

Griffith, Carol

From: Nicole Solis-Douglass <ndouglass@casacentex.org>
Sent: Wednesday, February 25, 2026 6:08 PM
To: Griffith, Carol; Marissa Herzog
Subject: [EXTERNAL] Re: [External]CDBG/HSAB question

Hi Carol,

Thank you for reaching out with these clarification questions. I'm glad to provide additional detail for the reviewers, and I hope the explanation below is helpful. Please feel free to include this with our applications.

Clarification for Reviewers

For both the CDBG and HSAB applications, CASA anticipates serving approximately 70 children in San Marcos during the grant period. The total cost of providing advocacy for 70 children is significantly higher than either individual request, as the full cost includes staff salaries, volunteer recruitment and training, case management, and overall program operations.

- The \$60,000 CDBG request represents a portion of the cost of serving these 70 children, not the full cost.
- The \$56,000 HSAB request is an additional contribution toward the same overall service population, supporting different components of the program.

Although some staff positions differ between the two applications, the Training Manager is included in both requests. This is because the Training Manager's work supports program needs funded under both sources, specifically, volunteer training, onboarding, and support that are essential to our service delivery in San Marcos. CASA can demonstrate that the Training Manager's salary can be proportionately divided across the two grants based on actual time and responsibilities tied to each funding stream.

In total, the applications represent \$116,000 in the requested funding. However, each committee will only review and consider the portion relevant to its respective program (CDBG or HSAB). Both requests collectively support the same goal: ensuring CASA can meet the projected advocacy needs of approximately 70 children in San Marcos.

We also intentionally chose to divide our total request across both funding opportunities, rather than submitting the full amount under a single program. We recognize that there are many worthy organizations in San Marcos seeking support, and by splitting our request, we allow the City greater flexibility to fund multiple agencies while still contributing meaningfully to CASA's cost of serving local children. This approach keeps our request competitive, reasonable, and aligned with the City's goal of equitable distribution of resources.

Please let me know if you would like any additional detail or further clarification. I'm happy to revise or expand this as needed for the reviewers.

Thank you again,

Nicole Douglass

Director of Development
CASA of Central Texas, Inc.
830.837.3060
www.casacentex.org



CASA aims for financial transparency with all of our donors and supporters. You may find more information on our publicly available GuideStar/Candid Platinum profile at: <https://www.guidestar.org/profile/74-2403373>

Give back by rounding up your change and donating the remainder to us when you shop on [Walmart.com](https://www.walmart.com) or the Walmart app. Learn more about **Spark Good Round Up** at walmart.com/SparkGood

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From: Griffith, Carol <CGriffith@sanmarcostx.gov>
Sent: Wednesday, February 25, 2026 4:00 PM
To: Marissa Herzog <mherzog@casacentex.org>
Cc: Nicole Solis-Douglass <ndouglass@casacentex.org>
Subject: [External]CDBG/HSAB question

Marissa,

I have clarification questions for you.

(If you covered this in the applications, let me know - I just made sure every question was answered without reading the text in detail.)

You are asking for \$60,000 from CDBG and \$56,000 from HSAB, and both applications mention serving 70 children.

Will you please spell this out for the reviewers in an email I could add on to your applications?

- How did you come up with 70 children for \$60,000 – that is, I assume costs more than \$60,000 to pay staff to train volunteers and participate in the advocacy process for 70 children, and they also do community outreach. It may seem obvious to you but I get the impression that board members sometimes think the \$60,000 is literally covering the cost of serving 70 children. Is it the case that you expect to serve about 70 children in San Marcos and you are asking for a \$60,000 contribution to the cost from the City?
- Should the reviewers consider your total request to be \$116,000? The CDBG reviewers will see that application first and I want to be very clear on the total requested.

Thank you! Carol

Carol Griffith



Housing and Community Development Manager | Planning & Development Services
630 E. Hopkins St, San Marcos, TX 78666
512-393-8147

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**CITY OF SAN MARCOS HUMAN SERVICES GRANT
FY 2026-2027 APPLICATION**

I. SUMMARY INFORMATION

Please spell out organization name and program name completely, without acronyms.

Applicant Organization: CASA of Central Texas, Inc.

Contact Name, Title: Norma Castilla-Blackwell, Chief Executive Officer Telephone: 830-626-2272

Contact E-Mail Address: nblackwell@casacentex.org Website: www.casacentex.org

Mailing Address: 1619 E. Common St, Suite 301, New Braunfels, TX 78130

Do you have a location in San Marcos where people can walk in and ask questions about the program? If so, what is the address? 2725 Hunter Road, San Marcos, TX 78666

Who is authorized to execute program documents? Norma Castilla-Blackwell, Chief Executive Officer

Program Name: CASA of Central Texas, Inc.

Amount of Funds Requested: \$56,000

What percentage of the cost of this program is requested as funding through this application? 15%

II. SHORT ESSAY QUESTIONS

All questions must be answered. Please type your answers. Application evaluations will be based on, but not necessarily limited to the criteria stated in each section.

OVERVIEW

1. Summarize the program for which funding is being requested, the services it provides, and the clients it serves.

CASA of Central Texas envisions a world where every child thrives in a safe, stable, and loving home. We serve children and youth in the foster care system throughout Hays, Caldwell, Guadalupe, and Comal counties who have experienced abuse or neglect. We do this by recruiting, training, and supporting compassionate community volunteers to advocate for their best interests. These volunteers are appointed by judges as Court Appointed Special Advocates (CASAs). CASA of Central Texas provides this unduplicated service, offering individualized, court-appointed advocacy, at no cost to families or the courts. Our volunteers advocate for children's medical, mental health, educational, housing, and permanency needs, serving children from birth through age 17, as well as young adults 18+ transitioning out of foster care.

Children entering foster care often experience significant trauma from abuse, neglect, and removal from their homes. CASA volunteers provide stability by building relationships with each child, attending court hearings and case meetings, coordinating with caregivers and service providers, and ensuring their needs are met. If a child relocates or changes placements, their CASA volunteer continues with them—offering the consistency and individualized support that children in foster care often lack.

For the anticipated grant period of October 1, 2026 to September 30, 2027, CASA of Central Texas anticipates serving approximately 70 San Marcos children and youth in foster or substitute care. These children are projected to be supported by 39 volunteer advocates, guided by experienced Case Supervisors who ensure compliance with state and national standards, oversee case progress, and support volunteers in navigating complex case dynamics. Staff and volunteers will participate in all court hearings, case meetings, and required reporting.

Additionally, we project completing 34 outreach and volunteer engagement activities—including community presentations, CASA Voices information sessions, and participation in local markets and festivals—to raise awareness and recruit additional volunteer advocates needed to serve San Marcos children.

COMMUNITY NEED AND JUSTIFICATION –20 POINTS

Evaluation: documentation and justification of the need for the program in the City of San Marcos.

1. Describe in detail the need for this program in San Marcos.

San Marcos faces a critical need for CASA advocacy due to the high number of children entering foster care as a result of abuse or neglect, combined with the strain placed on the child welfare system by COVID-19 impacts, court backlogs, legislative changes, and statewide litigation. Children in protective custody frequently endure multiple placement moves, changes in schools and service providers, and inconsistent access to medical and mental health supports, placing them at elevated risk for re-victimization, academic disruption, and homelessness. Hays County's rapid population growth and limited rural resources further intensify these challenges, and historically, San Marcos children represent 40–50% of all CASA-served youth in Hays County, demonstrating a concentrated local need. CASA provides independent, high-quality, personalized advocacy to ensure each child's safety, well-being, and long-term stability, including targeted support for older youth preparing to age out of foster care—many of whom lack the relationships and resources necessary for a safe transition into adulthood.

2. Has the need for this program been increasing in recent years?

Yes. The need for CASA services in San Marcos has steadily increased as population growth across Central Texas—and particularly in Hays County—continues to outpace state and national averages, leading to higher demand for child protection resources and volunteer advocates. At the same time, the child welfare system remains under significant strain due to lingering pandemic-related delays, ongoing court backlogs, shifting policies, and complex statewide litigation, all of which prolong foster care cases and increase the number of children requiring consistent advocacy. As more families move into the region and more children enter foster care, CASA must expand its volunteer base and program capacity to keep pace with rising needs across the mix of urban, suburban, and rural communities we serve. Continued grant support is essential to ensure that every San Marcos child in foster care has a dedicated advocate standing beside them.

IMPLEMENTATION –15 POINTS

Evaluation:

- *The application demonstrates that resources needed to manage the proposed program are available and ready.*
 - *Applicant has clearly defined objectives focusing on results and measurable outcomes vs. only program activities descriptions and numbers served.*
- Past performance of programs funded by Human Services Grants has met expectations.*

1. Are all resources in place to be able to implement this program? If not, what is missing?

Yes, the essential resources are in place to successfully operate this program, including trained staff, established facilities, and a strong program infrastructure. However, like many nonprofits, CASA of Central Texas relies on a blend of public and private funding to sustain operations, and additional support is needed to ensure we can continue serving every child referred to us. While we are equipped to deliver services, we always need more volunteers to reach 100% of the children in care, as well as funding to cover rising operational costs and core functions that are often underfunded—such as staff salaries, administrative support, and day-to-day program expenses. Strengthening these foundational resources allows us to maintain consistent, high-quality advocacy and keep pace with the community's growing needs.

2. What specific, measurable outcomes or results do you hope to achieve with this program?

During this grant period, we hope to provide meaningful, life-changing advocacy for 70 San Marcos children and youth who have been removed from their homes due to abuse or neglect. Through the donated time and compassion of approximately 39 dedicated CASA volunteers, we aim to ensure each child is truly seen, heard, and supported. These volunteers will spend an estimated 10 hours per month building relationships with the children they serve, meeting with caregivers, teachers, and caseworkers, attending all court hearings, and advocating for each child's medical, mental health, educational, housing, and permanency needs. In addition, we project completing 34 outreach and volunteer engagement activities to help the community understand the urgency of child abuse prevention and the critical need for more advocates. These activities—whether a presentation, a CASA Voices session, or a conversation at a community event—help open doors for new volunteers to step forward and change a child's life.

Success for us is measured not just in numbers, but in outcomes that shape a child's future: reunification with safe parents, placement with relatives, adoption into loving homes, or thoughtful preparation for independence for older youth. Although shifts in policy and statewide reforms create some uncertainty, our goals reflect both our projected capacity and our commitment to ensuring that every San Marcos child in foster care has a steady, trusted adult walking alongside them through one of the hardest chapters of their young lives.

3. If funding is not available at the requested amount, what is the minimum Human Services Grant funding needed to be able to run this program?

\$40,000 is the minimum Human Services Grant funding needed to be able to run this program.

IMPACT AND COST EFFECTIVENESS –20 POINTS

Evaluation:

- *impact on the identified need*
- *implementation costs compared to impact*
- *use of available resources (financial, staff, volunteer)*
- *impact compared to other applicants*

1. Programs can provide value by deeply impacting the lives of a few, with effects that may ripple through generations, or by providing smaller but meaningful impact to a larger group. Describe in detail the impact this program will have on the identified need and on San Marcos residents.

This program creates a deep and lasting impact on San Marcos children by ensuring that every young person in foster care has a dedicated, trained advocate who stands beside them through one of the most difficult chapters of their lives. CASA volunteers—appointed by the Child Protection Court and District Courts and serving as both Court Appointed Special Advocates and Guardians ad Litem—focus on one child or sibling group at a time, offering the kind of individualized attention and advocacy that no other program provides. They get to know each child personally, attend every court hearing, participate in case meetings, collaborate with schools, TDFPS, treatment providers, and foster placements, and remain on the case until the child reaches a safe and permanent home. Their work is grounded in extensive training on trauma, resilience, child development, and cultural competence, allowing them to bring both expertise and compassion into every interaction. Through this grant, San Marcos children will receive high-quality, personalized advocacy that ensures their medical, educational, mental health, housing, and permanency needs are consistently addressed. This support is especially transformative for older youth preparing to graduate or age out of foster care, many of whom face adulthood without stable connections or resources. The impact of this program extends far beyond case closure—when a CASA advocate helps a child achieve safety, stability, and hope, the ripple effects strengthen families, uplift neighborhoods, and contribute to a more resilient San Marcos community for generations to come.

2. Briefly describe other funding sources, volunteers, or in-kind donations that will be used with this program. CASA of Central Texas receives support from additional public and private funders, including VOCA, HHSC, OVAG, and United Way. Our volunteers also contribute significant in-kind value by assisting with outreach, connecting us to civic, business, faith based, and community partners, and sharing their lived experience during volunteer trainings. Many offer their professional expertise—such as educational advocacy, mental health, or child support—as continuing education for fellow advocates. Volunteers and board members also participate in our Legislative Advocacy Team and support events like school supply drives, toy drives, book fairs, and fundraisers. These combined contributions strengthen the program far beyond financial resources and deepen our impact in San Marcos.

3. How many total annual unduplicated direct clients is this program expected to serve? What percentage will be San Marcos residents?

We are anticipating serving 375 children and youth during our current fiscal year.

Approximately 19% are expected to be San Marcos residents.

4. Please list the agencies with which you partner to provide this program's services.

CASA of Central Texas partners with a wide network of agencies to provide comprehensive advocacy for children, including the Texas Department of Family and Protective Services (TDFPS), Child Protective Investigations, foster care and child-placing agencies, treatment centers, local school districts, mental and behavioral health providers, law enforcement, juvenile courts, and the Child Protection Court of Central Texas. We also collaborate with community organizations, service providers, and nonprofit partners throughout Hays County and San Marcos to ensure children and youth have access to the supports, resources, and services they need for safety, healing, and long-term stability.

COMMUNITY SUPPORT – 15 POINTS

Evaluation:

- *A minimum of three letters of reference that indicate strong local support for the program and the agency's ability to implement it as described in the application. Letters must be in support of the specific program requesting funding, not the agency as a whole. Letters will preferably be from San Marcos residents as well as direct clients of the program.*
- *Evidence that volunteers play a vital role in the program or agency's operation.*
- *Evidence that board members are actively involved in and supportive of the agency*

1. What actions do Board members take to support the programs of the agency?

CASA of Central Texas is blessed with caring, service-driven Board members who play a powerful role in helping us carry out our mission of standing up for children in foster care. Our Board members give their time, talent, and heart to make sure CASA has what it needs to serve children well. They offer strategic oversight and serve as ambassadors in the community. They show up for events, support volunteer recruitment, and help with fundraising so our program can grow and reach more children. Their leadership helps ensure the agency has the resources and visibility needed to support children in foster care. We are deeply thankful for their dedication, leadership, and compassion. Their commitment strengthens every part of our program and helps ensure that children in San Marcos and across our four counties have the advocacy, stability, and hope they deserve.

2. Briefly describe the number and role of volunteers in the program or agency's operation.

In our most recent fiscal year, CASA of Central Texas trained and supported 226 volunteers, including 84 from Hays County and 37 from San Marcos. These volunteers are truly the heart of our mission. They serve as Court Appointed Special Advocates (CASAs) and are appointed by a judge to speak up for a child in foster care. With the legal status of Guardian ad Litem (GAL), they provide an unduplicated service by giving each child a steady, trusted voice both in court and throughout the child welfare system. CASAs spend about 10 hours a month getting to know the child, meeting with caregivers, teachers, and caseworkers, attending court hearings, and making thoughtful recommendations to help judges make the best decisions for the child's future. Their one-on-one support makes a powerful difference, ensuring children receive the medical care, mental health services, educational stability, safe housing, and long-term permanency they deserve. Our volunteers are the backbone of our program, and the impact they have on each child's life is both meaningful and lasting.

COUNCIL PRIORITIES - 20 POINTS

1. How long has this program served San Marcos residents? (10 points if at least 2 years)

CASA of Central Texas has been serving children in San Marcos since 1985.

2. In what ways does your agency actively conduct outreach to engage San Marcos residents in its programs and services? How will San Marcos residents access those services? (up to 10 points)

CASA of Central Texas reaches San Marcos residents through year-round outreach, strong community partnerships, and ongoing volunteer recruitment. We take part in local events such as resource fairs, markets, and festivals, and we give presentations to civic groups, schools, and faith-based organizations. We also host "CASA Voices" information sessions to help residents learn about the urgent need for advocates for children in foster care. In addition, our staff and volunteers stay active on social media, in community newsletters, and through collaborations with agencies that support local families and youth.

San Marcos residents access our services through referrals from the courts, the Texas Department of Family and Protective Services, and other community partners. Once CASA is appointed to a case, our volunteers meet children wherever they are—whether at their placement, school, or another safe location—ensuring support is always accessible. While our offices are open by appointment, both staff and volunteers remain easy to reach, offering help through in-person visits, phone calls, and virtual meetings so every San Marcos child and family can receive the advocacy and care they need.

RISK - 10 POINTS

1. How many years’ experience does the agency have in implementing a program of this size and complexity? (5 points if more than 5 years)

CASA of Central Texas is entering its 41st year of serving vulnerable children through court-appointed volunteer advocacy. Since our inception in 1985, we have built decades of experience running a program of this size and complexity—recruiting, training, and supporting hundreds of volunteers each year; partnering closely with judges, child welfare professionals, and community agencies; and maintaining full compliance with state and national CASA standards. Over four decades, we have grown in both scope and strength, adapting to changing systems while staying firmly rooted in our mission. Our long history reflects not only our deep expertise, but also our unwavering commitment to ensuring every child has a safe, stable, and loving home. We look forward to continuing to stand with children, families, and the San Marcos community for many years to come.

2. What percentage of the program’s funding is non-City? (5 points if at least 50%)

97% of CASA of Central Texas’ program funding is non-city.

III. FUNDING RESTRICTIONS

By signing this application I certify the following to be true:

1. All Human Services Grant funding will be spent on San Marcos residents, except for school-based programs, in which case it may be spent within the San Marcos Consolidated Independent School District boundary.
2. Funding requested is not more than 50% of the total funding for the agency.
3. Funding will not be used to fund more than 20% of a full time position.
4. Agency has been in existence for at least 2 years. (This can include serving communities other than San Marcos.)

SUBMITTAL APPROVED BY:

Norma C Blackwell

Norma C Blackwell (Feb 24, 2026 20:42:18 CST)

Signature

February 24, 2026

Date

Norma Castilla-Blackwell

Printed Name

Chief Executive Officer

Title

City of San Marcos - Human Services 2026-27 Budget

| Item | Budget | | Requested | |
|--|-----------|-------------------|-----------|------------------|
| Chief Program Officer (KK) | \$ | 101,647.61 | \$ | 7,500.00 |
| Casework Supervisor #11 (AM) | \$ | 48,101.00 | \$ | 6,000.00 |
| Casework Supervisor #12 (EP) | \$ | 51,355.80 | \$ | 6,500.00 |
| Casework Supervisor #13 (SH) | \$ | 46,679.60 | \$ | 6,500.00 |
| Training Manager (BR) | \$ | 26,780.00 | \$ | 2,500.00 |
| Community Engagement Coordinator #2 (KC) | \$ | 44,290.00 | \$ | 7,000.00 |
| Fringe - 12.65% | \$ | 40,335.03 | \$ | 4,000.00 |
| Total | \$ | 359,189.04 | \$ | 40,000.00 |
| Signage for Building | \$ | 13,000.00 | \$ | 13,000.00 |
| Weather Resistant Outdoor Picnic Tables - Qty. 2 | \$ | 3,000.00 | \$ | 3,000.00 |
| Total | \$ | 16,000.00 | \$ | 16,000.00 |
| Grant Total | \$ | 375,189.04 | \$ | 56,000.00 |

**CASA of Central Texas
2025-26 Proposed Budget**

| INCOME BUDGET | 2025-26 |
|----------------------------|---------------------|
| Government Grants: | |
| Federal | 436,044.00 |
| State | 331,916.00 |
| County | 70,000.00 |
| City | 54,500.00 |
| United Way | 47,500.00 |
| Individual Donations | 144,500.00 |
| Board Member Contributions | 20,000.00 |
| Church & Civic Donations | 50,000.00 |
| Corporate Donations | 37,250.00 |
| Foundation | 763,000.00 |
| Fundraising | 446,260.00 |
| Interest Income | 12,000.00 |
| TOTAL INCOME | 2,412,970.00 |

| EXPENSE BUDGET | 2025-26 |
|-------------------------------------|---------------------|
| Salaries | 1,568,699.02 |
| Insurance Benefits | 91,008.00 |
| Payroll Taxes | 119,644.63 |
| Pension | 78,199.11 |
| Unemployment Taxes | 18,000.00 |
| Employee Recognition | 10,268.00 |
| Professional Services - Contractors | 54,623.00 |
| HR Outsourcing | 33,467.00 |
| Conferences/Education | 5,385.00 |
| Travel - Employees | 42,000.00 |
| Travel - Advocates | 8,500.00 |
| Background Screenings | 1,300.00 |
| Equipment/Computer/Software | 41,949.22 |
| Equipment Rental | 12,000.00 |
| Credit Card & Other Fees | 6,000.00 |
| Office Supplies | 5,100.00 |
| Training Expenses | 4,729.00 |
| Special Needs for Children | 21,600.00 |
| Advocate Recognition | 16,569.21 |
| Audit | 15,500.00 |
| Recruitment & Outreach | 14,000.00 |
| Marketing/Advertising | 39,613.21 |
| Fundraising | 81,735.00 |
| Insurance | |
| Directors & Officers | 4,100.00 |
| Liability & Fidelity | 28,000.00 |
| Membership & Subscriptions | 8,467.60 |
| Telephone/Internet | 24,912.00 |
| Utilities | 17,776.00 |
| Building Maintenance | 39,825.00 |
| TOTAL EXPENSE | 2,412,970.00 |

**CASA of Central Texas, Inc.
Board of Directors 2025**

| NAME | POSITION BOARD TERM | PROFESSIONAL AFFILIATION |
|--|--|---|
| David Pfeifer Canyon Lake, TX 78133 [REDACTED] | President 7/1/2024-6/30/2027 | Retired |
| Frank Pereira San Marcos, TX 78666 | Vice President 7/1/2023-6/30/2026 | Senior Vice President Broadway Bank |
| David Junkin San Marcos, TX 78666 | 2nd Vice President 7/1/2025-6/30/2028 | Attorney McGlothlin Junkin & Wilde |
| Karla Riley Blanco, TX 78606 [REDACTED] | Treasurer 7/1/2023-6/30/2026 | Branch President Security State Bank & Trust |
| Meredith Sisoian New Braunfels, TX 78130 | Secretary 7/1/2025-6/30/2028 | Sr HR Manager Valero Energy |
| Hollis Burklund San Marcos, TX 78666 | Past President 7/1/2024-6/30/2027 | Attorney Law Office of Hollis W. Burklund |
| Alfred Aird New Braunfels, TX 78132 | Board Member 7/1/2023-6/30/2026 | Manager Cemex USA |
| James Rothfelder New Braunfels, TX 78130 | Board Member 7/1/2024-6/30/2027 | Partner Kuehler Investments LLC |
| Beth Hittle New Braunfels, TX 78132 | Board Member 7/1/2024-6/30/2027 | Retired-Treatment Coordinator Layfield, DDS Orthodontist |
| John Hardy San Marcos, TX 78666 | Board Member 7/1/2024-6/30/2027 | Founder Divided Sky Roofing & Solar |
| Jennifer Martin-Rider New Braunfels, TX 78132 | Board Member 7/1/2025-6/30/2028 | Chief Operating Officer Guadalupe Family Health, P.A |
| Sara McCaffrey San Antonio, TX | Board Member 7/1/2025-6/30/2028 | Broker/Owner Southern Style Hospitality Real Estate |

CASA of Central Texas, Inc.

Board Member Job Description

Position Title: Board Member

Reports to: Board

Purpose: To carry out the purpose, mission, and vision of CASA of Central Texas as outlined in the Bylaws. To act as a voting member of the Board with full authority and responsibility to develop policies, procedures and regulations of the operation of their nonprofit; to monitor the nonprofit's financial health, programs and overall performance; and to provide the Chief Executive Officer with the resources to meet the needs of the those the nonprofit serves.

The full Board's responsibilities:

1. Establish policy
2. Hire and evaluate the Chief Executive Officer
3. Secure adequate funding for the nonprofit
4. The Board of Directors has a fiduciary responsibility to the corporation, including but not limited to, monitoring expenditures, review and approve the annual audit, Financial Policies and Procedures, financial statements.
5. Create and update a long range plan for the nonprofit
6. Select and support the nonprofit's Board officers and periodically review their performances
7. Adopt key operating policies and procedures; approve contracts as appropriate
8. Maintain the Board of Directors self-perpetuating body with its successors elected by the Board

Individual Board member's duties:

1. Attend all Board meetings and activities, including special events and Board retreats
2. Become knowledgeable about the nonprofit
3. Come to the Board meetings well prepared and well informed about issues on the agenda
4. Contribute to meetings by expressing your point of view
5. Consider others' points of view, make constructive suggestions and help the Board make decisions that benefit those the nonprofit serves
6. Serve on at least one committee
7. Represent the nonprofit to individuals the public and other organizations
8. Support the nonprofit through a personal financial contribution
9. Participate in fundraising efforts of CASA
10. Assume Board leadership roles when asked
11. Keep the Chief Executive Officer informed about any concerns they or the community has. Complaints or community concerns should be directed to the Chief Executive Officer.
12. The Board members should participate in staff and volunteer activities

Return of Organization Exempt From Income Tax

OMB No. 1545-0047

2024

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

Do not enter social security numbers on this form as it may be made public.

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

Go to www.irs.gov/Form990 for instructions and the latest information.

A For the 2024 calendar year, or tax year beginning Jul 1, 2024, and ending Jun 30, 2025

B Check if applicable:
 Address change
 Name change
 Initial return
 Final return/terminated
 Amended return
 Application pending

C Name of organization CASA of Central Texas, Inc.
 Doing business as _____
 Number and street (or P.O. box if mail is not delivered to street address) Room/suite
1619 E Common 301
 City or town, state or province, country, and ZIP or foreign postal code
New Braunfels, TX 78130

D Employer identification number
74-2403373

E Telephone number
(830) 626-2272

F Name and address of principal officer:
Norma Blackwell, 1619 E Common, New Braunfels, TX 78130

G Gross receipts \$ 2,483,431.

H(a) Is this a group return for subordinates? Yes No
H(b) Are all subordinates included? Yes No
 If "No," attach a list. See instructions.
H(c) Group exemption number _____

I Tax-exempt status: 501(c)(3) 501(c)() (insert no.) 4947(a)(1) or 527

J Website: www.casacentex.org

K Form of organization: Corporation Trust Association Other

L Year of formation: 1985 **M** State of legal domicile: TX

Part I Summary

| | | | | |
|-----------------------------|---|---|---------------------------|-------------------|
| Activities & Governance | 1 | Briefly describe the organization's mission or most significant activities: <u>Advocates for children</u> | | |
| | 2 | Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets. | | |
| | 3 | Number of voting members of the governing body (Part VI, line 1a) | 3 | <u>11</u> |
| | 4 | Number of independent voting members of the governing body (Part VI, line 1b) | 4 | <u>11</u> |
| | 5 | Total number of individuals employed in calendar year 2024 (Part V, line 2a) | 5 | <u>25</u> |
| | 6 | Total number of volunteers (estimate if necessary) | 6 | <u>222</u> |
| | 7a | Total unrelated business revenue from Part VIII, column (C), line 12 | 7a | <u>0.</u> |
| 7b | Net unrelated business taxable income from Form 990-T, Part I, line 11 | 7b | <u>0.</u> | |
| Revenue | 8 | Contributions and grants (Part VIII, line 1h) | Prior Year | Current Year |
| | 9 | Program service revenue (Part VIII, line 2g) | <u>2,548,449.</u> | <u>2,456,393.</u> |
| | 10 | Investment income (Part VIII, column (A), lines 3, 4, and 7d) | <u>2,869.</u> | <u>20,115.</u> |
| | 11 | Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) | <u>28,612.</u> | <u>6,923.</u> |
| | 12 | Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12) | <u>2,579,930.</u> | <u>2,483,431.</u> |
| Expenses | 13 | Grants and similar amounts paid (Part IX, column (A), lines 1-3) | | |
| | 14 | Benefits paid to or for members (Part IX, column (A), line 4) | | |
| | 15 | Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) | <u>1,753,226.</u> | <u>1,767,701.</u> |
| | 16a | Professional fundraising fees (Part IX, column (A), line 11e) | | |
| | b | Total fundraising expenses (Part IX, column (D), line 25) <u>107,195.</u> | <u>853,956.</u> | <u>897,305.</u> |
| 17 | Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) | <u>2,607,182.</u> | <u>2,665,006.</u> | |
| 18 | Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) | <u>-27,252.</u> | <u>-181,575.</u> | |
| 19 | Revenue less expenses. Subtract line 18 from line 12 | | | |
| Net Assets or Fund Balances | 20 | Total assets (Part X, line 16) | Beginning of Current Year | End of Year |
| | 21 | Total liabilities (Part X, line 26) | <u>3,714,760.</u> | <u>3,513,504.</u> |
| | 22 | Net assets or fund balances. Subtract line 21 from line 20 | <u>90,238.</u> | <u>70,557.</u> |

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here

Signature of officer: Norma C Blackwell Date: 02/20/26
Norma C Blackwell (Pre-2025: 2025-10-27) (317)

Type or print name and title: Norma Blackwell, Chief Executive Officer

Paid Preparer Use Only

Preparer's name: Linda T Gonzalez Preparer's signature: Linda T Gonzalez Date: 02/05/2026 Check if self-employed PTIN: P01065920

Firm's name: LINDA TENYUQUE GONZALEZ, CPA Firm's EIN: 20-8254700

Firm's address: 116 FALL CREEK DR, KYLE, TX 78666 Phone no.: (512) 587-6337

May the IRS discuss this return with the preparer shown above? See instructions Yes No

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III

1 Briefly describe the organization's mission:
Advocates for children

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? Yes No

If "Yes," describe these new services on Schedule O.
3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? Yes No

If "Yes," describe these changes on Schedule O.
4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code:) (Expenses \$ 2,304,797 including grants of \$ 0) (Revenue \$ 0)
Advocates for children in criminal and civil court proceedings, be an independent voice in children's fights, aid in case preparations, educate public about child abuse. Advocates donate time, auto mileage and supplies valued at \$356,707.

4b (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4c (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4d Other program services (Describe on Schedule O.)
(Expenses \$ including grants of \$) (Revenue \$)

4e Total program service expenses 2,304,797

NON-DISCRIMINATION POLICY STATEMENT

Equal Employment Opportunity

CASA is committed to providing equal employment opportunities to all employees and applicants regardless of race, color, religion, sex (including pregnancy), national origin, age, disability, veteran status, or any other characteristic protected by applicable federal, state, or local law (TAC 377.113(b)(2)). As a local volunteer advocate program, CASA endeavors to be an inclusive organization whose employees, volunteers, and directors reflect the diversity of the children and community that the program serves in terms of gender, ethnicity, and cultural and socio-economic backgrounds (TAC 377.113(b)(3)).

This policy applies to all aspects of employment, including recruitment and hiring, job assignment and classification, compensation and benefits, promotion and advancement, discipline and termination, training and development, and access to facilities, activities and programs. CASA will make reasonable accommodation for qualified individuals with disabilities and for religious beliefs, as required by law.

Prohibited Discrimination and Harassment. Discrimination or harassment based on any legally protected characteristic will not be tolerated. Anyone found to have engaged in such conduct will be subject to disciplinary action, up to and including termination.

Procedure. Applicants or employees needing accommodation to perform essential job functions should contact their immediate supervisor, the Human Resources Department or the CEO. They must specify the requested accommodation and provide support documentation, as allowed by law. CASA will review the request, engage in an interactive process, and determine whether the accommodation can be provided. Alternative accommodation may be considered as appropriate. The individual will be notified of CASA's decision within a reasonable timeframe. All medical information will be kept confidential.

Reporting Concerns. An employee who believes they have been subjected to discrimination or harassment should promptly report the incident to their immediate supervisor, the Human Resources Department or the CEO. All complaints will be investigated promptly and handled with appropriate confidentiality.

Non-Retaliation. Retaliation against any employee for reporting discrimination or participating in an investigation is strictly prohibited and may result in disciplinary action.

Harassment-Free Workplace

Harassment of any person – employee, volunteer, Board member, client – is prohibited, whether by employees, volunteers, Board members, vendors, suppliers, customers, visitors, or any other third parties. Harassing behaviors are unacceptable in the workplace, in other work-related settings, such as business-related social events, and on social media regardless of whether they rise to the level of being legally actionable. Inappropriate conduct toward, or harassment of, employees by non-employees is also a violation of this policy. Further, mistreatment on social media or through electronic technology carries the weight of workplace interaction and will be treated as such. Harassing or offensive conduct that is directed at one individual may be overheard, seen by, and offend others in the vicinity or online. Thus, any conduct that violates this policy will be addressed, regardless of intent.

Harassment is defined as verbal, written (in-person, online or through electronic media), or physical conduct that has the intent or effect of interfering with an individual's work performance, or that creates an intimidating, hostile, or offensive work environment. The term "harassment" may include, but is not limited to:

- Slurs, epithets, derogatory comments, or any other offensive remarks or jokes;
- Unwarranted touching, assault, impeding or blocking movement, or any physical interference with normal work or movement;
- Derogatory posters, cartoons, drawings, e-mails, text messages, online posts, or gestures;
- Threats of violence or harm, whether implied or direct; or
- Any other conduct that may create a hostile, intimidating, or offensive work environment.

Sexual harassment is defined as unwelcome sexual advances, requests for sexual favors, and other verbal, written, online, or physical conduct of a sexual nature when:

- Submission to sexual conduct is an expressed or implied term or condition of employment;
- Submission to sexual conduct is the basis for any employment decision; or

- When verbal, written, or online communication or physical conduct of a sexual nature has the purpose or effect of unreasonably interfering with an individual's work performance or creates an intimidating, hostile, or offensive working environment.

Examples of sexual harassment may include, but are not limited to:

- Unwanted sexual advances;
- Demands for sexual favors in exchange for favorable treatment or continued employment;
- Threats, either direct or implied, of termination, demotion, poor evaluation, or other detrimental or retaliatory conduct when made for the purpose of obtaining sexual favors;
- Verbal or online conduct, such as derogatory or obscene comments, slurs or sexual invitations, sexual jokes, propositions, suggestive, insulting, or obscene comments or gestures, or any other verbal abuse of a sexual nature;
- Graphic, verbal or online commentary about an individual's body, sexual prowess, or sexual deficiencies, or inquiries into one's sexual experiences;
- Flirtations, advances, leering, whistling, touching, pinching, assault, coerced sexual acts, obstruction of movement, or any other physical interference of a sexual nature; or
- Demonstrative conduct such as derogatory or sexual posters, photographs, cartoons, drawings, calendars, gestures, e-mails, text messages, online postings, or other displays of sexually suggestive objects or pictures.

Complaint Procedure. A person who believes that they are being harassed and/or who witnesses or has knowledge of harassment or inappropriate behavior under this policy must immediately report it to their supervisor (or any other member of management with whom they are comfortable) and the CEO. No person should assume that CASA is aware of a problem or potential problem or that someone who witnessed inappropriate behavior reported it, as conduct that may be offensive to one may not be offensive to another. The complaint will be investigated promptly, thoroughly, and impartially. If unsatisfied with the response to their complaint after using any of the avenues listed above, or if uncomfortable with using any of those avenues, the person must report the conduct to the President of CASA's Board of Directors.

Investigation. The identity of any individual who submits a report, a witness who provides information regarding a report, and the target of the complaint, will be kept confidential to the extent possible consistent with a thorough and impartial investigation. Further, any information gathered as part of an investigation will be kept confidential to the extent possible consistent with a thorough and impartial investigation. Employees should also be aware that when harassing behavior occurs online, through social media, or through electronic technology, CASA may require access to employees' social media and electronic accounts and/or content when doing so is necessary for a thorough investigation of a complaint and that refusal to provide such access may be deemed as an attempt to impede the investigation and may result in disciplinary action, up to and including termination of employment.

Retaliation. CASA prohibits retaliation against employees who complain of harassment or participate in an investigation. An employee who feels that retaliation has occurred should immediately report the alleged retaliation, using the complaint procedures described in this policy. An employee found to have retaliated against an individual who submits a report of harassment or provides information during an investigation will be subject to disciplinary action up to and including immediate termination.

If alleged harassment or retaliation continues after a complaint or investigation, the employee must immediately report the alleged conduct using the complaint procedures described in this policy for further investigation and any appropriate corrective action.

Reporting to Law Enforcement or Appropriate Child or Adult Protective Services. The suspicion of child abuse of any kind should immediately be reported to the DFPS Abuse Hotline, 1-800-252-5400. CASA is committed to following the state and federal legal requirements for reporting allegations or incidents of sexual abuse or misconduct to appropriate law enforcement and child or adult protective services organizations. It is the policy of CASA not to attempt to investigate or assess the validity or credibility of an allegation of sexual or physical abuse as a condition before reporting the allegation to proper law enforcement authorities or protective services organizations.

Designated Media Contact. CASA always has a duty to protect the children we serve and will cooperate with the proper authorities. To protect the confidentiality of all parties involved, CASA will not release any information to media outlets regarding any allegations of sexual abuse or misconduct. The CEO is the sole Designated Media Contact for CASA.



NATIONAL CASA/GAL ASSOCIATION

TEXAS CASA STANDARDS

FOR LOCAL CASA/GAL PROGRAMS

FY2026 | PROGRAMS STRUCTURED AS NONPROFITS



TEXAS **CASA** VISION

Texas CASA envisions communities where all children and families can safely thrive.

TEXAS **CASA** MISSION

Texas CASA's mission is to support local CASA programs with training, community awareness, resources and public policy to make a positive difference in the lives of children and families in Texas.

ABOUT TEXAS **CASA**

Established in 1989, Texas CASA is the statewide membership association for all local CASA programs. In this role, we support the CASA network by serving as the administrator of state and federal funds, setting and monitoring standards, providing training, leading a statewide volunteer recruitment campaign, advocating for public policy and more. Texas CASA is committed to partnering with statewide stakeholders and the CASA network to elevate best practices when working with children and families.

Standards Effective January 2026

Approved by Texas CASA Board of Directors
Last modified January 23, 2026

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EXECUTIVE SUMMARY

These 11 updated Standards reflect National CASA/GAL's focus on becoming a highly effective organization at the national level and desire to see highly effective organizations on the state and local levels. They also represent our collective unwavering commitment to providing quality volunteer advocacy for children who have experienced abuse or neglect. Texas CASA worked with Regional Representatives and select local programs across the state to incorporate the new National CASA Standards, as well as legal requirements of CASA programs and Texas-specific Standards. A public comment period was also provided to incorporate network input into these requirements.

The objective of Standards for Local CASA/GAL Programs is to set performance levels for local programs to ensure quality while allowing individual programs the room for creativity and innovation. A set of quality standards to measure a program's operations demonstrates that a program:

- Respects and is committed to quality for the children and families served and that volunteers provide best-interest advocacy
- Utilizes established policies and procedures necessary for effective management and governance
- Manages their financial affairs prudently, are financially sound, and are committed to the principles of public disclosure
- Continually evaluates its services and operations
- Works positively and collaboratively with their community partners, other local programs, Texas CASA and with National CASA/GAL
- Recruits, trains, develops, and supports a high-caliber team through effective human resource practices

Programs participate in standards-based quality assurance (QA) reviews which foster greater awareness among staff, volunteers and governing bodies about how the programs are governed, operate, and execute our shared mission. Texas CASA is strongly committed to high-quality best-interest advocacy and will support this commitment through dedicated technical assistance to the local network to achieve these Standards.

HOW TO USE THE STANDARDS

The document provides a framework for quality program management and operations excellence for nonprofit CASA/GAL programs. The document is organized into sections dealing with specific areas of program management. Each section begins with a standard. There are 11 standards for local CASA/GAL programs. The order of the standards does not in any way represent importance; they are all equal in stature.

The standard statement in each section defines the overall approach to manage a particular aspect of program operations. Under each standard, "Elements of Practice" are provided as indicators for how the standard is implemented. Elements of Practice operationalize the standards by specifying activities, policies and/or processes for a local program to have in place to adhere to and to carry out the intent of the overall standard.

Texas CASA Standards include the National CASA/GAL standards as well as state laws, regulations and court rules that apply to CASA. State laws take precedence over National CASA/GAL Association standards and Texas CASA standards.

A Glossary of Terms is provided as a complement to the standards to provide a definition of select terms. The first use of each term in the Standards at a Glance and the Elements of Practice is linked to the term in the glossary.

The Documentation List is organized by standard and is designed to itemize the documents or type of documentation that will or can help to substantiate the Elements of Practices for the respective standards. Though all documentation is requisite, a series of the documents will be required to be submitted to National CASA/GAL or Texas CASA as a part of the QA process, depending on who is conducting the audit.

STANDARDS AT A GLANCE

1 CORE MODEL AND MISSION

CASA/GAL programs adhere to and advance the CASA/GAL mission and vision for court-appointed volunteer best-interest advocacy for all children/youth and work to strengthen and support families through the implementation of the Core Model.

CASA/GAL volunteers advocate for children from birth through the age of 25, as defined by Texas statute, or young adults who elect to remain in care if the court continues the appointment.

2 VALUES

CASA/GAL entities embody and exhibit these common set of CASA/GAL values that guide all conduct, engagements, interactions, communications, and practices. Program volunteer advocates, staff and nonprofit governing board members demonstrate and promote the following CASA/GAL values: (see more in standard 2).

3 ADVOCACY FOR ALL

Commits to understanding the children and families we serve and demonstrates this in its operations, governance, management and advocacy for all.

4 ETHICAL CONDUCT AND CONFIDENTIALITY

Upholds the credibility, integrity, dignity and reliability of CASA/GAL advocacy by conducting all interactions in an honest, fair, respectful, professional and compassionate manner. The CASA/GAL program incorporates policies and practices to avoid conflicts of interest and preserve confidentiality.

5 GOVERNANCE AND ADMINISTRATION

Oversees and ensures compliance with applicable laws, regulations, fiduciary obligations, written agreements, standards and financial sustainability of the CASA/GAL program.

6 MANAGEMENT AND FUNDING

Demonstrates mission-oriented leadership in operations management and is a responsible steward of all resources in order to maximize advocacy for children who are eligible for and in need of a CASA/GAL volunteer.

7 HUMAN RESOURCES

Follows written policies for recruiting, screening, training, supervising, evaluating and developing staff in a welcoming environment that advances the CASA/GAL mission.

8 VOLUNTEER ADMINISTRATION

Follows written policies for recruiting, screening, training, supporting, supervising, recognizing and retaining volunteers to fulfill the role and duties of court-appointed special advocates/guardians ad litem, in accordance with applicable laws, rules, regulations and standards.

9 PUBLIC EDUCATION AND ENGAGEMENT

Communicates and actively engages with community partners and the general public to provide information and build support for the CASA/GAL mission and the needs of children who have experienced abuse or neglect.

10 DATA AND RECORDS

Compiles, maintains, manages and reports quality data and information in accordance with applicable laws, policies and/or standards. The CASA/GAL program maintains complete, accurate and current case records and volunteer files.

11 NETWORK AND MEMBERSHIP

Maintains membership with National CASA/GAL Association, is a member or an affiliate of Texas CASA, and meets the standards, requirements and policies of both.

STANDARD 1

CORE MODEL AND MISSION

CASA/GAL programs adhere to and advance the CASA/GAL mission and vision for court-appointed volunteer best-interest advocacy for all children/youth and work to strengthen and support families through the implementation of the Core Model. CASA/GAL volunteers advocate for children from birth through the age of 25, as defined by Texas statute, or young adults who elect to remain in care if the court continues the appointment.

ELEMENTS OF PRACTICE¹

- A. CASA/GAL advocacy is grounded in the knowledge that children grow and thrive in strong, stable permanent families, understanding the need for trauma-informed practices with a commitment to family preservation, reunification and permanence.
 - I. CASA/GAL community volunteer advocates:
 - a. Are thoroughly screened per National CASA/GAL Association standards and the Texas Administrative Code (TAC) prior to and regularly throughout their service.
 - b. Are trained in the National CASA/GAL research-informed pre-service curricula according to National CASA/GAL training and facilitation standards and engage in continual learning and development.
 - c. Are supervised and supported by program staff or peer in accordance with National CASA/GAL standards.
 - d. Meet in-person with the child/youth every thirty (30) days at a minimum.*
 - e. Advocate for the best interests of children/youth by:
 - i. *Gathering information from and collaborating with the child/youth, the child's/youth's family, professionals, and others with relevant information about the child/youth. *See Standard 8.Fg.ii regarding a written exceptions policy which Texas CASA created for Texas.*
 - ii. *Assessing and identifying risks to inform needs for services and supports for the child/youth and family.*
 - iii. *Providing up-to-date, fact-based information and/or recommendations to the court to help the judicial officer make the most well-informed decisions.*
 - iv. *Communicating the child's/youth's wishes to the court.*
 - v. *Providing active advocacy and attending court hearings until directed otherwise by the court or released by the program.*

2. CASA/GAL programs are appointed and sanctioned by the court to serve children/youth:
 - a. Who are involved in judicial proceedings related to abuse or neglect as defined by relevant child welfare laws.
 - b. Living at home or in out-of-home care.
 - c. From birth through the age defined by state law, Tribal law, or court rule as the limit to youth remaining in care.
 - d. Through supervision and support of CASA/GAL volunteer advocates and/or peers.
 - e. Through active advocacy until directed otherwise or released by the court.
3. Once the program has taken all available Suit Affecting the Parent Child Relationship cases, if courts and the Texas CASA Board of Directors are in alignment with a CASA/GAL volunteer program accepting other types of cases, they may, with a waiver outlining data and funding restrictions or requirements.
4. CASA/GAL programs serving at least 90% of available conservatorship cases are eligible to serve Court-Ordered Services (COS), also referred to as Motion to Participate or Order to Participate.
5. All Texas CASA Standards for local CASA/GAL programs that apply to a Suit Affecting the Parent Child Relationship (SAPCR) apply to Court-Ordered Services cases.
6. CASA/GAL programs develop and incorporate strategies and practices to strengthen and support families by understanding and embodying these guiding principles:
 - a. Family preservation and reunification are key components of CASA/GAL best-interest advocacy and are foundational to the well-being of children/youth with the understanding that children, youth, and families experience trauma when separated.
 - b. Children/youth do best within a strong, stable, and permanent family whether biological or non-biological, chosen or circumstantial, which connects the child/youth and parent/caregiver through tradition, shared experiences, emotional commitment, and mutual support.
 - c. When children/youth are separated from their families, regular contact with their parents/caregivers, siblings, relatives, and community is critical.
 - d. Working effectively with children and youth in their home as well as in out-of-home care is essential to CASA/GAL best-interest advocacy.
 - e. Family-finding strategies are an important element of best-interest advocacy to maintain key relationships for the child/youth.
 - f. CASA/GAL best-interest advocacy serves as a protective factor by ensuring a consistent, stable, engaged presence in the child's/youth's life.

- g. When a court determines a child cannot be safely reunified with their family of origin consistent with legal mandates, another permanent placement is in a child's best interests.
7. Each CASA/GAL program complies with the requirements and provisions of the contract between Texas CASA and the Health and Human Services Commission.
 8. At least once in a two-year period, the CASA/GAL program conducts a review through written surveys of volunteers, judges, and other key community partners, which includes assessment of the program goals, degree to which the program meets the needs of the children it serves, changing demographics and effectiveness of its services.

B. The program's governing body develops, adopts and advances a written program mission statement. The program's mission is:

1. Consistent with the National CASA/GAL Association Mission, which states: "The National CASA/GAL Association, together with state and local member programs, supports and promotes court-appointed volunteer advocacy so every child who has experienced abuse or neglect can be safe, have a permanent home, and the opportunity to thrive."
2. Reflective of the Role of a Local Program, which states: [Local CASA/GAL programs] provide a sound organizational framework to recruit, screen, train, supervise, support, and retain court-appointed special advocates/Guardian ad Litem.
3. Operationalized for decision-making at all levels to guide services, priorities, planning, and volunteer administration.
4. Reflected throughout the program's written materials and published on the program's webpage.

C. The program's governing body develops, adopts, and advances a written program vision. The program's vision:

1. Is consistent with the National CASA/GAL Vision, which is: "A world where every child who has experienced abuse or neglect is given the opportunity to thrive in a safe and loving home."
2. Strives to serve all children and youth within the program's service area.
3. Envisions all children and youth in the program's service area thriving within a permanent, strong, stable family.
4. Reflected throughout the program's written materials and published on the program's webpage.

STANDARD 2

VALUES

CASA/GAL entities embody and exhibit a common set of CASA/GAL values that guide all conduct, engagements, interactions, communications, and practices. Program volunteer advocates, staff and nonprofit governing board members demonstrate and promote the following CASA/GAL values.

ELEMENTS OF PRACTICE

- A. **It is in a child's best interest to remain with their family of origin when possible and if conditions are safe:** We know separation causes trauma and believe families should receive the resources they need to be reunited and stay together. This includes having children live with relatives and remain with siblings while in care. If they cannot be placed together, it is equally important for children to maintain contact with their siblings, as well as with their parent(s). We advocate for connecting families with services and support that will help them achieve stability.
- B. **Partnership and respect are essential to successful collaboration:** Whether we work with member organizations, volunteers, individuals in the child welfare and judicial systems, families, educators, or organizations that provide supportive services, we are reliable partners. We commit to integrating different viewpoints to achieve effective and inspiring solutions.
- C. **Individualized, relevant services and practices are foundational to our work:** We respect and value the unique individuality of each child/youth, family, staff person, board member and volunteer. We know that everyone brings their personal experience, insights and strengths to their engagement with us. We strive for advocacy that is unique to each child/youth and family through deep knowledge of the child's/youth's history, needs and wishes. We commit to independent fact-finding and information gathering that is comprehensive for the purpose of pursuing the best outcomes for children/youth and families.
- D. **Integrity drives the way we act:** We commit to having responsive, honest and fair interactions that address problems directly. We keep the best interests of children and families at the forefront. We hold ourselves accountable to the highest ethical and professional conduct.

- E. Empathy is essential:** We put ourselves in a position to work alongside others on their journeys with dignity, and we aim to better understand their perspectives. We respect the effort, time and care others are already putting into this important work and recognize the privilege we are afforded to be part of children's and families' lives. No one should be defined by their situation or circumstances, and we strive to appreciate every person fully for who they are.

- F. Positive impact and outcomes are the true measures of success:** In all of our work, we want our decisions and efforts to result in fewer children remaining in or returning to the child welfare system. We want to ensure that every child has the opportunity to thrive. And we will use all of the tools, data, and resources available to inform our practices and improve outcomes for children and families.

STANDARD 3

ADVOCACY FOR ALL

CASA/GAL entities commit to leveraging the insights, skills and strengths of our volunteer advocates, staff, board members and partners to inform individualized, relevant service that advances best-interest advocacy and optimal outcomes for each child/youth and family involved in judicial proceedings related to abuse or neglect.

ELEMENTS OF PRACTICE

- A. Best interest advocacy requires comprehensive understanding of each child's/youth's history, needs and wishes.**
 - 1. Parents and all parties relevant to CASA/GAL appointments from the court are valued for their unique perspectives, insights and contributions toward assessing the child's/youth's best interests.
 - 2. CASA/GAL entities identify and leverage the strengths of each family member, staff person, volunteer and board member for optimal outcomes.
 - 3. CASA/GAL entities facilitate access to learning opportunities to develop an entity-wide strengths-based lens for best-interest advocacy.

- B. CASA/GAL entities work to ensure staff, volunteers and governing board members have a range of skillsets, experiences and abilities to meet the needs of the children/youth served, and to continually strengthen the CASA/GAL entity.**
 - 1. The CASA/GAL entity's written strategic plan includes recruitment goals for staff, volunteers and board members that:
 - a. Address the needs of the children/youth served for the relevant service area
 - b. Support family preservation and reunification outcomes
 - c. Maximize efficient operations and practices
 - d. Elevate and amplify all resources to prioritize capacity-building to serve all children in the relevant service area
 - 2. CASA/GAL entities engage individuals who can:
 - a. Help the program identify and understand the needs of the children/youth and families served.
 - b. Identify the action steps to address these needs through governance, recruitment, training, supervision, retention, evaluation and advocacy.

3. CASA/GAL entities evaluate their recruitment needs at least annually for their service area.
4. The CASA/GAL entity's strategic plan and/or recruitment plan includes one or more strategies for developing staff, volunteers and board members to continually build a strong collective base of varied skills, abilities and expertise for optimal outcomes for each child/youth, family, as well as the CASA/GAL entity.
5. All recruitment, retention and development strategies and activities comply with applicable laws, statutes, Tribal law, court orders and regulations.
6. Local programs leverage resources and support from Texas CASA and the National CASA/GAL Association to advance the CASA/GAL mission.

STANDARD 4

ETHICAL CONDUCT AND CONFIDENTIALITY

Upholds the credibility, integrity, dignity, and reliability of CASA/GAL advocacy by conducting all interactions in an honest, fair, respectful, professional, and compassionate manner. The CASA/GAL program incorporates policies and practices to avoid conflicts of interest and preserve confidentiality.

ELEMENTS OF PRACTICE

A. Requires ethical conduct.

1. The CASA/GAL program establishes policies to govern ethical conduct of its staff, paid consultants, volunteers, and governing board. Policy includes recognition of the Texas Family Code, 107.009, that a person is not liable for civil damages for a recommendation made or an opinion rendered in good faith, while acting in the official scope of the person's duties as a board member, staff member, or volunteer of a local volunteer advocate program.
2. The CASA/GAL program maintains a written conflict of interest policy approved by the governing board. The conflict-of-interest policy:
 - a. Is signed annually by staff, paid consultants, and members of the governing board; and the CASA/GAL program retains this document in the appropriate record or file.
 - b. Identifies and defines conduct and transactions in which a conflict of interest exists or has the potential to exist and warrants disclosure, including but not limited to:
 - i. *A conflict that renders the person unable or potentially unable to perform duties in an impartial manner.*
 - ii. *A conflict that permits a person to receive or potentially receive private gain or favor for themselves or others or otherwise creates the appearance of impropriety.*
 - c. Prohibits staff, paid consultants, volunteers, and members of the governing board from having direct or indirect financial interest in the assets, leases, business transactions, or professional services of the CASA/GAL program.
 - d. Prohibits staff and/or assigned CASA/GAL volunteers from being related to any parties involved in the case or being employed in a position and/or affiliated with an agency that might result in a conflict of interest.
 - e. Identifies other specific conduct or circumstances that constitute a conflict or potential conflict and would therefore be prohibited.

- f. Requires that the individual involved makes timely disclosure to the CASA/GAL program of any conflict or potential for conflict of interest.
 - g. Includes a procedure for recusal from the transaction, case, or decision by the individual with the conflict or potential conflict.
 - h. Includes a procedure for dismissal or other appropriate discipline of the individual involved with a conflict in the event said individual fails to disclose the conflict prior to becoming involved in the transaction, case, or decision affected by the conflict.
 - i. Includes a procedure for dismissal of a volunteer, employee, or board member who has abused or neglected any position of trust or violated the policies governing ethical conduct or otherwise created a negative image for the CASA/GAL program.
 - j. Prohibits discrimination against any individual on the basis of race, color, religion, sex, national origin, age, and disability per federal civil rights laws.
 - k. Includes restricting the employment of any person related within the second degree of affinity (spouse, in-laws or grandparents/grandchildren of a spouse) or the third degree of consanguinity (parent, child, sibling, grandparent/child, niece/nephew, aunt/uncle) to any member of the governing body, or to any other officer or employee authorized to employ or supervise such person.
3. Although legal counsel may be provided to the CASA/GAL program under voluntary auspices on a pro bono basis and a lawyer who offers legal counsel may sit on the CASA/GAL program board, the CASA/GAL program clarifies these roles in order to keep the two functions separate.
 4. If active volunteers are members of the governing board, there are processes and procedures in place for handling potential conflicts of interest in relation to human resources and other issues with potential for a conflict of interest.
 5. If an employee also serves on the governing body, they may not be a voting board member.
 6. The CASA/GAL program's staff, volunteers, and governing board members must immediately notify the CASA/GAL program of any criminal charges filed against them.
 7. The CASA/GAL program shall promptly refer to National CASA/GAL Association and Texas CASA any credible evidence that a staff person, volunteer, governing board member, contractor, subcontractor, subgrantee, or other person affiliated with the CASA/GAL program has committed a criminal or civil violation of law pertinent to fraud, conflict of interest, bribery, gratuity, or similar misconduct involving CASA/GAL program funds.
 8. CASA/GAL staff and volunteer advocates may foster or foster/adopt a child or children only if the staff or volunteer is related or is fictive kin to the child, defined as a close, pre-existing relationship with the child or child's family prior to coming into care. Staff may also foster or foster/adopt if the child is not in conservatorship from any county served by the staff member's CASA program.
 9. Individual CASA/GAL staff and volunteers have no contractual relationship with DFPS or designee within their court jurisdiction.

B. Maintains confidentiality.

1. The CASA/GAL program follows written policies and procedures regarding access to, use of, and release of information about the children it serves to ensure that the confidentiality of children and their families is maintained at all times.
2. Staff and volunteers respect the child's right to privacy by maintaining confidentiality.
3. Volunteers take an oath of confidentiality upon completion of the National CASA/GAL Association pre-service training and sign a statement of confidentiality upon acceptance of each case.
4. Staff and members of the governing board sign a statement of confidentiality upon hire or affiliation with the CASA/GAL program.
5. The CASA/GAL program counsels volunteers, employees, and directors on what constitutes confidential information.
6. The CASA/GAL program demonstrates its compliance with applicable statutory requirements pertaining to confidentiality of case-related information by ensuring that its policies, procedures, and practices are consistent with all applicable laws and regulations.
7. Access to records is limited to the court, authorized CASA/GAL program staff, volunteer advocates, and others outside the CASA/GAL program whose request for access to confidential information is permitted by statute or the court.
8. The CASA/GAL program has a written policy to protect confidential information of staff, volunteers, governing board, and advisory committee members, donors, and the children and youth it serves.
9. The CASA/GAL program shall not share, except as state law or court order allows, the following: the child's full name; the child's location; the child's placement; the child's history of abuse and neglect; records regarding social services, law enforcement records, school records, records of a probate or court proceeding, medical, mental health or drug or alcohol treatment record; or any relevant records related to the child obtained as Guardian ad Litem or CASA advocate.
10. All confidential electronic and hard copy correspondence, files, and records are securely maintained and are readily accessible.

STANDARD 5

GOVERNANCE AND ADMINISTRATION

Oversees and ensures compliance with applicable laws, regulations, fiduciary obligations, written agreements, standards and financial sustainability of the CASA/GAL program.

ELEMENTS OF PRACTICE

A. Ensures the governing board adheres to its role and responsibilities:

1. Ensures CASA/GAL program compliance with the Texas Family Code and any other applicable state and local statutes, court rules, ordinances, executive orders, and appropriate regulations which govern the relationship with the court.
2. Provides the CASA/GAL program with access to legal counsel and/or relevant legal expertise to clarify the meaning of laws and regulations governing its program operations and to provide legal counsel as needed to assist in performing the duties assigned to the volunteers by the courts.
3. Establishes a written strategic plan with annual operational goals and objectives with an action plan and timeline for meeting those goals and objectives that is reviewed and whose progress is evaluated annually.
4. Ensures development of and compliance with all policies required by National CASA/GAL Association.
5. To assess the need for updates, the program will review all required policies, plan, protocols, and governance documents at least every three (3) years (or more often if required by law, rule, regulation, ordinance, executive order, court order, standards, or legislative activities). The reviewer(s) and date of review or update will be recorded on the document.
6. Adheres to a whistleblower policy which provides members of the governing board, staff, and volunteers a procedure for reporting unethical, inappropriate, or illegal activities by members of the governing board, staff, or volunteers and such policy affords the reporter protection in making good faith reports about such activities.
7. Secures sufficient financial resources, and manages resources prudently in order to support the CASA/GAL program's provision of services.

8. Adopts the CASA/GAL program's written budget annually which guides the management of resources based on:
 - a. Funding anticipated during the CASA/GAL program year that is based on CASA/GAL program goals and objectives.
 - b. Fixed and incremental costs of operating the CASA/GAL program and identification of potentially changing costs.
 - c. Review, approval and documentation of any budget deviations.
 - d. No more than 50% dependence on funding through HHSC.
9. Ensures the CASA/GAL program has applicable insurance coverages, such as liability insurance, workers' compensation insurance and directors' and officers' coverage.
10. Appoints the executive director, or functional equivalent, and delegates authority and responsibility for CASA/GAL program operations, financial management, and policy implementation to the executive director.
11. Evaluates the performance of the executive director in writing at least annually utilizing written performance criteria.
 - a. Provides for the participation of the executive director in the evaluation process.
 - b. The executive director is given the opportunity to sign the evaluation report, to obtain a copy and to include written comments before the report is entered into the human resources record.
12. Establishes a written succession plan for the executive director position. The plan makes provision for the following:
 - a. Designating an interim executive director, if necessary.
 - b. Charging a committee or designee with responsibility for conducting a formal search.
 - c. Identifying and providing resources needed to carry out the search effectively.
 - d. Notifying Texas CASA, National CASA/GAL Association, significant funders, staff, and community partners within 10 days of departure.
13. Maintains records of every governing board meeting and accurately reports all actions taken by the governing board and includes a summary of the governing board's deliberations. The written record also includes reports of board committees. The written record is prepared in a timely manner and copies are made available to members of the governing board. A master copy of the written record, to include all board meeting minutes, dates, topics or agendas and attendance records and absences, is kept with the CASA/GAL program's official documents.
14. Ensures the CASA/GAL program has been granted the legal authority to operate through state or local statutes, statewide MOU, executive or judicial order or court rules.

15. Ensures the CASA/GAL program has a statute or signed written agreement with the court of jurisdiction over the Suit Affecting the Parent-Child Relationship or in the conservatorship of the Department of Family and Protective Services (DFPS), that defines the case assignment and acceptance process as well as the working relationship between the CASA/GAL program and the court.
 - a. The agreement must be reviewed at least once every two (2) years to assess the need for updates.
 - b. The written agreement between the CASA/GAL program and the court must be renewed when there is a change in the judicial leadership or changes in policy, law or local court rules, or CASA/GAL program resources that substantially impacts the relationship between the CASA/GAL program and the court.
 - c. The CASA/GAL program has regular communication with the court in order to evaluate the court's satisfaction with the CASA/GAL program and to obtain the court's recommendations for improving the effectiveness of the CASA/GAL program.
16. Ensures the CASA/GAL program has in place and follows a memorandum of understanding which defines the working relationship between the CASA/GAL program and the Department of Family and Protective Services (DFPS), or with their Single Source Continuum Contractor (SSCC) if the CASA/GAL program is within a Community-Based Care catchment area, reviewed every two years, that is approved by Texas CASA.
17. Ensures the development of, compliance with and review of by-laws for CASA/GAL programs structured as nonprofits. At a minimum, the by-laws:
 - a. Meet statutory requirements.
 - b. Describe the organizational structure and responsibilities of the governing board.
 - c. Include a rotation of directors as well as term limits for directors and executive committee officers as well as the mechanisms for selection, duration of membership, and election of officers.
 - d. Require at least nine members, with an executive committee comprised of, at a minimum, the offices of president, vice president, secretary, and treasurer.
 - e. Describe terms of board membership, including a minimum age of 21.
 - f. Set the minimum number of formal meetings of the full governing board at least four (4) times per calendar year.
 - g. Set the quorum for these meetings of at least a simple majority of the current membership of the governing board.
 - h. Describe standing committees to include executive and finance committees.

B. Ensures and monitors screening of all staff, volunteers, and members of the governing board as follows:

1. Obtains a completed written application from each prospective staff person, volunteer or governing board member containing information about educational background, training, employment history, and experience working with children.
2. Obtains a completed reference check on three (3) or more references that are unrelated to the applicant.
3. Obtains written authorization, consent, and release forms for the CASA/GAL program and other appropriate agencies to secure, and secures, a background check on each prospective staff person, volunteer and governing board member initially, and at least annually if there are no rap back services, to include:
 - a. Criminal records from the court jurisdiction in which the applicant currently resides and works.
 - b. State criminal records.
 - c. A fingerprint-based search conducted in conjunction with the Federal Bureau of Investigations (FBI) under the authority of the Health and Human Services Commission (HHSC). If unable to complete a fingerprint-based check after two attempts, a national name based criminal history check shall be completed with re-checks annually, which includes a Social Security Number trace. The CASA/GAL program shall retain documentation as prescribed by Criminal Justice Information Service (CJIS).
 - d. National sex offender registry maintained by US Department of Justice and Texas Public Sex Offender Registry maintained by TDPS, if not included in the fingerprint-based check.
 - e. Child Abuse and Neglect Central Registry maintained by the DFPS in accordance with federal law and Texas Family Code 261.002.
4. Conducts a personal interview in person with each prospective staff person, volunteer, and governing board member.
5. Secures county and state criminal record checks for any county or state not covered by a national criminal background check in which the prospective staff person, volunteer, or governing board member has resided for the previous seven (7) years.
6. Secures a child abuse registry or child protective services check, unless prohibited by law, for any state in which the prospective staff person, volunteer, or governing board member has resided for the previous seven (7) years.
7. Declines any prospective staff person, volunteer, or governing board member who refuses or fails to sign a release of information form or submit the required information necessary for any of the checks required by these Standards for Local CASA/GAL Programs.

8. Declines or dismisses any prospective or current staff person, volunteer or governing board applicant found to have been convicted of, or having charges pending for, a felony or misdemeanor involving a sex offense, child abuse or neglect or related acts that would pose risks to children or the CASA/GAL program's credibility.
 - a. Barred Felony or Misdemeanor Offense: A board member, staff or volunteer whose background check produces a conviction, guilty plea, plea of no contest, acceptance of deferred adjudication or pending charge is permanently barred from service or employment if the charge is any level of offense under the Texas Penal Code:
 - i. Chapter 19, Criminal Homicide,
 - ii. Chapter 20, Kidnapping,
 - iii. Chapter 20A, Trafficking,
 - iv. Chapter 21, Sections 21.02, 21.07, 21.08, 21.11, 21.12, Continuous Sexual Abuse of Young Child or Children, Public Lewdness, Indecent Exposure to Another Person, Indecency With a Child, Improper Relationship Between Educator and Student,
 - v. Chapter 22, Sections 22.011, 22.02, 22.021, Sexual Assault, Aggravated Assault, Aggravated Sexual Assault, Injury to a Child. See additional Sections 22.04, 22.041, 22.05, 22.07, 22.11,
 - vi. Chapter 25, Offenses Against the Family: Bigamy; Prohibited Sexual Conduct. See all additional Sections.
 - vii. Chapter 28, Section 28.02, Arson.
 - viii. Chapter 29, Robbery,
 - ix. Chapter 30, Section 30.02, Burglary,
 - x. Chapter 33, Section 33.021, Online Solicitation of a Minor,
 - xi. Chapter 42, Section 42.072, Stalking,
 - xii. Chapter 43, Public Indecency,
 - xiii. Chapter 46, Section 46.06, 46.09, 46.10, Unlawful Transfer of Certain Weapons,
 - xiv. Chapter 48, Section 48.02, Prohibition of the Purchase and Sale of Human Organs,
 - xv. Chapter 49, Section, 49.045, 49.05, 49.07, 49.08, Intoxication Assault, Intoxication Manslaughter. See Additional Section 49.045,
 - xvi. Chapter 71, Organized Crime,
 - xvii. or any other charge involving violence, child abuse or neglect, assault with family violence, a sex-related offense or a history of founded allegations of abuse with DFPS.
 - b. A volunteer, staff or board member must be barred from service or employment if the volunteer, staff or board member knowingly or intentionally places a child through the actions of the volunteer, staff, or board member in direct contact with a person whose criminal history involves an offense listed above, other than a CPS-approved visitation.

- c. **Ten-Year Bar for Felony Offenses:** A board member, staff, or volunteer whose background check produces a conviction, guilty plea, plea of no contest, acceptance of deferred adjudication or pending charge that includes any grade of felony, other than for offenses listed as a permanent bar, is barred from service or employment for 10 years after the offense, after which time the CASA/GAL program will consider the extent of the rehabilitation since the offense as well as other factors that may influence the decision to accept the applicant as a board member, staff, or volunteer.
9. Considers, if an applicant is found to have committed a misdemeanor or felony that is not listed as a permanent bar or would not pose a risk to children and would not negatively impact the credibility of the CASA/GAL program, the extent of the rehabilitation since the misdemeanor or felony was committed, as well as other factors that may influence the decision, to accept the applicant as a staff person, volunteer, or governing board member.
10. When the program becomes aware of a volunteer, staff, or board member who is the subject of a pending charge listed above in **Standard 5.B.8.a.** or an open DFPS investigation, the person is suspended pending a disposition. A new review shall be made once the charge or investigation is resolved, for CASA service to continue.
11. Completes and documents all screening before the staff person, volunteer, or governing board member is accepted by the CASA/GAL program, and written verification is maintained on file at the CASA/GAL program office.
12. Provides written notification as part of the application process for prospective staff, volunteers, and governing board members about all screening and background check requirements.
13. Repeats and documents these record checks for each active staff person, volunteer and governing board member at least annually. Rap back services may be utilized for criminal and child abuse background re-checks.
14. Determines and monitors adherence to policies related to corrective action(s) for any current staff person, volunteer, or governing board member who violates a CASA/GAL program policy, court rule, or law that poses a risk to a child or negatively impacts the CASA/GAL program.

C. Provides CASA/GAL program administration oversight as follows:

1. Ensures clear lines of accountability and authority exist at all levels of the CASA/GAL program's organizational and management structures and are formalized in a chart of the organization, showing lines of accountability, to which all staff, volunteers, and governing board members have received orientation.
2. If the CASA/GAL program is under the umbrella of a parent organization, a written agreement or memorandum of understanding (MOU) is developed that:
 - a. Details the rights and responsibilities of the CASA/GAL program and the parent organization.

- b. Includes procedures for resolving situations in which a conflict of interest exists between the CASA/GAL program and its parent organization.
 - c. Contains the protocol for resource development activities of both organizations.
 - d. Sets a time frame of no more than two (2) years for review and possible revisions of the agreement.
 - e. Specifies the process for termination of the agreement or memorandum of understanding.
3. Communication and collaboration between staff, volunteers, and governing board members is promoted by providing opportunities for interactions amongst volunteers, staff, and the governing board.

D. Recruits members of the governing board:

1. The governing board is diverse and has members who bring a range of skills, backgrounds, and knowledge which support the CASA/GAL program in fulfilling its mission.
2. The CASA/GAL program utilizes a written plan or matrix to guide its recruitment efforts.
3. The CASA/GAL program governing board includes individuals with various capabilities:
 - a. Skills and experience to serve at a policy-making level.
 - b. Ability to advocate for sufficient financial resources for the CASA/GAL program to carry out its purpose.
 - c. Skills and experience to serve at a policy-making level.
 - d. Knowledge of the court system.
 - e. Knowledge of evidence-informed practices and child abuse and neglect dynamics.
 - f. Ability to reflect the community served.
 - g. Other specialized skills needed to carry out the objectives of the CASA/GAL program.
4. The CASA/GAL program develops and utilizes on an ongoing basis the following:
 - a. Job descriptions for board members.
 - b. Board recruitment strategies.
 - c. Election and screening procedures.
 - d. Written application for board members including consent and release for record checks.
5. Must provide orientation for new directors and continuing education for incumbent directors, which must include information on:
 - a. Applicable laws and regulations.
 - b. The National CASA/GAL Association Core Model.
 - c. The Texas CASA Standards for Local CASA/GAL Programs.
 - d. The roles and services of national, state and local CASA/GAL programs.

- e. The CASA/GAL program's applicable goals, objectives, structure and methods of operations.
- f. Applicable fiduciary responsibilities, including financial oversight.
- g. The court and child welfare system; and
- h. Program governance.

E. Establishes a written plan for ongoing training and development to improve the knowledge and skills of the governing board that is reviewed and evaluated annually.

- 1. At least one board member from each CASA/GAL program will attend the Texas CASA Local Board of Directors (LBOD) training, virtually or in-person, that will enable the CASA/GAL program to accomplish duties assumed by it in connection with its responsibilities.

F. Maintains governing board records:

- 1. Applications and screening documentation consistent with Standard 5.B for each governing board member.
- 2. Signed and dated statement of confidentiality for each governing board member.
- 3. Signed and dated conflict of interest policy for each governing board member.
- 4. Board minutes approved or signed by the board secretary or designee, including attendance and absences, dates of meetings, agendas, topics covered and decisions or resolutions.
- 5. Standing committee meeting minutes, including attendance and absences, dates of meetings, agendas, topics covered and decisions or resolutions, if applicable.

STANDARD 6

MANAGEMENT AND FUNDING

Demonstrates mission-oriented leadership in operations management and is a responsible steward of all resources in order to maximize advocacy for children who are eligible for and in need of a CASA/GAL volunteer.

ELEMENTS OF PRACTICE

A. Demonstrates CASA/GAL program leadership.

1. The executive director is responsible for the day-to-day management of the CASA/GAL program.
2. The executive director has the following qualifications:
 - a. Education and/or training in a related field.
 - b. Management skills and experience to effectively administer the CASA/GAL program's human and financial resources.
 - c. Ability to effectively coordinate services with the court and other community agencies.
3. The executive director:
 - a. Plans and coordinates with the governing board the development and periodic review of CASA/GAL program policies for approval.
 - b. Establishes a logic model that is adopted by the governing board and evaluated annually.
 - c. Attends, or is represented by a designee, at all meetings of the governing board and its

| ANNUAL CASA/GAL PROGRAM REVENUE | TIME REQUIREMENT | REQUIRED LEVEL OF INDEPENDENT REVIEW | ACCEPTABLE SERVICE PROVIDER |
|---------------------------------|------------------|--------------------------------------|-----------------------------|
| > \$500,000 | Annual | Audit | Independent CPA |
| \$250,000-\$500,000 | Annual | Audit | Independent CPA |
| < \$250,000 | Annual | Audit | Independent CPA |

committees to the extent authorized by the governing board.

4. The executive director is delegated human resources management authority by the governing board, and the executive director ensures that the CASA/GAL program's staff management is carried out in accord with written policy.

B. Manages financial resources.

1. The CASA/GAL program follows a written plan for securing and maintaining diversified financial resources adequate to accomplish its established goals and objectives that reflect community support.
2. The CASA/GAL program maintains its tax-exempt status.
3. The CASA/GAL program seeks to conserve its financial resources by:
 - a. Accessing benefits allowed for tax-exempt organizations, when applicable.
 - b. Maintaining sound policies regarding purchasing and inventory control.
 - c. Using competitive bidding, where applicable, in accordance with governing board policy and law or regulation.
4. The CASA/GAL program regularly analyzes:
 - a. Cost of operations.
 - b. Current and potential funding sources.
 - c. Allocation of funds.
 - d. Effectiveness in achieving budget objectives.

C. Reports and accounts for fiscal operations.

1. The executive director is accountable to the governing board for prudent financial management.
2. The executive director ensures the submission of financial reports to the governing board at least quarterly.
3. The CASA/GAL program shall submit quarterly and annual financial reports to Texas CASA, as determined by HHSC.
4. The CASA/GAL program ensures that an annual report is developed which includes financial, statistical and service data summary information.
5. The CASA/GAL program annually files the required Internal Revenue Service (IRS) Form 990 in a timely manner which is provided to the governing board or designee prior to filing.
6. The CASA/GAL program makes timely payments to the IRS and to other taxing authorities, as required by law.
7. Independent audits, financial reviews or compilations are required annually as follows in the table below. Audits are recommended at least every three (3) years regardless of annual revenue.
 - a. A financial audit, review or compilation is completed within nine (9) months following the close of the fiscal year, and the audit is submitted to Texas CASA by the designated deadline.

- i. *The audit must contain a separate schedule of all funds provided under HHSC and VOCA contracts and a Statement of Functional Expenses.*
- b. A designated committee of the governing board, such as a finance or audit review committee, or a designated member of the governing board, reviews the audit findings and meets with the independent auditor as necessary.
- c. The auditor's report is reviewed and formally approved or accepted by the governing board and is made available for public inspection.
- d. When a management letter has accompanied the audit, the governing board promptly reviews and ensures that the recommendations are implemented.
- e. The CASA/GAL program sends to Texas CASA any audit findings or questioned costs from any private or government audit/monitoring report within 60 days of receipt of findings.
- f. CASA/GAL programs receiving grant funding through National CASA/GAL Association may be subject to additional financial oversight.

D. Adheres to accounting and financial reporting policies.

1. Generally Accepted Accounting Principles (GAAP) apply to independent audits and reviews. Therefore, management's financial statements must be prepared in accordance with GAAP.
2. The CASA/GAL program has written operational policies and procedures with regard to accounting controls to which the CASA/GAL program adheres. In the case of CASA/GAL programs under an umbrella organization, the CASA/GAL program adheres to the extent that is within the CASA/GAL program's control. These policies and procedures include:
 - a. Descriptive chart of accounts.
 - b. Prompt and accurate recording of revenues and expenses.
 - c. Maintenance of a filing system which contains account records and receipts.
 - d. Safeguarding and verification of assets.
 - e. Control over expenditures.
 - f. Separation of duties to the extent possible.
 - g. Internal financial control policies:
 - i. *Accounting controls including limited system access, segregation of duties and dual controls.*
 - ii. *Authority parameters and approval procedures.*
 - iii. *Documentation standards.*
 - iv. *Protection of assets.*
 - v. *Limited access to key assets.*
 - vi. *Reports, reconciliations and reviews.*
 - vii. *Compliance with Texas CASA HHSC and VOCA Grant Contract Assurances.*

3. The CASA/GAL program uses a financial management system that ensures the segregation of restricted funds.
4. When the CASA/GAL program has the authority, its policies and procedures require that:
 - a. Staff with financial responsibilities receive orientation to the bookkeeping system and retraining when system changes occur.
 - b. Systems are in place to prevent or to detect fraud, waste or abuses of the system, such as control, use and review of the system by more than one person.
5. The CASA/GAL program's accounting records are kept up to date and balanced on a monthly basis.
6. The CASA/GAL program reconciles bank statements to the general ledger on a monthly basis.

E. Develops resources to sustain the CASA/GAL program.

1. The CASA/GAL program's governing board sets policies and provides oversight for resource development activities carried out by its staff and volunteers.
2. The CASA/GAL program registers with the applicable state agency to conduct charitable solicitations.
3. The CASA/GAL program provides potential funders with an accurate description of the CASA/GAL program, its purpose and services as well as the financial needs for which the solicitation is being made.
4. The CASA/GAL program spends funds for the purposes for which they were solicited and/or designated, except for reasonable costs for administration of resource development activities.
5. The CASA/GAL program establishes controls on processing and acknowledging contributions in accordance with applicable laws.

F. Manages the workplace.

1. The CASA/GAL program operates from commercial or community (donated, leased or owned) offices, which provide a safe, well-maintained physical environment for its staff, volunteers and visitors.
2. The CASA/GAL program maintains a work environment for its staff and volunteers that is conducive to effective performance.
3. The CASA/GAL program's facilities comply with applicable health, fire safety, and accessibility codes and regulations.
4. The CASA/GAL program takes reasonable measures to maintain its equipment and ensure it is used as intended.
5. The CASA/GAL program plans for the disposition of property in the event of its dissolution.

G. Monitors for and minimizes risk.

1. The CASA/GAL program protects its physical, human and financial resources by evaluating, preventing and reducing the risks to which it is exposed.
2. The CASA/GAL program has liability protection for the governing board, the organization, CASA/GAL program staff and volunteers through the court, state statute or private insurance coverage.
3. The governing board has responsibility for determining the extent and nature of the liability protection needed for the CASA/GAL program, staff, volunteers and governing board, when applicable laws are unclear or silent, and has a plan for regularly reviewing potential liability and establishes the necessary protections for preventing or reducing exposure.
4. The CASA/GAL program evaluates and reduces potential liability by:
 - a. Assigning the risk management function to a person or committee whose job description includes responsibility for risk management policies and activities.
 - b. Ensuring that appropriate bonding, self-insurance, or external coverage is adequate to meet the potential liability.
 - c. Developing a process to identify risks in terms of their nature, severity, and frequency.
 - d. Avoiding risk through loss prevention and risk reduction.
 - e. Evaluating and monitoring the effectiveness of the risk management function.
 - f. Carrying workers' compensation insurance and other insurance required by contract or as deemed necessary based upon evaluation of its risks and protecting itself through means such as indemnification, participation in a risk- pooling trust, or external insurance coverage.
 - g. Establishing and adhering to procedures to safeguard all staff, volunteer, governing board, and CASA/GAL program confidential email, digital, and electronic communications.
5. The CASA/GAL program requires all persons with authority to sign checks, handle cash or contributions, or manage funds to be bonded or the CASA/GAL program maintains appropriate insurance coverage to cover losses which may be incurred. The amount of the fidelity bond must equal, at a minimum, the CASA/GAL program's combined HHSC/VOCA grant awards.
6. The CASA/GAL program informs its governing board members and executive director of the amount and type of coverage that is provided on their behalf by the CASA/GAL program.
7. The CASA/GAL program annually reviews its insurance coverage with its insurance carrier to ensure adequate coverage.
8. The CASA/GAL program displays licenses and notices required by and in accordance with applicable statutes, rules, or ordinances.

9. The CASA/GAL program requires staff, volunteers, and governing board members to immediately notify the CASA/GAL program leadership if/when they have been involved in any criminal activity.
10. When the practice of transporting children is not prohibited in the state, and the CASA/GAL program allows staff or volunteers to provide transportation for children, the CASA/GAL program:
 - a. Has written policies.
 - b. Secures the necessary liability insurance to cover the CASA/GAL program and the staff or volunteer.
 - c. Ensures that the staff or volunteer obtains written permission of the supervisor or executive director.
 - d. Obtains written permission of the child's legal guardian or custodial agency.
 - e. When allowing use of a personal vehicle for transportation of children, ensures that the staff or volunteer who has agreed to provide the transportation:
 - i. *Has passed a motor vehicles division record check annually.*
 - ii. *Provides annually to the CASA/GAL program a copy of a valid unexpired current driver's license, and proof of adequate personal automobile insurance that meets the required state minimum if one exists or the CASA/GAL program's insurance carrier minimum if absent a state minimum.*
 - iii. *Is knowledgeable of the potential personal risk of liability and chooses to accept the responsibility.*

STANDARD 7

HUMAN RESOURCES

Follows written policies for recruiting, screening, training, supervising, evaluating, and developing staff with a wide range of skills, insights and abilities in an environment that advances the CASA/GAL mission.

ELEMENTS OF PRACTICE

A. Maintains and adheres to human resources policies.

1. The CASA/GAL program has and adheres to written human resources policies and practices that specify the responsibilities of staff. Human resources policies and practices are fair, clear, and consistent.
2. Written human resources policies are made available to all CASA/GAL program staff, which include, but are not limited to:
 - a. Human resources practices.
 - b. Working conditions.
 - c. Wage policies and benefits, as applicable.
 - d. Conflict of Interest and Confidentiality policy.
 - e. Insurance protection.
 - f. Required and supplemental training, and development opportunities.
 - g. A social media policy.
 - h. A policy requiring all staff and contract workers to disclose any paid employment, contract work, volunteer service or membership on a board of directors that might present a conflict of interest.
 - i. A whistleblower policy.
 - j. A media/crisis communication plan.
 - k. A weapons prohibition policy approved by Texas CASA, stating that individuals are prohibited from possessing any firearm, ammunition or weapon of any kind in CASA/GAL offices or in violation of any state or federal law or regulation. This policy will include the following:
 - i. *Prohibition of firearms, ammunition or weapons of any kind being carried or transported while involved in any case-related activity.*
 - ii. *Law enforcement agents are exempt from this policy.*

3. Each staff person receives a copy of the human resources policies and provides a signed acknowledgement of reading and understanding the policies which is kept on file.
4. The CASA/GAL program complies with applicable laws and regulations governing fair employment practices.
5. The executive director and/or appropriate designee reviews at least every three (3) years the human resources policies and practices; updates policies and revises the policies as needed; and submits the proposed policies to the governing board for review and approval.
6. Salaries and benefits are established by considering practices of similar nonprofit organizations in the CASA/GAL program's area.
7. The CASA/GAL program maintains written operational procedures regarding grievances to provide staff, volunteers, and community members the opportunity and means to lodge complaints and appeals.
8. The CASA/GAL program acts on any complaints in accordance with its procedures and keeps documentation on file.
9. The complainant is informed of the resolution of any complaint, subject to confidentiality limitations, and a copy of the notification is maintained on file.
10. Written procedures allow for the periodic participation by the executive director or delegate in the governing board's review of human resources policies and for written notification to staff of any changes to the human resources policies.

B. Recruits and selects qualified staff.

1. Recruitment and selection procedures ensure that the needs of the CASA/GAL program are adequately met through an ongoing planning process, which details the type and number of staff required to accomplish its goals and objectives.
2. The CASA/GAL program obtains a written application and conducts a personal interview with all applicants considered for employment with the CASA/GAL program.
3. The CASA/GAL program is required to complete full screening of any applicants, who must be at least 21 years old, considered for employment prior to finalizing any offer of employment, consistent with Standard 5.B.
4. The CASA/GAL program's selection process for all staff includes discussion about the issues and challenges that impact the children and families the CASA/GAL program serves.

C. Retains qualified staff.

1. The CASA/GAL program establishes a succession plan for key staff.
2. The CASA/GAL program retains staff qualified to carry out its CASA/GAL program goals.

3. The CASA/GAL program has a written job description for each position or group of similar positions which clearly specifies qualifications and responsibilities.
4. The CASA/GAL program efficiently manages its administrative systems, including accounting, bookkeeping, human resources records and statistical reporting, and assigns appropriately skilled staff to carry out those tasks.
5. Administrative and/or supervisory responsibility is assigned to staff qualified by experience and training.
6. CASA/GAL program staff meet all applicable state registration, licensing or certification requirements for their assignment and/or use of professional titles.
7. The CASA/GAL program, in its ongoing planning process, details the type and number of staff required to accomplish the CASA/GAL program's goals and objectives.

D. Ensures new staff receive orientation.

1. The CASA/GAL program provides new staff orientation introducing the National CASA/GAL Association Core Model, Standards for Local CASA/GAL Programs, Role of the local CASA/GAL program, the CASA/GAL program's policies and services including, but not limited to:
 - a. Information about confidentiality laws and CASA/GAL program policies and the staff person's responsibility to abide by these laws.
 - b. Information about the CASA/GAL program's structure, service mandates, relationship to the court and human resources policies including sexual harassment and non-discrimination policies.
 - c. Lines of accountability and authority within the CASA/GAL program.
 - d. Information about pertinent laws, regulations and policies.
 - e. Demographics of the community and the children served by the CASA/GAL program.
 - f. Job responsibilities and description.
2. Newly hired CASA/GAL program directors and volunteer supervisors complete the National CASA/GAL Association Pre-Service Training within six (6) months of hire.

E. Trains and develops staff.

1. The CASA/GAL program implements a training and development plan for staff that is reviewed annually and ensures that staff complete 12 hours of continuing education annually to improve knowledge and skills to fulfill the requirements of their respective positions and/or advance the CASA/GAL mission.
2. The training and development plan prepares executive directors and volunteer supervisors to effectively support volunteers who work with children who have experienced abuse or neglect. The training and development plan provides information about the court and child welfare system, law and legal process, trauma-informed care, the nature and effects of child abuse and neglect, the background and needs of children served, child development, the Indian Child Welfare Act (ICWA) and other relevant subjects, and the importance of family reunification when safely possible.

3. A CASA/GAL program considering using a peer coordinator model (or other models utilizing volunteers coordinating other volunteers) must:
 - a. Inform National CASA/GAL Association of intent to explore and/or implement the model, and undergo any required training and adhere to applicable standards, policies and procedures.
 - b. Seek legal counsel before adoption so the requirements of the Fair Labor Standards Act (FLSA) and all applicable laws are considered.
 - c. Engage in a review of insurance considerations, including workers' compensation, to explore implications of such a model.
 - d. Participate in learning opportunities about the peer coordinator model.
 - e. Undergo an organizational assessment to determine need and readiness including considerations around budget, training, recruitment, staffing, and organizational culture.
4. A CASA/GAL program that adopts and implements a peer coordinator model (or other models utilizing volunteers coordinating other volunteers):
 - a. Has a written job description and policies or procedures for the position of peer coordinator.
 - b. Provides adequate supervision for the peer coordinator based on written supervisory policies or procedures and holds them accountable for the performance of assigned duties and responsibilities.
 - c. Has a written policy that requires a peer coordinator to participate in equivalent staff orientation, training, and evaluation as paid staff.
 - d. Maintains that any staff assigned to the supervision of a peer coordinator as a full-time function will not supervise more than 15 peer coordinators.
 - e. Maintains that a peer coordinator will not oversee more than 10 volunteer advocates.
 - f. Establishes a plan for managing cases assigned to the peer coordinator in the event that the peer coordinator leaves or becomes unavailable.

F. Supervises and evaluates staff.

1. The CASA/GAL program provides adequate supervision for its staff and holds staff accountable for the performance of assigned duties and responsibilities.
2. Frequency of individual or group supervision is arranged on the basis of staff needs, the complexity and size of the workload, and the staff's familiarity with assignments.
3. The CASA/GAL program supervisor holds regularly scheduled case conferences with staff who supervise volunteers to review progress on each case.
4. The CASA/GAL program develops and implements a system for the periodic evaluation of all staff.

5. At least once a year, the performance of each staff person is evaluated to review performance against established criteria, and the evaluation is documented and kept on file. The staff person actively participates in this process.
6. Staff evaluations include:
 - a. Assessment of job performance in relation to the quality and quantity of work defined in the job description and to the performance objectives established in the most recent evaluation.
 - b. Clearly stated objectives for future performance.
 - c. Opportunity for staff self-evaluation.
 - d. Recommendations for further training and skill building, if applicable.
7. Staff are given the opportunity to sign the evaluation report, to obtain a copy, and to include written comments before the report is entered into the human resources record.
8. The CASA/GAL program's human resources policies and practices specify, in writing, the conditions for disciplinary action and termination of employment, including violations of CASA/GAL program policy and/or documented substandard performance. The CASA/GAL program's policies and procedures specify the person or persons with authority to implement disciplinary action(s) and/or terminate employment.
9. The CASA/GAL program has policies and procedures for termination of employment that are in compliance with applicable laws and regulations.

G. Maintains human resources records.

1. Maintains a confidential file or record for each staff person that contains:
 - a. Identifying information and emergency contacts.
 - b. Recruiting and screening documents such as applications, resumes, and educational verification.
 - c. Pay and compensation information.
 - d. Job description.
 - e. Training and/or professional development records.
 - f. Performance evaluations with signature page.
 - g. Disciplinary notices.
 - h. Termination of employment notices.
 - i. Letters of commendation or recommendation.
 - j. Time and attendance.

2. Separately retains the following confidential information, as applicable:
 - a. Security/background/three unrelated reference checks.
 - b. Employment Eligibility Verification (I-9) forms.
 - c. Self-identified disability, veteran or other status records.
 - d. Medical/insurance forms and records.
 - e. Drug test results.
 - f. Child support/garnishments.
 - g. Requests for employment/payroll verification.
 - h. Workers' compensation claims.
 - i. Internal investigation notes and reports.
 - j. Litigation-related or legally privileged communications and documents.

STANDARD 8

VOLUNTEER ADMINISTRATION

Follows written policies for recruiting, screening, training, supporting, supervising, recognizing, and retaining volunteers to fulfill the role and duties of court-appointed special advocates/Guardians ad Litem, in accordance with applicable laws, rules, regulations and standards.

ELEMENTS OF PRACTICE

A. Recruits volunteer advocates.

1. The program's written strategic plan includes strategies for recruiting and selecting volunteers to advocate for the best interests of children and youth who are involved in judicial proceedings related to abuse or neglect.
 - a. Recruitment strategies incorporate CASA/GAL program guiding principles (Standard 1), measurable goals and specific activities to attract volunteers who reflect the community served.
 - b. The recruitment plan includes measurable goals and strategies for community collaboration, media outreach, speaking engagements and other appropriate recruitment efforts.
2. The CASA/GAL program prepares standardized information that is readily available to recruit volunteers, which includes the following:
 - a. Purpose and role of the CASA/GAL volunteer.
 - b. Qualifications to become a CASA/GAL volunteer.
 - c. Minimum time commitment required.
3. The CASA/GAL program informs potential volunteers of, and refers them to other CASA/GAL programs, or National CASA/GAL or Texas CASA if the applicant might be eligible for or prefer to serve in another CASA/GAL program.
4. The CASA/GAL program responds to all potential volunteer inquiries within five (5) business days of receipt.

B. Screens prospective volunteers.

1. A volunteer CASA/GAL is an individual who is at least 21 years of age and has successfully passed the application and screening process, has successfully completed the National CASA/GAL Association⁺ Pre-Service Training, serves under the supervision of the CASA/GAL program, and is appointed by the court to advocate for children who come into the court system as a result of allegations of abuse or neglect as the subject of a Suit Affecting the Parent-Child Relationship or in the conservatorship of the Department of Family and Protective Services (DFPS) or a Court-Ordered Services (COS) case.
2. All volunteer applicants are required to provide the necessary information for screening, consistent with Standard 5.B.
3. If a volunteer applicant refuses or fails to provide the necessary documentation for screening consistent with Standard 5.B., the applicant is rejected.
4. The CASA/GAL program's volunteer selection procedures ensure that those not selected are treated with dignity and respect and, if appropriate, referred to alternative volunteer opportunities.
5. The CASA/GAL program completes all screening consistent with Standard 5.B. before the volunteer is assigned to a case, and all screening is documented on file at the CASA/GAL program office.
6. Upon selection, prior to assignment of a case, the CASA/GAL program obtains signed agreement from each volunteer to the following written policies:
 - a. Conflict of interest policy.
 - b. Confidentiality policy.
 - c. Social media policy.
 - d. CASA/GAL volunteer policies and procedures.
7. A qualified volunteer who transfers to a new CASA/GAL program must complete the full, written application and screening process consistent with Standard 5.B.
8. The CASA/GAL program has a written policy regarding the reactivation of volunteers who have been inactive for more than one (1) year. The written policy shall include guidelines under which a volunteer would not have to be retrained. The volunteer's file must include documentation of reactivation.

C. Trains volunteers.

1. The CASA/GAL program delivers training to volunteers using the current National CASA/GAL Association Pre-Service Training curriculum (or equivalent curriculum and process for qualification of facilitators that is reviewed and pre-approved in writing by National CASA/GAL Association in accordance with the National CASA/GAL Association Use of Pre-Service Training Materials Policy).

2. The CASA/GAL program verifies and documents that all volunteers successfully complete the required pre-service training, including:
 - a. Training dates.
 - b. Name(s) of facilitator(s).
 - c. Verification that the facilitator has been trained as specified below.
 - d. Participant attendance and completion records.
3. The National CASA/GAL Association Pre-Service Training is to be delivered in accordance with the one of the National CASA/GAL Association modalities and for the duration specified by the chosen modality, for a minimum of 30 hours, including in-person contact for CASA/GAL program staff to evaluate the applicant's suitability to serve as a volunteer, as specified by the chosen modality.
4. The National CASA/GAL Association Pre-Service Training must be delivered by a qualified facilitator. A qualified facilitator has previously completed the National CASA/GAL Association Pre-Service Training in accordance with Standard 8.C.1 above, and
 - a. Completed the National CASA/GAL Association Training of Facilitators, or
 - b. Completed a training of facilitators provided by Texas CASA's facilitator who has completed the National CASA/GAL Association Training of Facilitators, or
 - c. Co-facilitates their first pre-service training with a qualified facilitator who has completed the training of facilitators offered by the National CASA/GAL Association or Texas CASA.
5. The CASA/GAL program ensures that the training facilitator(s) offers the current, approved curriculum and prohibits the use of curriculum or materials that have been retired.
6. The CASA/GAL program documents that the facilitator completes 12 hours of continuing education annually to include topics related to facilitation, child welfare and CASA/GAL mission.
7. Guest speakers shall not deliver the curriculum unless trained to facilitate the CASA/GAL training or a CASA/GAL Training Facilitator co-facilitates the content.
8. In addition to 30 hours of pre-service training, if allowed by the court, the CASA/GAL program requires each volunteer to visit the court served while the court is in session to observe abuse/neglect proceedings before appearing in court for an assigned case.
9. The CASA/GAL program ensures that volunteers complete 12 hours of continuing education annually (pro-rated based on the volunteer's date of swearing in) consistent with National CASA/GAL Association guidelines and the CASA/GAL program documents completion of this requirement for each volunteer. Continuing education hours should be related to the work of best interest advocacy, including but not limited to: (A) the background and needs of children served by the local volunteer advocate program; (B) the operation of the court and the child welfare system; and (C) the nature and effects of child abuse and neglect. Training can be completed through a variety of sources and delivery methods such as education events hosted by the local CASA/GAL program or state organization (such as an annual conference), program-approved externally provided opportunities (in person or online), National CASA/GAL Association webinars, program-approved books and videos. To encourage a varied learning experience, no more than four (4) hours of continuing education should be completed by reading books/articles.

10. A qualified volunteer who transfers to a new CASA/GAL program must complete, at a minimum, training regarding the background and needs of children served by the CASA/GAL program, local court, laws, CASA/GAL program policies and procedures, investigation and report writing.

D. Establishes and adheres to policies for acceptance, assignment, and closure of cases.

1. The CASA/GAL program has procedures for the acceptance and assignment of cases.
2. The CASA/GAL program accepts and assigns cases consistent with the Guiding Principles (Standard 2), statutory authority, National CASA/GAL Association Core Model and CASA/GAL program capacity.
3. A volunteer is sworn in by the judge or court personnel before appointment to a case.
4. When possible, a volunteer is assigned at the earliest possible stage of the court proceedings.
5. All appointments and assignments are made by an appropriate written order of the court.
6. The CASA/GAL program or the court notifies all parties and agencies involved in the case of the volunteer's appointment and release.
7. Once the CASA/GAL program accepts appointment, advocacy and documentation of advocacy must begin and continue during appointment.
8. Volunteers are assigned to children with consideration to:
 - a. Experience, knowledge, skills, and performance as a CASA/GAL volunteer.
 - b. Nature and difficulty of the current assignments.
 - c. Specific circumstances and availability of the volunteer.
9. Upon case closure, a record (e.g. court order, case closure summary, recording in database) is made of the date and reason for closure.

E. Supervises volunteers.

1. The CASA/GAL program provides supervision which is appropriate to the volunteers' needs and complexity of case assignments and monitors performance consistent with Standard 8.F, following written procedures on failure to perform.
2. Supervisors provide timely and thorough guidance to volunteers through contact at least once per month by video conference, telephone, email, text or in-person meeting.
3. CASA/GAL program staff supervising volunteers full time will not supervise more than 30 active volunteers or a maximum of 45 cases. If the staff person is required to perform duties other than supervision of volunteers, the number of volunteers to be supervised shall be reduced pro rata.
4. A staff person performing the duties of a volunteer shall provide the advocacy and documentation of advocacy consistent with Standard 8.F.
5. The CASA/GAL program supervisor holds regularly scheduled case meetings with volunteers to review the issues or progress of the case and needs of the child(ren).

6. The CASA/GAL program supervisor conducts a review of the case and the volunteer's performance of the job description of a CASA/GAL volunteer on an ongoing basis and as a component of case closure.
7. The CASA/GAL program has in place a written plan to retain volunteers which includes mechanisms for volunteer recognition.

F. Establishes and adheres to volunteer administration policies and procedures.

1. The CASA/GAL program maintains written volunteer policies and procedures.
2. Each volunteer receives a copy of the current volunteer policies and procedures and provides signed acknowledgement of reading and understanding the policies which is retained by the CASA/GAL program in the volunteer's record.
3. The job description of the CASA/GAL volunteer is clearly communicated through written policies, role descriptions, pre-service training, continuing education, and supervision.
4. The CASA/GAL program volunteer policies and procedures specify the role and responsibilities of the CASA/GAL volunteer, are developed to align with the Texas Family Code 107.002 and align with the National CASA/GAL Association Core Model and Standards for Local CASA/GAL Programs.
5. The volunteer policies and procedures shall include a description of the volunteer's role and responsibilities, including but not limited to the following. The volunteer:
 - a. Reports any incident of child abuse or neglect, or any situation in which the volunteer has reason to believe that a child is in imminent danger, to the appropriate authorities and the CASA/GAL program supervisor, as mandated in the Texas Family Code which is within 24 hours.
 - b. Obtains first-hand a clear understanding of the needs and situation of the child by conducting an ongoing review of all relevant documents and records, including medical, psychological and school records; and interviewing the child, parents (as available and permissible), social workers, educators, service providers, child welfare service providers, Attorney ad Litem, any foster parent, and persons with knowledge of the case, in order to make recommendations regarding the child's best interest.
 - c. Identifies and advocates for the best interests of the child, considering the child's expressed objectives without being bound by those objectives, through monthly contact or documented attempts with the parents (as available and permissible), caregivers, case managers, and CASA/GAL program staff.
 - d. Collaborates and coordinates with legal, child welfare, and other partners to ensure service provision that is in the child's best interests, following applicable confidentiality requirements.
 - e. Provides independent and factual information regarding the child, in writing, to the court and to counsel for the parties involved at every statutorily required hearing, and additionally as permitted, which includes information and recommendations about the child's needs and best interests.
 - f. Appears in court to advocate for the child's best interests, and provide testimony when necessary.

- g. Meets in-person with the child once every 30 days at a minimum.
 - i. *In-person contact should take place where the child lives for a majority of visits to ensure in-depth knowledge of the child's environment for informed recommendations to the court.*
 - ii. *To allow for an exception, the CASA/GAL program must have a written exceptions policy outlining circumstances when exceptions may be permitted.*
 - iii. *Exceptions to permit less frequent in-person contact, or alternatives for in-person contact, shall be documented and retained in the CASA/GAL program's case record as to the justification for and reasonableness of the exception.*
 - iv. *For any child not seen by an advocate within the prescribed time, without an approved exception, CASA/GAL program staff must see the child within 10 days.*
- h. Makes recommendations for services for the child and the child's family, including referrals to existing community services.
- i. Seeks information about whether a permanency plan has been created for the child and makes recommendations concerning permanency that encourage the permanent placement of children with their families, relatives, fictive kin, or through timely placement with adoptive families.
- j. Monitors implementation of service plans and court orders and assesses whether court-ordered services are implemented in a timely manner and whether review hearings should be scheduled with the court.
- k. Informs the court promptly of important developments in the case through appropriate means as determined by court rules or statute.
- l. Advocates for the child's best interests in the community by quarterly interfacing with legal, mental health, educational, and other relevant systems, subject to confidentiality limitations, including reviewing the medical care provided to the child and eliciting, as appropriate, the child's opinion on the medical care provided.
- m. Monitors the child to ensure the child's safety and to advocate against unnecessary relocations of the child to multiple temporary placements.
- n. Participates in all scheduled case reviews with CASA/GAL program supervisory staff.
- o. For a child at least 16 years of age, ascertains whether the child has received the following documents: a certified copy of the child's birth certificate, a social security card or replacement card, a driver's license or personal identification certificate, and any other personal document Department of Family and Protective Services determines appropriate.
- p. Seeks to elicit in a developmentally appropriate manner the name of any adult, particularly an adult residing in the child's community, who could be a relative or designated caregiver and/or connection for the child, and immediately provide the names of those individuals to the Department of Family and Protective Services or SSCC.
- q. Participates in continuing education relevant to CASA/GAL service.
- r. Maintains complete records about the case, including appointments, interviews and information gathered about the child and the child's life circumstances.

- s. Discusses all recommendations concerning the case with the CASA/GAL program supervisor prior to submitting recommendations to the court.
 - t. Is prohibited from the following activities:
 - i. *Taking a child to the volunteer's home.*
 - ii. *Taking a child to any location that is not pre-approved by the child's legal guardian, custodial agency and CASA/GAL program supervisor or director.*
 - iii. *Taking a child on an overnight outing.*
 - iv. *Giving legal advice or therapeutic counseling.*
 - v. *Making placement arrangements for the child.*
 - vi. *Giving money to the child, the child's family, caregiver, parent, relative or anyone associated with the case.*
 - vii. *Accepting money from child, the child's family, caregiver, parent, relative or anyone associated with the case.*
 - viii. *Making a recommendation or intervening in the physical removal of children to initiate a legal case prior to CPS making a recommendation on the removal based on their investigation.*
 - u. Returns the case file and notes to the CASA/GAL program when the volunteer's assignment concludes or the case closes.
6. The CASA/GAL program supervisor does not alter the volunteer's reports or recommendations without the knowledge and documented agreement of the CASA/GAL volunteer.
 7. The program has a written policy for the giving and receiving of gifts between volunteer advocates and the children/youth and families served.
 - a. Gifts that may be perceived as influencing either the volunteer advocate or the children, families and related parties are prohibited.
 - b. Gifts that may undermine or negatively impact the relationship between the child/youth and their family or caregiver are prohibited.
 - c. Modest and reasonable gifts may be permitted.
 - d. The gift policy clarifies that the program may provide modest gifts to children, youth and families as made available by program partners and supporters.
 8. The CASA/GAL program has a written policy to resolve conflicts between a volunteer and the CASA/GAL program supervisor regarding the handling of a case, reporting of information, or the recommendations to be included in a report to the court.
 9. The CASA/GAL program will not assign more than two (2) cases at a time to a volunteer.
 - a. To allow for an exception, the CASA/GAL program must have a written exceptions policy outlining circumstances when exceptions may be permitted. An exception may be granted in the discretion of the CASA/GAL program staff. However, the decision to permit additional assignments shall be documented as to the justification for and reasonableness of the exception.

- b. Under the exception, a volunteer is not assigned more than five (5) cases and the CASA/GAL program ensures that the volunteer adheres to the roles and responsibilities as described in Standard 8.F.5.

10. The minimum ratio of volunteers to assigned children is 80%.

11. When the practice of transporting children is not prohibited in the state, and the CASA/GAL program allows staff or volunteers to provide transportation for children, the CASA/GAL program:

- a. Has written policies.
- b. Secures the necessary liability insurance to cover the CASA/GAL program and the staff or volunteer.
- c. Ensures that the staff or volunteer obtains written permission of the supervisor or director.
- d. Obtains written permission of the child's legal guardian or custodial agency.
- e. When allowing use of a personal vehicle for transportation of children, ensures that the staff or volunteer who has agreed to provide the transportation:
 - i. *Has passed a motor vehicles division record check annually.*
 - ii. *Provides annually to the CASA/GAL program a copy of a valid unexpired current driver's license, and proof of adequate personal automobile insurance that meets the required state minimum if one exists or the CASA/GAL program's insurance carrier minimum if absent a state minimum.*
 - iii. *Is knowledgeable of the potential personal risk of liability and chooses to accept the responsibility.*

12. No CASA/GAL program staff or volunteer shall provide:

- i. *Housing or lodging for children.*
- ii. *Bathing facilities for children.*
- iii. *Supervision of a child overnight or for any shift while a child is in the physical custody of CPS.*

13. When a CASA/GAL program allows volunteers or staff to take photos of children, the CASA/GAL program has written policies that guide the purpose, use, distribution, storage, and destruction of the photos after case closure.

- a. Policies allow photos only when:
 - i. *Requested or required by the court to be included with or in the court report, or*
 - ii. *Written permission is obtained from the legal guardian or the young adult, if 18 years of age or older.*
 - iii. *They do not pertain to photos of injuries to private areas obtained during an investigation.*
- b. Policies prohibit the use of photos for social media, marketing or personal use unless written authorization is provided by the legal guardian or the young adult, if 18 years of age or older.

G. Takes corrective action when necessary.

1. The CASA/GAL program has policies and procedures that specify the conditions for corrective action and non-voluntary dismissal of volunteers.
2. Appropriate grounds for dismissal of a volunteer may include, but are not limited to:
 - a. Taking action without CASA/GAL program or court approval which endangers the child or is outside the role or authority of the CASA/GAL program.
 - b. Engaging in ex-parte communication with the court.
 - c. Violating a CASA/GAL program policy, court rule or law.
 - d. Failing to complete the required National CASA/GAL Association Pre- Service Training or 12 hours of continuing education each year.
 - e. Failing to effectively carry out assigned duties, which may include not following CASA/GAL program direction or guidance.
 - f. Falsifying a volunteer application or misrepresenting facts during the screening process.
 - g. Having allegations of child abuse or neglect brought against them.
 - h. Experiencing an irresolvable conflict of interest.
3. The CASA/GAL program's policies and procedures specify the person or persons with authority to dismiss a volunteer.

H. Maintains volunteer records.

1. The CASA/GAL program maintains a written confidential record for each volunteer that contains, at minimum:
 - a. Application.
 - b. Emergency and identifying contact information.
 - c. Volunteer job description.
 - d. References documentation.
 - e. Documentation of all records checks.
 - f. Pre-service training and continuing education records.
 - g. Performance evaluations and any other applicable documentation related to performance.
 - h. Documentation of volunteer status.
 - i. Copy of volunteer's current driver's license, motor vehicles records check and verification of automobile insurance (if CASA/GAL program allows transportation).
 - j. Documentation of personal interview.
 - k. Name of each child assigned.
 - l. Date of each assignment.
 - m. Date of release from each assignment.

2. Written policies outline when, and if, volunteers have access to their records and detail the procedures for review, addition and correction (by volunteers) of information contained in the record.
3. The CASA/GAL program retains the record after a volunteer has left the CASA/GAL program in accordance with the CASA/GAL program's records retention policy.

STANDARD 9

PUBLIC EDUCATION AND ENGAGEMENT

Communicates and actively engages with community partners and the general public to provide information and build support for the CASA/GAL mission and the needs of children in the child protection system and their families.

ELEMENTS OF PRACTICE

I. A. Educates and engages the public.

1. Consistent with the National CASA/GAL Association Core Model and National CASA/GAL Association Brand Guidelines and Intellectual Property Standards, the CASA/GAL program establishes and executes a written plan for public information, outreach, and education activities to provide an understanding of the CASA/GAL program's purpose, function, and role in judicial proceedings and the community social service system.
2. The CASA/GAL program disseminates public information to broaden awareness about the needs of the children and families it serves and the benefits of CASA/GAL advocacy for those children.
3. The CASA/GAL program works closely with representatives from the legal and social services communities, other child advocacy programs, community service and civic groups, as well as with businesses to advance the CASA/GAL mission and to foster interagency collaboration and coordination of services for children and families.
4. The CASA/GAL program works in partnership with Texas CASA and the National CASA/GAL Association to disseminate timely information concerning newsworthy events, stories and occurrences to advance the CASA/GAL mission and benefit the children and families served.
5. The CASA/GAL program has a written communications policy that:
 - a. Aligns with the National CASA/GAL Association Brand Guidelines and Intellectual Property Standards.
 - b. Outlines appropriate contact with the media and an escalation protocol for state or national media inquiries.
 - c. Identifies who communicates with the public.
 - d. Addresses use of social media.

- e. Requires that issues with the potential of negatively inappropriately impacting or posing risk to the CASA/GAL brand such as allegations of fraud, illegalities, child fatality, misconduct, abuse, and theft are promptly escalated to Texas CASA and the National CASA/GAL Association.
 - i. *Requires all requests for information and media inquiries about the National CASA/GAL Association be promptly directed to and handled by the National CASA/GAL Association.*
 - ii. *Requires all requests for information and media inquiries about Texas CASA be promptly directed to and handled by Texas CASA.*
 - iii. *Requires all requests for information and media inquiries about a local CASA/GAL program be promptly directed to and handled by that local program.*

- 6. The program has a written crisis management plan that addresses issues that may have significant impact on the credibility, reputation or funding at the local, state, or national level. This crisis management plan:
 - a. Requires prompt information sharing between the program, governing board, court, National CASA/GAL, and the state organization within 24 hours, subject to confidentiality limitations.
 - b. Identifies who from the local program may respond to public comment, requests for information and/or media inquiries.
 - c. Establishes a procedure or protocol for information sharing with other key community partners as appropriate.

STANDARD 10

DATA AND RECORDS

Compiles, maintains, manages and reports quality data and information in accordance with applicable laws, policies and/or standards. The CASA/GAL program maintains complete, accurate and current case records and volunteer files.

ELEMENTS OF PRACTICE

A. Collects data for reporting.

1. The CASA/GAL program collects the information needed to complete Texas CASA's quarterly reports and the National CASA/GAL Association's six-month and annual surveys, and other data collection requests.
2. The CASA/GAL program has a tool and/or software for the collection of data with the following safeguards:
 - a. Operational procedures governing use of the tool, system, and/or software.
 - b. Confidentiality policies concerning electronic data and information sharing via electronic media.
 - c. Review of all decisions regarding electronic files by CASA/GAL program management.

B. Retains child and case information.

1. The CASA/GAL program maintains complete, accurate, and current records for each child served, which include:
 - a. Name of the child.
 - b. Name of volunteer.
 - c. Date of appointment by the court.
 - d. Date of assignment of the case to the volunteer.
 - e. Date the case is either closed by the court or CASA is dismissed from the case.
 - f. Date the volunteer is released from the case.
 - g. Biographical or other identifying information.
 - h. Background on the nature of the presenting problem or reason for referral by the court.
 - i. Court reports and any court orders related to the service being provided.
 - j. Social service case plan, or other document from the child protection agency indicating the plans for the child.

2. Records for all children served are kept up to date through:
 - a. Current contact entries.
 - b. Monthly progress notes or summaries.
3. The CASA/GAL program maintains copies of all volunteer reports, written correspondence concerning the case, and documentation of significant case updates and issues discussed through non-written communications (such as in-person meetings or phone calls) not otherwise included in volunteer reports or written correspondence and requires its volunteers to turn in their case records including all notes when the case is closed.
4. Upon case closure, a record (e.g. court order, case closure summary, recording in database) is made of the date and reason for closure.
5. The CASA/GAL program has written operational procedures, consistent with legal requirements, and with the policy on confidential information, governing the retention, maintenance, protection, destruction, and return of case files when the case is closed. Procedures should include:
 - a. Records are kept a minimum of seven (7) years from case closure unless there is a court or statutory requirement that dictates otherwise.
 - b. Electronic children's case files are backed up on a separate system at least once a week and the backup is kept off-site.
6. The CASA/GAL program has established procedures for the legal and programmatic release, in writing, of volunteers when a case is closed or when a volunteer is removed from a case.
7. The CASA/GAL program reports Court-Ordered Services (COS) cases separately in Quarterly Performance Reports.

STANDARD 11

NETWORK AND MEMBERSHIP

The National CASA/GAL Association Board of Trustees determines new and continued membership in and with the national association and must approve all expansions, mergers, governance changes, and name changes. The National CASA/GAL Association Board of Trustees establishes the membership categories, criteria, and requirements for all affiliations with the National CASA/GAL Association.

Members of the National CASA/GAL Association operate in compliance with this membership standard and carry out the duties and responsibilities outlined in the designated membership category. The following are required for CASA/GAL state, local, Tribal program, and auxiliary membership.

Maintains membership with Texas CASA, and meets the standards, requirements and policies of both.

ELEMENTS OF PRACTICE

A. Is a member of the National CASA/GAL Association

1. The program maintains membership and works cooperatively and collaboratively with the National CASA/GAL Association.
2. The program adheres to all National CASA/GAL Association's membership standards, policies and agreements.
3. The program provides a copy of the National CASA/GAL Association Core Model and Standards for Local CASA/GAL Programs to its board of directors and program staff, and reviews these with the board of directors periodically to strengthen understanding and clarity of the role and requirements of local CASA/GAL programs in advancing our shared mission.
4. Existing programs contemplating expansion to a new county or jurisdiction, regionalization, merger, change of name or a change in governance structure must adhere to the applicable procedures of the National CASA/GAL Membership Process.

B. Is a member of or affiliated with the state CASA/GAL organization.

1. The program maintains membership or affiliation with the state CASA/GAL organization (if one exists).

2. The program takes advantage of the services available from the state CASA/GAL organization consistent with the Role of State Organizations.
3. The program complies with state CASA/GAL standards (if they exist). When the program believes a conflict exists between National CASA/GAL Association standards, requirements and policies and state CASA/GAL standards requirements and policies, the program and state organization, present the perceived conflict to the National CASA/GAL Association. National CASA/GAL will review the conflict and determine which takes precedence.
4. Recognizing the unique relationship between tribal programs and state organizations, the tribal CASA/GAL program and state CASA/GAL organization collaborate to the fullest extent possible

C. Collaborates across the statewide network.

1. The program participates in a collaborative network with other local CASA/GAL programs across the state.
2. The program takes advantage of technical assistance and support provided by National CASA/GAL.
3. The program participates in state specific gatherings and networking opportunities.

D. Is a member of Texas CASA

1. The CASA/GAL program maintains membership in good standing with Texas CASA.
2. The CASA/GAL program may take advantage of the services available from Texas CASA which may include:
 - a. Technical assistance.
 - b. Resource materials.
 - c. State conference.
 - d. Local CASA/GAL program directors' meetings.
 - e. Training opportunities.
 - f. Web resources.
3. The CASA/GAL program complies with Texas CASA standards, the Texas Family Code, the Texas Administrative Code, any other applicable state statutes, and state and federal funding requirements. When the CASA/GAL program believes a conflict exists between National CASA/GAL Association standards and Texas CASA standards, the CASA/GAL program and Texas CASA present the perceived conflict to the National CASA/GAL Association. National CASA/GAL Association will review the conflict and determine which takes precedence.
4. Recognizing the unique relationship between tribal programs and state organizations, the tribal CASA/GAL program and state CASA/GAL organization collaborate to the fullest extent possible.

5. The CASA/GAL program demonstrates compliance with Texas CASA standards through a quality assurance process.
6. Neither the Office of the Attorney General nor Texas CASA will be liable for the actions of the CASA/GAL program volunteers, governing body or employees.

GLOSSARY

ADMINISTRATIVE AUTHORITY

The oversight authority for a publicly administered program.

ADVOCACY FOR ALL

Commits to understanding the children and families we serve and demonstrates this in its operations, governance, management, and advocacy for all.

AUDIT

When a certified public accountant (CPA) examines a CASA/GAL program's financial records in order to formulate an opinion on the financial statements. Generally Accepted Accounting Principles (GAAP) apply to independent audits and reviews.

Therefore, management's financial statements must be prepared in accordance with GAAP and the auditor must follow generally accepted auditing standards. Internal controls are evaluated and transactions are tested for legitimacy and separation of duties. These tests provide a basis for an audit opinion which will state the accuracy of the financial statements.

BEST INTEREST

"Best Interest" is always the primary consideration of the court in determining the issues of conservatorship, possession, well-being, permanency and access to the child. Section 263.307 of the Texas Family Code provides factors that can be considered when determining the best interest of the child.

CASE

A Suit Affecting the Parent Child Relationship (SAPCR) or in the conservatorship of the Department of Family and Protective Services (DFPS) before the court for abuse or neglect involving one child or a sibling group. Case also refers to Court-Ordered Services (Motion to Participate or Order to Participate).

CORE MODEL

The National CASA/GAL Association Core Model identifies the foundational elements of CASA/GAL best-interest advocacy. This includes guiding principles, types of cases served, primary activities performed by CASA/GAL volunteers, parameters for staff serving cases and the screening, training, and supervision requirements.

CHILD PROTECTIVE SERVICES (CPS)

Child Protective Services (CPS) is a division of the Department of Family and Protective Services (DFPS). CPS investigates reports of abuse and neglect, provides services to children and families, obtains placement for children in foster care and provides case management services. CPS duties may be assumed under Community- Based Care by a private agency for a defined geographic area.

EXECUTIVE DIRECTOR

This title is used throughout the standards to refer to the person who manages the day-to-day operations of the local nonprofit CASA/GAL program and is accountable to a nonprofit governing board. Other titles may be utilized by local programs for this role, such as Chief Executive Officer.

FINANCIAL COMPILATION

When a qualified individual creates financial statements based upon all of an entity's transactions for a fiscal period and compiles them into the form of a Statement of Financial Position and Statement of Activities in accordance with GAAP (generally accepted principles of accounting).

FINANCIAL REVIEW

When a certified public accountant (CPA) reviews the CASA/GAL program's financial statements to ensure they are presented in accordance with generally accepted accounting principles (GAAP). A review includes inquiries and analytical procedures to identify trends or areas in the financial statements which may be presented incorrectly.

GUARDIAN AD LITEM

Guardian appointed by the court to represent the best interest of a child under the court's jurisdiction.

IRS FORM 990

An Internal Revenue Service form required to be completed and filed annually.

LOCAL PROGRAM

A member entity of the CASA/GAL network that recruits volunteers to provide best-interest advocacy as a stand-alone, independent CASA/GAL member program that recruits volunteers to provide best-interest advocacy for children and service to families. Local programs may cover a single county/jurisdiction or multiple counties/jurisdictions.

LOGIC MODEL

A strategy encompassing the intended outcomes and impact of CASA advocacy that identifies the inputs, activities, and outputs required to reach stated goals. The Texas CASA network collaborates on a statewide logic model.

MEMORANDUM OF UNDERSTANDING (MOU)

A written agreement between the local CASA program and another entity that defines the working relationship. Local CASA programs create an MOU with their local court and adhere to an MOU with DFPS and Community-Based Care providers.

NATIONAL CASA/GAL PRE-SERVICE TRAINING

A required training using National CASA/GAL's proprietary or National CASA/GAL- approved 30-hour curriculum that is completed by volunteers in preparation to serve a child or group of siblings.

OPERATIONAL PROCEDURES

Organizational protocols and procedures that establish controls over any internal and/or financial processes. Written operational procedures for accounting may also be known as internal financial controls.

PEER COORDINATOR

A volunteer coordinating and supporting other volunteers within the guidelines of the Standards for Local CASA/GAL Programs.

PEER COORDINATOR MODEL

The policies and practices of implementing and managing Peer Coordinator volunteers who coordinate and support other volunteers within the guidelines of the Standards for Local CASA/GAL Programs.

PROGRAM AUXILIARY

A nonprofit organization, independent from the CASA/GAL program, whose purpose is to promote the CASA/GAL program primarily by raising funds and heightening community awareness of the program. Not used in Texas.

PROGRAM DIRECTOR

This title is used to refer to the person who manages the direct-service side of program operations, such as supervision of volunteer coaches, volunteer training, and the management of case and volunteer data.

QUALIFIED INDIVIDUAL (PERFORMING FINANCIAL COMPILATION SERVICES)

An individual with 3-5 years of experience creating financial statements based upon all of an entity's transactions for a fiscal period and compiling them into the form of a Statement of Financial Position and Statement of Activities.

RISK MANAGEMENT

The overall systematic approach to analyzing risk and implementing controls to minimize risk.

SCREENING

The process of vetting potential volunteers, staff and nonprofit governing board members which includes, but is not limited to, an application, reference checks, background checks, personal interviews and pre-service training (for volunteers, staff supervising volunteers and training facilitators).

TRAINED AND QUALIFIED COMMUNITY VOLUNTEERS

The CASA mission supports court appointment of individuals who serve as volunteers to advocate for children who have experienced abuse or neglect. Standard 8 sets forth required training and supervision for individuals who serve as trained community volunteers. Volunteers must meet the screening and training requirements and be under the supervision and guidance of a CASA/GAL program. The National CASA/GAL Association acknowledges that there may be exceptional times when it would be necessary and appropriate to appoint local program staff members to fulfill all or a part of the CASA/GAL volunteer role and responsibilities as set forth in Standard 8 for a limited and time-specific basis. In the event local program staff members are assigned, the staff member appointed by the court must be trained and supervised in the same manner as required for volunteers in Standard 8. Per Texas CASA, a minimum ratio of 80% volunteer assignment to children served must be maintained.

VOLUNTEER JOB DESCRIPTION

A document that describes the role and responsibilities of the volunteer advocate.

VOLUNTEER RATIO

The percentage of children served by a volunteer (PChV) must be maintained by a local CASA/GAL program to reflect that at least 80% of all children served by the program are appointed a trained and qualified community volunteer. Program staff are not eligible to count within the 80% volunteer ratio.

DOCUMENTATION LIST

This list has been prepared to provide local CASA/GAL program staff the documents or type of documentation that will or can help to substantiate the Elements of Practices for these local Standards. The documents are organized by standard and are listed in the order in which they appear and/or are applicable in the Texas CASA Standards for Local CASA/GAL Programs.

Note: Any documents in **bold** represent the documents required to be submitted to National CASA/GAL as a part of the self-assessment phase of the local quality assurance (QA) process. Other documents may be reviewed during the QA process but are not necessarily required for submission. Texas CASA has requested certification to substitute for National CASA/GAL QA reviews.

STANDARD 1

- Mission statement with proof and date of adoption by the governing board
- Written values with proof and date of adoption by the governing board
- **Board minutes reflecting board adoption of the mission and values**

STANDARD 2

- Court report(s) (report template and redacted samples)
- Documentation of orientation materials, including guiding principles topics for staff, and governing board members (table of contents, agenda and/or materials—may be included in orientation or onboarding materials)
- Record/documentation of orientation attendance or dates of completion for staff and governing board members

STANDARD 3

- A written recruitment plan with action steps are adopted to be a welcoming organization whose program's staff, volunteers, and governing board understand the children and families they serve through research, training, and engaging individuals who can:
 - Help the CASA/GAL program identify and understand the needs, experiences, and backgrounds of the children served.
 - Identify the action steps the CASA/GAL program can take to address these needs in governance, recruitment, training, supervision, retention, evaluation, and advocacy.
- Equal employment opportunity (EEO) policy*
- Anti-discrimination policy*
- Anti-harassment policy*

* These may be included in human resources policies or separate documents (see also Standard 7)

- **Board minutes reflecting review of and/or updates to required plans and policies included in this standard**

STANDARD 4

- Conflict of interest policy with proof and date of governing board approval
- Signed, dated conflict of interest policy, statement or agreement for each staff person, paid consultants, and governing board members
- Confidentiality policy with proof and date of adoption by the governing board
- Release of information policy/protocol (this may be included in the confidentiality policy)
- Signed, dated confidentiality policy, oath, or agreement from each volunteer, staff person, and governing board member
- Policy for protection of non-case information (this may be combined with or included in confidentiality policy or records retention policy)
- **Board minutes reflecting review of and/or updates to required plans and policies included in this standard**

STANDARD 5

- Strategic plan or equivalent
- Whistleblower policy (this may be included in human resources policy)
- Current budget with date of adoption by governing board
- Certificate(s) of insurance for all insurance policies
- Executive director performance evaluation form (a copy of the blank form; see also Standard 7)
- Dated signature sheet from most recent executive director performance evaluation
- Current succession plan for executive director position
- Statute or memorandum of understanding (MOU) that defines case assignment and acceptance, as well as working relationship with the court
- Bylaws
- Screening application form(s) (a copy of the blank form)
- Written/signed authorizations for background checks (redacted if necessary) or case management system report with completion dates
- Documentation of all background screening for volunteers, staff, and members of the governing board (see Standard 5.B elements of screening)
- Sample application or information packet(s) for volunteer recruitment, staff recruitment, and/or governing board recruitment that contains notice about background screening requirements

- Documentation that background screening checks have been updated annually for anyone not included in rap back services; confirmation of rap back service for criminal background checks and subscription for child abuse checks will be required
- Organization chart showing management structure and lines of accountability
- For CASA/GAL programs operating under an umbrella organization, an MOU between the program and the umbrella organization
- Recruitment plan or matrix for governing board
- Job descriptions for members of the governing board. Board election and screening procedures
- Documentation of orientation materials for governing board members, including guiding principles' topics (table of contents, agenda and/or materials - may be included in orientation or on-boarding materials)
- Training and development plan for governing board.
- Board records as specified in Standard 5.G
- **Board minutes reflecting review and/or updates to required plans and policies included in this standard**
- **Board minutes of annual meeting**
- **Board minutes reflecting review and adoption of annual budget**
- **Board minutes reflecting review and/or updates to insurance coverage**
- **Board minutes reflecting review and/or updates to agreement with the court (e.g. Memorandum of Understanding)**
- **Board minutes reflecting review and/or updates to bylaws**

STANDARD 6

- **Logic model**
- Financial resources plan (might also be known as resource development plan, fundraising plan or sustainability plan)
- 501(c)(3) designation letter from IRS
- Purchasing and inventory control policy/policies (might also be known as procurement policy)
- Quarterly financial reports submitted to the governing board Annual report
- IRS form 990
- IRS form 941s or proof of payment
- **Most recently completed financial audit, review or compilation as required by Standard 6.C**
- **Documentation of the governing board's review of the audit, financial review or compilation (This may be in board or committee minutes)**
- When applicable, **Management Letter, confirmation of review of management letter and audit findings** are sent to National CASA/GAL
- Operational policies, manual or handbook consistent with Standard 6.D.2 Internal financial controls policy (this may be included in operational policies) Financial management system (e.g. QuickBooks or Dynamics)

- Resource development policies (this may be included in resource development plan, operational policies or equivalent)
- Documentation that the program is recognized by the state government as approved to conduct charitable solicitations
- Controls or procedures for processing and acknowledging contributions in accordance with applicable laws (This may be included in internal controls or internal financial controls)
- Plan for disposition of property in the event the program is dissolved (may be included with Articles of Incorporation filed with the state)
- Certificate(s) of insurance for all insurance policies (e.g. general liability, workers' compensation; see also Standard 5)
- Email communication policy (This may be included in communications plan, social media policy or confidentiality policy)
- When the practice of transporting children is not prohibited in the state, and the program allows staff or volunteers to provide transportation for children, the program has written policies for transportation that include the following required documents (see also Standard 8):
 - Proof of appropriate liability protection/insurance for the program and staff
 - Written permission of the supervisor or executive director
 - Written permission of the child's legal guardian or custodial agency
 - When allowing use of a personal vehicle for transportation of children:
 - ◇ Documentation of annual motor vehicles division record
 - ◇ Annual copy of a valid unexpired current driver's license, and proof of adequate personal automobile insurance that meets the required state minimum if one exists or the program's insurance carrier minimum if absent a state minimum
- **Board minutes reflecting review and/or updates to required plans and policies included in this standard**
- **Board minutes reflecting review of quarterly financial reports**
- **Board minutes reflecting review of annual report**
- **Board minutes reflecting review of IRS Form 990**
- **Board minutes reflecting review of the financial audit, review or compilation, and any corresponding management letter of findings**

STANDARD 7

- Human resources policies, manual or handbook
 - Human resources practices
 - Working conditions
 - Wage policies and benefits, as applicable
 - Insurance protection
 - Required and supplemental training, and development opportunities
 - Social media policy

- Policy requiring all staff and contract workers to disclose any paid employment, contract work, volunteer service or membership on a board of directors that might present a conflict of interest
- Whistleblower policy

- Signed, dated acknowledgment of receiving human resources policies from each staff person
- Equal employment opportunity (EEO) policy*
- Anti-discrimination policy*
- Anti-harassment policy*

*These may be included in human resources policies; see also Standard 5

- Human resources policies or operational policies (see above) include procedures for staff grievances and appeals unless prohibited by law
- Complaints, investigations, and responses are documented and kept separate from main human resources file for each staff person
- Human resources policies include (see above) or separate governance policy that allows periodic participation by the executive director or delegate in the governing body's review of human resources policies and for written notification to staff of any changes to the human resources policies
- Staff recruitment plan detailing the type and number of staff required to accomplish program goals and objectives (this may be included in strategic plan)
- Documentation of background screening for each staff person as required in Standard 5.B
 - Current succession plan for key staff ("key" staff is determined by the program succession plan, for key staff may be reflected in executive director succession plan)
- Job descriptions for each staff person or group of similar positions
- Documentation of staff orientation
 - Staff orientation agenda, curriculum and/or materials
 - Attendance and/or completion dates
- Documentation of employment start date and pre-service training completion date for executive directors and staff supervising volunteers
- Professional development plan for staff (individually or as a group)
- Documentation of continuing education and on-going training hours and content with dates of attendance and/or completion
- If considering a peer coordinator model, written plan and timeline for implementation
- **If using a peer coordinator model:**
 - **Written job description for the position of peer coordinator**
 - **Policy that requires a peer coordinator to participate in equivalent staff orientation, training and evaluation as paid staff**
 - **Plan for managing cases assigned to the peer coordinator in the event that the peer coordinator leaves or becomes unavailable**
- System for staff periodic evaluation(s) (This may be included in human resources policies)

- Staff performance evaluation form(s) (a copy of the blank form)
- Dated signature sheets for each completed staff performance evaluation
- Policies or procedures that specify conditions for disciplinary action and termination of employment, including violations of program policy, and/or documented substandard performance; the program's policies and procedures specify the person or persons with authority to implement disciplinary action(s) and/or terminate employment (this may be included in human resources policies)
- Human resources records as specified in Standard 7.G
- **Board minutes reflecting review and/or updates to required plans and policies included in this standard**

STANDARD 8

- Recruitment plan for volunteer advocates
- Sample of standardized information used to recruit volunteer advocates Volunteer application (a copy of a blank form or redacted as necessary)
- Documentation of background screening for each volunteer advocate as required in Standard 5.B
- Signed agreements from volunteer advocates:
 - Conflict of interest policy
 - Confidentiality policy
 - Social media policy
 - CASA/GAL volunteer policies and procedures
- Reactivation policy for volunteers who have been inactive for more than one (1) year. The written policy shall include guidelines under which a volunteer would not have to be retrained. The volunteer's file must include documentation of reactivation (this may be included in volunteer policies and procedures)
- **Copy of equivalent curriculum for review and written pre-approval before use from National CASA/GAL** if the program is not using the current National CASA/GAL Association pre-service training curriculum or the approved Texas CASA adaptation of the National CASA/GAL curriculum
- Documentation of pre-service attendance and completion date for each volunteer advocate
- Documentation/confirmation that facilitator requirements have been met consistent with Standard 8.C.4
- Documentation of continuing education hours and content for pre-service training facilitators (this may include professional development hours for staff)
- Proof of court observation if allowable (documentation of dates) Pre-service training records:
 - Training dates
 - Name(s) of facilitator(s)
 - Verification that the facilitator has been trained in accordance with the standard
 - Participant attendance and completion records

Documentation of continuing education hours and content for volunteer advocates to include dates of attendance and/or completion

Procedure for acceptance and assignment of cases (This may be included in operational policies, MOU with the court, or a separate procedure)

Signed court order(s) of appointment

Documentation of staff supervision meeting dates with volunteer advocates (These may be notes in a case management system)

Case assignment list to include case number, name of volunteer advocate and staff supervisor

Volunteer performance evaluation documentation Volunteer retention plan

Volunteer policies and procedures

Signed acknowledgement of receiving the volunteer policies and procedures for each volunteer advocate

Volunteer job description, roles and responsibilities (this may be included in Volunteer Policies and Procedures)

Exceptions policy, if applicable, for in-person contact minimum requirement per Standard 8.F.5.g (This may be included in the volunteer policies and procedures)

Policy to resolve conflicts between volunteer advocates and the program supervisor (This may be included in the volunteer policies and procedures)

Exceptions policy, if applicable, for case assignment ratios per Standard 8.F.8 (This may be included in the volunteer policies and procedures)

When the practice of transporting children is not prohibited in the state, and the program allows staff or volunteers to provide transportation for children, the program has written policies for transportation that include the following required documents (see also Standard 8):

- Proof of appropriate liability protection/insurance for the program and staff
- Written permission of the supervisor or executive director
- Written permission of the child's legal guardian or custodial agency
- When allowing use of a personal vehicle for transportation of children:
 - ◇ Documentation of annual motor vehicles division record
 - ◇ Annual copy of a valid unexpired current driver's license, and proof of adequate personal automobile insurance that meets the required state minimum if one exists or the program's insurance carrier minimum if absent a state minimum.

When a program allows volunteers or staff to take photos of children, the program has written policies that guide the purpose, use, distribution, storage and destruction of the photos after case closure.

- Policies allow photos only when:
 - ◇ Requested or required by the court to be included with or in the court report, or
 - ◇ Written permission is obtained from the legal guardian

- Policies prohibit the use of photos for social media, marketing or personal use unless written authorization is provided by the legal guardian
- Policies and procedures for corrective action and non-voluntary dismissal of volunteers (this may be included in volunteer policies and procedures)
- Volunteer records include documentation of elements listed in Standard 8.H
- Policies that specify when, and if, volunteers have access to their records and detail the procedures for review, addition and correction (by volunteers) of information contained in the record (This may be included in volunteer policies and procedures)
- Records retention policy (see also Standard 10)
- **Board minutes reflecting review and/or updates to required plans and policies included in this standard**

STANDARD 9

- Plan for public information, outreach, and education
- Communications policy
- Crisis management plan
- **Board minutes reflecting review and/or updates to required plans and policies included in this standard**

STANDARD 10

- Operational procedures for data collection tool or software
- Confidentiality policies concerning electronic data and information sharing via electronic media. Case records include documentation consistent with elements listed in Standard 10.A.2
- Child and case records per Standard 10.B
- Court reports and correspondence
- Date and reason for case closure documented in the case file
- Written operational procedures, consistent with legal requirements, and with the policy on confidential information, governing the retention, maintenance, protection, destruction, and return of case files when the case is closed
- Procedures for the legal and programmatic release, in writing, of volunteers when a case is closed or when a volunteer is removed from a case (this may be included in volunteer policies and procedures or operational procedures)
- **Board minutes reflecting review and/or updates to required plans and policies included in this standard**

STANDARD 11

- If the program has an auxiliary, the program has a written agreement with the auxiliary

- Board minutes reflecting review and/or updates to required plans and policies included in this standard

ADDITIONAL DOCUMENT

- Growth plan (if not at 100% service to children in conservatorship in the service area)

02/18/2026

City of San Marcos Human Services Grant Program
San Marcos, TX 78666

To Whom It May Concern,

I am writing to provide a letter of reference for CASA of Central Texas, Inc. in support of their application for the Human Services Program.

As past President of the San Marcos Industrial Foundation, Inc. and retired President of CenturyTel Investments of Texas, Inc., I have had the pleasure of working closely with their team and have witnessed firsthand the positive impact they have on our community over the last twenty years.

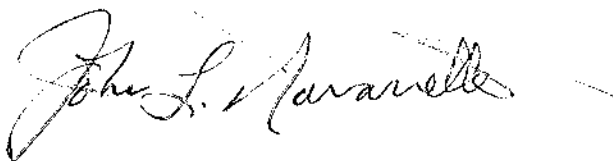
Through this advocacy program, CASA of Central Texas, Inc. has consistently demonstrated a commitment to improving the quality of life for some of the most vulnerable residents of San Marcos.

I am confident that the funding provided by the Human Services Program will enable CASA to continue and expand their valuable work in our community. Their dedication to serving child victims of abuse aligns perfectly with the mission of the Human Services Program.

I wholeheartedly support their application and believe that they are deserving of this grant.

Thank you for your consideration.

Sincerely,

A handwritten signature in black ink, appearing to read "John L. Navarette". The signature is written in a cursive style with a horizontal line extending to the right.

Mr. John L. Navarette

Carol J. Grimm

February 18, 2026

Human Services Program Funding
City of San Marcos
San Marcos, Texas

City of San Marcos Human Services Program Funding Team:

I am writing to ask the City of San Marcos to support the request of CASA of Central Texas for Human Services Funding in carrying out their essential and critical services to the children removed from their homes because of abuse or neglect. The goal of the Court Appointed Special Advocates is to achieve safety and permanence for the children in their cases, either returning to their family or being adopted by a loving family.

I have been involved with CASA since 2001 as a Volunteer and supporter. Over the years, the number of children coming into State care has grown dramatically. CASA of Central Texas in 2001 had close to 60 volunteers; today there are 226 volunteers to serve the most vulnerable children in our community. Even with this increase in volunteers, CASA is still unable to provide Court Appointed Special Advocate for 100% of the children in State care in our 4-county area.

For those children who are fortunate enough to receive a CASA, the CASA fills a unique role in their lives and helps the court in determining the best outcome for them. Children who receive a CASA are far more likely to become tax-paying citizens as adults, rather than a tax-burden to the city. To increase the number of children served, the number of volunteers must be increased. CASA of Central Texas needs your help to recruit, to train, and to support more volunteers to help these children and their families. Please consider the benefits of CASA to our community.

Thank you for your compassionate consideration of my request.

Respectfully,



Carol J. Grimm

San Marcos, TX 78666



February 18, 2026

Human Services Program Funding
City of San Marcos
San Marcos, Texas

Dear Honorable Members of the City of San Marcos Human Services Program:

I am writing to respectfully and wholeheartedly support the request by CASA of Central Texas for Human Services Funding. The goal of Court Appointed Special Advocates, or CASA, is to achieve safety and permanence for the children to whom they are assigned; with their biological family or by being adopted by a loving family. This requested funding is critical to CASA's ability to Jo conduct their purposeful work, providing essential services and support to the children removed from their homes because of abuse or neglect.

I have been involved with CASA since 2003, when I was afforded the opportunity to begin serving Hays, Caldwell and Blanco Counties in the Texas Legislature. My collaboration with CASA increased as I chaired the Human Services Committee in the Texas House of Representatives from 2007-2010, and my respect for the critical importance of the program has only increased since that time. After founding Corridor Title in 2010, my colleagues and I have closely partnered with CASA in several ways. And this partnership has provided me a unique and clear-eyed perspective on the finite nature of public and private resources, as well as the critical nature of their work. I wish to make two brief points in support of CASA's grant request.

First, CASA's work is critically important. Data clearly suggests that better outcomes are enjoyed by children fortunate enough to receive a CASA --- helping them navigate the challenges of foster and adoptive care, and ultimately leading to a safe, stable and loving home environment. That success manifests in better educational, economic and life outcomes. In 2025, with 84 active volunteers in Hays County (37 in San Marcos) serving as Guardians ad Litem, CASA served 128 Hays County (69 San Marcos) children. With the rapid growing population in San Marcos and Hays County, CASA of Central Texas hopes to serve even more children and find permanency for them.

Second, CASA of Central Texas has proved to be an extremely effective steward of public dollars. They carefully manage a Board-approved budget, while maintaining a laser-like focus on prioritizing their expenses in support of training and supporting more CASA volunteers, thereby amplifying their ability to advocate for the children of our community. Financial accountability is an important guiding principle of the organization, and one of the reasons I so appreciate the capable execution of their purposeful work.

Thank you very much for your service to our city, as well as your compassionate consideration of my request.

Respectfully,

A handwritten signature in blue ink that reads "Patrick M. Rose".

Patrick M. Rose

San Marcos, Texas 78666



HUMAN SERVICES ADVISORY BOARD GRANT QUARTERLY PERFORMANCE REPORT

Agency Name: CASA of Central Texas, Inc.
Program Name: Advocacy for Abused and Neglected Children
Program Year: 2025

Reporting Period: (check one)

- January through March (due April 30)
- April through June (due July 31)
- July through September (due October 31)
- October through December (due January 31)

Submit report to: cgriffith@sanmarcostx.gov

PROGRAM STATUS

Please provide a written description of actions taken this period and how they helped achieve your program goals.

Advocacy (Casework): 30 active San Marcos advocates provided the child protection court with best interest recommendations and testimony regarding children's housing and welfare needs, seeking permanent outcomes for children to be placed in safe and stable homes, free from abuse and neglect.

Training & Recruitment: 7 new San Marcos volunteers (9 in Hays County) were recruited through outreach, social media posts, and presentations. Applicants were screened and, after completion of training, volunteers were matched with case supervisors and incoming cases.

Outreach & Engagement: 12 communications and volunteer engagement activities occurred to raise awareness of the need for child abuse prevention and advocacy, including group presentations (organizations, businesses), information sessions ("CASA Voices"), outreach events (festivals, markets), and networking in local organizations and online (Chambers of Commerce, Rotary, Facebook, Instagram).

PROGRAM BENEFICIARIES

For the program that received HSAB funding, please report either number of unduplicated individuals served or number of unduplicated households served.

Check one: Unduplicated Individuals Unduplicated Households

| | Jan-Mar | Apr-Jun | Jul-Sep | Oct-Dec | Year to Date |
|-----------------------------|---------|---------|---------|---------|--------------|
| Total Served | 9 | 2 | 2 | 5 | 18 |
| San Marcos Residents Served | 9 | 2 | 2 | 5 | 18 |
| % San Marcos Residents | 100% | 100% | 100% | 100% | 100% |

PROGRAM EXPENDITURES

For the final report of the year, please provide a bulleted list that briefly summarizes how the HSAB funding was spent.

- Funding went towards the salaries for our Community Engagement department and Casework Supervisors who support Hays County advocates. These staff members play a crucial role in the advocacy of the San Marcos and Hays County children we serve.
- Funding also was used in various other ways to support operations, such as through property maintenance and Microsoft account services.

Certification:

I certify that to the best of my knowledge and belief the information reported in this Quarterly Performance Report is factual and accurate.

Norma C Blackwell
Norma C Blackwell (DP 01 2019 1031 0001)

 Signature

January 20, 2025

 Date

Norma Castilla-Blackwell

 Printed name

Chief Executive Officer

 Title