

Strengthening Advocacy Through Quality Report Writing

PRESENTED BY: Jeff Marzyck, CASA, GAL

**Washington State CASA's
17th Annual Conference
October 16-17, 2009**



OVERVIEW

- Why we write reports and understanding our audience.
- How to development factual narratives that are objective and non-opinionated.
- Building continuity into a report.
- Identify issues and turning them into recommendations.
- Tips on editing, proper word usage, and common problems to avoid.



Goal Of Today's Session

Increase your credibility with the court

AND..

Your ability to advocate for the children you represent.



Understanding Our Role

What is the CASA's main purpose for the court?

To observe and report.



Why Do We Write Reports?

- Written information can be re-read and reviewed
- Documents fact as evidence
- Establishes a permanent record
- Judge can determine the weight of evidence
- Basis for testimony
- Facilitates settlements



Who Reads Our Reports?

- All parties get copies-
 - Attorneys, Social Workers, Parents
- Our main audience is the commissioner.



3 Basic Components In a Report

- Factual Narrative
- Findings / Conclusions
- Recommendations



Elements of a Factual Narrative

A Factual Narrative is an accurate, written official record of your activity.

It tells a reader

What happened, who did it, when it happened, where it happened, why it happened and how it happened.



Elements of a Factual Narrative

- Accurate – Factual information forms the foundation upon which the report is written.
- Names, dates, descriptions, addresses, numbers and the like are double checked for accuracy
- Feelings and opinions of the writer do not belong in the narrative
- Devoid of conclusionary language
- Focus on both positive and negative aspects of case



Elements of a Factual Narrative

- Clarity- The language and the format must be simple and to the point. Facts should follow a logical sequence – usually in chronological order.
- Relevant – The narrative should deal exclusively with the subject or purpose with which it is concerned. If other subjects are introduced, the relationship should be made clear right away and its relevance shown.



Elements of a Factual Narrative

Describing a person's personal affect.

Describing a person's emotional state, physical wellbeing and developmental progress can be challenging.

- Build your paragraphs around a clear unified topic.
- Use concrete details to describe the person's presentation. Avoid metaphors or "frilly" language.



Elements of a Factual Narrative

Describing a persons personal affect.

- Refer to, psych evaluations, treatment records, report cards, IEP's or developmental testing data when applicable.
- Use factual descriptions of your own personal observations or the person's own words if possible



Elements of a Factual Narrative

Avoiding Conclusionary Language

- Content must be factual, accurate, objective and complete.
- Avoid conclusionary language by showing not telling.

Example:

The home was filthy and unkempt.

Instead write:

The home had a large pile of garbage in the corner of the kitchen, the kitchen sink was piled with dirty dishes, the bathroom had black mold on the walls and smelled of urine and there was cat feces in the living room, hallway and bedrooms.



Elements of a Factual Narrative

Avoiding Conclusionary Language

Objective word usage

Consider the meaning of each of these words.....



Elements of a Factual Narrative

Cried

Wept

Blubbered

Consider the use of the words stated and claimed.



Elements of a Factual Narrative

Connotative v. Denotative Words

- Connotative words have either positive or negative overtones associated with their meanings.
- Denotative words have little emotional effect and are more objective.



Elements of a Factual Narrative

Words To Avoid

refused, denied,
claimed, consented,
admitted

Assaulted, attacked,
resisted, forced,
intimidated

So Use

A verbatim or
approximate quote
of what was said.

A factual account of
who did what.



Elements of a Factual Narrative

Words To Avoid

angry, upset, excited,
nervous, happy

Disparaging or biased
terms that refer to
race, religion
ethnicity or sexual
preference

So Use

Factual description of
what angry or upset
looks like.

Use the denotative
form of the word to
describe these
things.



Elements of a Factual Narrative

Words To Avoid

A few, often, many,
frequently, a large
amount

some time later, after
a while, at last,
soon, near future

So Use

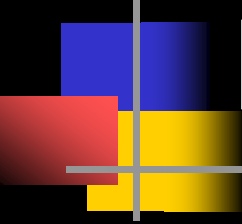
Quantify, be precise as
possible.

Provide an accurate
time frame.



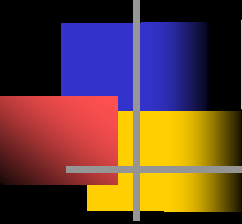
Findings / Conclusions

- *List your findings in accordance with the flow of the document.*
- *Are the parties in compliance?*
- *List each finding in a clear and concise manner.*
- *Did you objectively evaluate and explore all credible interpretations?*
- *Findings must be supported by facts.*
- *Clearly express your theory and opinion of the case*
- *Do not add new or extraneous facts.*



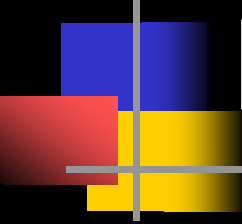
Identify Issues and Turning Them into Recommendations.

- Sometimes we see what needs to happen before we have all the facts.
- CASA's 1st duty?
- Consult with Case Manager and Social Worker about your ideas.
- Develop a set of recommendations that are supported by the facts and findings.



Identify Issues and Turning Them into Recommendations.

- Must be within the court's authority
- Should the petition be granted or not
- What services does the child need
- What services should the parents complete to remedy their deficits
- Is an early review necessary
- Recommendations should be specific



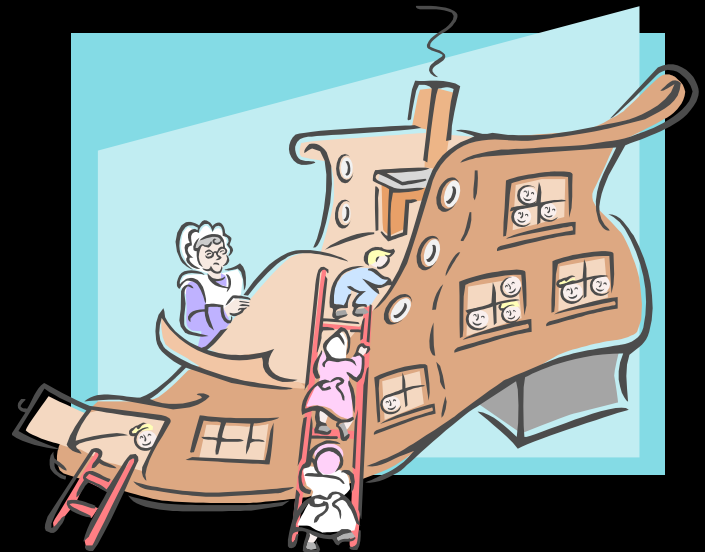
Identify Issues and Turning Them into Recommendations.

The facts are...

There was an old women who lived in a shoe.
She had so many children, she didn't know
what to do. She gave them all broth, without
any bread, then whipped them all soundly
and sent them to bed.

Issues

- Inadequate housing
- Possible major depressive episode, Domestic violence issues
- Lacks parenting skills
- Safety issues
- Nutritional neglect





Recommendations

- Referral for Section 8 housing
- Psychological evaluation, follow any recommendations
- Parenting classes through local crisis nursery or DSHS
- Placement out of home with cousin Snow White, who has room for 7 children
- Public Health Nurse to instruct on proper diet and nutrition, referrals for WIC and Food Bank



Recommendations

Recommendations should not be a surprise. They should be a logical proposal that is derived and supported by your factual narrative and your findings.



Recommendations

- *List your recommendations in accordance with the flow of the document.*
- *Do your recommendations concur with your facts and findings?*
- *Be concise in describing recommendations. Limits on visitation, frequency of task or services, level of compliance.*
- *Be sure to include the GAL in any discretionary changes in the recommendations.*



Question???

- What do you suppose is the single biggest complaint from judges and attorneys about CASA / GAL reports?

Lack of Continuity

So....

what is continuity and what does it look like?



Continuity Defined

*Continuity: An uninterrupted succession or flow;
a coherent whole.*

This means..

- Facts stay with facts*
- Findings stay with findings*
- Recommendations stay with recommendations*

*Deal only with the material needed in that particular
section.*



Continuity- What does it look like?

Facts-

Mrs. Smith missed her scheduled IOP treatment sessions on June 6, 10, and 13, 2009. Additionally, Mrs. Smith did not call in to notify or reschedule her appointments with the treatment center on any of these dates. Furthermore, Ms. Smith stated to this GAL, during interviews on June 11 and June 15, 2009, that she felt that going to treatment was a waste of her time. The treatment center reported on June 29, 2009 that Mrs.. Smith had stopped attending session all together. This is Ms. Smith's third attempt at IOP.



Continuity- What does it look like?

Findings-

Mrs. Smith's has dropped out of her court ordered IOP services three times. Mrs. Smith is not in compliance with the current court ordered services. It is the opinion of this GAL that Mrs. Smith has no real interest in engaging in the court ordered alcohol and drug treatment. Furthermore, This GAL believes that Ms. Smith's rehabilitation needs are not being met through IOP services.



Continuity- What does it look like?

Recommendation-

Annie Smith should remain in her current placement . Due to Mrs. Smith's repeated noncompliance in her court ordered alcohol and drug treatment, this GAL recommends that Ms. Smith be ordered into an inpatient alcohol and drug treatment program. In the event that Mrs. Smith fails to fully engage in this treatment with 100% compliance, this GAL recommends that the permanent placement plan be changed to adoption.



Putting It All Together / Mechanics of Effective Writing

Grammar-

"From now on, ending a sentence with a preposition is something up with which I shall not put." Winston Churchill (1874-1965)

Mistakes in spelling, punctuation, capitalization and grammar give the reader the impression that you are careless, stupid or incompetent –possibly all three.

A properly written report boosts your credibility.



Putting It All Together / Mechanics of Effective Writing

Clarity-

The biggest problem with communication is the illusion that it has been accomplished." – George Bernard Shaw, (1856-1950)

Your report should have the same word meaning to every person who reads it.

Consider some of these passages.



Putting It All Together / Mechanics of Effective Writing

“This GAL spoke with the social worker concerning Mrs. Smith’s treatment counselor, Ms. Ames, and her absence at her treatment sessions, she told me to contact her directly to get all the facts.”



Putting It All Together / Mechanics of Effective Writing

“On June 25, 2009 this GAL spoke with the social worker concerning Mrs. Smith’s attendance at treatment sessions. The Social worker stated that the treatment counselor, Ms. Ames, had reported that Ms. Smith had been absent from several of her scheduled sessions. The social worker told me to contact Ms. Ames directly to get all the facts.”



Putting It All Together / Mechanics of Effective Writing

“Ms. Johnson stated that she would be attending church this Easter Sunday to lay an egg on the alter in honor of her daughter.”



Putting It All Together / Mechanics of Effective Writing

“Ms. Johnson stated that she would be attending church this Easter Sunday. Ms. Johnson went on to say that she would be placing an egg on the alter in honor of her daughter as part of the celebration.



Putting It All Together / Mechanics of Effective Writing

Brevity-

He can compress the most words into the smallest idea of any man I know."

- Abraham Lincoln (1809-1865)

Also known as wordiness- Rules against wordiness

- Try to eliminate unnecessary words, such as:

Kind of, sort of, type of, really, basically, for all intents and purposes, definitely, actually, generally, individual, specific, particular



Putting It All Together / Mechanics of Effective Writing

Examples-

Wordy-

*The report, which was recently submitted by this GAL
states...*

Better-

This GAL's recent report states...

Putting It All Together / Mechanics of Effective Writing

Avoid roundabout expressions that take several words to say what could be expressed with one word.

Try using because, since or why for phrases like:

-the reason for

-for the reason that

-owing/due to the fact that

-in light of the fact that

-considering the fact that

-on the grounds that

-this is why



Putting It All Together / Mechanics of Effective Writing

Passive v. Active Voice

- Active voice is the voice of persuasive writing.
- Active voice is usually more direct and puts the action where it belongs.
- Active voice uses fewer words
- Good idea to aim for about 70-80% of your sentences to be active when writing reports



Putting It All Together / Mechanics of Effective Writing

Examples of Active Voice

Passive: *A trial by jury was requested by Mr. Jones.*

Active: *Mr. Jones requested a jury trial.*

Passive: *The children were encouraged to use exploratory play by their teachers.*

Active: *The teachers encouraged the children to use exploratory play.*

Passive: *The determination of custodial parental rights is largely done on a case-by-case basis.*

Active: *Courts determine custodial parental rights on a case-by-case basis.*



Putting It All Together / Mechanics of Effective Writing

Tone-

- Tone can be defined as the underlying attitude we take towards the parties in the case.
- No need to attack or berate the parties
- A logical, objective and reasonable tone is usually the most persuasive



Putting It All Together / Mechanics of Effective Writing

Final Drafts

- After you have a quality draft, walk away for a period of time.
- When you return- Print it out, read it and fix it
- Shorten it
- Structure
- Word usage



Final Analysis

A Quality Report Has...

- *Factually based narrative, that is presented in an objective non-emotional and non-conclusionary format*
- *Facts stay with facts, findings stay with findings and recommendations stay with recommendations*



Final Analysis

- *Paragraphs are clear, concise, on point and complete*
- *Organization of themes and issues throughout the report provide the court with an well thought-out, logical, flowing document. Continuity.*



Final Analysis

QUESTIONS?