





Agenda

- 1 Project Summary
- 2 Demographic Analysis
- 3 Volunteer Experience Journey
- 4 Potential Projects





Project Summary



Henrico CASA - Project Charter Summer 2023

Problem Statement

Henrico CASA is facing decreased volunteer retention & increased case-load. This is making it difficult for them to meet their goal of providing CASAs for 100% of cases brought to them.

Goal Statement

- Understand the typical volunteer experience to identify areas of improvement during their case
- Evaluate filtering process to identify ideal candidates
- Generate recommendations to increase CASA length of service to 5+ years & volunteer base to 120+.

In Scope:

- Volunteer Experience
- Recruitment Process
- Back-Office Operations

Out of Scope:

- Funding
- Regulatory Issues
- Governing Bodies

Deliverables

- Volunteer Experience Journey Map to visualize the advocate experience through the volunteer's lens from ones first to last point of contact with Henrico CASA
- Potential next projects based on findings from the Volunteer Experience Journey

Project Team & roles

- Jeannine Panzera – Executive Director, Henrico CASA
- Kristin Blalock – Community Engagement Coordinator, Henrico CASA

Primary Metrics of Success

- Increase Volunteer Length of Service to 5+ years
- Increase Active Volunteer Count to 120+
- Allow for optimal volunteer case load
- Meet 100% of case need

Secondary Metrics of Success

- Volunteer Satisfaction
- Volunteer-Coordinator Relationship Quality
- Increase onboarding

Curtis

- Abby Nichols
- Dan Baratka
- Simona Brkic
- Bennett Pompei
- Charlie Unice
- Stephen Kossuth





Executive Summary

Opportunity Identify strategies to increase & retain CASA Volunteers

Action

Analyzed CASA data to find key relationships between demographics & CASA length of service

Detailed analysis of Gap to Target goals for volunteer retention

Utilized Power BI to generate visualizations investigating CASA length of service

Created Volunteer Experience Journey

Interviewed six former CASAs & six CASA employees to understand the CASA process from both the volunteer & employee viewpoint

Created a 10-minute online survey for distribution to current & former CASA Volunteers

Identified pain points & corresponding improvement opportunities

Directed attention to areas of difficulty that lower volunteer length of service

Proposed key actions to directly address pain points in process

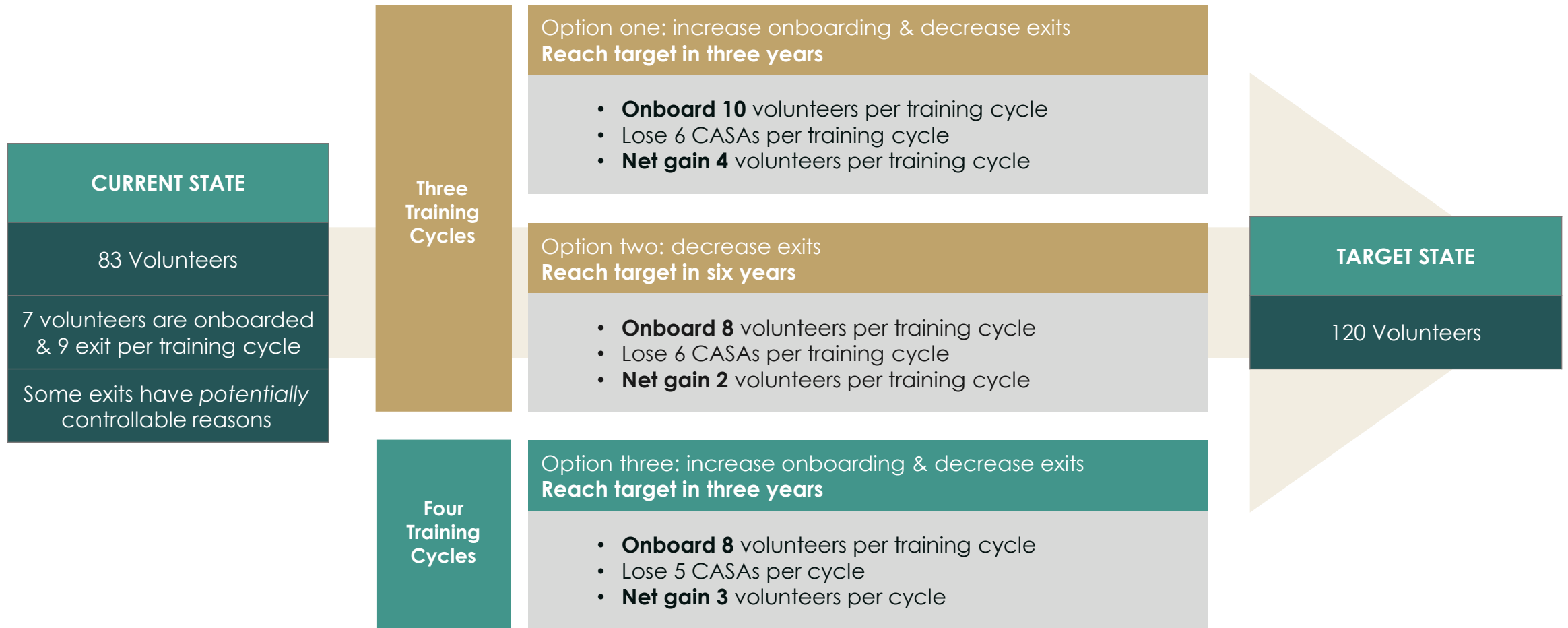
Value Creation

- Analyzed CASA data to find **key insights**
- Identified **specific pain points** to improve in the future
- Created list of **next projects** for volunteer retention





Current Statement of Gap to Target



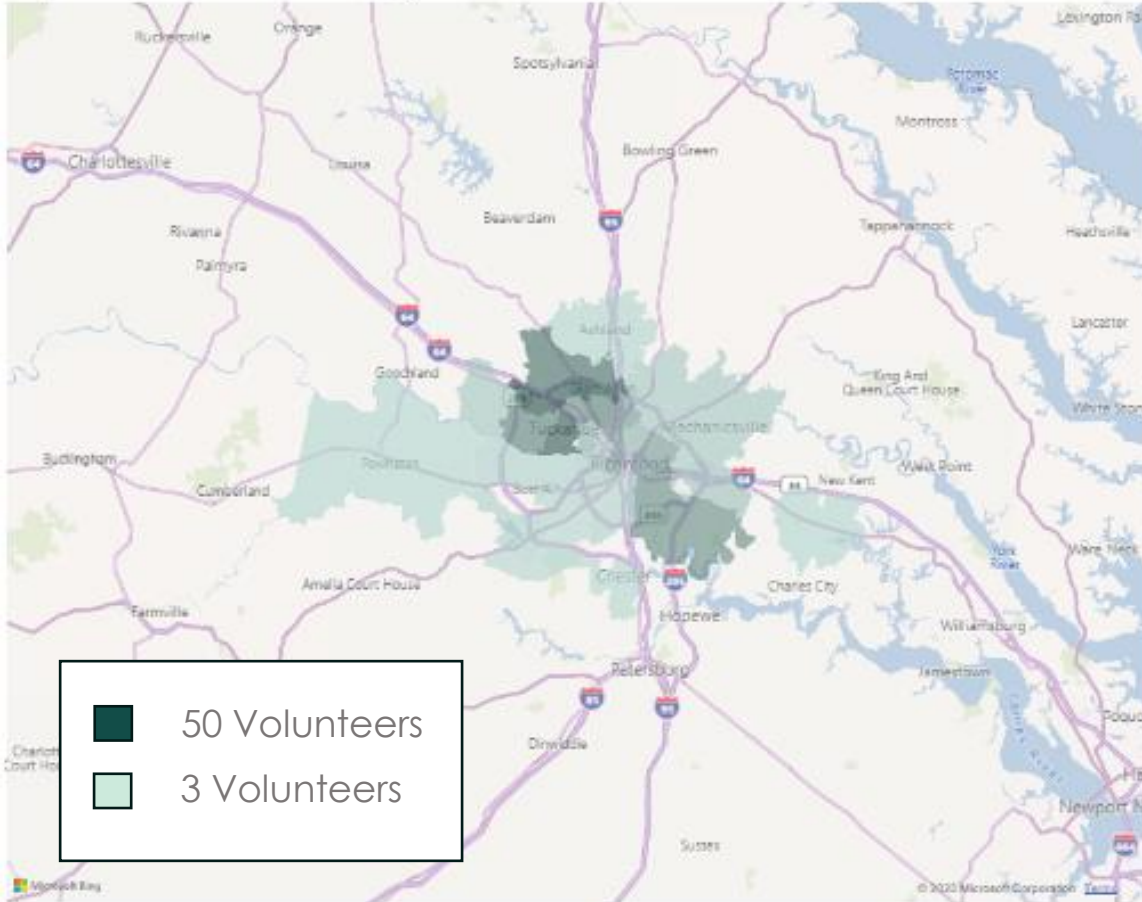


Demographic Analysis

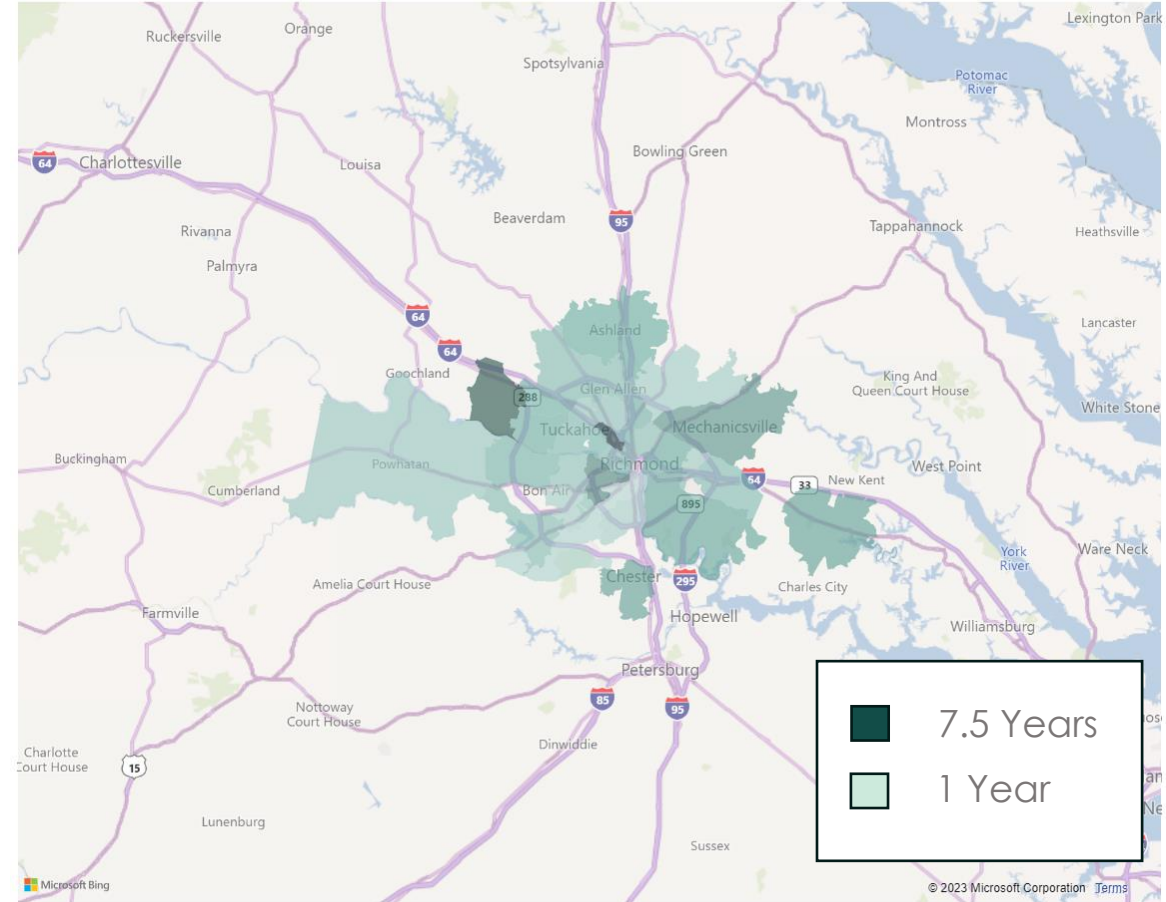


Demographic Analysis

Zip Codes of Volunteers, By Count



Zip Codes of Volunteers, By Average Length of Service





Data Takeaways & Insights

EDUCATION

Highly educated volunteers serve on average longer than less educated ones

LOCATION

Most CASAs live in the Richmond Metro Area, & the longest serving CASAs are local

EMPLOYMENT STATUS

Retired CASAs serve on average longer than those who are not retired

GENDER

Men & women have a similar length of service, but far fewer CASAs are men

PREVENTABLE EXITS

The proportion of potentially preventable exits has risen over the past few years

POTENTIAL QUICK WINS

- Increase outreach to potential male volunteers
- Build bigger presence with retirees (retiree & empty-nester Facebook groups)
- Target those leaving jobs in relevant sectors (education, social work, law)
- Target high-yield zip codes with events & traditional advertising





Survey Insights from Volunteers

COMMUNITY

50% of respondents indicated a desire for increased community with other CASAs

APPRECIATION

Current advocates indicated feeling very appreciated.

RESPONDENT RECOMMENDATIONS

- Centralized **templates** for requests
- **Technical** support
- **Report writing** support
- Information about **the legal system**
- Expanded definition of **continuing education**
- **Resources** to provide to families
- **Shadow** a CASA during training
- Multiple CASAs on demanding cases


















Volunteer Experience Journey



Volunteer Experience Journey

Stage	Recruitment	Application	Training	Case			Cont. Ed.	
Volunteer Activities	Interest form, virtual info session 	Application & interview	Complete training sessions & court observations	Family visits, record gathering 	Community & staff support 	Report writing 	Court attendance	Continuing education 
Volunteer Goal	Find an opportunity to make a difference	Be accepted to CASA	Prepare for role responsibilities	Gather information to develop report	Be heard & supported if problems arise	Create a comprehensive report	Vocalize the child's best interest in court	Maintain advocacy eligibility
Pain Points	Personal challenges & time commitment	None identified	Scheduling, practice report	Family cooperation, safety concerns, filing challenges	Fear of overwhelming coordinators, timely responses	Report quality, time management, writing process	Slow courts, opposing views, lack of respect	Limited opportunities
Satisfaction								
	Responsive, transparent	Requires time but exciting	Robust, extensive	Nuisance, slow	Exceptional	Frustrating, anxiety inducing	Unpredictable	Advantageous
CASA's Goal	Target volunteers that will stay for 5+ years	Properly screen for qualified volunteers	Ensure volunteers are prepared for role	Investigate case circumstances & ensure compliance	Assist volunteer through case complexities	Volunteers provide impartial facts to aid court decisions	Volunteers cooperate with local agencies to develop action plan	Maintain volunteer knowledge & improve skill set
Volunteer's Wishlist	Volunteer's needs are met	Volunteer's needs are met	Flexibility & list of available social services	Unproblematic visits & templates for record requests	Administrative assistant, technology support, & increased community	Writing workshops, simpler time sheet, & confidence	Receive professional courtesy from courtroom players	In-person & more alternatives
Responsible Party	Prospective Volunteers & CASA Staff	Prospective Volunteers & CASA Staff	Volunteers, CASA Staff, & Juvenile Court	Volunteers, CASA Staff, & Involved Parties	Volunteers & Volunteer Coordinators	Volunteers & CASA Staff	Volunteers, Judges, Attorneys, & GALs	Volunteers & CASA Staff





Volunteer Experience Journey Moments of Truth



Recruitment

Goal: Refine recruitment to target volunteers that will stay for 5+ years

Key finding: Print media, word of mouth, information session

Takeaway: CASA is a volunteer opportunity that changes lives



Family Visits

Goal: Investigate case circumstances & ensure party compliance

Key finding: Challenging family dynamic, resource accessibility

Takeaway: Access to support & resources provides peace of mind



Support

Goal: Assist volunteers with case complexities & questions

Key finding: Volunteer coordinator relationships, response rate

Takeaway: Quick & total support is imperative for volunteer satisfaction

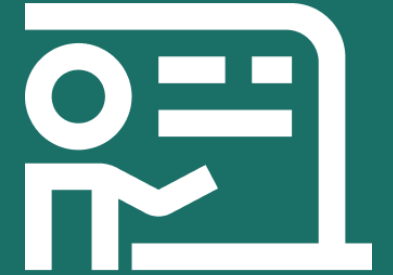


Reports

Goal: Volunteers create a comprehensive report servicing the court

Key finding: Writing process, storytelling anxiety

Takeaway: Self-doubt is a restraining attribute while report writing



Continuing Ed.

Goal: Encourage growth in volunteer knowledge & skill set

Key finding: Flexibility in education methods, skill building

Takeaway: Volunteers seek case relevant education opportunities





Potential Projects



Potential Projects



Recruitment

Methodology for future data collection

Examine data collection process & make recommendations on future strategy for feedback & information gathering

Outreach strategy

Develop a data-driven outreach approach that specifically targets people likely to be long-serving advocates



Family Visits

Resource compilation

Create organized hub of resources that can be distributed to families

Template compilation

Compile useful templates for medical requests, police info, & other useful tools to save volunteers' time



Support

CASA appreciation

Develop a data-driven CASA Appreciation program to ensure satisfaction of volunteers

Auxiliary volunteer time usage

Find opportunities for volunteers to serve the organization without the full advocate commitments



Reports

Writing workshop program

Create program for ongoing report support & technical writing skill training



Continuing Ed.

Flexibility

Explore what CASAs would like to have as continuing education options more deeply. Examples include a more extensive list of books & movies, more in person events, & more information about the legal system in which they operate



Q & A



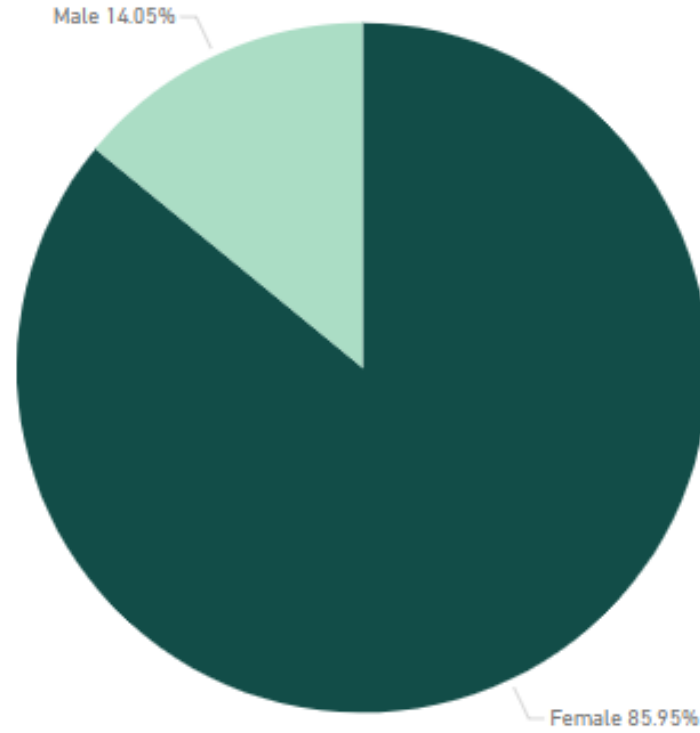


Appendix



Appendix – Volunteers by Gender

Volunteers by Gender



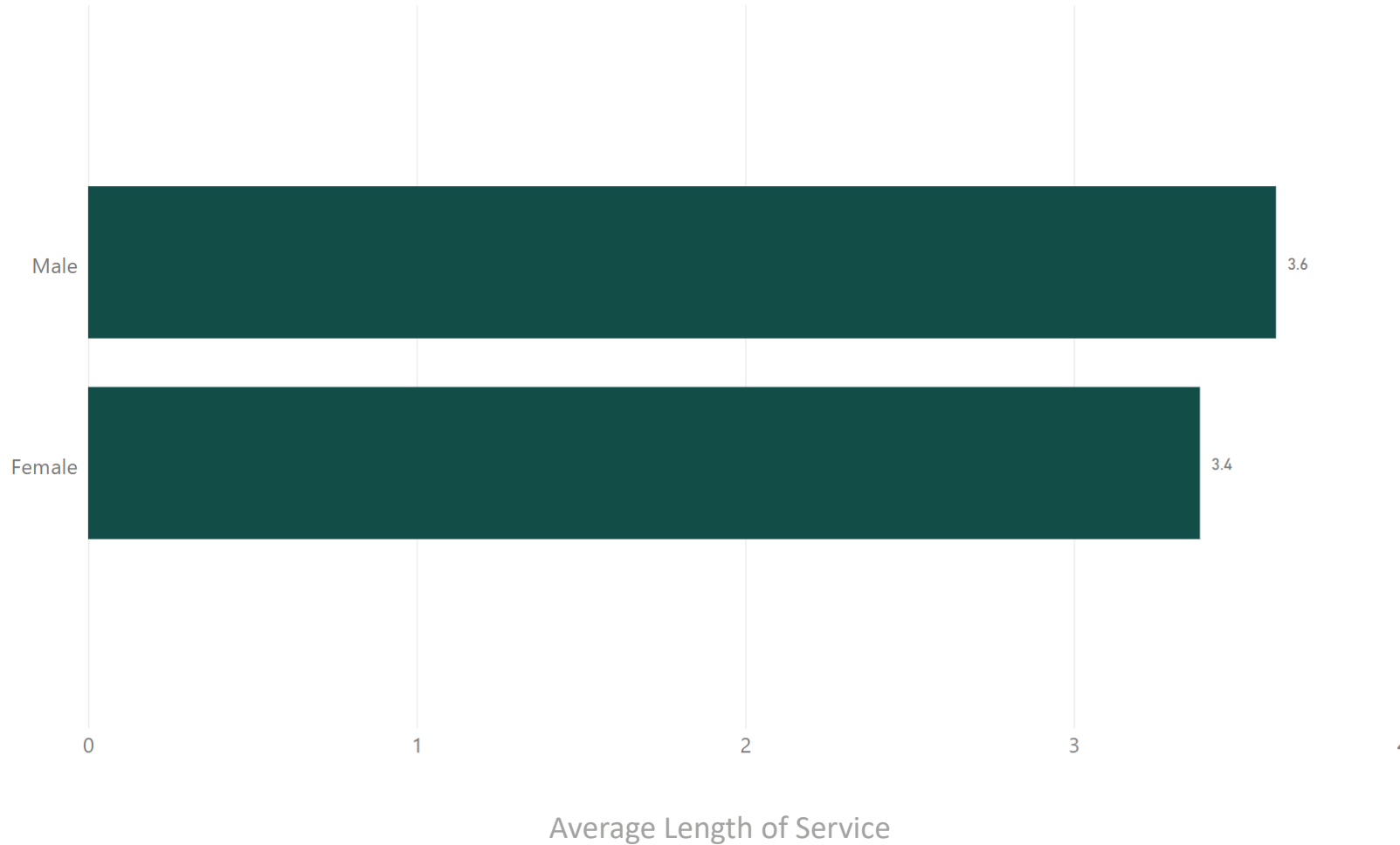
WholeCrewGraphics, Gender Demo





Appendix – Average Length of Service by Gender

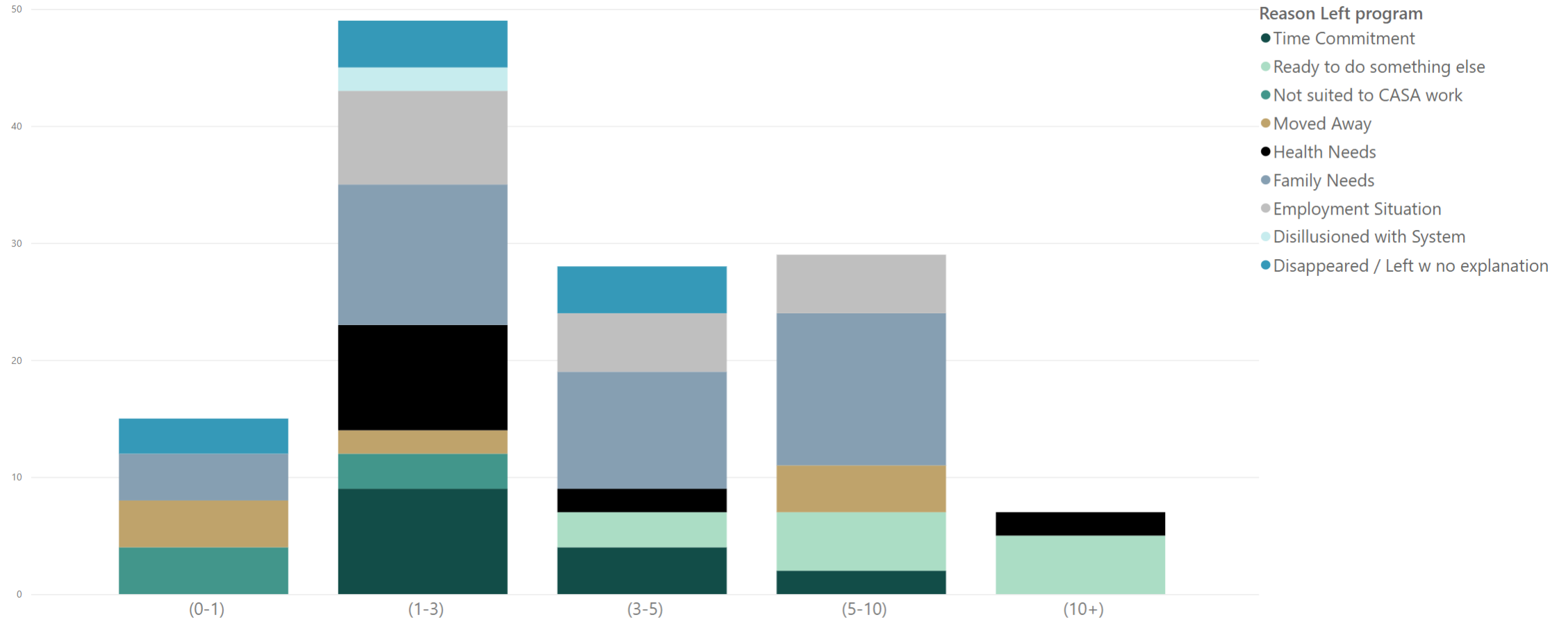
Average Volunteer Length of Service, By Gender





Appendix – Reason for Leaving (last 5 years)

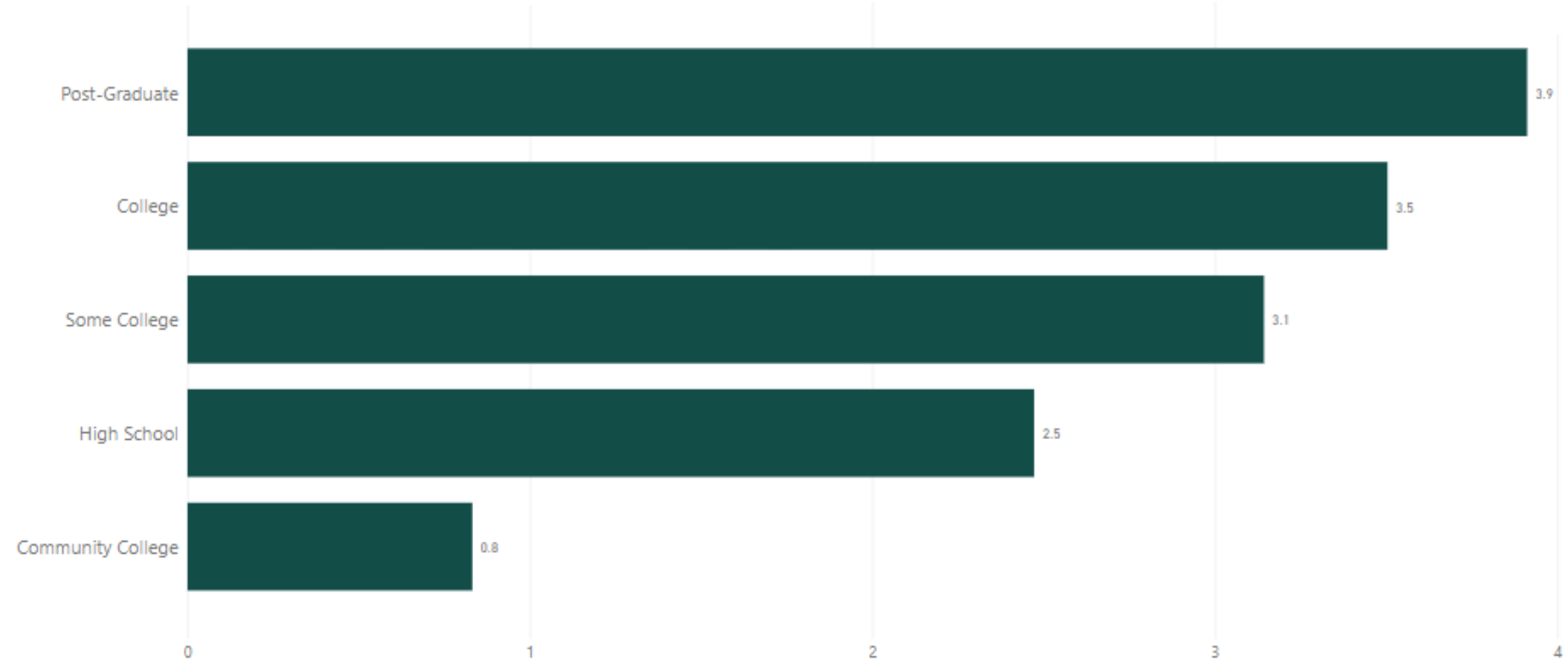
Reason Left Program, by Length of Service at Departure (2018-2023)





Appendix – Average Length of Service by Education

Average Length of Service, By Education



WholeCrewGraphics, Tenure Educ





Appendix – Avg. Length of Service by Employment Status

Average Length of Service, By Employment Status





Curtis&Co

CASA Outreach and Data Strategy



Agenda

1. Project Charter
2. Scope
3. Referral Raffle & Implementation
4. Reflection Workshop
5. Potential Partners
6. Advocate-Driven Partnerships
7. Surveys





Henrico CASA - Project Charter Summer 2023

Problem Statement

Henrico CASA is facing two critical challenges: a growing caseload and a decrease in volunteer recruitment and retention. They want to understand where to focus their outreach efforts to attract and retain more ideal volunteers.

Goal Statement

- Outline outreach tactics to reach potential volunteers that will stay CASAs for 5+ years
- Develop method for ongoing CASA data collection

In Scope:

- Recruitment
- Outreach
- Data collection

Out of Scope:

- Funding
- Training
- Casework

Deliverables

- Overview of new outreach methods
- Outreach toolkit for strategy implementation
- CASA Feedback Surveys

Project Team & Roles

- Jeannine Panzera – Executive Director, Henrico CASA
- Kristin Blalock – Community Engagement Coordinator, Henrico CASA
- Dan Baratka – Curtis
- Abby Nichols – Curtis
- Simona Brkic – Curtis
- Stephen Kossuth – Curtis
- Bennett Pompei – Curtis
- Charlie Unice – Curtis

Primary Metrics of Success

- Average volunteer tenure to 5+ years
- Active volunteer count to 120+

Secondary Metrics of Success

- Volunteer satisfaction
- Increase in training attendance
- Meet 100% of case need





Scope

Outreach Strategy



Design a data-driven outreach plan for recruiting long-serving CASA candidates

Data Collection



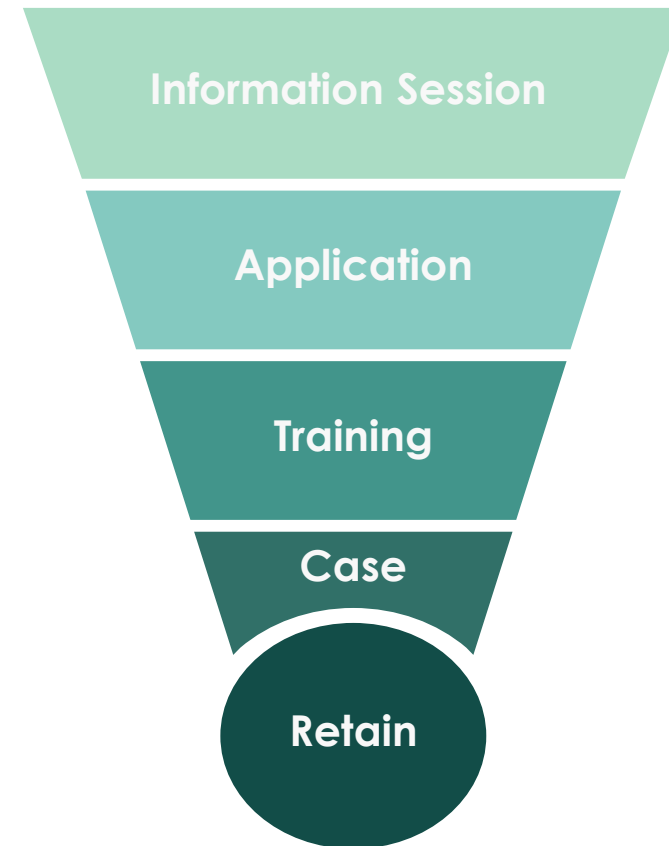
Evaluate data collection and propose enhancements for gathering information





Referral Raffle

Incentivize volunteers to refer CASA candidates to info sessions with an end-of-year raffle





Referral Raffle Implementation



Refer a CASA

CASA Name

Potential CASA

Email

Phone number

Why?

I have talked to the person above about the upcoming CASA info session

Build System

CASA
CHRONICLES



June 2023



We are now on Pinterest! Think of Pinterest as an online bulletin board, a place to "pin" resources... books you want to read, articles that interest you, etc. As we pin items related to your work



Our June blog will detail how trauma can change a child's brain in both structure and function. Before reading those posts, it's important to remember the definition of trauma. See how the author

Market to Advocates

CASA NIGHT

APPRECIATION RAFFLE

NOVEMBER

PRIZES

VACATIONS RESTAURANTS
SPA DAY SHOPPING
EXPERIENCES CLASSES

REFER
OTHERS FOR
EXTRA
ENTRIES



Connect to Community





Reflection Workshop

Encourage reflection to increase referrals



Icebreaker

Build **common ground** to feel comfortable reflecting and sharing



Reflect

Remember why they volunteer and what they've **gained**



“Us” Mindset

Understand their **value** and develop a sense of **ownership**



Toolkit

Easy ways for CASAs to approach community **outreach**





Potential Partners



Schools

Retiring and part-time teachers

Parents of high school seniors



Henrico County

Retiring social workers

Retiring government officials



Law & Finance Firms

Retiring lawyers

Financial advisor clients

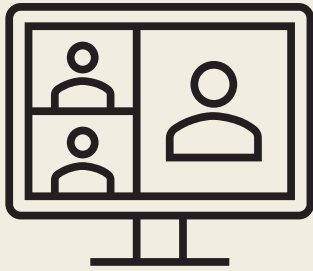
Develop targeted **strategy** and **language** for each partner organization





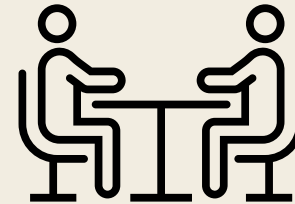
Surveys

Post-Info Session



Understand session effectiveness
Understand attendee hesitations
Ask for feedback

Post-Case



Understand volunteer's case experience
Understand perspective moving forward
Ask for feedback

Structured feedback will increase retention





Volunteer Experience Journey Moments of Truth



Recruitment

Goal: Refine recruitment to target volunteers that will stay for 5+ years

Key finding: Volunteer fairs, print media, word of mouth, information session

Takeaway: CASA is a volunteer opportunity that makes a huge impact



Family Visits

Goal: Ensure safety & aid volunteers in information gathering

Key finding: Challenging family dynamic, resource accessibility

Takeaway: Meetings are often rewarding but CASAs must feel supported through challenges



Support

Goal: Continue supporting the volunteers, ease workload of volunteer coordinators

Key finding: Relationship with the volunteer coordinator, response rate

Takeaway: Total support is imperative for CASA satisfaction

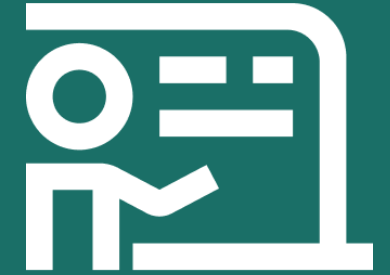


Reports

Goal: Train and support volunteers to write excellent reports

Key finding: Anxiety surrounding conveying message to court

Takeaway: Volunteers often lack confidence and need support



Continuing Ed.

Goal: Support volunteers as they grow

Key finding: Volunteers seek flexibility in education methods

Takeaway: Continuing ed is very helpful





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