applicant be a graduate of an ABA-approved law school?	
	Yes	No	Yes	No	Yes	No	Yes	No
Alabama	X			X		X		
Alaska	X			X		X		
Arizona	X			X		X		
Arkansas	X		X			X		
California					X			X
Colorado	X		X			X		
Connecticut	X		X			X		
Delaware						X		
District of Columbia		X	X			X		
Florida						X		
Georgia	X			X	X		X	
Hawaii						X		
Idaho	X			X	X		X	
Illinois		X	X			X		
Indiana		X	X			X		
Iowa		X	X			X		
Kansas	X			X		X		
Kentucky	X		X			X		
Louisiana						X		
Maine		X	X			X		
Maryland					X			X
Massachusetts		X	X			X		
Michigan		X	X			X		
Minnesota		X	X			X		
Mississippi	X		X			X		
Missouri	X		X			X		
Montana		X		X		X		
Nebraska		X	X			X		
Nevada						X		
New Hampshire	X			X		X		
New Jersey	X			X		X		
New Mexico	X		X			X		
New York	X		X			X		
North Carolina	X		X			X		
North Dakota		X	X			X		
Ohio		X		X		X		
Oklahoma	X		X			X		
Oregon	X			X		X		
Pennsylvania	X		X			X		
Rhode Island					X			X
South Carolina						X		
South Dakota	X		X			X		
Tennessee		X	X			X		
Texas		X	X			X		
Utah	X			X		X		
Vermont		X	X			X		
Virginia	X		X			X		
Washington		X	X			X		
West Virginia	X		X			X		
Wisconsin		X	X			X		
Wyoming	X			X		X		
Guam					X		X	
Northern Mariana Islands					X		X	
Palau						X		
Puerto Rico						X		
Virgin Islands	X			X		X		

Source: National Conference of Bar Examiners, 2018 Bar Admissions Guide

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