LEADERSHIP

8. Facilitates the development of the governing body

    ➢ Requirements
       o Partners with the governing body leadership to ensure:
           • Comprehensive and proper orientation and onboarding process that educates the governing body on the mission, vision and network-at-large, national, state and local.
           • Understanding of Core Model, Role of National CASA, Role of a State Organization, Role of a Local Program, Standards for State CASA/GAL Organizations, and membership and regulatory reporting requirements.
       Non-profit organizations:
       o Informs and assists the Board in the establishment of a written Board development plan
       o Supports the Board in the identification of state leadership development opportunities
    ➢ Required Documentation
       o Board development plan (*Non-profit only)*
       o Board/Governing Body orientation and onboarding materials
    ➢ Related Practices
       o Consistently provides governing body with opportunities to participate in workshops, attend conferences, including the National CASA conference, expand networking, and be mentored in all governing matters
       o Provides an outside expert to train governing body when appropriate
    ➢ Resources and Links
       o BoardSource: Orientation & Education
       o BoardSource: Board Development Plan

The organization is equitable, inclusive and reflects the diversity of the community it serves

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9. Adopts and implements an ongoing, written plan to track, evaluate and guide diversity of its Board (non-profit organizations only), staff and volunteers in order to reflect the demographics of the community it serves

    ➢ Requirements
       o Written Diversity Plan
           ▪ Identifies specific measurable goals
           ▪ Identifies new goals and activities to be met in the future
           ▪ Includes measurable action steps which are reviewed, measured and documented at least annually
           ▪ The plan is updated at least every three years
       o Leadership, staff and Board (non-profit organizations only) participate in trainings centered on issues of diversity, equity, and inclusion
       o The state organization engages in mutual exchange with its local CASA/GAL network to maximize diversity, equity and inclusion
       o Annual assessment of community demographics
    ➢ Required Documentation
       o Diversity Plan

- o Documentation of completed staff training
- ➤ **Related Practices**
  - o The state organization works closely with representatives from legal and social services communities, other child advocacy programs, community service organizations and civic groups to address the need for systemic changes that address issues of diversity, inclusion, disproportionality and disparate outcomes
  - o Evidence of formalized methods of data collection and analyses (collected on an ongoing basis) regarding the diversity of the organization's governing body, staff and volunteers to reflect the demographics of community served and implementation of interventions to increase diversity.
  - o Data should demonstrate that the organization's demographics reflect the community served and services are provided to individuals equitably.
  - o Annual data collection of diversity of leadership, staff and Board
- ➤ **Resources and Links**
  - o National CASA Inclusiveness and Diversity Training Resources
  - o US Census: QuickFacts
    - Understanding Disproportionality
    - Calculating Disproportionality
  - o BoardSource: Diversity, Inclusion, and Equity
  - o Inclusiveness and Diversity Plan
    - Sample 1 - nonprofit
    - Sample 2 - nonprofit
    - Sample 3 – tribal
  - o Inclusiveness and Diversity Plan Progress Report
    - Sample 1 - nonprofit
    - Sample 2 - public agency

10. **Engages and provides services to individuals equitably regardless of race, color, ethnicity, pregnancy, gender identity, sexual orientation, religion, national origin, marital status, age, disability, genetic information or other differences**

- ➤ **Requirements**
  - o Understands and seeks to provide reasonable accommodations and is in compliance with Americans with Disabilities Act (ADA) as required
  - o Has a non-discrimination policy
  - o Has no known discrimination violations
  - o All staff, board and volunteers read and sign the Anti-Discrimination policy
- ➤ **Required Documentation**
  - o Non-discrimination policy
- ➤ **Related Practices**
  - o Engages individuals who can help the organization identify and understand the needs of the children served and the actions the organization can take to address these needs in governance, recruitment, cultural competency education and training, supervision, retention, evaluation and advocacy from a diversity perspective
  - o Partners with a local organization to provide diversity and inclusiveness training and support

GOVERNANCE

Board membership reflects the goals in the diversity and inclusion plan

32. **Has a diversity and inclusion plan for governing body, staff and volunteers**

   ➢ **Requirements**
      o Develops and adopts a diversity and inclusion plan for governing body members, staff and volunteers
      o The governing body aims to reflect the diversity of the community and has members who bring a range of skills, backgrounds and knowledge that support the state organization in fulfilling its mission
      o Evaluates progress toward the goals in the diversity and inclusion plan annually
      o Board participates in trainings centered on issues of diversity, equity, and inclusion
   ➢ **Required Documentation**
      o The Diversity and Inclusion Plan:
         ▪ Identifies specific measurable goals
         ▪ Identifies new goals and activities to be met in the future
         ▪ Includes measurable action steps which are reviewed, measured and documented at least annually
         ▪ The plan is updated at least every three years
   ➢ **Related Practices**
      o Diversity and inclusion is a priority for the governing body and leadership
      o Understands that a focus on inclusion and sensitivity to cultural differences (i.e., diversity of staff and governing body members) can help ensure decisions are based on a full spectrum of perspectives.
   ➢ **Resources and Links**
      o BoardSource: Diversity, Inclusion, and Equity
      o BoardSource: Where is Race on Your Board's Recruitment Agenda?

SERVICE

➢ **Required Documentation**
  o Documentation of service evaluation (e.g., satisfaction surveys)

Develops a written strategic plan/framework every 1-3 years that incorporates short and long-term goals necessary for fulfilling the organization's mission

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43. **Engages in ongoing planning to advance the mission of the organization**

➢ **Requirements**
  o Strategic plan/framework is completed with input from the Board, local programs, or other stakeholders
    ▪ **Assessment.** To develop the strategic plan, an assessment must be completed including evaluation of:
      • Local program needs
      • Delivery of services to local CASA/GAL staff and programs
      • Local program staff satisfaction
      • State organization financial and human resources
      • State organization governance and management
      • Community Demographics, Demographics of volunteers, staff and Board (if applicable)
      • Conducts an analysis of the organization's strengths, weaknesses, opportunities and threats
    ▪ **Elements of Strategic Plan/framework (Example of Strategic Plan)**
      • Statement of mission and purpose
      • Staffing – including current and projected needs
      • Board of Directors membership, size, method of selection, governing body member performance assessment, meetings, committee structure, and other bylaw provisions
      • Financial projections including income, expenses, reserves and new revenue streams
      • Public education of mission
      • Fundraising goals and strategies
      • Provision of services in accordance with local program needs
      • The development of resources to achieve the state organization's mission
      • Diversity and Inclusivity Plan. The ways the state organization will address the inclusiveness and diversity needs at the state and local levels, including outreach, staffing, volunteer recruitment and training.
        o The Diversity plan should include:
          ▪ Statement of commitment to diversity and inclusion
          ▪ Assessment
            • Community demographics
            • Demographics of children served
            • Analysis of the disparities between children served and volunteers, staff, and Board
          ▪ Strategies to achieve diversity and inclusivity