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Organization/Record Preservation

Form for organizing cases (See example Word form)

- a) Other examples people use?
- b) Hard copy and digital?
- c) Preserving records.
 - i) *All records are considered the appointed attorney's confidential case file. If the Case Consultant's contract ends for any reason, they must provide the attorney with a copy of all relevant documents, as well as maintain their own records for 7 years.*

Purpose

- a) Reviewing cases with me or if need to Transfer cases to another CC, it's helpful to have your own tracking system (i.e., Excel) to compare to what may be in CARES.
- b) Making sure no cases fall through the cracks.
- c) CARES report.

2

CARES Activities

How are you using CARES activities?

- a) Intra office Consultation.
- b) Joint Billing address expectations, correct use.
 - i. What are your experiences going with lawyer?
- c) You should have a mixture of the activities over your invoice.
- d) Combining invoice entries (same person/group, same day, same case).
 - i. If easier to do them separate that's fine too.
- e) "Notes" section in CARES. Enough info to avoid follow up from me.
 - i. i.e., Yes, these two entries look like duplicates but they're not.
 - ii. The travel was so long because of traffic.
 - iii. These were two meetings because mom and dad can't do meetings together.



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Case Allotment/Needs of The Case

Case allotment is the lawyer's responsibility but feel free to mention it if you see the allotment low.

- a) Working with a CC is a good reason for additional funds.
- b) We want you to do good work if there is a need.
- c) If there is a need for additional contact the allotment should not be the thing preventing it.
- d) Part of data collection is to show *how* you help and why the extra cost has a higher return in the case.

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Case Timeline

1. Child/youth removed from home and put into placement.
2. Temporary Custody Hearing– must be held within 48-72 hours of the date of placement.
3. County department of human/social services files a Dependency and Neglect petition (Usually filed at the Temporary Custody Hearing).
4. Adjudication Hearing– must be held within 60-90 days of the date of placement depending on the child/youth's age.
5. Dispositional Hearing– must be held within 45 days of Adjudication (May be held at the same time as Adjudication).
6. Review Hearing– must be held within 90 days of Disposition and every 6 months thereafter.
7. Permanency Hearing– must be held within 12 months of date of placement.

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Be Proactive

This is some of the language in our posting for CCs. OCR wants involved CCs using their skills to advance the legal case and youth voice.



What are your experiences with this description?

Identifies, locates, and interviews individuals relevant to the case in a culturally respectful manner and identifies and **analyzes relevant records** pertaining to the GAL/CFY's representation.

Assists the GAL/CFY in **identifying and understanding** major mental illness, intellectual and developmental disability, substance use issues, individual and transgenerational trauma, and neurological issues resulting from congenital or traumatic brain injury.

Analyzes all relevant information and consults with the GAL/CFY to provide a social science perspective on the child/ren to assist in presenting a comprehensive and cohesive case.

Possible **crisis intervention or risk assessment** with approval or direction from the GAL/CFY.

Doing all of it, some of it?

Have you been asked to inform a safety assessment?

What might a safety assessment look like in the role of GAL or CFY?

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Talk With The Lawyer

The first step is having a conversation with the lawyer.

- a) Ideally in person but the phone is ok.
- b) If they don't lead off with a communication plan, then you organize.
- c) What is our communication plan for phone or in person?
 - i. Biweekly?
- d) Lots of information can be exchanged digitally but need to talk on a regular basis.
- e) This doesn't work without a communication system.

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Sample Chit Chat

- 1) I'd like to get everything you have so I can get myself up to speed on the case.
 - a) What is all the contact information for the various players?
 - b) Is there anyone I *can't* speak to?
 - c) Any initial thoughts on what you'd like me to do?
 - d) This is what I think I can start with, that sound ok?
 - e) These are a couple of initial long-term thoughts I have.
 - f) What's the next court date/meeting and initial thoughts/plans for it/them?
 - i. What needs to be addressed before then?
 - g) Please add me to email chains and/or it's helpful to introduce me to the players.
 - h) Please add me to the appointment order.
 - i) Do you have letterhead I could use for school or other agency requests?
 - i. I would let you know who I would be using it for when needed.
- 2) Anything else I should know or do?

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Take Aways from 2023 Attorney Survey

Stopped hearing from CC.

Having to give too much direction.

Attorneys in general want proactive CCs.

You're regularly touching base with the lawyer so they can tell you no. Better to err on being proactive and providing suggestions.

If you are worried the lawyer is unaware/missed significance of something, then double check with them and explain your reasoning or concern.

If you can't do a particular request because of timing, etc. Explain why and see if there is a 2nd best option.

If you're not sure of the status of the case, ask the lawyer.

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Communication Is The Name Of The Game

Succinct information in email/report with plan of having more in-depth phone or in person consultation.

- a) Bullet points are your friend.
- b) Preferences will differ but should generally cover what you observed/learned.
 - i) Your thoughts, concerns, and next step suggestions.
 - ii) What is the lawyer doing, what are you doing?
 - i) The tasks and any deadlines.
 - iii) When are we talking/meeting next?

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Concerns About Other Professionals

If there are concerns about what an attorney is asking you to do, please reach out to me.

- a) A lawyer should not ask you to change activity dates in CARES.
- b) Consultation every Friday at 7pm isn't reasonable.
- c) Personalities and Professional style will differ.
- d) Are there any concerns along these lines?
- e) Tips on working with a new Attorney from group?



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Experience With Services and Placement

What are you experiencing looking for services?

- Could always be more but general experience.
- Successes and struggles?
- Culturally appropriate ones?

What are your experiences with placements?

- What are common issues you're running into?
- Creative solutions you've come up with?
- Questions about the placement process?
- Reminder: OCR Placement Advocacy Training: <https://coloradochildrep.org/training-archives/placement-advocacy-case-consultant-training/>

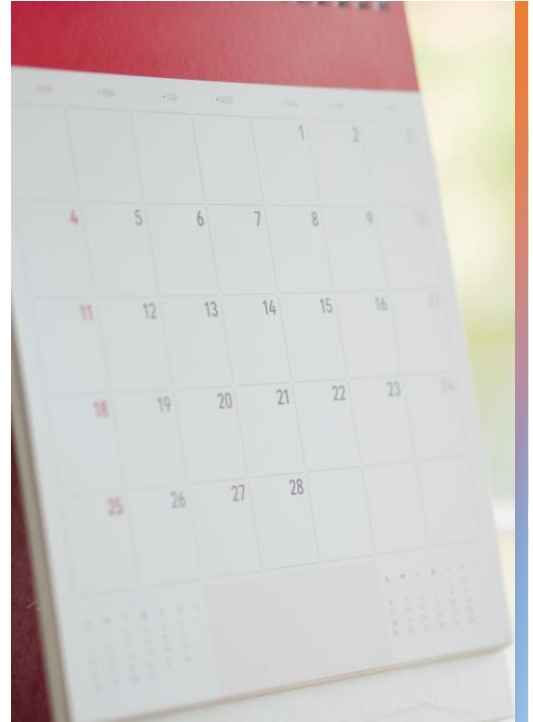
Experience working with DHS, RPC, defense?

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Closing Cases

The When, How, Why.

- a) Depending on the circumstances if nothing has happened in 3-6 months have a conversation.
- b) If very little has happened in 6-9 months have a conversation.
- c) It may be a good case review and might identify new tasks, or it may be time to prepare to close the case.
 - i. Any final requests from lawyer?
 - ii. Keep child/youth informed along the way, being mindful of probable past turnover/loss.
 - iii. Termination, individually planned.
- d) Can always re-request.
- e) CARES and Formsite info.



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Feedback Plan and Purpose

The primary goal of this feedback is to get good data for CC program use and any constructive criticism of the CC program and/or for individual CCs.

- a) Program use
 - i. Explaining why CC rates should be higher.
 - ii. Explaining why there is a need for more CCs.
 - iii. Explaining how CCs help in these cases.
- b) Individual use
 - i. The purpose is not to catch or penalize but to help everyone be as good a CC as possible.
 - ii. The best multidisciplinary advocacy for the child/youth/family is the goal.
 - a. CC End of Assignment form. (see blank copies for both forms)
 - b. Case Consultant Feedback form.
 - iii. Mark case "inactive" in CARES.
 - iv. Working on Youth Feedback form.

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Renewal Process

- a) Provide you with collected data from CARES and Formsite.
 - i. Summary of any comments from lawyers.
 - ii. Compare individually to state average.
 - iii. Eventually youth feedback.
- b) If there are any issues I will talk with you in the moment, no surprises.
- c) The vast majority of feedback has been good.



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Final Questions?

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