

# MIC: GIVING CHILDREN THE VOICE



Documentation

Experience Studio - Fall 2023

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Pramika Kamana, Zoe Wetzel

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## Meet the Team

Our team of 7 includes 6 undergraduate students and 1 graduate student.



**Faye Ochi**



**Pramika Kamana**



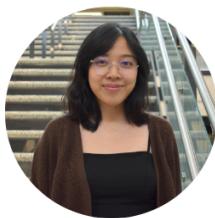
**Jackson Murray**



**Ellie Starzak**



**Macy Bosworth**



**Jasmine Bui**



**Zoe Wetzel**

## Meet Our Sponsor

**Landon Young** is the founder of MIC, while also working as an entrepreneur and an investor as his full-time job. Landon is a CASA (Court Appointed Special Advocate) volunteer advocating for children's needs in Lawrence County, Indiana. Experiencing the CASA work himself, his perspective as a sponsor and a volunteer has been incredibly helpful to the team.

# Project Overview

## About MIC and Our Project Scope

MIC is a start-up concept focused on **empowering CASAs** (Court Appointed Special Advocates). CASAs are a trained community of volunteers who advocate for abused and neglected children in the child welfare system. Indiana volunteers represent over 23,290 abused and neglected children cases in 2021. "***There are far too many cases than the number of existing volunteers to help with these cases, leaving children without a voice.***" - Landon Young, CASA advocate

Similarly, volunteers manage dozens of relationships with therapists, foster parents, child services, teachers, and many more with no dedicated communication channel speaking on highly sensitive information.

### Key Terms

**CASA:** Court Appointed Special Advocate

**CASA Volunteers:** can be addressed as CASA, CASA volunteer, or volunteer.

**DCS:** Department of Child Services.

**CPS:** Child Protective Services

These two terms are used interchangeably in different counties and departments.

### **Problem Statement:**

CASA volunteers with full-time jobs **need a system to effectively take, organize, review, upload meeting notes and information**, enabling them to provide the best recommendations and insights when writing court reports.

### **Users:**

CASA volunteers with full-time jobs are our main target.

Our team arrived at this user group through our codesign workshop activities. We saw the most value in improving the experience for volunteers at this intersection and we predominantly had access to people in this group. The largest number of CASA volunteers belong to the senior, retired group, which we were not able to reach.

## **Goals (Phases):**

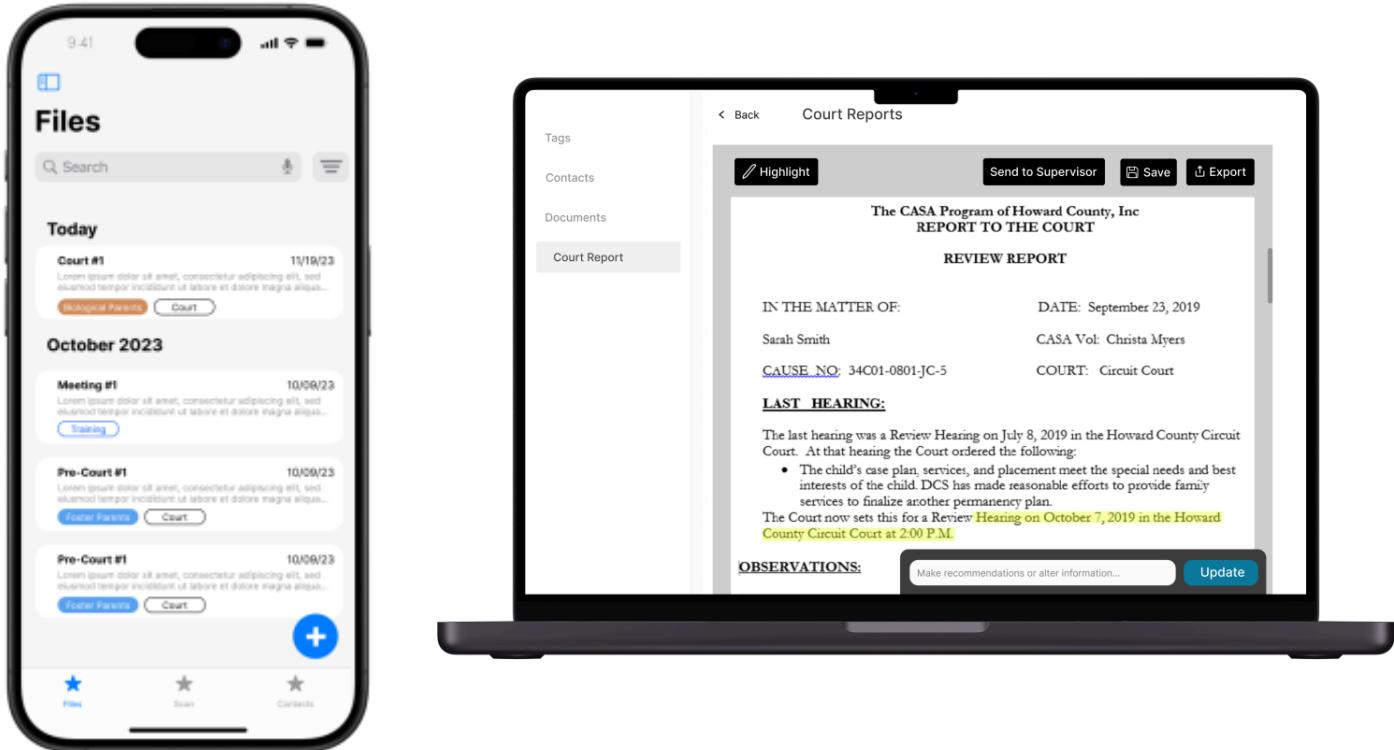
1. **Develop frameworks** communicating meaningful research findings and analysis about the existing process/problem space through visualizations such as journey maps, stakeholder maps, personas, etc.
2. Create **a vision document displaying 3 solutions** created by the team and/or CASA volunteers analyzing why solutions address pain points and empower volunteers.
3. Design a **low to mid-fidelity functionality-based prototype** that serves CASA volunteers' needs and is a solution to their problem. This deliverable is detailed further below.

## **Deliverables:**

1. A functionality-based prototype solution streamlining case documentation and court writing to prepare CASAs better for the responsibilities of representing children in court. The solution will be communicated through a persona and user walkthrough.
2. Two written documents: 'Design Process Documentation' and 'Transition Documentation'. The 'Design Process Documentation' includes our research findings, design ideas, and rationale behind all design work. The 'Transition Document' will link to all of our team's Miro Boards, Figma Prototypes, and Google Drive.

# Final Solution: Meet Mic's X-Factor

A **mobile and web ecosystem** for CASAs to upload and organize their notes and information to help them prepare for court.



Our work represents a comprehensive and innovative approach to empowering CASA volunteers with needed solutions at their fingertips. Developing these solutions, we hope to create opportunities to increase existing volunteer efficiency and make CASA responsibilities more digestible for full-time employees interested in becoming CASAs.

Next, our team will explain how we got here.

# Phase 1 - Developing Frameworks

**What are the most important things for our team to learn about CASAs and their tasks within the case timeline?**

## Goals:

- Generate data to drive insight creation and assist in the decision-making process.
  - Hear real stories from stakeholders to gain empathy and confirm the team is focusing on the right problem.
  - Create visualizations of the problem space to facilitate a shared team understanding of CASA experiences.
- 

## Approach & Activities

To gain an initial comprehensive understanding of the problem space, our team asked **5 research questions**. We conducted the activities below to answer the RQ.

1. Secondary Research
2. Interviews
3. Analyzing CASA Software: Optima and CASA Manager

## About Interviews:

We've completed a total of five interviews, encompassing insights from two CASA volunteers, one CASA Supervisor, one CASA Attorney, and one CPS worker. Through these interviews, we've gained a comprehensive and well-rounded understanding of CASA's tasks and communication systems, significantly enriching our knowledge base. View interview protocol and notes [here](#).

# Phase 1 Insights

By developing our knowledge of a CASA's tasks, responsibilities, and roles through background research and interviews, we were able to begin to answer 5 research questions that helped complete our framework and understanding.

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## Q1: What is the journey of representing a child as a CASA?

### Overview:

Appointed by judges, CASA volunteers advocate for children affected by abuse or neglect.

- General time: 6 months.
- Managed by: CASA case managers and judges.
- Purpose: Seek permanence for the child.

### Cases:

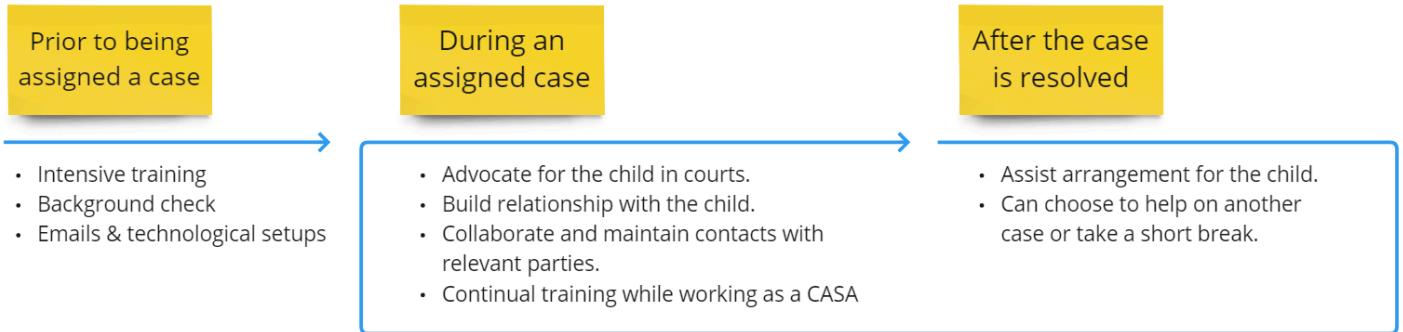
Volunteers tend to care for one case at a time, supporting either multiple siblings or a single child. It is possible, but not recommended, to advocate for more than one case, depending on the volunteer's workload.

### Role in Court:

CASA volunteers must ensure a thorough understanding of the situation, assess the child's needs, and advocate for their well-being. They voice the recommendations to judges to benefit the child's needs.

## **CASA's Journey Overview**

Note: CASA organizations are county-based with variations in the work styles that we only capture the key steps.



*Figure 1 - Simplified Journey Map displaying CASA responsibilities before, during, and after a case.*

More details regarding the volunteers' responsibilities are described [here](#).

## **Q2: What stakeholders are involved in the CASA ecosystem? How do CASAs communicate with these stakeholders and how often?**

### **Overview:**

- Cases range from 5 to 15 stakeholder involved.
- Each stakeholder has a different contact frequency and method.

### **Stakeholders in the CASA Ecosystem**

- These are defined as the individuals whom the CASA has to keep constant communication with throughout a child's case.

Primary Stakeholder	Child (the volunteer is advocating for)
Secondary Stakeholder	CASA Supervisor, Attorney, DCS Case Manager.
Tertiary Stakeholders	Biological Parents, Foster Parents, Service Providers, Doctors, Therapists, Teachers, and more.

### **About Communication**

Contact Frequency varies depending on the timeline of the case	<table border="1"><thead><tr><th>CONTACT</th><th>FREQUENCY</th></tr></thead><tbody><tr><td>1. CHILD</td><td>1x per month, with a minimum of seeing the child in the home every other month</td></tr><tr><td>2. DCS CASE MANAGER (FCM)</td><td>1x per month by phone/email/in person</td></tr><tr><td>3. CASA SUPERVISOR</td><td>1x per month by phone/email/in person</td></tr><tr><td>4. PARENTS (if applicable)</td><td>1x per month (in home CHINS) 1x per 2 months (out of home CHINS)</td></tr><tr><td>5. FOSTER PARENTS</td><td>1x per 2 months in person/email/phone</td></tr><tr><td>6. SERVICE PROVIDERS</td><td>1x per 2 months in person/email/phone</td></tr><tr><td>7. TEACHERS</td><td>1x per 3 months</td></tr><tr><td>8. CHILD (2 or more hours away)</td><td>1x per 60 days in person *You still need to have contact with the child 1x per month (virtual or phone) <small>mirp</small></td></tr></tbody></table>	CONTACT	FREQUENCY	1. CHILD	1x per month, with a minimum of seeing the child in the home every other month	2. DCS CASE MANAGER (FCM)	1x per month by phone/email/in person	3. CASA SUPERVISOR	1x per month by phone/email/in person	4. PARENTS (if applicable)	1x per month (in home CHINS) 1x per 2 months (out of home CHINS)	5. FOSTER PARENTS	1x per 2 months in person/email/phone	6. SERVICE PROVIDERS	1x per 2 months in person/email/phone	7. TEACHERS	1x per 3 months	8. CHILD (2 or more hours away)	1x per 60 days in person *You still need to have contact with the child 1x per month (virtual or phone) <small>mirp</small>
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*Figure 1.1 - CASA's Contacts and Communication Frequency (From Sponsor).*

Mediums	Phone call, in-person meeting, facetime/zoom, text, or email.
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## Q3: What are the CASA's main tasks and responsibilities?

### Overview

Each CASA volunteer's case is a unique circumstance, but there are general tasks and responsibilities that all CASA's face. The main responsibility of a CASA volunteer is to advocate for the child's best interest while maintaining confidentiality. To achieve this goal, CASA volunteers must understand the situation, support the child's needs, and represent the child.

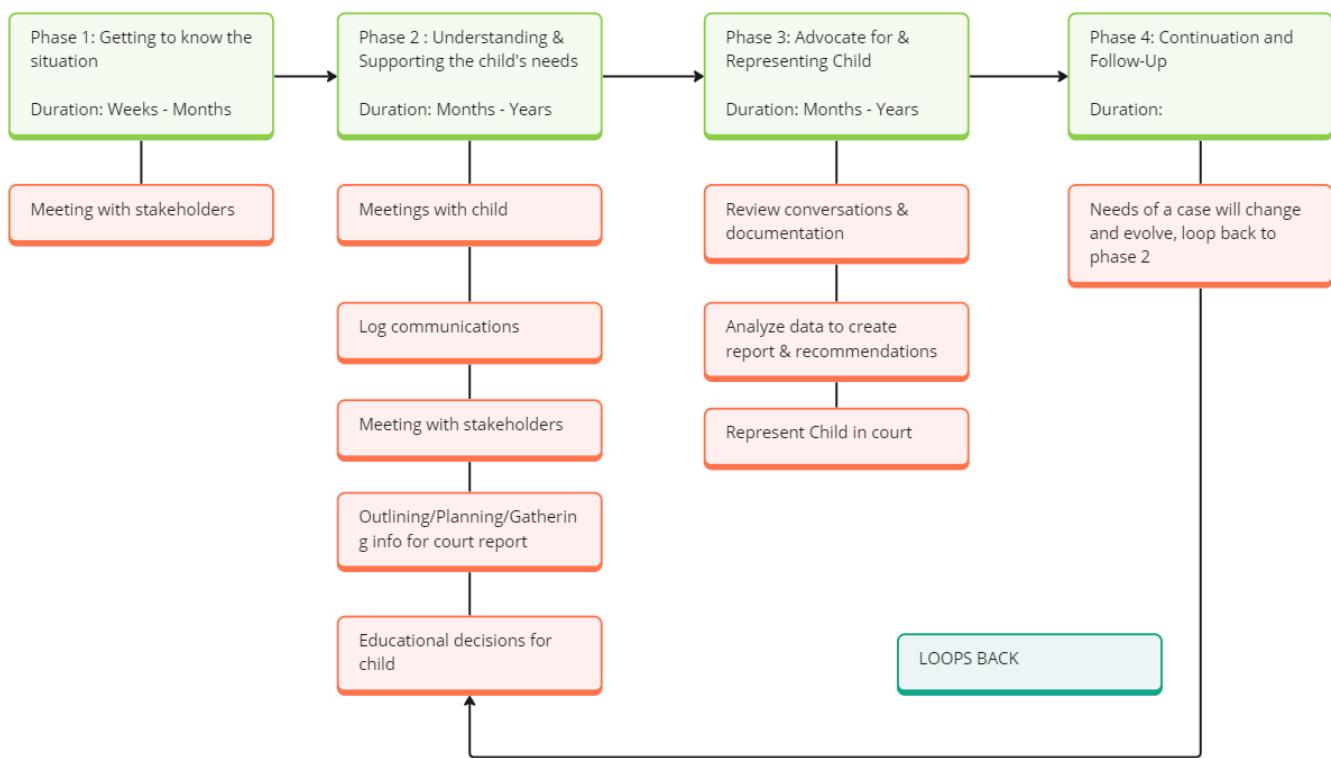


Figure 2: A CASA volunteer role in a child welfare system throughout a CPS Case

### How a CASA Gets to Know and Understand the Situation

- Training:** CASA volunteers undergo intensive training and continuous education to stay knowledgeable about relevant information.
- Case Review:** To have a thorough understanding of the child's case, CASA must review previous court documents, social services records, school reports, and other relevant documents.

## **How a CASA Recognizes and Supports a Child's Needs**

1. **Visitations:** These visitations build a relationship and safe environment for the child. Each volunteer is required to meet the child in person at least once a month.
2. **Educational Support:** CASAs must determine if a child is receiving adequate education which includes appropriate placement, special education services, etc.
3. **Communication with Relevant Stakeholders:** The support system of a child which may include biological parents, foster families, medical professionals, etc. should be kept in contact throughout the case.
4. **Advocacy:** The primary role of a CASA is to give the child a voice. CASAs must utilize the information they have gathered to advocate for the child's best interest.
5. **Documentation:** Keeping accurate and detailed records of conversations, observations, and activities relating to a case is a crucial task.

## **How a CASA Advocates and Represents a Child**

1. **Court Report:** CASAs write a report including observations, findings, and recommendations for the child's situation.
2. **Attend Court Hearings:** CASAs present their observations and findings to the court. They can discuss the child's well-being, safety, and permanent plan.

## **Q4: What are a CASA volunteer's primary needs? How does the current system provide for these needs?**

CASA volunteers, despite unique case circumstances, work to advocate for the child's best interest while maintaining confidentiality. In addition to addressing the child's needs, this section explores how **CASAs have informational needs** (case data) and **emotional needs** (breaks between cases to recuperate) to effectively fulfill their responsibilities.

### **Informational Needs**

To be an effective advocate, a CASA needs proper background information to understand the case. Currently, CASAs look for this information in a variety of areas.

1. **Optima:** the current software platform for CASA volunteers for managing and documenting case information. Optima is an attempt to streamline work within the child welfare system.
2. **Initial Meeting:** CASA volunteers use the initial meeting with the child and parents to gain a basic understanding of the situation and clues into the family's living situation and potential issues.
3. **Meetings with the child (and other stakeholders):** Throughout a case, CASAs engage in meetings with different stakeholders (via in-person meetings, email/text, phone calls, etc.) to gather crucial information to better comprehend the child's needs.
4. **Activities/Bonding with the Child:** Building a strong connection with the child is a vital part of the CASA work as it transcends gathering case information and instead involves spending quality time in a safe, low-stress environment to understand the child's needs.

Based on this, a primary need for CASAs is **spending time with the child** because this allows them to better understand the child's needs and how to advocate for them.

### **Emotional Needs**

CASAs face emotionally challenging situations, such as domestic abuse cases, **requiring breaks for recuperation**, often lasting a month or longer. Our interviews revealed that emotional needs may limit CASA's abilities to take on multiple cases and addressing this lack of emotional support is an area of improvement to be addressed by future designs.

# Phase 2 - Creating a Vision Document

Which critical insights can we use to inform design and empower CASAs?

## Goals

- Identify and prioritize CASA needs to understand the best areas the team can make an impact.
  - Generate low-fidelity mockups for solutions that address pain points empower volunteers and allow the opportunity for solution iteration.
  - Communicate solutions in a way that is easily understandable by the sponsor and team.
- 

# Codesign Workshop

## Goals

1. Increase understanding of what tasks CASAs find the **most valuable** and **time-consuming**
2. Identify the **top 3 needs** that are the most important to improving CASA's experience.

## Approach

We conducted the codesign on miro and had a facilitator guide our participants through 2 activities to help them understand the self-assigned values of the tasks these volunteers are doing. Read more about our codesign process [here](#).

Activities: 1) Value vs. Time Matrix 2) Identify Top 3 Needs and Ideate

Participants: 2 current CASA volunteers, both with full-time jobs

## Activities

### 1. Value vs. Time Matrix

**Process:** We gave our participants a list of CASA tasks and responsibilities identified in phase 1 and had them categorize each task based on the **time it takes** and the **value it offers** the CASA and child. We then had them reflect on their experience with these tasks and generate ideas as to how they could be improved.



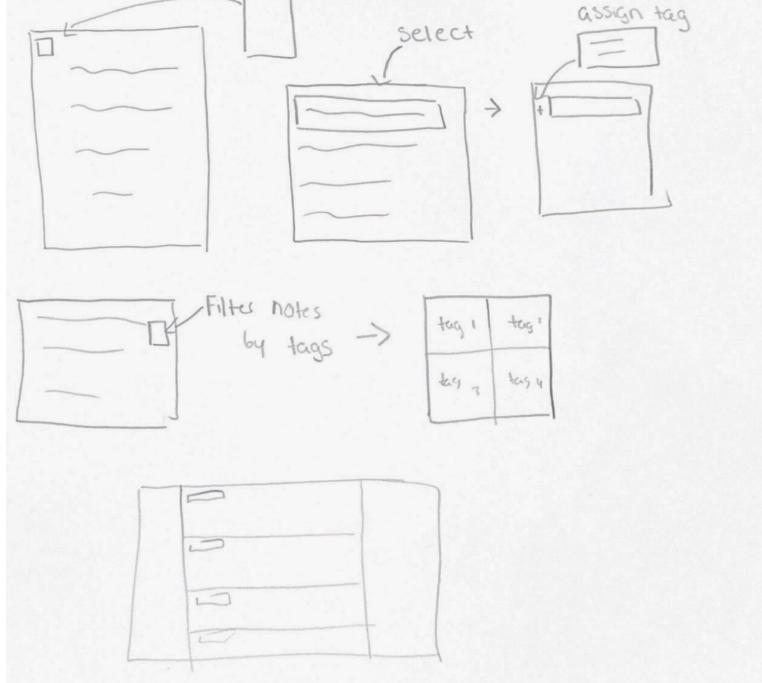
Figure 3 - Simplified version of workshop matrix displaying the spectrum of task importance between tasks.

**Takeaway:** The participants identified **writing court reports as the most important and time consuming task** in the CASA experience. On the contrary, we found that “transferring notes to optima” and “taking notes outside of optima” were time-consuming tasks that offered little benefit to their experience as a CASA.

### 2. Identify the Top 3 Needs and Ideate

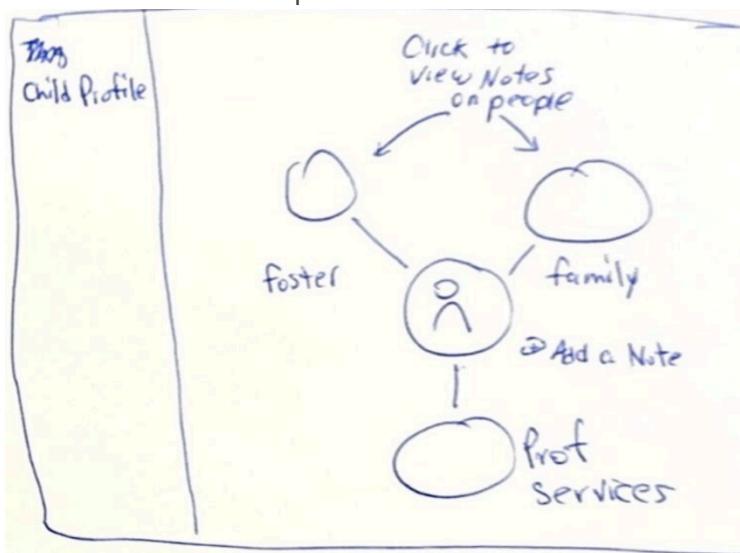
**Process:** We gave the participants a list of the 9 most relevant CASA needs that we identified through phase 1. After narrowing the list down to their personal top 3 needs, we had them generate ideas and possible solutions.

## Takeaways:

Top 3 Needs Identified by Participants	Supporting Information from Workshop by Participants (Sketches/Insights)
<p>1. The need for a system to effectively take and store notes.</p>	<ul style="list-style-type: none"> <li>- Scanning notes and uploading right to optima</li> <li>- Prompts for taking notes during meetings</li> </ul> <p><i>Optima - photo note upload</i></p> <p><i>- header sections -</i></p> <p><i>- suggested prompts related to meeting type</i></p>
<p>2. The need for an accessible place to easily review meeting notes, and relevant documents, and organize the report provides the best recommendations.</p>	<ul style="list-style-type: none"> <li>- Tagging notes to categorize and organize</li> <li>- Using tags to help organize court reports and find information</li> </ul>  <p><i>assets</i></p> <p><i>report template related tags</i></p>

3. The need to have the ability to create and store a list of all stakeholders involved in the case and maintain up-to-personal information.

- Organize and visualize contact information for all involved in a particular case



## Vision Document

The vision document consists of concise descriptions of CASA's top needs and a set of ideas generated by the team to address and solve these identified needs effectively.

## Our Process

Inspired by many ideas from the workshops, the team split into groups to focus on the three main needs of CASA volunteers identified through our codesign. Each group sketched ideas for their specific need. We discussed our designs with each other and iterated on these sketches 3 times to better visualize our design concepts before transforming them to mid-fidelity screens. We then created our vision document through a visually annotated document to send to our sponsor to present and narrow down to our potential final solutions. View our vision document [here](#).

## Top 3 Identified Needs:

Through 2 Co-Design Workshops, CASA volunteers voted on:

1. The need for a system to effectively take and store notes.
2. An accessible place to easily review meeting notes and relevant documents before writing court reports in order to provide the best recommendations.
3. The need to have the ability to create and store a list of all stakeholders involved in the case and maintain up-to-personal information.

## Our Sketches

As explained, we developed multiple sketches to address the 3 needs, which can be found in Appendix ([here](#)). The table below provides a summary of how our ideas may address the needs. After being advised, we designed more representative mockups to display the functionality of MIC's system, which is shown in Phase 3.

## Vision Document Overview

Identified Need	Potential Features of Solution	How do these features address the need?
<p>Need 1 - CASAs need a system to <b>effectively take and store meeting notes.</b></p>	<p>1. Mobile application for CASAs to upload meeting notes and automatically store them in the main management systems used by their county</p>	<ul style="list-style-type: none"> <li>- Provides an efficient way to quickly upload physical meeting notes after stakeholder meetings</li> <li>- Ensures notes are securely saved, reducing the risk of lost information or misplacement</li> </ul>
<p>Need 2 - A drive/system to <b>easily review meeting notes and relevant documents</b> before writing court reports in order to provide the best recommendations.</p>	<p>1. Organize, store, tag, and export needed notes and documents</p> <p>2. Tag documents/notes thematically sort through all relevant case data</p> <p>3. Exporting desired data as PDFs or sending them to case management system (ex. optima)</p> <p>4. AI focused on searching for and summarizing content using a document library to help identify key information and summarize quickly</p>	<ul style="list-style-type: none"> <li>- Make the process CASAs use to locate relevant information quickly more efficient</li> <li>- Seamless transfer of data into case management systems (ex. optima)</li> <li>- AI can enhance productivity by quickly identifying key information in documents</li> </ul>
<p>Need 3 - CASAs need the ability to <b>create and store a list of stakeholders involved</b> in the case and maintain up-to-date information.</p>	<p>1. Mobile application to create, view, and filter through all stakeholder's contact information</p> <p>2. Global search and filters to easily sort through contacts</p> <p>3. Create contacts and add specific information (relationship, case number, tags)</p>	<ul style="list-style-type: none"> <li>- An easily accessible place to stay updated with involved stakeholders</li> </ul>

Rather than only addressing one need, we shifted our solution's focus to designing an ecosystem of features that cater to all the identified needs. Each of the features work together to enable CASAs with a powerful toolkit to complete their tasks and provide the best help to a child's case.

# Phase 3 - Functional Prototype:

**How might we create a system to effectively take, organize, review, upload meeting notes and information, enabling CASAs to provide the best recommendations and insights when writing court reports?**

## Goals:

Build a comprehensive functional prototype based on the prioritized needs of CASA, ensuring it incorporates key features and addresses identified pain points.

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## Competitive Analysis

**Goal:** Research what other softwares are out there that could have similar features to what CASAs need, and find existing features for each need to guide the development phase.

## Approach

For each identified need in the vision document, we researched existing solutions capable of fulfilling those needs. We **aimed to draw inspiration and insights** from these existing solutions, which would help guide us through developing mockups of our solution.

We split up into 3 teams on miro, and we found examples of existing solutions that meet certain criteria:

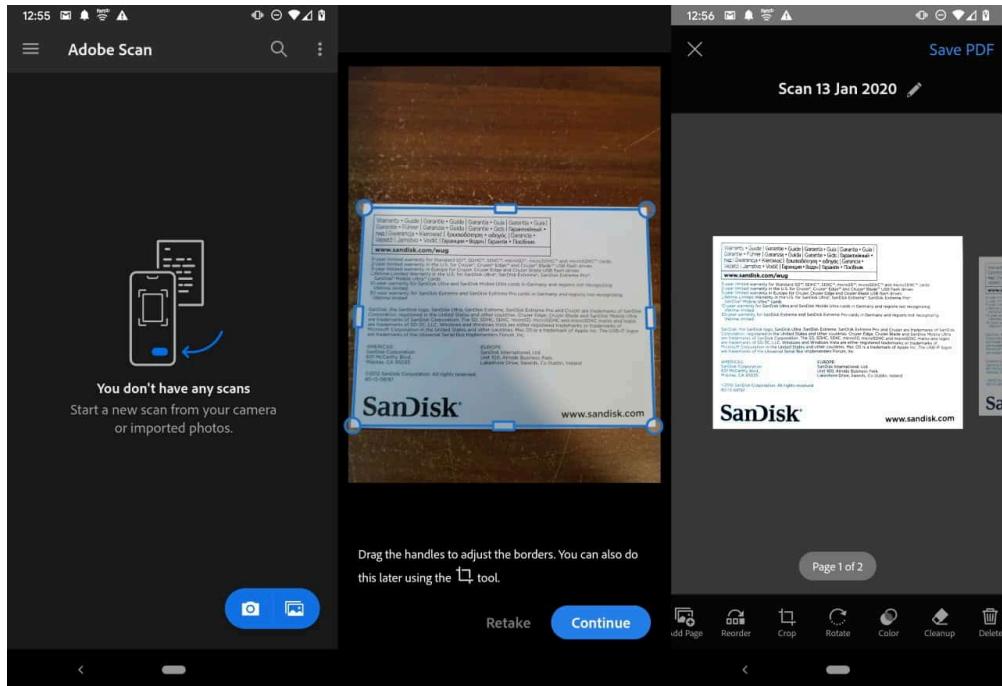
First, can be applied as a solution to our identified needs, and second can be integrated into design/feasibility.

## Findings:



Adobe Scan

Adobe Scan provides a strong experience for scanning documents on the phone, which would be useful for Need 1 allowing volunteers to scan and store notes easily.



Dovetail

Dovetail makes tagging words and organizing information easy, which could help for Need 2 as so volunteers don't have to worry about overwhelming documents and notes.

In testing / Usability test with Anna

B I ⌂ ... + ⚡ Automation

click us off, it would be great. If you could talk a bit about involves and what some of your responsibilities

I'm an UX designer. So generally my role involves visualizing how things will work. So usually start with some sort of brief, or have really specific requirements or use the stories. Sometimes we know we want to improve this feature, or we think there's opportunity in this area. And then sometimes I'll have to do some research.

Recent tags

- Daily tasks 23 (selected)
- Failures 5
- Wins 15

Boards

- Tags
- Feature requests



Monday.com

Organizing contact information and roles is smooth across people and projects with Monday.com, which would be useful for need 3 with CASA's long contact list.

New Project ▾ Q Search ⌂ Person Filter ▾ Sort Hide ...

▼ This month

	Project	Owner	Due Date	Status	Priority	Notes
<input type="checkbox"/>	Project 1	UK	Oct 29	Working on it	Low	Action item
<input type="checkbox"/>	Project 2			Done	High	Meeting
<input type="checkbox"/>	Project 3			Stuck	Medium	Other
+ Add project						

Search names, roles or teams

Suggested people

Invite a new member by email

▼ Next month

Assigning roles

The image shows a digital workspace interface with two main sections. On the left, there is a list of team members with their profiles and roles. On the right, there is a detailed profile view for a specific member named Ruben Vetrovs.

**Team Members List:**

- 1. Ruben Vetrovs - Software Developer, Long term
- 2. Justin Westervelt - Team Leader, Lead
- 3. Gustavo Lipshutz - Project Manager, Long term
- 4. Jaxson Vaccaro - Ethical Hacker, Partner
- 5. Terry Dokidis - Software Tester, New
- 6. Kadin Aminoff - Software Development..., Long term
- 7. Cooper Vaccaro - UI/UX Designer, Intern
- 8. Lincoln Torff - Scrum Master, Long term

**Ruben Vetrovs Profile View:**

**Profile Information:**

- ID: RP9GU3
- Email: rubenvetrovs@mail.com
- Phone: +33 1 23 45 6789
- Birth: Des, 12 1996
- Address: Bukit Batok West Ave 9 Singapore

**Activity Tab:**

- Performance
- Activity** (selected)
- Team
- Schedule
- File
- Favorite

**Recent Activity:**

- May, 17 2023
- Call by Wilson Septimus
- Duration 23:12
- Note
- 09:20 AM

**Miro Logo:**

Profile overview with tags being utilized

# Final Solution Walkthrough



## Meet Amanda, A CASA Volunteer

- A 38-year-old full-time marketer in Lafayette,
- Interested in adopting children in the future.
- Work as a CASA volunteer in her free time.

## Amanda's tasks as a CASA

- Meets with different stakeholders.
- Bonds and understands the child's needs.
- Advocates for the child's best interest.

## Habits:

- Has versatile note taking methods.
- Doesn't check her files & notes often until needed.

Amanda is currently working on James' case, a 12-year-old neglected child in the welfare system. Amanda and James meet at least 1 a month in person, so she can identify what's best for James.

## Mobile Experience

After meeting with James, Amanda wants to store her notes in the CASA system before she forgets. She uses the MIC app on her phone to scan and upload the physical notes.

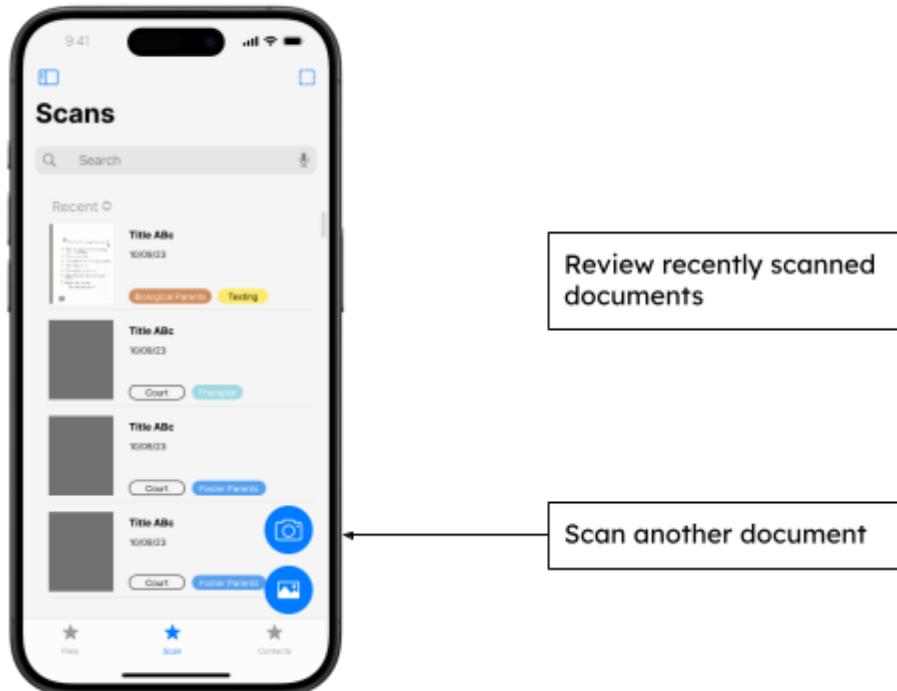
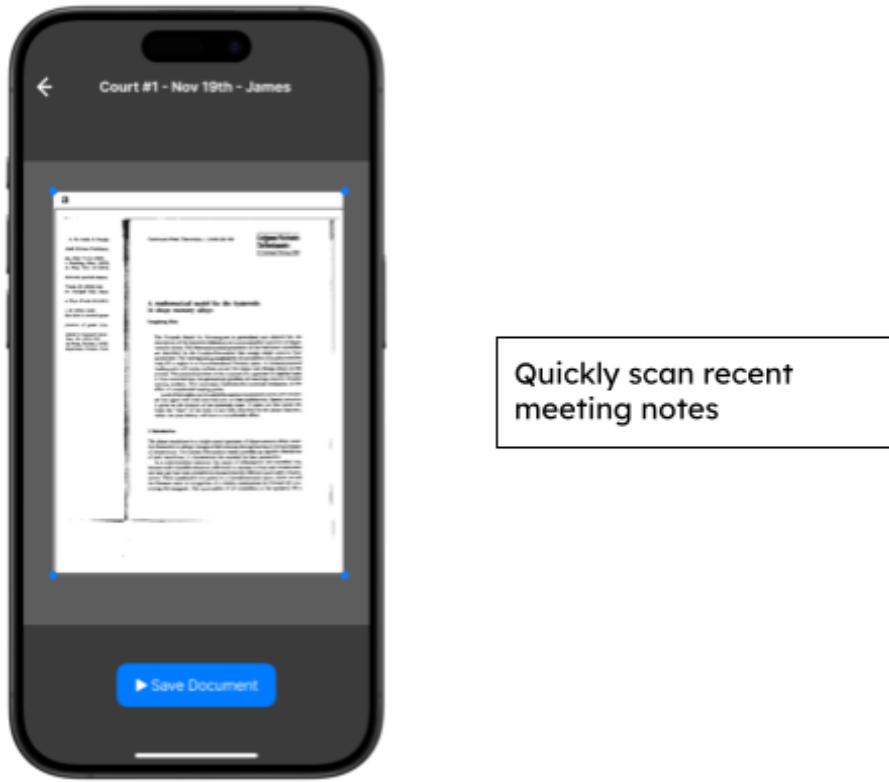


Figure 4: Mic's Scanning Page for Uploading and Viewing Scanned Documents



*Figure 5: Feature for Scanning Documents*

After scanning, Amanda assigns tags, helping her stay organized among numerous CASA documents and meeting notes. These tags are suggested based on the scan's content using AI technology, or she can create her new tags. Amanda organizes this scan into specific folders in her file system so she can locate them later. Amanda clicks "Save" to ensure the new documents are imported in the MIC app and the CASA management system.

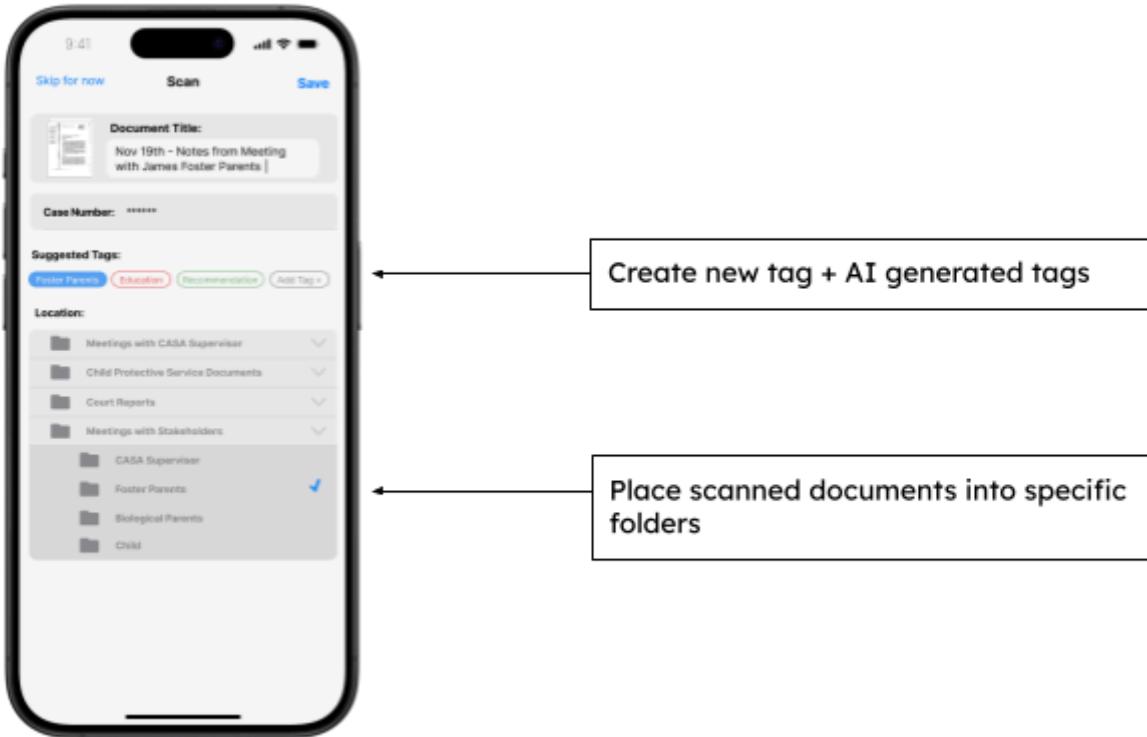


Figure 6: Feature to Assign Tags and Placing the Document in Specific Folders

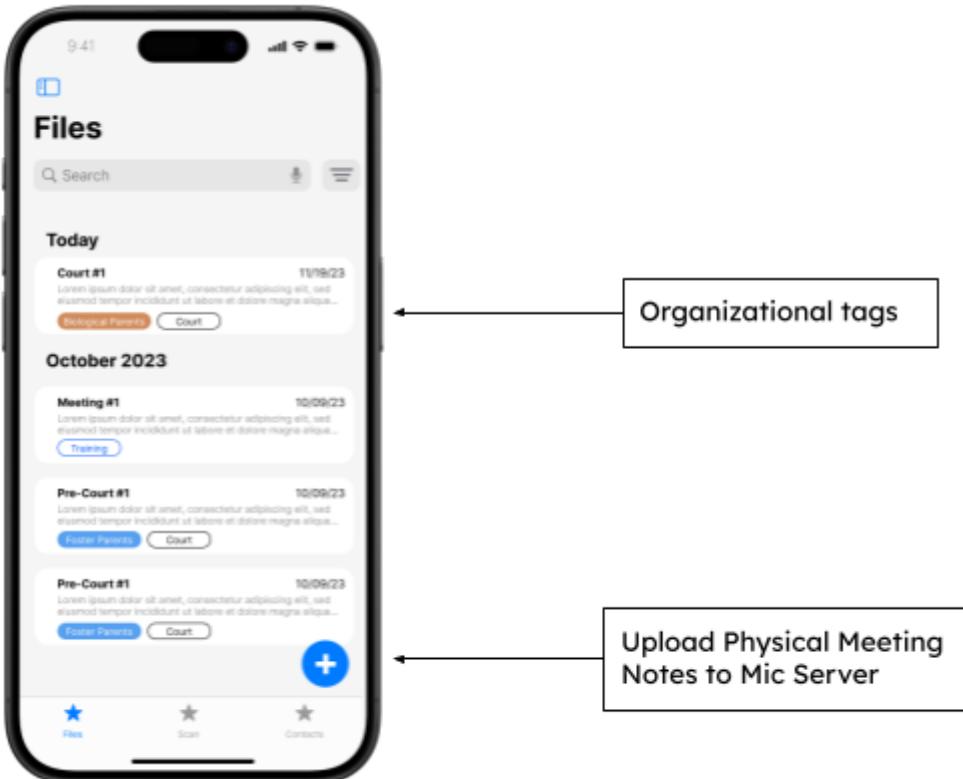


Figure 7: Mic's Drive for all stored files within the system

## Amanda also received a new number for James' foster parents:

To change the number on Jame's foster parents, Amanda edits it on the “Contacts” tab. Here she can assign roles to foster parents, adding case number, changing phone numbers & emails. She can add any notes if needed. This allows Amanda to update or add any contacts to the list.

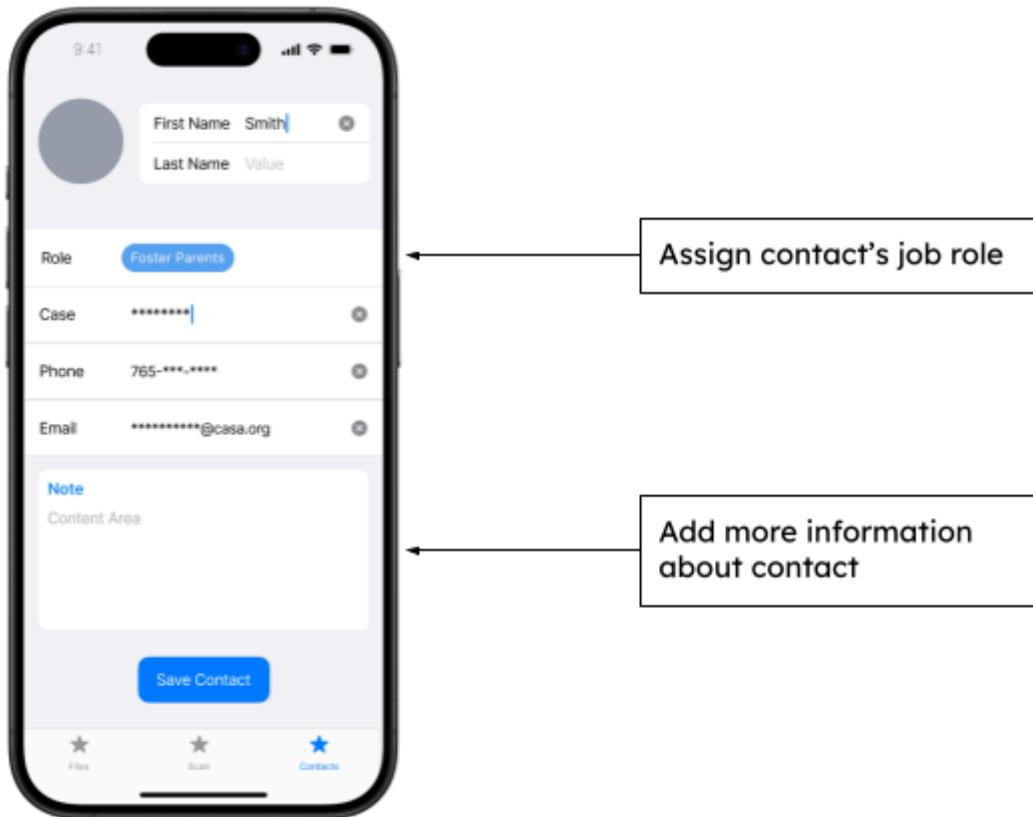


Figure 8: How to Create a New Contact or Edit a Previous Contact

With the intensive rate of communications in the CASA system, CASA volunteers have to manage a list of contacts. No need to worry now that Amanda can filter through the list by case number, roles, and relevant tags.

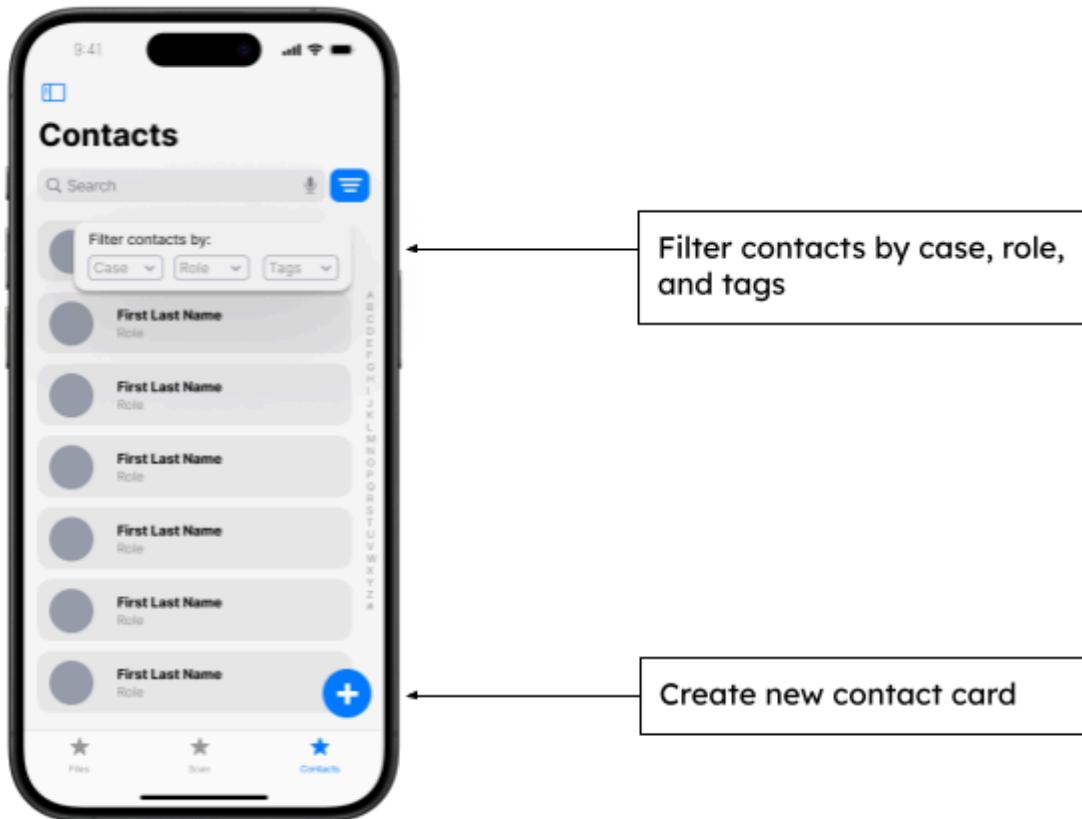


Figure 9: Feature to Filter Contact List

## Desktop Experience

Later on at home, Amanda may want to review her documents that she uploaded earlier. To do this, she can use her laptop to access our platform and documents page (fig xx).

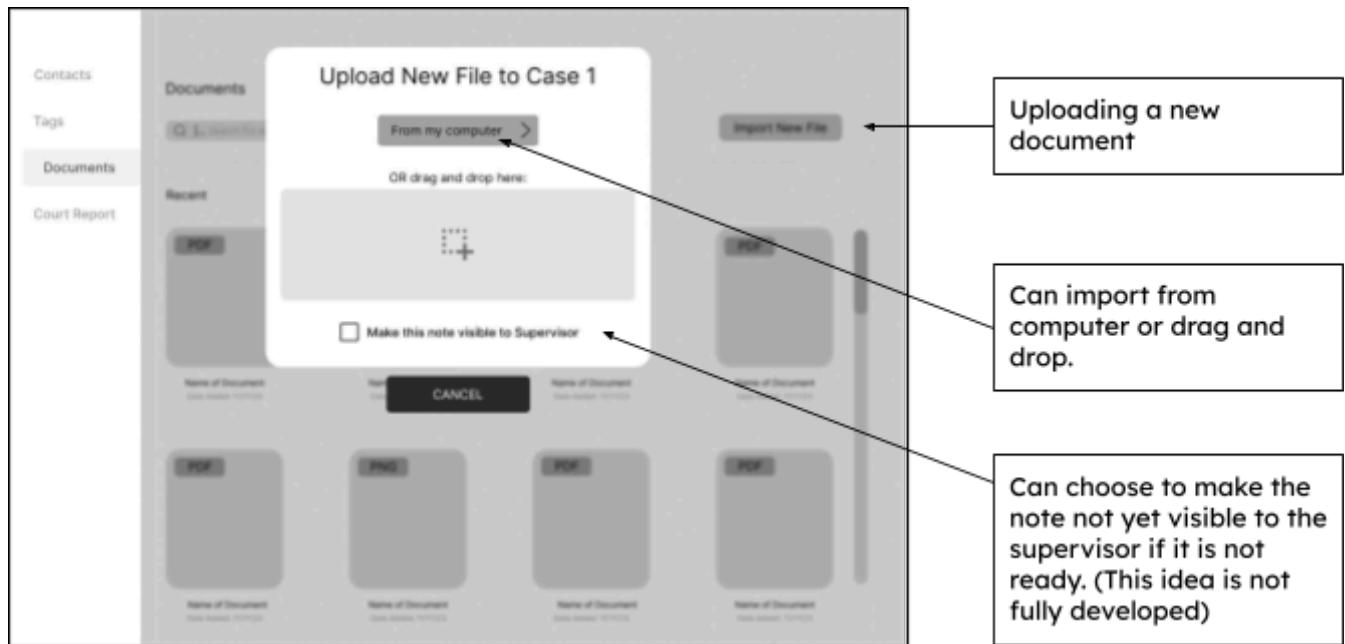


Can search, sort, select, add, view, and filter documents.

Desktop Documents Page

*Figure 10: Mic's Home Desktop View of Uploaded CASA Documents*

Amanda can also upload documents that she may receive from stakeholders (fig xx). She can easily upload her documents by importing from her computer or drag and dropping. Lastly, she can choose to make her uploaded documents (which are usually notes) visible to her supervisor.



*Figure 11: Uploading Documents from Desktop*

Amanda can then review her uploaded document (fig xx). In order to get a better understanding of larger documents quickly, Amanda can generate an AI summary of some of the main takeaways from the document.

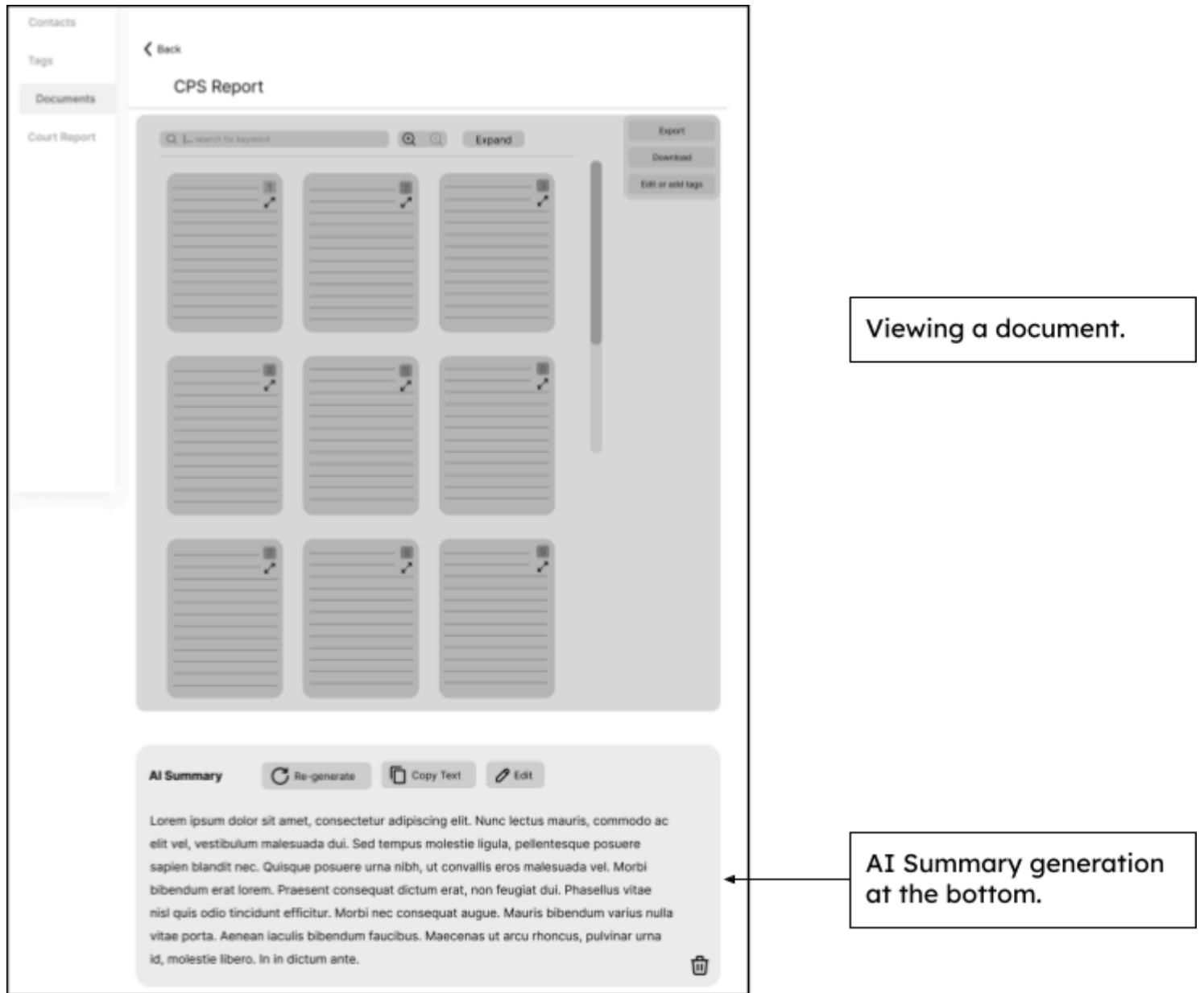


Figure 12: View a Document and Generate an AI Summary

**Amanda remembers her court hearing is approaching so she uses the Court Report Tool to generate a rough draft of her court report**

She will now be able to:

- 1) Review events since her last meeting and look over notes so she can remind herself of important updates that should be discussed in the report,
- 2) Review the documents that information will be pulled from for the report and even add or delete certain documents,
- 3) Give direction instruction to the AI of important things that should be highlighted

The screenshot shows a user interface for generating a court report. On the left, a sidebar lists 'Tags', 'Contacts', 'Documents', and 'Court Report' (which is selected). The main area has three sections:

- Review events since your last hearing...**: Shows four cards for meetings on OCT 23: 'Meeting with Child' (View notes), 'Meeting with Foster Parents' (View notes), 'Meeting with Supervisor' (View notes), and 'Meeting with Bio Parents' (View notes). Each card includes tags and a 'View notes' button.
- Information sources for current report...**: Shows four PDF documents: 'Therapist Report' (Date Added: 10/1/23), 'Child Meeting Notes' (Date Added: 10/1/23), 'CPS Report' (Date Added: 10/1/23), and 'Supervisor Meeting' (Date Added: 10/1/23). Each document has a 'PDF' icon, a 'View notes' button, and a row of tags.
- Other information that should be highlighted in report...**: A text input field with placeholder text 'Give direct instruction for what you want included in report...'.

On the right, three callout boxes provide instructions:

- Review recent events/meetings since last hearing**
- Review/edit documents that information is pulled from for report**
- Give direct instruction to AI of important things to emphasize in report**

**Generate Report** button is at the bottom center.

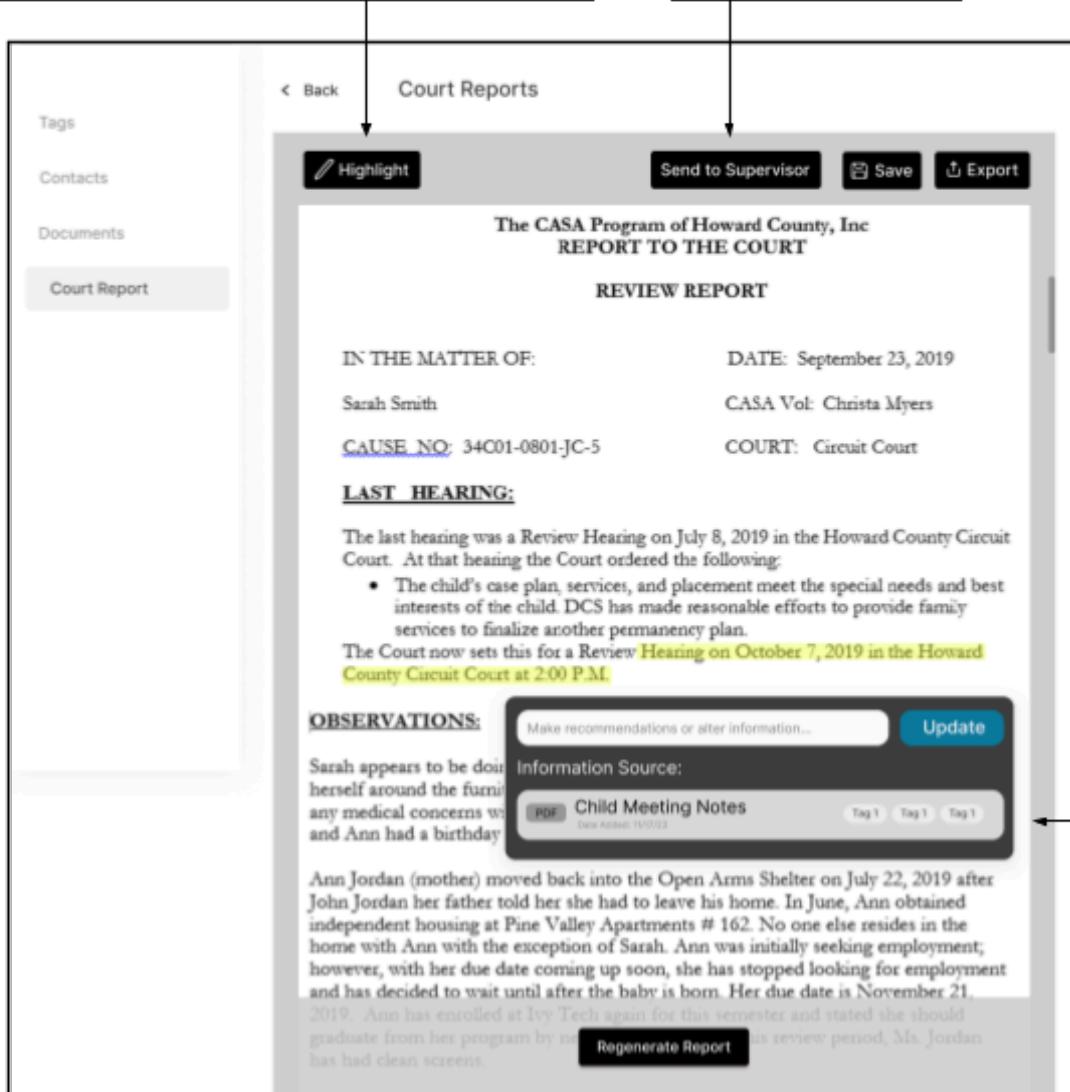
Figure 13: Court Report Tool - Review of Events & Documents + Direct Instruction

Once she clicks generate the report, she will see the rough draft of her court report (fig xx). She can directly edit the text, use the highlight tool, and send the report to her supervisor. The highlight tool gives Amanda the ability to directly source where certain information is found in her documents and regenerate text..

## Highlight tool:

- find where information is from
  - regenerate/rephrase information

Send court  
report directly  
to supervisor



*Figure 14: Generate AI Court Reports and Reference Information from Notes*

Find exact  
information source  
within documents



Thanks to the technologies that streamline Amanda's workload with many documents and meeting notes, Amanda can dedicate more time to meaningful tasks that will help James seek his permanent, loving home faster.

## Impacts

Through Amanda's inspiring journey, we witness the potential for change within the welfare system. At MIC Systems, we're committed to empowering more advocates like Amanda. By streamlining their administrative tasks, we unlock the capacity for these dedicated volunteers to focus wholeheartedly on nurturing and supporting the children in our overwhelmed systems.

**With over 400,000 children in foster care and only approximately 97,000 volunteers each year, our technology aims to magnify our CASA volunteers' great impact, enabling more volunteers to join the cause and make a profound difference in these children's lives.**

# Design Rationale

## Designing an ecosystem

Considering CASA volunteers' demanding schedules, having an ecosystem consisting of both a mobile app and a desktop experience will greatly benefit them along their advocacy journey. With on-the-go tasks like contacting stakeholders, viewing documents quickly, jotting down notes, the app provides such accessibility while keeping all materials synchronized on both platforms. For labor-intensive tasks like writing reports, preparing for courts, and more, volunteers can utilize the desktop platform. This ecosystem aims to **cater to the diverse needs of CASA volunteers**, ensuring they can effectively manage their responsibilities irrespective of their location or device preference.

## Integrating AI

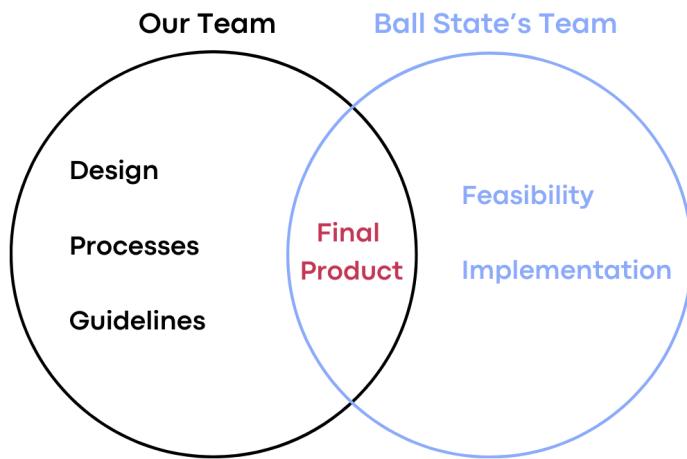
The integration of AI within our system allows CASAs to **increase workflow efficiency** by automating certain tasks (summarizing documents, suggesting tags, helping with court reports, etc). This is because organizing documents and meeting notes is arduous while bringing the least value to these volunteers. With the time saved, CASA volunteers can focus on helping more children in the system.

# Limitations

1. **Lack of access to CASA Volunteers:** Despite our tremendous effort in getting in contact with current CASA volunteers, our outreach has been met with limited success, resulting in conversations with only a few individuals.
2. **Constrained ideation window:** Our ideation process is under pressure due to time constraints, limiting the team to explore different options and iterate on our ideas.
3. **Not able to conduct user testing:** We intend to test our designs soon. However, this means we haven't collected feedback from our users to help refine the concepts. While we were able to conduct concept testing with our sponsor, we weren't able to test our solution with different CASAs.

# Future Development

Upon finishing the project, our work will be taken over to a team at Ball State to be further developed. This allows our team to focus on communicating the designs and functionalities, and not technological possibilities. Our team will provide thorough instructions on our designs that will serve as a comprehensive blueprint for the development team at Ball State.



## Next Steps

1. **Evaluating the Effectiveness:** To what extent does the design solution align with and address the identified needs, and how can its impact be measured in solving complex challenges?

We plan to conduct concept testing with the design solution to understand how the solution could solve complex problems and include the perspectives we did not take into account when developing the designs. We have our user testing protocols ready ([here](#)).

2. **Preparing for hand-off & meeting with Ball State development team:** As previously discussed, our next phase involves conveying our design concepts to the development team at Ball State University. We will join a collaborative meeting with our sponsor and the development team to clarify and address any concerns and questions, ensuring a smooth transition of the project.

To facilitate this hand-off, we will organize a comprehensive documentation package including this documentation, the team's Drive folders and design files.

# Appendix

## Phase 1: Interview Protocols

### CASA Interview Protocol:

#### Interview Goals

- Understand how CASA volunteers currently **organize their case information** and the **struggles** within the existing experience.
- Learn about the **variety of responsibilities and tasks** CASA volunteers encounter throughout the ups and downs of a CASA case.
- Understand how CASA volunteers learn about the **child's support system, communicate with stakeholders**, and the **sensitivity of the information discussed**.

#### Interview Participants

Individuals with:

- Diverse CASA case experience (have one case vs multiple cases)
- Multiple years of CASA experience
- Work within the Indiana CASA system

Example Participants:

- CASA Volunteer, Members of CASA Program/Department

#### Discussion Topics:

##### **Basic Information**

1. How did you become a CASA? What's your story?
  - a. How many years of experience do you have?
  - b. How many children have you helped?
  - c. Why become a CASA?
2. Overall feeling about the CASA experience
  - a. Tasking, Responsibilities, Communication
  - b. How and when do you make time for CASA tasks? (assuming they have a full-time job while volunteering)

##### **Organizing Information**

1. How do you currently organize/keep track of meeting information?
  - a. How do you currently keep track of meeting times/dates?
  - b. What about notes from the meetings?

- c. Where do you place forms, documentation, and sensitive information?
2. What struggles do you face in organizing/storing information for cases?
  - a. If you had a magic wand to fix this and create anything? What would you make?
3. What software do you utilize (Optima, CASA Manager)?
  - a. How has your current experience with [Optima] been?
  - b. What do you like or dislike about the software?

## **General Tasking / Responsibilities**

1. What is a general comprehensive list of all the tasks/responsibilities you may need to complete and manage within a CASA?
  - a. If this is too broad, what are the MUST DO items?
  - b. What does a typical meeting with your child look like?
  - c. How do you prepare for court hearings?
2. How do your responsibilities vary from case to case?
3. If you only have one case, what aspects and roles of your job are holding you back from taking on more?
  - a. What processes could be improved to make your tasks more efficient?

## **Communication with Child & Support Systems**

1. When you need to meet with a child or someone in the child's support system, how do you go about doing that?
  - a. What system do you use? (text, email, etc)
  - b. How do you get various contact information?
  - c. How often do you meet (In-person/Phone/Virtual) with these different stakeholders? (kids/parents/teachers/others)
2. How frequently do you meet with these stakeholders in-person versus over the phone/virtually?
  - a. Are there any difficulties you experience when contacting these stakeholders?

## **Wrap-Up**

### **Interview Questions for Other Stakeholders**

1. What involvement do you have with CASA?
  - a. (Why do you meet with them/generally what do you discuss?)
2. How often do you meet with them?
3. What role do you play in helping the child through this process?
4. Do you have any difficulties/inconveniences with keeping in touch or communicating with the CASA?
  - a. If so, what are they?

## **Attorney/Director Interview Protocol:**

### **Interview Goals**

Interview Rich as attorney:

- Understand the relationship **attorney** has with:
  - CASAs
  - Kids involved in cases
  - Supervisors
- Learn about the variety of responsibilities and tasks **attorney** encounter

Interview Rich as department head:

- Understand the relationship **department head** has with
  - CASAs
  - Kids involved in cases
  - Supervisors
- Learn about the variety of responsibilities and tasks **department head** encounter

### **Interview Participant**

Head of lawrence county CASA & attorney: Rich Kosmala

### **Discussion Topics:**

Ask for a little background on his career first (what's his role)

1. How did you come to be in this role? What motivated you to pursue this career?
  - a. How many years of experience?
  - b. How do you balance being both Lawrence county's CASA department head while also being the sole attorney representing kids in court?
  - c. Do you have other support (other attorney's that may take on some of your tasks)
  - d. Which role takes up the most time?
  - e. What does a typical week in your life look like? With who and how are you communicating with others?
2. How has technology played a role in improving the communication and management of the CASA program

### **Rich as Attorney:**

1. What are your tasks and responsibilities as an attorney for a child?
  - a. What are your unique needs to be a great CASA attorney?

- b. Is there anything that could be better?
  - c. What challenges do you face?
2. Who are the main people you communicate with on a regular basis?
    - a. How do you communicate with them?
    - b. Frequency of communication?
  3. Where do you store information for cases?
    - a. Methods? Technology Used?
  4. What sort of information do you receive from CASAs?
    - a. How involved with each case are you?
  5. What are court processes like as an attorney for children in the CASA program?
    - a. Do you learn a lot of information from the case from a CASAs report?
  6. Do you have any sort of training for working with CASAs?
  7. What kind of software/programs do you use?
    - a. If optima: how often do you use it, what do you use it for

#### **Rich as Department Head/ Program Director:**

1. What are some of your responsibilities as the Director?
2. How do you support your CASA volunteers?
3. Do you have direct contact with the CASAs in your county?
4. In the future, what are ways you can think of to enable CASA's to take on more cases?
5. Do you communicate solely with your county? Other counties? State level?
6. Can you talk a little bit more about the collaboration between CASAs and other professionals involved in cases? (social workers, therapists)
  - a. What are some challenges you observe?

#### **Supervisor Interview Protocol:**

##### **Interview Goals**

Interview Amber as Supervisor

- Understand how multiple cases are managed and organized as a supervisor
- Learn about the variety of responsibilities and tasks supervisors encounter
- Understand the relationship the supervisor has with:
  - CASA volunteers
  - Children involved
  - Other stakeholders (lawyers, medical professionals) etc.

##### **Interview Participant**

Landon's CASA supervisor: Amber Green

##### **Discussion Topics:**

###### **Basic Information**

1. How did you come to be in this role? What motivated you to pursue this career?
  - a. How many years of experience do you have?
2. What does a typical week in your life look like?
  - a. With who and how are you communicating with others?
3. What kind of training did you have to go through to work with CASAs?
  - a. How does it compare to the training of a volunteer?

## **Organizing and Managing Cases**

1. Can you discuss your experience in managing case statistics?
  - a. providing data for requisite reports
  - b. Track up-to-date case files
2. How do you ensure adequate case coverage during volunteer absences to meet the needs of the children involved?
3. How do you balance managing multiple CASA cases as a supervisor?
  - a. Around how many cases do you manage at a time?
  - b. Destress time?
4. With multiple cases, how do you maintain case files and reports?
  - a. How do you store these documents?

## **Tasking / Responsibilities**

1. What is a general comprehensive list of all the tasks/responsibilities you may need to complete and manage within a CASA program?
  - a. Do you use Optima? If so, how?
2. What does the process of recruiting, screening and training new CASA volunteers look like?
  - a. What does the court process look like as a supervisor?

## **Relationship with CASA, Child, & Stakeholders**

1. Do you have any difficulties/inconveniences with keeping in touch or communicating with the CASA?
  - a. If so, what are they?
  - b. Working with CASA from different demographics
2. Can you give examples of how you provide support to CASA volunteers during their case(s)?
3. Any challenges that CASA volunteers have from your observation?
4. How do you make sure the child's needs are being met?

## **Interview Notes**

### **CASA Interview 1:**

- CASA Volunteer at Travis County, Texas

- Volunteer for about 1.5 years (had around 4 cases)
- Stopped volunteering due to relocation in 2019/2020.

## **Basic Information**

1. How did you become a CASA? What's your story?
  - Chose to become a CASA because it is a valuable thing and she had time to give back
  - Really liked the idea of doing CASA because the impact is so big
  - By getting to know child you can get additional insight compared to someone like a lawyer
  - Children need people to represent them
  - Difference between CASA volunteer and lawyer is that CASA looks at best interest whereas lawyer looks more at what the child wants (CASA is unbiased)
  - Being a CASA can also add additional insight
    - a. How many years of experience do you have?
      - Julie volunteered in Texas for a few years
      - Right before covid was her last case
      - CASA volunteer with CASA Travis county
      - Right before covid was her last case
    - b. How many children have you helped?
      - Had one case then two cases then one case
      - Moved away from Travis County so decided not to take any more cases
2. Overall feeling about the CASA experience
  - a. Tasking, Responsibilities, Communication
    - Court
    - Within court said she enjoyed it but could be stressful
    - Argue for best interest of the child
    - Ran through report with supervisor in advance which reviewed recommendations and made sure was within CASAs guidelines
    - Stood up in court and would read the statement out loud in front of judge
    - And always had bullets to read in court which was just a summary (did not read full report out loud in court)
    - Supervisor was always in the court not necessarily hers but always one there
    - What representing a child is like
    - Certain guidelines to how much you have to visit child based on where they were at (minimum once a month vs twice a month)
    - Stay in contact with the child and support system (parents, case workers)
  - b. How and when do you make time for CASA tasks? (assuming they have a full-time job while volunteering)
    - Said she already had a lot of time on her hands and did not have a full time-job
    - Going (driving) and meeting with children was the most time consuming part
    - Some cases were a 2 hour drive, some cases can be up to a couple hours away

## **Organizing Information**

1. How do you currently organize/keep track of meeting information?
  - a. How do you currently keep track of meeting times/dates?
  - b. What about notes from the meetings?
  - c. Where do you place forms, documentation, and sensitive information?
    - Software has changed since she left Travis County
    - Used a specific task management software
    - Thinks she used Optima before, but not sure
    - Used software to enter relevant information
    - Did not feel that reporting things took a long time
    - About 5-20 minutes to write details and log meeting
    - Was in a recruiting role so she is used to documenting conversations
2. What struggles do you face in organizing/storing information for cases?
  - a. If you had a magic wand to fix this and create anything? What would you make?
    - Doesn't think the tools were a big challenge, thinks clicking around in it could have been more intuitive
    - Thought the tool they used was quick only logging in was difficult
    - Described the software as "clunky"
    - Would be nice to be able to edit notes when something was forgotten
    - Used software mainly to log communications, court reports,
    - The software was on website not on the app store
3. What software do you utilize (Optima, CASA Manager)?
  - a. How has your current experience with [Optima] been?
  - b. What do you like or dislike about the software?

## General Tasking / Responsibilities

1. What is a general comprehensive list of all the tasks/responsibilities you may need to complete and manage within a CASA?
  - a. If this is too broad, what are the MUST DO items?
    - Always check in and update supervisor
    - Drive to where child is located or the child can be brought to a location by guardians
    - Could be where you are located or within a couple hours
    - Travel was biggest time commitment
    - Training:
      - CASA training is intense and multiple week nights, etc.
      - As a CASA you are required to do something for continuous education every semester to stay up to date like reading books etc.
    - Might have had to log hours but can't remember
  - b. What does a typical meeting with your child look like?
    - Can take them somewhere
    - Activities
    - Check what is age appropriate and safe for that kid with supervisor first
    - Ice cream

- Lunch
  - Walk around at park
  - When first met with child, supervisor came to the meeting but doesn't know if that is standard everywhere
  - Make sure you are sharing your role with the child so that they know what they say can be shared out
  - c. How do you prepare for court hearings?
    - Writing court report was the longest part
    - Had to make sure it wasn't too detailed but not detailed enough
    - At least a page
    - Provided court report in advance
    - To compile report had to look back at reports and write summary
    - Used something like word or docs to write report
    - During training for CASA they give you a fake court report
2. How do your responsibilities vary from case to case?
- As CASA it is important to see where they are placed in person to see if it safe and good environment for them
  - CASA asks you to commit for a minimum of one year or six months?
  - A CASA case would generally take around six months, there was a timeline on the case and the court expects you to come to a conclusion by the end of the timeline
  - Everything you do is case dependent
  - Always required to see them in person a certain number of times (if certain distance away, less often in person compared to virtual)
1. If you only have one case, what aspects and roles of your job are holding you back from taking on more?
- a. What processes could be improved to make your tasks more efficient?
    - When having two cases it was double the work and commute schedule was hard
    - Basically just managing one case x2
    - Never had a case that had more than one child within the case (unsure about sibling cases if there is one volunteer per or together?)

## Communication with Child & Support Systems

1. When you need to meet with a child or someone in the child's support system, how do you go about doing that?
- a. What system do you use? (text, email, etc)
    - Communicated with supervisor with mainly phone calls, some email, and little texting, and in person
    - Tried to contact and have closer relations with lawyers to see if aligned so that can provide all information that can be helpful in court
    - Want to maintain really open levels of communication

- Logged every time she was chatting in person, logged phone calls
- Did log in most emails and texts, but not for sure if it was everything
- Not sure if every communication with supervisor was logged, but at least some when they discussed the case
- Logged every single communication related to the child
- Logged discussions with lawyers and case workers
- b. How do you get various contact information?
  - To get in touch with CASA child:
  - Depends on child because some had cell phones
  - A lot of cases just would make a phone call where they were staying
- c. How often do you meet (In-person/Phone/Virtual) with these different stakeholders? (kids/parents/teachers/others)
  - i. How frequently do you meet with these stakeholders in-person versus over the phone/virtually?
    - At least monthly meeting with stakeholders
    - Really depends on child
    - Sometimes multiple times in a week or even day
    - If going good, not as needed
- d. Are there any difficulties you experience when contacting these stakeholders?

Other Notes:

- Once a case finishes they check to see if you need more time between cases or if you want to take another case
- Supervisor is the one who is employed by CASA so knows what is relevant and effective within court to represent yourself and CASA
- Community:
- Worked individually (not with volunteers) because cases are confidential
- Had training with other volunteers to connect with them for ideas, but when it came to case cannot be discussed among really anyone else besides supervisor

## CASA Interview 2:

### Basic Information

1. How did you become a CASA? What's your story?
  - Director of a Student Service Department (Full-Time Occupation)
  - CASA since March of 2020 (3+ years)
    - a. How many years of experience do you have?
      - i. 3+ years
    - How many children have you helped?
      - On 3rd case about to start 4th
      - First two were during pandemic- first involved 2 teenagers, second was 3 school aged-children

- Third case has gone on for two years, started as an infant and now a toddler, and two other children
  - (8 total so far)
  - Have only worked with sibling groups
- b. Why did you become a CASA?
- Interest - wants to become a foster parent
  - c. Volunteering is a great way to learn about the CPS system and about people in local community
  - d. Has a passion for kids, helping, and advocating for children
  - e. Kids in CPS have a lot of situational circumstances that hold them back and I want to empower them to get the most out of their future
- 2. Overall feeling about the CASA experience
  - The Tippecanoe CASA experience has been “incredible and amazing”
  - Great for seeking advice, asking questions, and helping you through your cases. The support makes me feel confident and ready to tackle these difficult situations. They come to court.
    - a. Tasking, Responsibilities, Communication
      - i. Supervisors are willing to go to meetings/court with you if you're uncomfortable
      - ii. “Sometimes there's a lot more than others”
      - iii. Meeting with a child once a month - sometimes it is more than once
        - 1. One cases required me to visit a child with parents at each house (divorce)
        - 2. Will visit in the evenings after work
      - iv. Conversations with Drs., Teachers, etc.
        - 1. Went to the school a couple times because the kids weren't going to school
      - v. Getting Court Orders to Access ..
        - 1. Medical Documents
        - 2. School Documents
        - 3. And more
      - vi. Keeping the DCS CaseWorker Accountable
        - 1. They have 25 cases vs I have 1
      - vii. Going to Court
        - 1. Attending court cases during the day
        - 2. May Testify in Court
      - viii. Write Reports for the Judge
        - 1. This is the report Judges read first and will quote the report directly throughout the case.
        - 2. Must be written clear and fact-based (no opinions, except recommendations)

- b. How and when do you make time for CASA tasks? (assuming they have a full-time job while volunteering)
  - i. Has a full-time job at purdue
  - ii. Does task in free time, isn't too time consuming
  - iii. "You usually know about court months in advance"
  - iv. Occasionally will have hearings that are much longer and needs to take some personal time for that but is okay with taking that responsibility

## **Organizing Information**

- 1. How do you currently organize/keep track of meeting information?
  - a. How do you currently keep track of meeting times/dates?
    - i. Don't like to take laptop to court (8 Lawyers in the Room representing different parties, no tables or room for laptops)
  - b. What about notes from the meetings?
    - i. Takes a notebook and then transpose notes from court into a google doc in personal gmail account
    - ii. Then use google doc to put things into optima that she has to later submit
    - iii. Appointments on 1 calendar kept for work life
- 2. What struggles do you face in organizing/storing information for cases?
  - a. If you had a magic wand to fix this and create anything? What would you make?
    - i. "I think that it would be to have more effective communication between the different channels, this is where the system gets gummed up and experiences the biggest delays. The information can't move smoothly. Delays catch up." - Towards the end of the interview
    - ii. "There isn't a good, in progress storage, there isn't a good note taking place."
      - 1. If I want to take notes before submitting them to be viewed by supervisors.
      - 2. I want my own area as a workspace
    - iii. Optima is just a Documentation Holder and where I submit reports.
- 3. What software do you utilize (Optima, CASA Manager)?
  - a. How has your current experience with [Optima] been?
    - Works relatively well
    - Keeps historical documentation readily available
      - Case that has been going on for 3 years before (our interviewee) took over
    - Has a list of people connected and related to the case (around 35 different people in one of her cases) (parents, case workers, etc) long list of different parties associated
    - Can enter notes but no formatting
  - b. What do you like or dislike about the software?

- I want to be able to see a confirmation of upcoming court dates. I'm afraid I'm going to miss something, make a mistake and write in the wrong room. I want a confirmation from Optima that I have all the correct information
  - I Want to be able to sort historical documents by type (court, DCS, doctor, school). "If i want to find a particular thing, it takes a lot to find it"
  - No formatting or copy-pasting (make more reader friendly)
  - Front Page Desires
    - Shows children's names, I wish I could see the child's birthday (I need this when I make regular phone calls),
    - Current placement is not up to date, responsibility of CASA but wishes it was more up to date
    - 3 Fathers and 1 Mother (divorced, in jail, etc.), having direct information extremely relevant to the existing child support system
  - Communication tool with DCS, lots of information you communicate with case workers, if they could tell you they talked to X it would be helpful
    - Most recent contact would be nice to see
  - Not an option to keep own notes, wishes there was a personal workspace where you can have notes that you are not ready to send out yet
  - Views optima as document holder and submit reports, does not use it as a working tool
4. If we were to create a homepage of essential information to your CASA case, what would you want to include and how?
- a. Parent location
  - b. Most recent contacts
  - c. Parent status with the case
  - d. Contact info
  - e. Last case note
  - f. Update address / Current placement for child + contact info
  - g. Details for child (DOB, age, if in school what grade, location [current placement], last note visit, last time they met with DCS)
  - h. Upcoming court date / deadlines - court stuff is due 10 days out (email before deadlines)
  - i. Think sibling info should be in the same place- they think case by case and often children don't do things separate from each other
    - i. Important to see them in one place

### **General Tasking / Responsibilities**

1. What is a general comprehensive list of all the tasks/responsibilities you may need to complete and manage within a CASA?
  - a. If this is too broad, what are the MUST DO items?
  - b. Major Requirements
    - i. Monthly Meeting with Child

1. Connect with housing location and plan a meeting
  2. Create an idea for how to bond and make the conversations less awkward
  3. Around for about an hour
    - a. Any concerns I contact my supervisor and DCS
  4. Write a report while the report is fresh in my mind (In Google Docs)
    - a. Review Previous Report
    - b. Review Service Provider Documents
      - i. Counselor Submitted
      - ii. DCS Submitted
    - c. What are the 3 to 4 things I want the judge to get from this report
    5. File Optima report within the Week
  - ii. 10-12 Hours of Yearly Training
    1. Tracked in Optima
    2. Workshops, Podcasts, Books, etc.
    3. Anything relevant to being an Optima
2. How do your responsibilities vary from case to case?
  - a. The program varies from state to state as how it is treated
    - i. In Indiana- making educational decisions might be more of a GAL responsibility
    - ii. CASA makes recommendations only. Judge decides on a ruling and then it is GAL's responsibility to carry that order
    - iii. Texas has slightly different responsibilities, just because of different child laws and jurisdiction
    - iv. If the child has a physical or mental disability they can receive services longer from the state
3. If you only have one case, what aspects and roles of your job are holding you back from taking on more?
  - i. Many volunteers are retired individuals, don't have a job
  - ii. Many retired individuals take on multiple cases
  - iii. Sometimes depending on the demands of the case the volunteer might seek a mental/emotional break
  - b. What processes could be improved to make your tasks more efficient?
    - i. Time to get more meetings- meeting heavy obligation
    - ii. Ability to give up more work day time- going to court is a half day away from the office which is difficult
    - iii. Can handle most of the report things with evenings and weekends because they are not too strenuous

## Communication with Child & Support Systems

1. When you need to meet with a child or someone in the child's support system, how do you go about doing that?

- a. What system do you use? (text, email, etc)
  - iv. Currently text and email - uses her personal cell phone
  - v. In one of the cases, the parent had a substance issue and was arrested for a violent situation, the parent was on house arrest (The Volunteer Lacks security/safety from this individual)
  - vi. Consider, how do volunteers want to notify the parents for a visit
  - vii. Confidentiality on the case - has to rely on supervisor for safety during meetings (can't tell friends)
    - 1. 12 different adults that have her personal cell phone number, "I don't know if I want those people to have my number down the line"
- b. How do you get various contact information?
  - Contact information is typically in optima
  - Once she receives a cause, she sits down with a pen and paper to start drawing the family tree and documenting ideas of information in a visual format
    - Who is connected and how
    - Often times last names won't match up / don't want to mix up matching child and parent
- c. How often do you meet (In-person/Phone/Virtual) with these different stakeholders? (kids/parents/teachers/others)
  - i. Varies based on where you are in the case
  - ii. How frequently do you meet with these stakeholders in-person versus over the phone/virtually?
  - iii. Talking over the phone and email way more
  - iv. She started during COVID and did everything on FaceTime and over the phone
  - v. 2 to 3 times a month with various stakeholders
- d. Are there any difficulties you experience when contacting these stakeholders?
  - i. Depending on the situation, sometimes parents think you don't need you or think you should be involved
  - ii. Parents feel angered and frustrated about the nature of this situation, it makes it challenging for the CASA
  - iii. Accessing child care and support system (Pediatric Care/Therapist, Doctors) regarding specific needs (Given that some of these professions are in high demand) (Local Problems in West Laf and can provide care at to the State) (A lot of children struggled during the pandemic)

## CASA Department Head & Attorney Interview:

Ask for a little background on his career first (what's his role)

1. How did you come to be in this role? What motivated you to pursue this career?
  - a. How many years of experience?

- i. IU Law school in 2005, Master in social work.
  - ii. DCS for 6.5 years
  - iii. Current position (quite unique - only 4,5 positions)
  - iv. Looking for the job (quite toxic)
2. How do you balance being both Lawrence county's CASA department head while also being the sole attorney representing kids in court?
- i. Balance: not a consistent workflow (some weeks are busier than normal), position supported by grants so he has to do work
    - 1. trainings,
    - 2. court dates - Monday & Friday which are blocked out
    - 3. Don't have direct volunteer supervision. Mostly delegating tasks
      - a. Have a staff to do online-based systems (finance, payrolls, casa information, etc.)
      - b. 4 staff working with him to do volunteer supervision
    - 4. Mostly freedom, depending on the workload.
    - 5. Emergencies with kids if not within business hours.

#### Court hearings:

- All cases are reviewed every 90 days
  - Meet prior to that
  - Shared word documents for training
  - Volunteers will write reports, be reviewed
    - He also reads these reports.
      - Grammatical edits -> because he doesn't know the cases so he don't change critical things.
      - Legal things to be done.
    - Volunteers don't keep paper files -> files get
- Most cases are caused substances abused
  - Drug treatment
  - Drug screening
- Southern Indiana - meths and drugs cases.

#### Meeting with CASA:

- Mostly training, because casa mostly work with supervisors
- 1 or 2 a month, a new thing happens that catches his attention to solve the problem
- Events (not really case-related): Pre covid, refresher training on something once a month, annual CASA conference lasting 3 days (600-700 volunteers showed up that they paid for),
  - Casual networking
- CHINS cases
  - They don't go to court with him?
  - By law, a CASA is appointed to every CHINS case.
    - Not all cases are assigned
  - A witness.

- He has to go to every hearing (Monday, Friday) for all cases (even there's no CASA)
  - Monday:
    - Review hearing (30 min per hearing)
    - Every 30 min from 9-4 with 1 hour for lunch
    - 10-12 hearings
    - Many kinds of hearings
  - Friday: trial day (civil law - not criminal)
    - Many times, fact finding day.
      - Court determines whether the case stands true
      - Mainly gets resolved in that day
    - Really varies, don't really know until that day.
    - Maybe two

#### Challenges:

- Talking CASA on Friday to prepare for Monday: keeping up to date is hard, things can happen on Monday.
- Case management?
- Dealing with multiple providers (DCS) & communicate with them is tricky
  - Hard to access
  - DCS workers have to send files to upload to the files.
- Technology:
  - Improvements:

#### Involvement:

- Supervisors started in 2020. Only

#### DCS court report:

- Have a template, which is hard to read (fragmented) to capture details
- Hard for volunteers
- He reviews reports from both sides
- Relies on CASA supervisors, who also come to hearing. They give him updates and if anything to be planned for. Usually people agree on the same page.
- Not a note taker.

#### Rich as Attorney:

1. Use Optima:
  - a. Not making life easier but it can be useful.
  - b. Licensed for CASA volunteers, not customized to Indiana work.
  - c. Have to find a different way to do that
2. Use Zoom:
  - a. No more courts over Zoom anymore
  - b. Mostly for meetings
  - c. Trials can last 1-2 days: deal with people from all backgrounds, rather sitting outside waiting, now they can do Zoom to testify.
3. Digital tech: easier, because courts have many files from previous years (evidence can be scattered over years)

- a. No more paper files. No more separate physical copies for all parties.
  - b. CASA can make recommendations.
  - c. Background check can be done online
4. Smartphones (text, phone calls) & emails:
5. Case management system:
- a. Files are sent via Optima -> upload there as database, no need to email.
  - b. Only printing these files out and get shredded later.
6. Every county runs differently
- a. Not easy to unify these technology used.
7. Volunteers are generally older
- a. Struggle with Optima
  - b. Volunteers that handwrite reports, supervisors have to type
  - c. There are retired, 80s, not tech savvy people.

#### Volunteers & the idea of taking more cases:

- Mostly have 1 case (not wanting to burn them out)
- Demographics (Landon has many to balance)
  - Other volunteers will have dif takes on this
- Dealing with DCS is hard
- Service providers:
  - Sometimes have to call them to get the information
- Optima:
  - Internal with CASA volunteers and staff.
  - Have to upload by themselves if there are external docs
  - No one else can have access to this.
  - Pulls information from Optima? Helpful.
  -

#### Communications at state level

- Separate conferences in Spring for directors
- Shared website (not useful)

#### Learning curve:

- Training: Optima, emails,
- Shared email address -> need to create a new email for confidentiality.

## CASA Supervisor Interview:

- Volunteer with CASA (2018-2020) then move on with supervisor roles.
- Adopt a child: familiar with adoption
- Weekly tasks:
  - DCS & case managers
  - SCM
  - Medical providers: therapists, pediatricians
    - Not every week, depending on the case

- Supervisors:
- Volunteers
- Placement
- Communication:
  - Providers: emails,
    - Once every 1-2 months.
  - Phone calls, texts,
  - Place message.
  - Need-based
  - Mostly once a week
- Training:
  - Learning as you go with a supervisor
  - Background as a manager
- Cases:
  - 8 cases of her own most of the time
  - Collecting info
  - Supervise 8 volunteers
  - Have a calendar to keep track of important events
    - Google Calendar
    - Court hearing shared calendars
    - Checking in once a week
    - She writes down the notes on notebooks
- Meeting:
  - Take notes in her notebook
  - Optima:
    - Transfer those notes to Optima (monthly basis)
    - Transfer emails to Optima
    - Transfer anything
- Volunteer vs Supervisor
  - Workload
  - Work tasks are mostly the same
    - Monthly check-in with volunteers
    - Approve communication log
    - Review & submit court reports
    - Some 1-1 meetings if volunteers need to meet.
- Court dates:
  - Hearings for her cases
  - Hearing for volunteers' cases.
- Marketing:
  - Word of mouth
  - Ads on social media
- Destress:
  - After case is over some volunteers will take 1-2 months off before next case

## CPS Worker Interview:

Role: Social Service Worker

CPS & DCS:

- Different counties call them different things.

With CASA:

- Have CASA involved because the children are tied with the CASA -> CASA represent the child.
- About twice a month (4-6 times/month)

Family, team meetings to discuss the case plans

- CASA got invited to get their input
- CASA has the good voice about the changes for the child

Communicate to CASA through email,

- Depending on the case workers

Role:

- Ensure child's safety
- Supervised visits between child and parents
- Ensure they are playing age-appropriate games
- How the children are interacting with the parents (if they are scared, etc)

Other questions:

Ask about how they handle reports & transfer files to CASA?

- Emails
- Sometime casa doesn't respond
- Sometimes what she feels in the best interest is not what the casa thinks

How many cases do you have to work with CASA?

- 12
- She could have 3 or 4 different cases that have the same casa

How do you observe the difference between CASA with 1 case vs multiple cases?

- She might feel the casa is too biased at time
- Sometime she might feel that the casa is too attached
- Speaks to casas through meetings but does not interact with them as much as the case workers

Do they have to go to court hearings?

- Sometimes
- Just depends on the case
- She only has to go if she is called upon to go (if there is an argument over custody or disagreements about the child going back, she would go in and discuss what she feels is in the best interest of the child)

Ask about when CASA don't respond, what does she do?

- Call attorney? Call higher up people
- If she wanted a casa off case it's hard to do that

What is her role tho? Like just handling the reports or...maybe ask about the tasks?

- Email is about reports or if they have any concerns about the child she will email the casa and tell her about differences in the child how can they improve the situation?

Do you have to report what you talk about with the casa?

- It depends
- Can have a convo with a casa and say “off the record” and just talk and discuss what we feel
- System where child services have a system for the state
- Document it under a note under the client’s file (what was discussed about them)

Her role (different from a case worker role)

- She communicated with both foster and bio parents
- Can drug screen the parents
- Can do random screens
- Can discuss goals with them and give them parenting skills
- She does not make case plans- case worker does that
- She does paperwork
- Main role when it comes to child services- ensuring that interactions between parents and children are safe

How do you feel about communicating to different groups of people who are involved with the child?

- Pretty good, no issue communicating, but some with sending emails and reading them
- Her agency is really short staffed so they help each other and communicate about what they think should happen, communication with HER agency is good, but sometimes they have GAL and CASA and attorney they communicate with and other agencies like mental health agencies, they put a lot of referrals in like for parents to get help with their addiction, give parents parenting classes, if there is domestic violence they help, they help with housing and furniture sometimes,

She works in Preble county (Ohio)

## Phase 1 Questions

→ What are the CASA’s main tasks and responsibilities?

### How a CASA volunteer understands the situation

1. **Training:** In order to be prepared for the role of a CASA volunteer, it is important to undergo intensive training and continuous education. This aids the CASA volunteer to be able to understand the situation by staying knowledgeable about relevant information.
2. **Case Review:** To have a thorough understanding of the child’s case, CASA’s must review previous court documents, social services records, school reports, and other relevant documents.

## **How a CASA volunteer supports a child's needs**

1. **Visitations:** Through these visitations, it is important to build a relationship and safe environment for the child. Each volunteer is required to meet the child in person at least once a month. For children living more than 3 to 4 hours away from the volunteer's location, it is possible to do video or phone calls.
2. **Educational Support:** As a CASA volunteer it is necessary to determine if the child is receiving adequate education. This includes appropriate school placement, special education services if needed, and communicating with school personnel to address any academic challenges the child encounters.
3. **Communication with Relevant Stakeholders:** The support system of a child which may include biological parents, foster families, medical professionals, etc. should be kept in contact with the CASA volunteer throughout the duration of the case. The means of communication and frequency can vary on a case-to-case basis.
4. **Advocacy:** The primary role of a CASA is to give the child a voice. They must be able to gather information about the situation by speaking to other stakeholders and utilizing this information to advocate for the child's best interest.
5. **Documentation:** The ability to keep accurate and detailed records of conversations, observations, and activities relating to the case is a crucial task.

## **How a CASA represents a child**

1. **Court Report:** To prepare for court, CASA volunteers must write a written report including observations, findings, and recommendations for the child's situation.
2. **Recommendations:** It is the CASA volunteer's responsibility to provide the court with their best recommendation for the child based on their perspective.
3. **Attend Court Hearings:** CASA volunteers must attend court hearings in order to present their observations and findings to the court. At these court hearings they can discuss the child's well-being, safety, and permanent plan.

## **Q4: What are a CASA volunteer's primary needs? How does the current system provide for these needs?**

As stated before, each CASA volunteer's case is a unique circumstance. However, a CASA's main responsibility is to advocate for the child's best interest while maintaining confidentiality. The last question we looked at addressed understanding situations, supporting the child's needs, and representing the child. However, CASAs have informational and emotional needs that need to be met in order to accomplish these. In this section, we look at the informational (case data) and emotional support (breaks between cases to recuperate) CASAs need and what support they are currently receiving.

## **Informational Needs**

To be an effective advocate, a CASA needs proper background information to understand the case. Currently, CASAs look for this information in a variety of areas.

1. **Optima:** Through the current system, CASA volunteers are given basic background information about a case through Optima. This information can include the child's name, age, and birthdate. CASA volunteers can also find the child's parents/caregivers through Optima.
2. **Initial Meeting:** When a CASA first meets with a child or parents, they use this as an opportunity to get a basic understanding of the situation. Visiting the home for the first time can give CASAs clues on what the home/family situation is and what issues may be occurring.
3. **Meetings with the child (and other stakeholders):** Throughout the course of a case, a CASA will meet with various stakeholders (via in-person meetings, email/text, phone calls, etc.). Each meeting helps to inform them of the situation. Especially important for a CASA are meetings with children as these meetings serve as a way for the volunteer to better understand the child and their needs.
4. **Activities/Bonding with the Child:** One important aspect of meeting with children is connecting with them. A CASA doesn't just get case information by meeting with a child. In order to really understand the child's needs and advocate for them, CASAs need to connect with the children they serve. Spending time with the child doing activities allows the CASA to learn more about the kid in a safe, low-stress environment. This low-stress environment can also encourage the child to open up more to their CASA.

Based on this, a primary need for CASAs is **spending time with the child** because this allows them to better understand the child's needs and how to advocate for them.

## **Emotional Needs**

Volunteers are subjected to situations that are mentally and emotionally taxing in nature, such as dealing with domestic abuse. Because of the heavy situations CASAs are dealing with, it's important for CASAs to **take a break for recuperation**, especially between cases. From our interviews, we learned that it is quite common for volunteers to take month-long breaks between cases so that they are able to recuperate.

Another thing we learned through our interviews is that a CASA's emotional needs and limits may prevent them from taking on multiple cases at a time. Our sponsor wants as many volunteers as possible to take on multiple cases simultaneously and he believes that given the proper support, more CASAs will be able to take on multiple cases. However, the current system does not seem to have anything built in for offering CASAs emotional

support during, between, and after cases. If we want to help CASAs take on more cases, this will be an issue that we may need to address in our design.

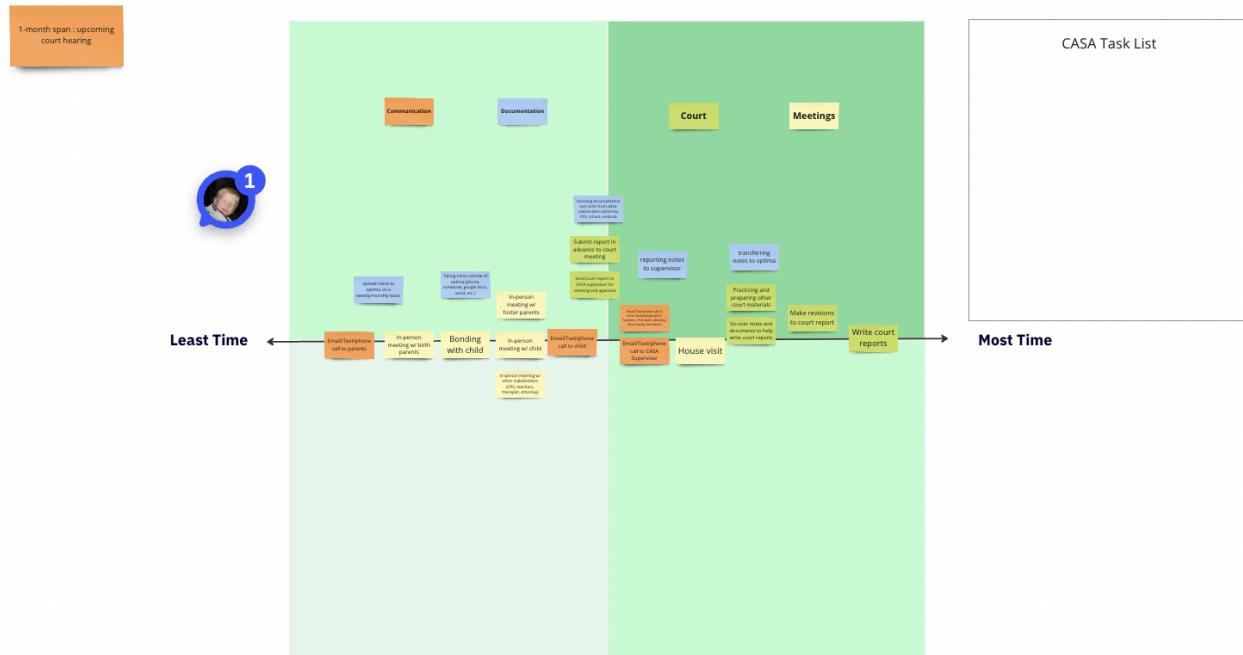
## Phase 2: CoDesign

### CoDesign Miro Results:

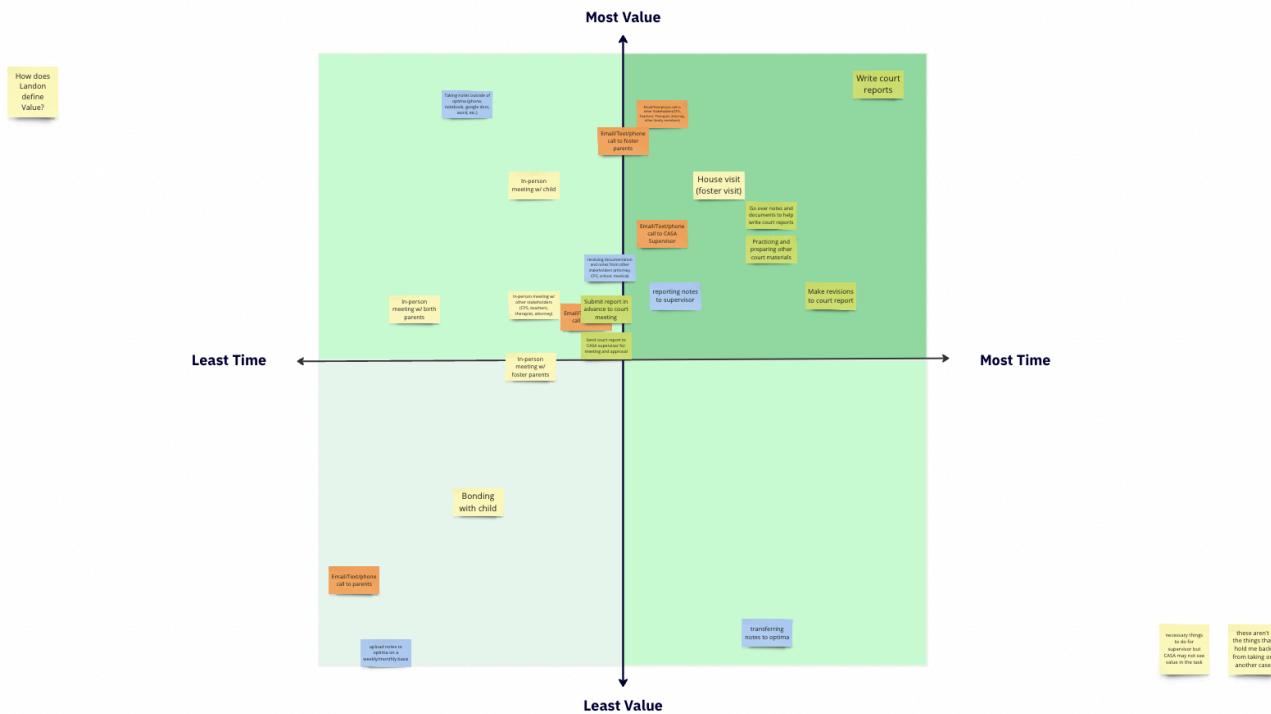
#### Participant 1-

The goal of this activity is to identify time-consuming tasks that are less valuable to the CASA role throughout the entire timeline of a case.

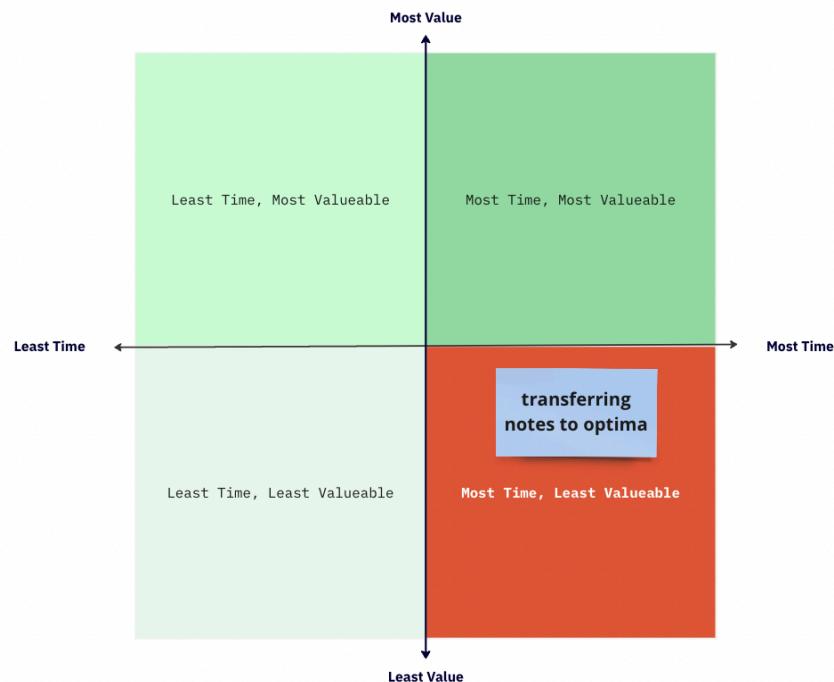
Part 1: Rank how much time do you spend doing these CASA Activities and Tasks throughout a 1 year Case?



## Part 2: Rank how valuable is this task to you throughout a 1 year Case?



## Part 3: Reveal the Matrix Categories - Interest to improve this quadrant



Part 4: Take all the tasks from the red quadrant. What don't you like about them? Ideate solutions on your 3 least valuable tasks that take up most of your time. After we create ideas share out!

only loading things into Optima when he has to  
Not a default recording tool  
Optima Go (Mobile but doesn't utilize)  
Lacks ability to global search  
Solution to send notes from all over the place into Optima  
Reporting Requirements to CASA are better organized and can be questions

Needs time to go through everything and then have to type up reports and half hours required for reporting  
Comments page using the most common items and then generate other for reports

Fulfilling communication requirements  
Be able to handle multiple conversations

Safety and well-being communication and send ideas between caseworker and optima

Can understand and identify on its own different types of documents and categorize

drop in the images, ideas, and sketches here

## The goal of this activity is to prioritize CASA needs and ideate on solutions together.

In this scenario, you are one month away from the upcoming court date, where you will present your findings and recommendations for the child you're advocating for. It's a critical moment in the child's life, and your advocacy can make a significant impact.

Part 1: Read through the list of identified pain points. Is there anything you need we might be missing?

5 and 2 are pretty similiar

Relevant Needs for Advocating for the Child in Court:

1. CASA's need a confirmation of upcoming court dates.
2. CASA's need to quickly and easily sort through previous documents and conversations
3. CASA's need time to decompress and take an emotional break after a case. (**Would be great to talk to others who are going through this**)
4. CASA's need the ability to input and stylize information digitally for future reference.
5. **CASA's need an accessible place to easily review meeting notes, relevant documents, and organize the report to provide the best recommendations.**
6. CASA's need a system to effectively take and store notes. (**consider tags that separate kids, cases, or other factors like month, location, or whatever. See Notion's tags in tables**)
7. CASA's need better ways to connect in-person with the child in order to bond and have a clear understanding of the situation. (**prompts, questions**)
8. **CASA's need to have the ability to create and store a list of all stakeholder's involved in the case. (**and maintain up-to-date records**)**
9. **CASA's need a tool to see the large volume of meetings and communication channels as dates and case deadlines approach.**

4 & 5 have confusing language

"chip away at the glacier"

Facilitator set a 30 minute timer and make sure we pace the activity well

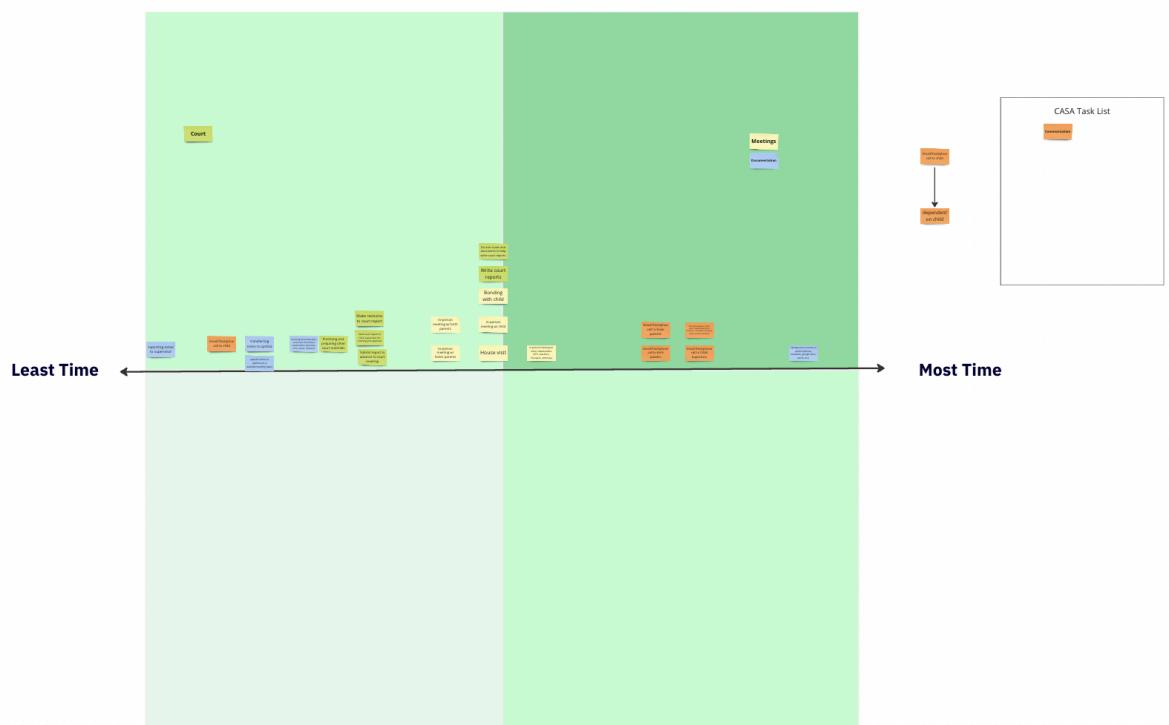
Part 2: Choose the Top 3 pain points of importance to you! (Bold in the List Above)

### Part 3: Ideate Solutions to the Needs.

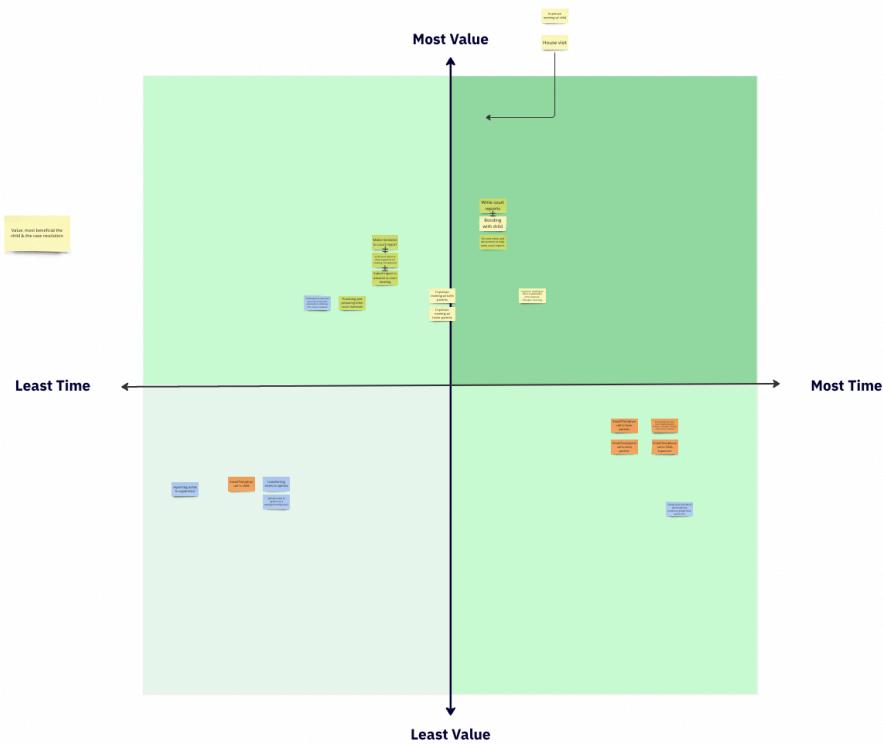


## Participant 2-

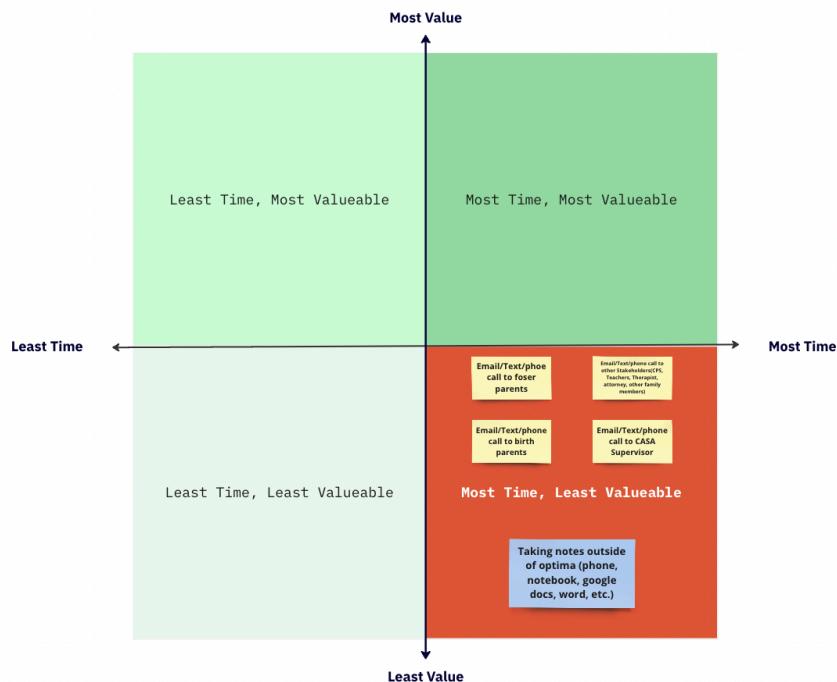
Part 1: Rank how much time do you spend doing these CASA Activities and Tasks throughout a 1 year Case?



Part 2: Rank how valuable is this task to you throughout a 1 year Case?



Part 3: Reveal the Matrix Categories - Interest to improve this quadrant



## The goal of this activity is to prioritize CASA needs and ideate on solutions together.

In this scenario, you are one month away from the upcoming court date, where you will present your findings and recommendations for the child you're advocating for. It's a critical moment in the child's life, and your advocacy can make a significant impact.

Part 1: Read through the list of identified pain points. Is there anything you need we might be missing?

1. Know court, date, time, location

Relevant Needs for Advocating for the Child in Court:

1. CASA's need a confirmation of upcoming court dates.
2. CASA's need to quickly and easily sort through previous documents and conversations
3. CASA's need time to decompress and take an emotional break after a case.
4. CASA's need the ability to input and stylize information digitally for future reference.
5. **CASA's need an accessible place to easily review meeting notes, relevant documents, and organize the report to provide the best recommendations.**
6. **CASA's need a system to effectively take and store notes.**
7. CASA's need better ways to connect in-person with the child in order to bond and have a clear understanding of the situation.
8. CASA's need to have the ability to create and store a list of all stakeholder's involved in the case.
9. **CASA's need a tool to see the large volume of meetings and communication channels as dates and case deadlines approach.**

2. Pull up documents of a certain type and look at them together

8. if you are able to take notes next to that person, this would be helpful to keep track of all the stakeholders

3. would be helpful if CASA had an identified way to debrief

9. A calendar within optimia is only useful if it can connect to the calendar in her phone

Wishes it was easier to scroll through notes

## Sketches

### Need 1 Ideas

#### **CASAs need a system to effectively take and store notes.**

Idea: A mobile application for CASA volunteers, dedicated to uploading meeting notes and automatically storing them in the main case management systems used by that county.

Our CASA volunteers who actively need to log communications now can ensure notes are located in the right place regardless of the note-taking tools used.

1. Create a new meeting log on the app.
2. Upload Notes using Scan or Upload From Devices
  - a. Quickly input the meeting's information.

- b. Add tags to quickly organize notes in the management system (Correlates with Need 2)

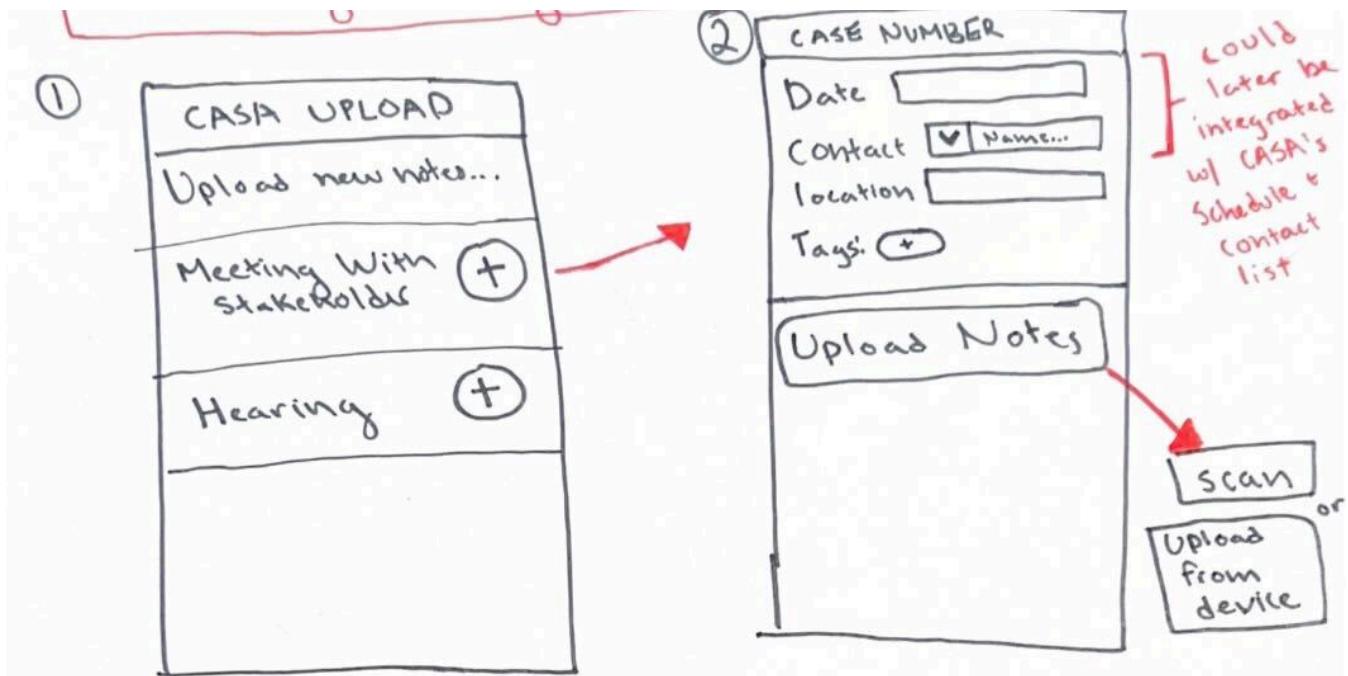


Figure X: Uploading Meeting Notes and Adding Description on Mobile

3. Scan/Upload notes and transfer them to CASA's Case Management Software (Optima, or others).
4. Store CASA volunteers' initial notes as drafts.
  - a. Volunteers can edit drafts and submit the final version for others to view when ready.
  - b. Highlighting important parts of the notes using the Highlighter. Doing this allows volunteers to skim through the notes quickly with crucial key points from past conversations.

Once done, CASA volunteers can save and synchronize these communication logs with their designated case management systems (mainly on websites).

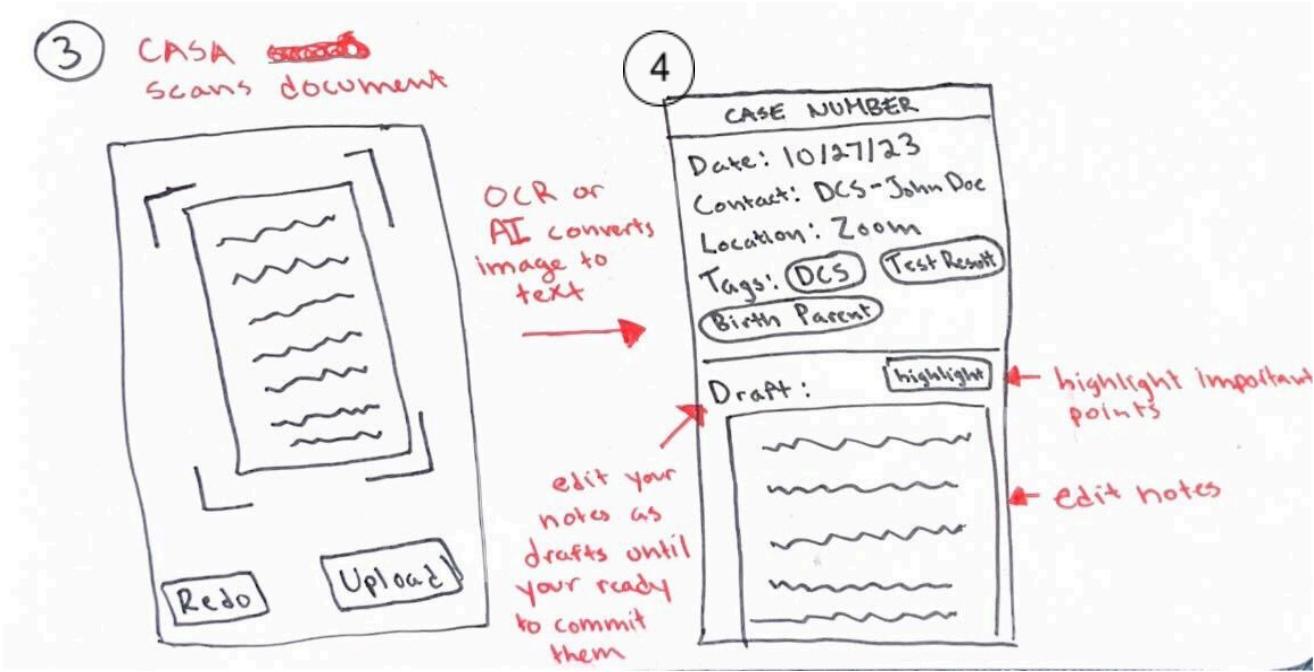


Figure 3: Scan & transfer notes to the communication log

## Need 2 Ideas

**CASAs need an accessible place to easily review meeting notes, and relevant documents, and organize the report to provide the best recommendations.**

Ecosystem Overview:

1. An interface solution to organize, store, tag, and export needed notes and documents.

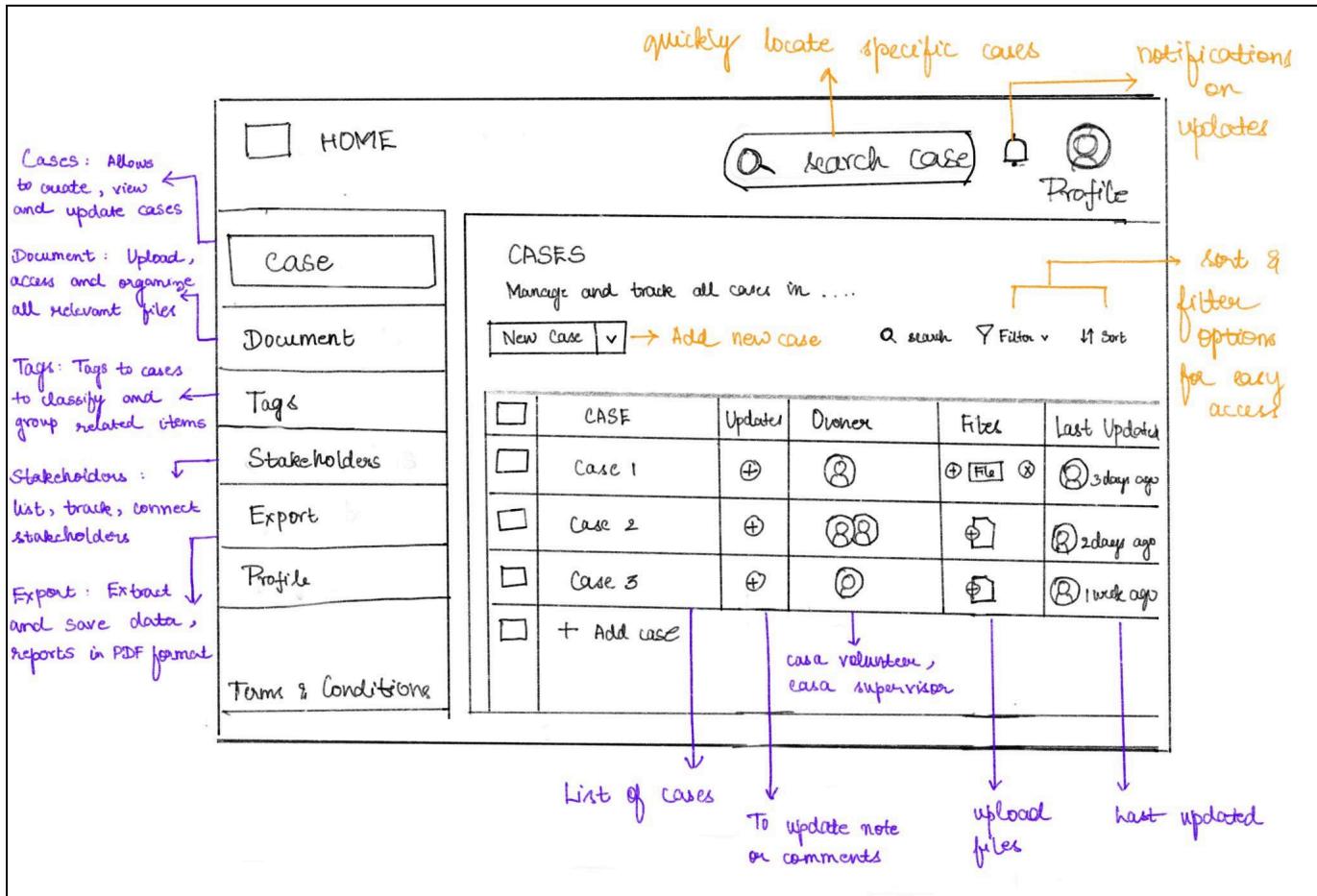


Figure 4: Home page

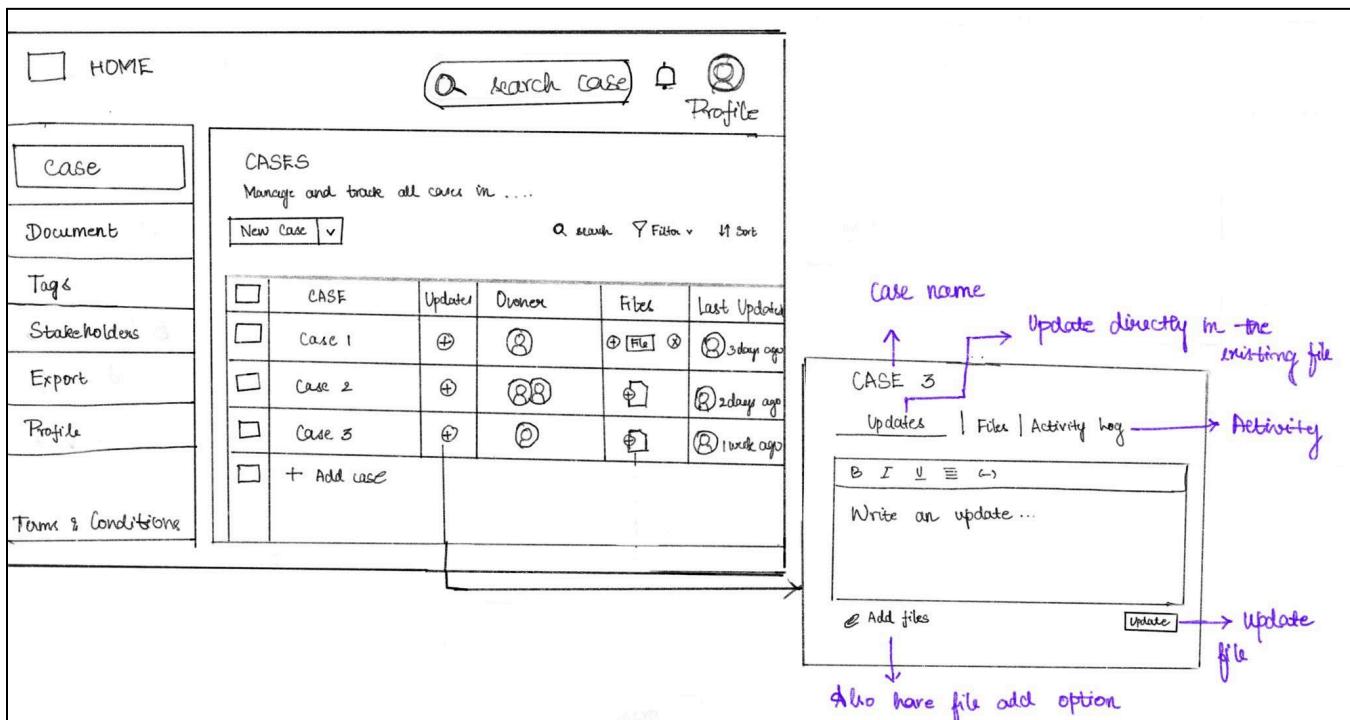


Figure 5: Updating notes and comments

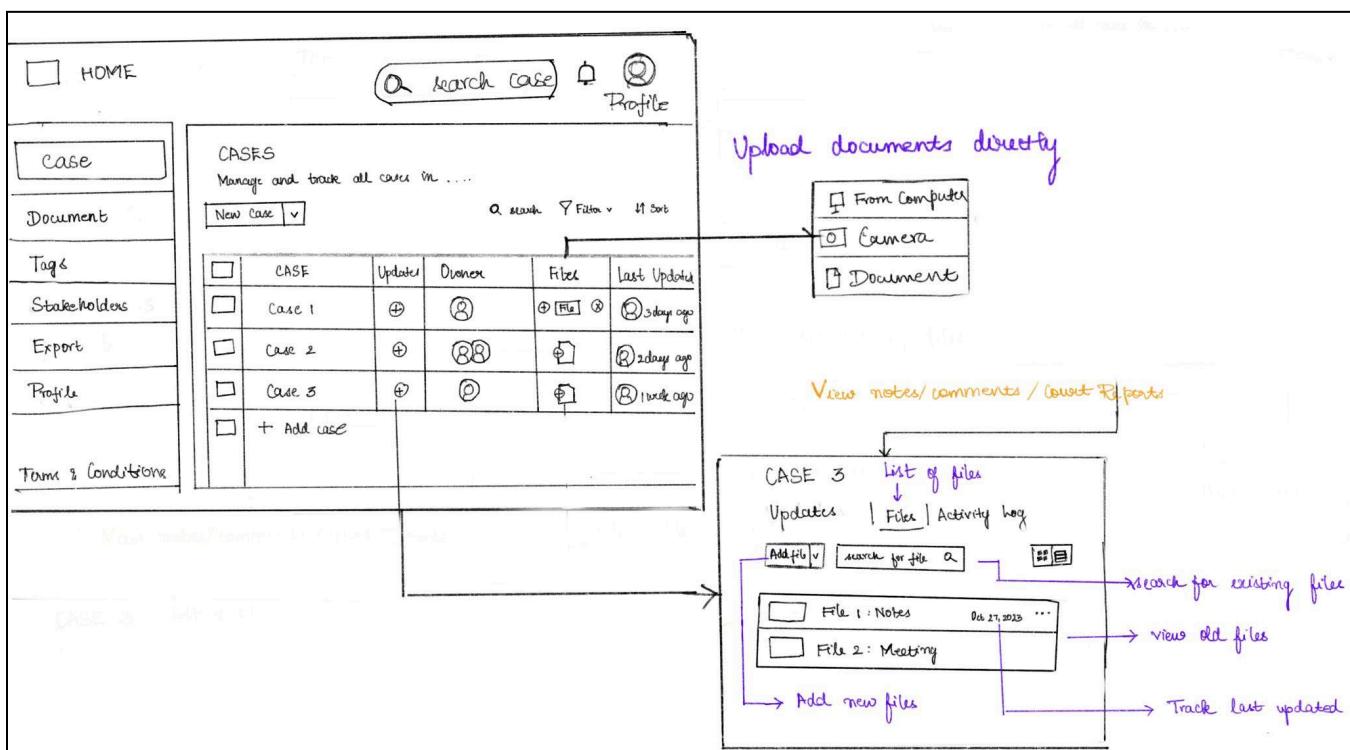


Figure 6: Uploading Notes, Court Reports, & Documents

Features:

2. Organize documents into a case library under the “Documents” section.

Similar to Google Drive, the interface would have a library of all the added documents, notes, etc. The CASA could filter documents, create new notes, and navigate through all uploaded documents.

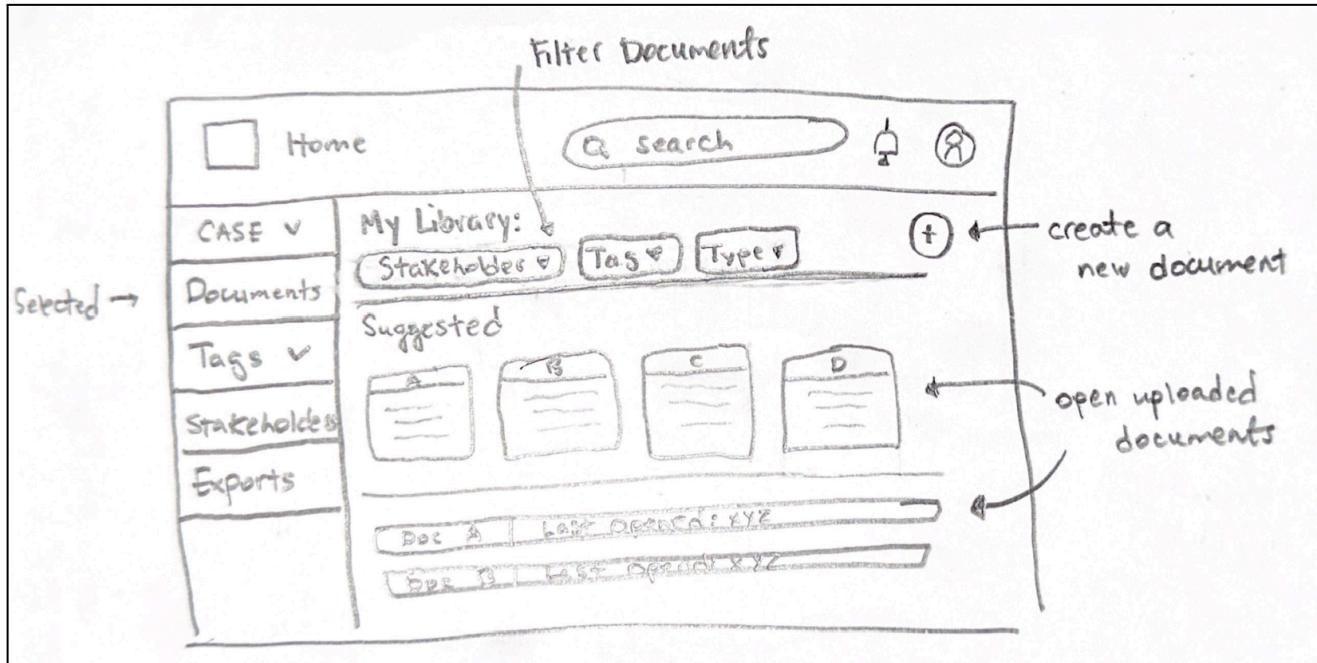


Figure 7: Library of Example Notes and Documents for a CASA Case

3. Tag documents and notes to thematically sort through all relevant case data under the “Tags” section.

With documents being uploaded into the tool, CASA volunteers would be able to create tags and organize relevant information under the tags. Examples could include therapist notes, potential recommendations, basic child information, family dynamics, violence, report cards, and more.

In the idea below, a volunteer is able to select sections of notes and documents to tag the information to access later under a tag. CASAs will have pre-programmed tags and be able to add their own.

With this solution, a CASA would need to comb through all of their notes and documents. To save time, an AI model could be trained to auto-tag the documents/notes.

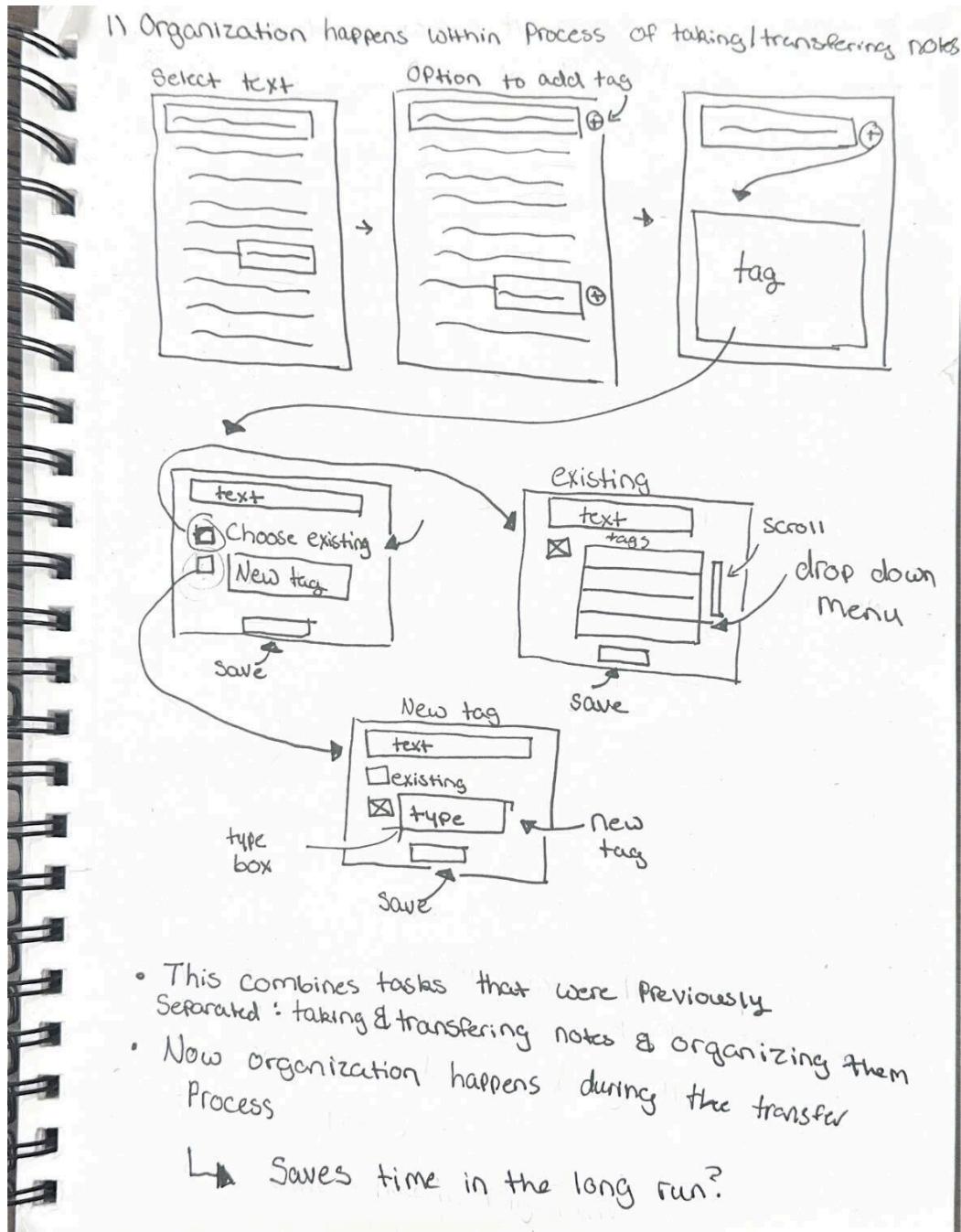


Figure 8: Creating & Assigning Tags

When CASAs want to view tagged information they can do so by clicking the tags section of the home page. Volunteers would be able to see all of their tags created for a case and navigate these tags to look at all the information they tagged.

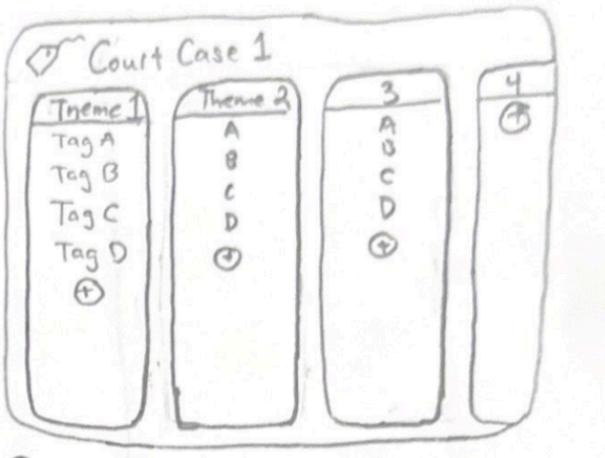


Figure 9: View of all Tags within a CASA Case

After clicking a specific tag, all of the tagged information from documents and notes will appear below. In the example below, the tagged information is of different sizes and states the tagged document, date tagged, and the tagged information.

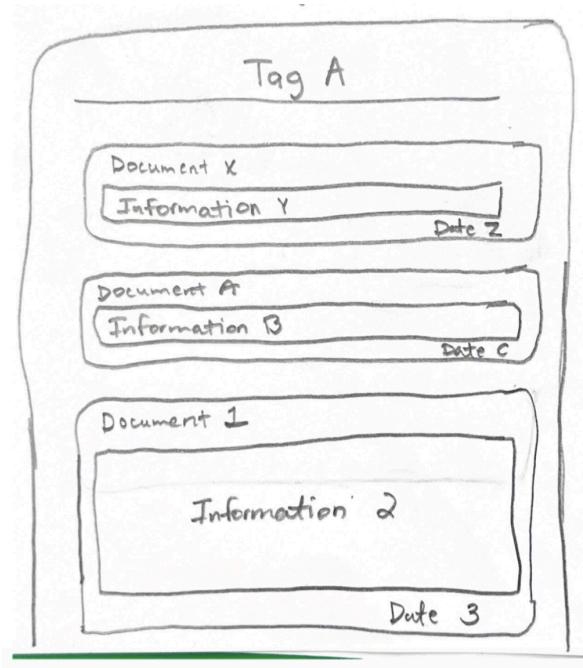


Figure 10: After Clicking on a Tag, CASAs would be able to view all Tagged Information

4. Exporting desired data (tags, documents, AI summaries, etc) as PDFs or sending them to Optima.

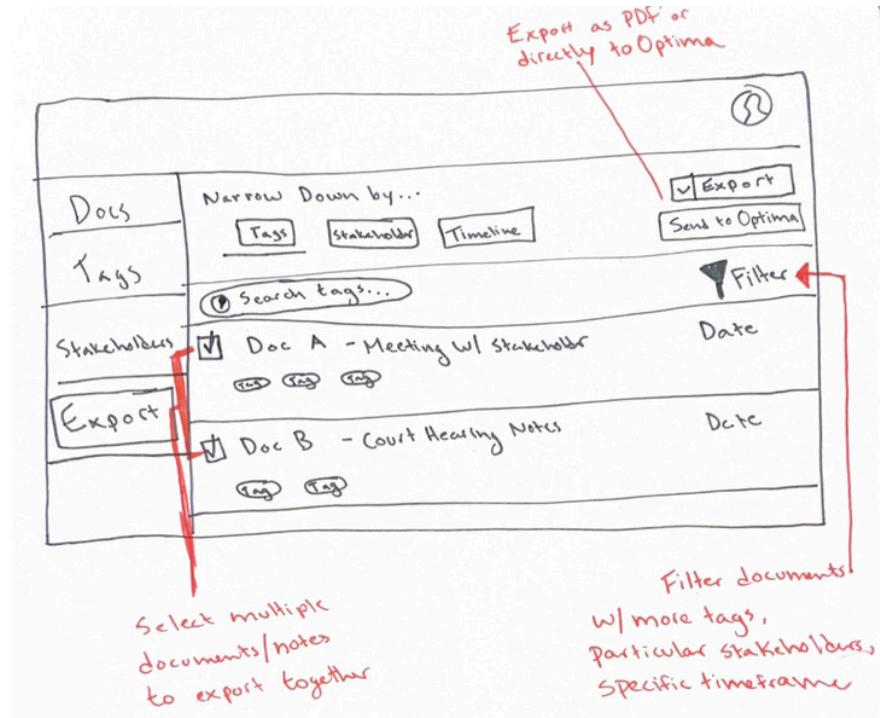


Figure 11: Compile Notes and Documents to Export

5. An AI focused on searching and summarizing content that parses through document libraries to help identify key information and summarize information quickly.

In this idea, the AI will read through all the uploaded documents and information to assist in the case. In the examples below, on the left, a user is able to utilize the search bar to navigate documents easily and efficiently. On the right, a user is able to request information to be summarized by the AI based on all the uploaded documents, notes, and tags.

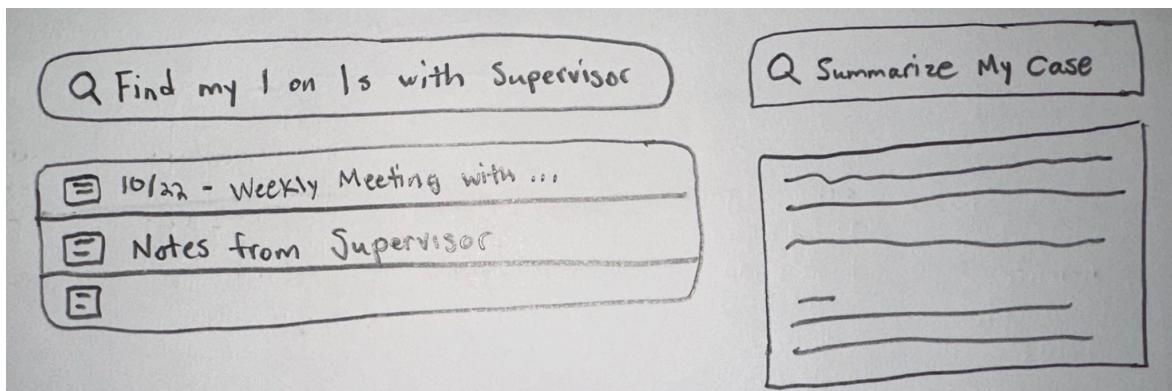


Figure 12 - Utilizing AI Search Bar to Save Time and Request Information

The other use case for an AI would be utilizing the AI for summarizing long documents. In the drawing below, CPS sent our CASA volunteer an investigation report. The CASA would be able to ask the AI any questions, so the volunteer requests the key takeaways from the report.

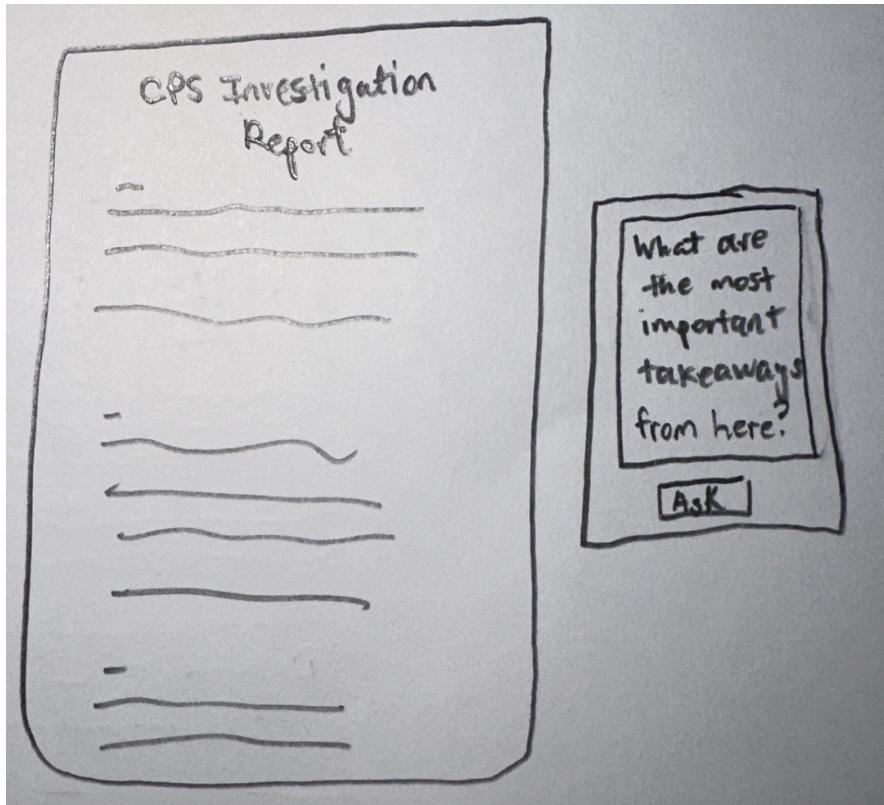


Figure 13 - Utilizing AI to Summarize Document-Specific Information

### **Need 3 Ideas**

**CASAs need the ability to create and store a list of stakeholders involved in the case and maintain up-to-date information.**

Idea 1: A mobile application for CASA volunteers to create, view, and filter through all stakeholder's contact information.

1. Global search and filters to easily sort through all contacts

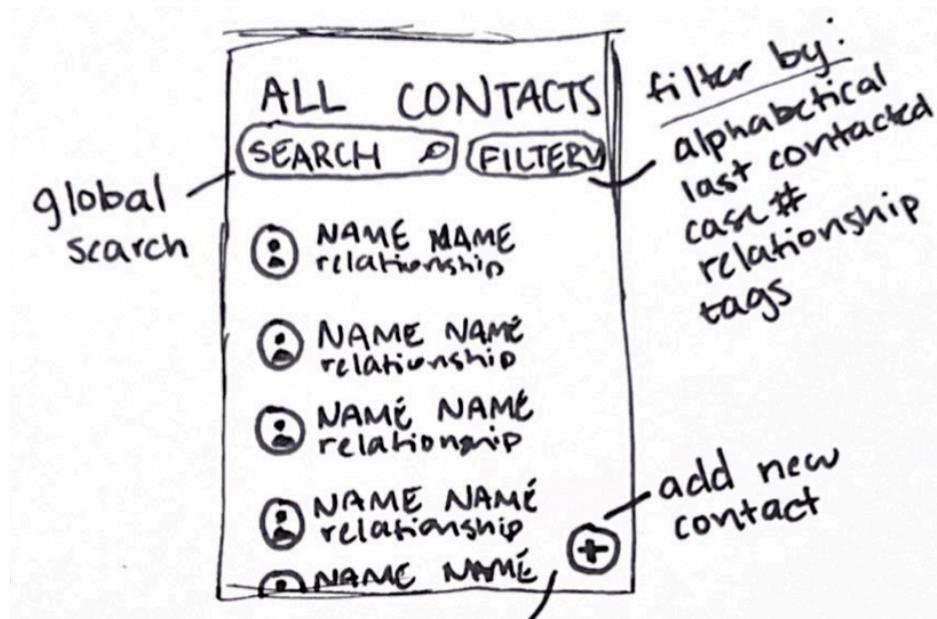


Figure 14: List of all contacts

2. Organize contacts by case and pin important or frequent contacts

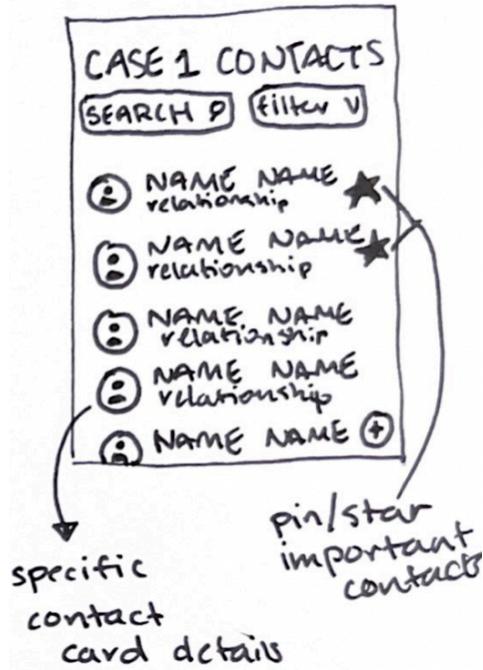


Figure 15: Pinning contacts in a case

3. Ability to create new contacts and add specific information (relationship, case, tags)

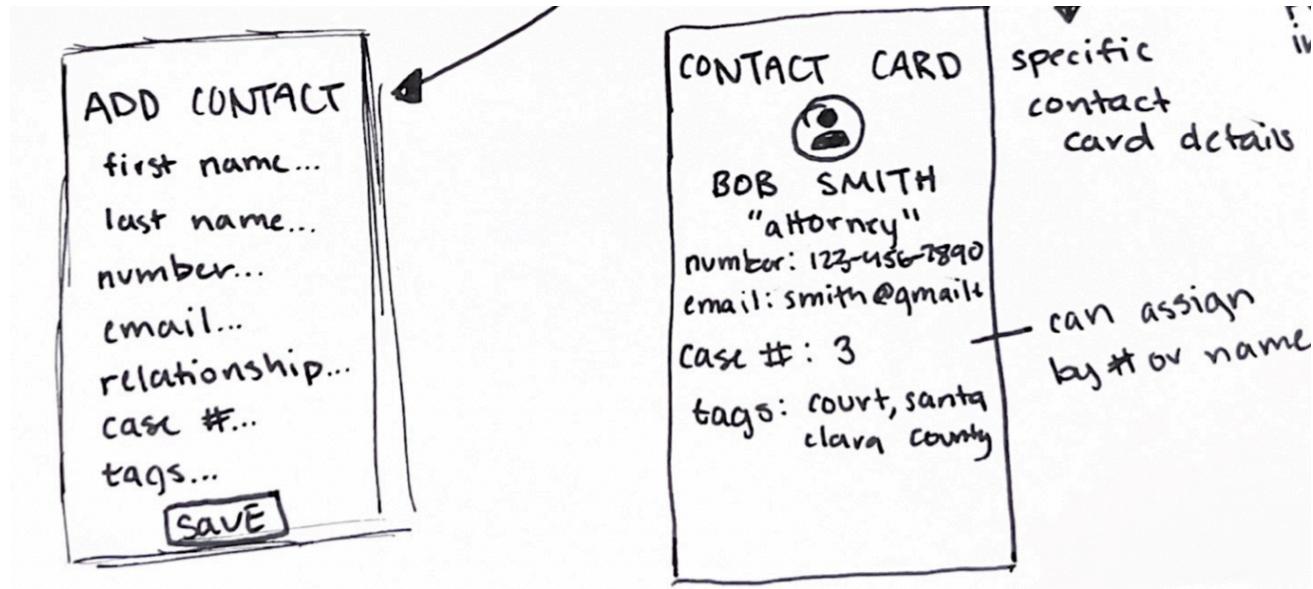


Figure 16: Adding and viewing contacts

Idea 2: An interface showing one way that contacts can be organized, as well as being able to request the contact information for someone from a CASA supervisor.

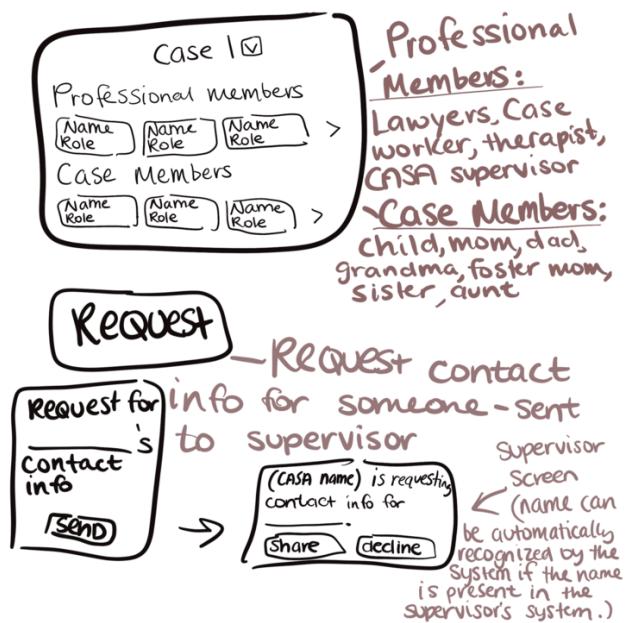


Figure 17: Ideas for Contacts organization and sending contact information to a CASA supervisor.

## Phase 3: Functional Prototypes

### User Testing Protocols

Potential Users: Other UX teams and experts, Our sponsor (Landon)

#### Goal:

To evaluate our design concept that informs our design iterations.

To understand users' perspectives and behaviors going through the screens.

#### Approach

For our sponsor: We'll show the designs, which he's quite familiar with already, for a thorough look into the details. We will ask our sponsor to think of the solutions from a CASA's perspective and his behaviors, and we will go through the screens together where he offers his thoughts and recommendations. The team will take note of his comments and evaluate whether to implement the suggestions in the final designs.

For the other teams and experts: We'll offer brief background on the problem space and then show our designs, mostly the ones that have to do with tagging. We will specifically ask other teams to look at our designs from a usability standpoint rather than through a CASA's eyes. As with our sponsor, we will take note of any comments and recommendations and evaluate if and how to implement them.