

**JUDICIAL CONFERENCE OF INDIANA
BOARD OF DIRECTORS
Minutes
Indianapolis, Indiana
April 9, 2024**

1. Attendees:

- a. Members:** Robert Altice, David Avery, Brian Bade, Jon Brown, Stephanie Campbell (member and as proxy for Heather Welch and Kelsey Hanlon), Sam Cappas, Vicki Carmichael, Michael Christofeno, Joseph Claypool, Dean Colvin, Aleksandra Dimitrijevic, Danielle Gaughan, Clayton Graham, Frances Gull, Jennifer Harrison, Elizabeth Hurley, Kristina Kantar, Steve Kitts, Robert Krieg, Stephenie LeMay-Luken, Jeryl Leach, Sally McLaughlin, Jason McVicker, Bradley Mohler, James Muehlhausen, Jenny Newton, Jaime Oss, Lakshmi Reddy, Hunter Reece, Matthew Rentschler, Loretta Rush, Lori Schein, Leslie Shively, Gregory Smith, Adam Squiller, Richard Stalbrink, Stephanie Steele, Mark Stoner, AmyMarie Travis,
- b. Not in attendance:** Marla Clark, MaryEllen Diekhoff, Kelsey Hanlon (Stephanie Campbelle appointed proxy), Charnette Garner, Clay Kellerman, Kristen McVey, Heather Welch (Stephanie Campbell appointed proxy).
- c. Guests:** Kim Dowling, Christopher Goff, Mark Massa, Derek Molter, Elizabeth Tavitass
- d. Staff:** Jennifer Bauer, Vicki Davis, Mary DePrez, Kathryn Dolan, Leslie Dunn, Michelle Goodman, Ava Hassel, Bob Rath, Jeff Wiese, Amanda Wishin, Josh Woodward.

- 2. Welcome and opening remarks.** Chief Justice Loretta Rush welcomed the Board and encouraged them to attend the upcoming district meetings and to reach out to new judges. The Chief Justice thanked Judge Vicki Carmichael for leading the weighted case load study and achieving 98% participation of the judges. She noted that the Supreme Court will begin building the next budget this summer and that an order was issued for a new commission on the future of the legal field.
- 3. Minutes.** A motion was made by Judge AmyMarie Travis and seconded by Judge Clayton Graham to approve the minutes from the meeting held November 30, 2023. The motion carried unanimously.
- 4. Court of Appeals Report.** Judge Bob Altice reported that the Court of Appeals has two upcoming openings in the northern district and has been providing CLEs on demystifying the judicial nominating process. Judge Altice invited the Board to the Court of Appeals open house on Wednesday, April 10 at 4:45 pm.

- 5. Indiana Judges Association (IJA) and Indiana Council of Juvenile and Family Court Judges (ICJFCJ) report.** Judge Stephanie Campbell provided the updates for both IJA and ICJFCJ. She encouraged the Board to continue the forward momentum of the current healthy relationship between legislators and the judges by welcoming newly elected legislators. If a county is interested in adding a new judicial officer, the IJA has created a subcommittee to help, and counties should reach out to her or Judge Mark Spitzer.
- 6. Guardian ad Litem Guidelines.** Judge Elizabeth Tavitaz, chair of Family Law Taskforce, provided a copy of the guardian ad litem guidelines that had been revised after receiving public comments. She encouraged the Board to contact her or Leslie Dunn with comments; the Board will vote on the guidelines at the September meeting.
- 7. Jury Orientation Video.** Judge Kim Dowling, on behalf of the Jury Committee, noted that Jury Rule 11 requires courts to use a standard juror orientation video. The Jury Committee has spent significant time reviewing the current script and provided a draft update with the substantive addition of information on keeping an open mind/biases. A motion was made to approve the updated script by Judge Vicki Carmichael, seconded by Judge Stephanie Campbell, and was carried unanimously.
- 8. Justice Reinvestment Advisory Council Electronic Monitoring Report.** Michelle Goodman reported that a statute requires electronic monitoring reports be compiled and submitted to the Legislative Council and the Board. Ms. Goodman noted that the report was reviewed by the Youth Justice Oversight Committee. The key takeaways are that the adult population is primarily post-disposition, and the juvenile population is mostly pre-adjudication.
- 9. Office of Judicial Administration (OJA).** Justin Forkner, Chief Administrative Officer, also mentioned new judge requests. He is happy to chat with counties about making a request and noted that the information about the process is located on the website. He also noted that OJA is hiring for two management positions – State Court Behavioral Health administrator and Executive Director of IOCS. Mr. Forkner announced that Vicki Davis is the Interim Executive Director.
- 10. Indiana Office of Court Service (IOCS) report.** Vicki Davis, Interim Executive Director, highlighted the grants available through IOCS - problem-solving, pretrial, and youth justice oversight. Ms. Davis noted that the Education Division is requesting a needs assessment, and that the final Legislative Update has been published. IOCS has some vacancies - Jeff Bercovitz retired and there are two openings in Justices Services. Ms. Davis also gave a heads up that the Judicial Conference committee selection letter will be arriving in email boxes soon.
- 11. Court Technology.** Mary DePrez, Executive Director, announced that all trial courts are now using Odyssey except for the nine courts using QUEST. She noted that a new INCite application for law enforcement officers, Limited Weapons Disqualification Data, was

released in February, as required by legislation passed in 2023. This new INCite application searches Odyssey, Protection Order Registry, and the NICS Reporting application. Court Tech has also been working with Division of Mental Health staff to better coordinate courts who find a defendant to be incompetent to stand trial and need to be transferred to a state facility. Finally, the INjail application has been deployed to Martin, Grant and Elkhart Counties and Warren County will be deploying INjail in the coming months.

12. Other business

- Judge Bradley Mohler expressed concern about public defender reimbursement and caseloads.
- Judge Sam Capps stated that Lake County does not put people on electronic monitoring because of the liability involved with contacting victims. Further research will be done on this issue.
- Judge Rich Stalbrink provided a quick Strategic Plan update. The Committee is still executing portions of the 2020 plan, working with the Court Security Committee on security issues, and building a good relationship with the Clerks Association.

13. Future meetings: The 2024 meetings are scheduled for:

- September 18, 10:30 am – Indianapolis
- December 12, 3:30 pm - Carmel

**JUDICIAL CONFERENCE OF INDIANA
BOARD OF DIRECTORS
Minutes
Indianapolis, Indiana
September 18, 2024**

1. Attendees:

a. Members: Robert Altice, Dale Arnett, David Avery, Brian Bade, Murielle Bright, Jon Brown, Sam Capps, Vicki Carmichael, Michael Christofeno, Marla Clark, Joseph Claypool, Dean Colvin, MaryEllen Diekhoff, Charnette Garner, Danielle Gaughan, Clayton Graham, Frances Gull, Kelsey Hanlon, Jennifer Harrison, Elizabeth Hurley, Kristina Kantar, Clay Kellerman, Steve Kitts, Robert Krieg, Jeryl Leach, Stephenie LeMay-Luken, Sally McLaughlin, Kristen McVey, Jason McVicker, Bradley Mohler, Jenny Newton, Jaime Oss, Lakshmi Reddy, Hunter Reece, Loretta Rush, Lori Schein, Leslie Shively, Gregory Smith, Adam Squiller, Richard Stalbrink, Stephanie Steele, Mark Stoner, Lisa Swaim, AmyMarie Travis, Heather Welch

b. Not in attendance: Aleksandra Dimitrijevic

c. Guests: Christopher Goff, Mark Massa, Derek Molter, Matt Sarber, Elizabeth Tavitias

d. Staff: Jennifer Bauer, Vicki Davis, Mary DePrez, Kathryn Dolan, Leslie Dunn, Heather Falks, Tom Felts, Joseph Fischer, Michelle Goodman, Catheryne Pully, Bob Rath, Lisa Thompson, Jeff Wiese, Amanda Wishin, Josh Woodward.

2. Welcome and opening remarks. Chief Justice Loretta Rush welcomed the Board. She noted that she will be asking the legislature for more money for court security, technology, and problem solving courts.

3. Minutes. A motion was made by Judge Mark Stoner and seconded by Judge Kristina Kantar to approve the minutes from the meeting held April 9, 2024. The motion carried unanimously.

4. Court of Appeals Report. Chief Judge Bob Altice reported that Governor Holcomb appointed Porter County Judge Mary DeBoer to the Court of Appeals. The Court of Appeals has completed six traveling oral arguments this year and has six more remaining. Judges Peter Foley and Rudy Pyle are up for retention vote in November.

5. Indiana Judges Association (IJA) report. President, Senior Judge Heather Welch, announced that the 89th Indiana Judges Association luncheon is the next day. At the luncheon, IJA will be giving out awards for champions of justice, 24-years of service, and for judicial college completion. The Board of Managers has two contested elections: Marion

County and northern Indiana magistrates. The winner of those elections will also be announced at the luncheon. Judge Welch encouraged judges to build relationships with legislators. She noted that the Interim Study Committee on Courts and the Judiciary will take requests for new judicial officers every other year based on severity of need. Requests are being taken this year, and if a county is going to make a request, Judge Mark Spitzer chairs a technical assistance committee. Judge Welch also encouraged judges to increase transparency by allowing cameras in their courtrooms, putting their calendars on Odyssey, and inviting their state senator or representative to court.

6. **Indiana Council of Juvenile and Family Court Judges (ICJFCJ) report.** President, Judge Kelsey Hanlon, reported that the ICJFCJ is discussing what benefits the organization can provide to get judges more engaged. She reported that bills on barriers to permanency are likely to be filed in the 2025 legislative session.
7. **Weighted caseload study.** Judge Vicki Carmichael and Judge Matt Sarber, Co-chairs of the Judicial Administration Committee, provided an overview of the study. They announced that 98% of judicial officers participated in the weighted caseload study. For the adequacy of time study, 359 judges responded. Marion Township Small Claims were included in the study this year, but their numbers were removed in created the case weights. The study also showed that the Commercial Court clerks are essential to accomplishing the work of the Commercial Courts. The Judicial Administration Committee asked for two new case identifiers - GP for grandparent visitation and EC for Commercial Courts. Ninety minutes a day is the national average for non-case related work. The majority of case weights increased.
8. **Guardian ad Litem Guidelines.** Judge Elizabeth Tavitias, chair of Family Law Taskforce, presented the finalized guardian ad litem guidelines. She had presented them to the board at the June 2023 meeting. They were then posted for public comment in June 2023 and the Committee made changes based on the comments. She brought the amended guidelines to the Board again in April 2024 for additional comment. A motion was made by Judge Greg Smith to approve the guidelines with an effective date of January 1, 2025, seconded by Judge Jon Brown, and carried unanimously.
9. **Office of Judicial Administration (OJA).** Justin Forkner, Chief Administrative Officer, introduced new managers: Brittany Kelly, Office of Behavioral Health; Heather Falks, General Counsel; and, Catheryne Pully, Executive Director of the Indiana Office of Court Services. He also announced that the Commission on Legal Futures has released a report and noted that district meetings will be held this afternoon.
10. **IOCS and IOCT joint project:** Michelle Goodman and Lisa Thompson presented a juvenile reports project coming out of the Youth Justice Oversight Committee that modifies the standard Preliminary Inquiry Report, Pre-Dispositional Report, and Modification Report. The changes will enhance compliance with HEA 1359-2022 and address requests from probation

departments to improve the reports. At the December meeting, these reports will be presented to the Board for final approval with a requested July 1, 2025 effective date.

11. Indiana Office of Court Service (IOCS) report. Catheryne Pully, Executive Director, introduced herself to the Board. She then highlighted the grants available through IOCS - problem-solving, pretrial, and youth justice. She also announced that new judge orientation will be in December, January, and March, and that the Spring Conference and Justice Services Conferences will be held together in 2025 together.

12. Court Technology. Mary DePrez, Executive Director, updated the Board that Court Technology worked with the Family Law Taskforce to develop a new financial disclosure form for divorces that went live on September 3rd. She encouraged judges to reach out if they would like to make their calendar public. For Odyssey, Court Technology is testing the new judge edition, with the hope that its use will begin before the end of the year. The INjail project is live in a few counties and adding more. Court Technology is also working on a Justice Partners Portal for prosecutors and probation officers that will protect data but allow other stakeholders access to the information that they need.

13. Other business: A couple additional announcements were made to wrap up the meeting:

- NextGen bar exam will start being used in Indiana in 2028.
- Justice Chris Goff announced that he will be in Allen County for a meeting of the judicial nominating committee to fill Judge David Avery's position, thanking Judge Avery for his long service. He also encouraged the Board to get involved in their local JRAC.
- Justice Derek Molter provided an update for the Marion County Judicial Nominating Committee, thanking Judge John Hanley and Judge Mark Stoner for their service, he noted that 28 applicants applied for their openings.
- Judge Kristen McVey suggested expungements be moved to a particular centralized expungement court to assist with judges' caseloads.
- Judge Fran Gull informed the Board that the Allen County court administrator, John McGauley has a podcast about how the courts run. The podcast is called INsession and the Chief Justice will serve as a guest on October 8th.

14. Future meeting: The last 2024 meeting is scheduled for December 12, 3:30 pm in Carmel.

**JUDICIAL CONFERENCE OF INDIANA
BOARD OF DIRECTORS
Minutes
Carmel, Indiana
December 12, 2024**

1. Attendees:

- a. Members:** Robert Altice, Dale Arnett, Craig Bobay, Murielle Bright, Stephanie Campbell (proxy for Kelsey Hanlon and Hunter Reece), Marla Clark, Charnette Garner (member and as proxy for Mark Stoner), Danielle Gaughan, Chris Goff (proxy for Loretta Rush), Clayton Graham, Frances Gull, Jennifer Harrison, Dustin Houchin (proxy for Joseph Claypool), Elizabeth Hurley, Kristina Kantar, Clay Kellerman, Steve Kitts, Stephenie LeMay-Luken, Kristen McVey, Jennifer Newton (member and as proxy for Brian Bade), Jaime Oss, Matt Sarber, Lori Schein, Gregory Smith, Richard Stalbrink, Stephanie Steele, Heather Welch
- b. Not in attendance:** Brian Bade (Jennifer Newton appointed as proxy), Jon Brown, Sam Cappas, Vicki Carmichael, Michael Christofeno, Joseph Claypool (Dustin Houchin appointed as proxy), MaryEllen Diekhoff, Aleksandra Dimitrijevic, Kelsey Hanlon (Stephanie Campbell appointed as proxy), Robert Krieg, Jeryl Leach, Sally McLaughlin, Jason McVicker, Bradley Mohler, Lakshmi Reddy, Hunter Reece (Stephanie Campbell appointed as proxy), Loretta Rush (Chris Goff appointed as proxy), Leslie Shively, Adam Squiller, Mark Stoner (Charnette Garner appointed as proxy), Lisa Swaim, AmyMarie Travis
- c. Guests:** Derek Molter, David Najjar
- d. Staff:** Mary DePrez, Kathryn Dolan, Brittany Kelly, Diane Mains, Catheryne Pully, Lisa Thompson, Amanda Wishin.

- 2. Welcome and opening remarks.** Justice Chris Goff welcomed the Board. He noted that the Chief Justice is in Washington D.C. helping find the new executive director for the National Center for State Courts.
- 3. Minutes.** A motion was made by Judge Clayton Graham and seconded by Judge Charnette Garner to approve the minutes from the meeting held September 18, 2024. The motion carried unanimously.
- 4. Court of Appeals Report.** Chief Judge Bob Altice reported that the next judicial appointment to the Court will be soon. The Court of Appeals has completed thirty-three traveling oral arguments in 2024 and has eighteen scheduled for 2025. The Court of Appeals is on track to issue 1,900 opinions in 2024, which is back to pre-pandemic numbers.

5. **Indiana Judges Association (IJA) report.** President, Senior Judge Heather Welch, reminded the Board that the 2025 legislative session is a budget session with a number of new legislators and a new Governor. The State of Judiciary will be January 29, with the IJA luncheon reception starting at 11:30. She encouraged the Board to build relationships with their local legislators. Nine new judicial officers were approved by the Interim Commission on Courts and the Judiciary. Sine die for the legislative session is April 30.
6. **Indiana Council of Juvenile and Family Court Judges (ICJFCJ) report.** Judge Stephanie Campbell, on behalf of President Kelsey Hanlon, reported that the ICJFCJ will also be closely following the legislative session, and have judges ready to testify on bills.
7. **IOCS and IOCT joint project:** Lisa Thompson presented the juvenile reports project coming out of the Youth Justice Oversight Committee that modifies the standard Preliminary Inquiry Report, Pre-Dispositional Report, and Modification Report. The changes will enhance compliance with HEA 1359-2022 and address requests from probation departments to improve the reports. A motion was made to approve the changes by Judge Steve Kitts, seconded by Judge Fran Gull, and approved unanimously. The new forms will be effective July 1, 2025.
8. **Court Alcohol & Drug Program Advisory Committee Rules:** Committee Chair, David Najjar, presented amendments to the Court Alcohol & Drug Program Rules and asked that the Board approve their posting for public comment. The changes are primarily related to the education requirements; the proposed rules also add instructions for closing a program and add requirements to inform clients about federal confidentiality. A motion to post the amendments for public comment was made by Judge Steve Kitts and seconded by Judge Jennifer Harrison, and approved unanimously.
9. **Office of Judicial Administration (OJA).** Justin Forkner, Chief Administrative Officer, gave an overview of the Court's new budget asks for this session – Court Tech money to finish INjail, court security, and additional problem-solving court funds. This legislative session adjustments may be made to the allotment of judicial officers in each county based on the weighted caseload study. The Court has launched a Guardianship Reform Taskforce and a Legal Future Commission; there will be some legislative requests related to those programs.
10. **Indiana Office of Court Service (IOCS) report.** Catheryne Pully, Executive Director, announced that because of the departure of April Dubree, Georgia McCart has been hired as her executive coordinator. She also announced that Rich Payne is retiring. IOCS is also hiring a new learning consultant program support specialist in Justice Services. In upcoming education events, the Spring Conference and Justice Services Conference are combined this April, and the Pretrial Services Committee and Behavioral Health Committee are exploring the possibility of a summit in 2026. The Children and Family Division is launching the GAL Guidelines, Legal Services is preparing for legislative session, and Justice Services is streamlining certification and re-certification for problem solving courts.

11. Court Technology. Mary DePrez, Executive Director, updated the Board that Court Technology has launched the new version of Odyssey in a test environment; they are targeting the 3rd or 4th quarter for launch. Court Technology received another grant for the INjail project. Counties that are live with INjail are Martin, Grant, Elkhart and Warren, and Putnam, Fountain, Hendricks and Jennings counties are in the pipeline. Court Tech and IOCS distributed a memo in a Wednesday message a few weeks ago regarding reporting certain juvenile dispositions to NICS. Court Tech is automating the process as much as possible to ensure that these cases are reported as required by state statute.

12. Other business: Judge Stephanie Campbell introduced Brittany Kelly, the Court's new State Court Behavioral Health Administrator. She can be reached at 317-234-4113 or Brittany.kelly@courts.in.gov.

13. Future meetings: Save the dates for the 2025 meetings:

- Tuesday, April 15, 10:30 - Indianapolis
- Wednesday, September 17, 10:30 – Fort Wayne
- Thursday, December 4, 4:00 - Carmel