

Minutes
Court Personnel Committee Meeting
February 11, 2020; 1:30 p.m.
251 N. Illinois Street, Indianapolis, Room 873

Members Present: Mary DePrez, Lori Fleeman (via phone); Kyle Gillaspie, Brandi Kirkendall (via phone), Renee Cooley – Proxy for Hon. Larry W. Medlock (via phone), Chris Nancarrow, Hon. David N. Riggins (Chair, via phone), and Emily VanOsdol (via phone); Kathy Williams (via phone).

Staff Present: Vicki Davis, Heather Falks, Kristyn Hill, Ashley Moise, Paige Newland, and Ruth Reichard

1. Judge Riggins took a role called the meeting to order.
2. Judge Riggins called for a motion to approve the November 2019 minutes. Chris Nancarrow moved to approve; seconded by Kyle Gillaspie. The Committee unanimously voted to approve the November 2019 minutes.
3. Technology Update
 - a. Mary DePrez reported that Odyssey was deployed to Newton County and Daviess County in December and Decatur County last week. There are 13 counties remaining to transition from CSI to Odyssey, which should be completed by the end of next year.
 - b. E-filing is statewide, and that Trial Court Technology continues to work on initial filing of juvenile cases. TCT has received positive reports of e-filing experiences so far.
 - c. TCT recently moved its data center from TCT offices to Eastgate and to Cincinnati as a backup, which was costly. However, now that production servers for Odyssey and INcite are offsite, it should quicken the resolution of issues. There have been a few issues in the transition, but TCT is working with Tyler Technologies to fix any problems.
 - d. There is also a new senior judge application that will help with claims and tracking time. Eventually, it should also help trial and appellate court judges schedule senior judges in their court. Heather Falks is also involved in the senior judge application and is working with Jill Russell from Court Technology.
 - e. There is not a firm timeline on the release of Odyssey R17, although a tentative timeframe is the third quarter of 2020. TCT is getting feedback from Tyler Technologies on how some other states are faring for R17 and R18.
4. Focus Groups for Court Personnel
 - a. Kristyn Hill reported that the Education Division will soon begin conducting court personnel focus groups to determine educational needs and desires. There are 10 scheduled through April, the first of which will be in Shelby Superior Court 2 with Judge Riggins' staff. Two more will be added in May. The groups

will be semi-structured with a preset list of questions, although not every question may be addressed. The ultimate goal is to have dynamic, organic conversation.

5. Court Administrator Training: Institute for Court Management
 - a. Ruth Reichard explained that the National Center for State Courts (NCSC) houses the Institute for Court Management (ICM), whose purpose is to offer professional development for those who run the daily operations of courts, regardless of the size of the jurisdiction. ICM has a six-part course for court administrators, each pertaining to a core competency identified by ICM, that IOCS has an opportunity to bring to Indiana. IOCS would like to bring in all six courses, approximately two courses per year, with a possible addition of a train-the-trainer course for IOCS staff. IOCS is working with ICM to schedule the first two courses for later this year. The application process would likely require a recommendation letter as well as approval by the applicant's supervising judge. By the next Committee Meeting, IOCS hopes to have a tentative calendar, course offerings, and a finalized application. IOCS has determined that the Renaissance Indianapolis North Hotel can likely offer a government rate, and IOCS will investigate costs for partial meal coverage; currently, applicants are expected to cover their own travel and lodging expenses.
 - b. The program can accommodate up to 40 attendees. IOCS suggests opening the application to other roles besides court administrators including clerks and probation officers. Roles and duties vary from county to county and court to court, so an expanded pool of applicants could give counties without a designated court administrator an opportunity to submit candidates.
 - c. Additional information about the ICM program and core competencies can be found [here](#).
 - d. Some on the Committee expressed concern over the wide range of applicants and discussed the fact that *because* of the variation of duties, the courses may not be applicable to everyone. Additionally, some court administrators in the state have already created an informal network of information and resource-sharing. Vicki Davis suggests adding extra detail in the course descriptions on the application so people could get a better idea if the program would truly benefit them.

6. 2020 Trial Court and Clerk Employee Conference: Tuesday, July 7, 2020, at the Marriott East
 - a. Kristyn Hill reviewed the draft agenda with proposed session topics. Attendee feedback from the previous conference as well as previous Committee discussion prompted the extension of the conference to later in the afternoon, which would give attendees more opportunity for education. The program will commence with two consecutive plenary sessions (the first on implicit bias, the second on access to court records), followed by three sets of concurrent sessions.
 - b. The Committee discussed adding a concurrent session on records retention, but ultimately decided to include it in the plenary presentation on Access to Court Records, making it a more inclusive records-related session.
 - c. It was suggested that Tom Jones, IOCS staff attorney, staff a table at the conference to answer records-related questions.

7. 2020 Court Security Conference: Tuesday, September 29, 2020
 - a. Kristyn Hill reported that IOCS had narrowed down a shortlist of venues. Ms. Hill also reviewed suggested topics for the conference: Cultural Awareness for Law Enforcement (provided by the Indiana State Police); sovereign citizens; emergency preparedness planning including Administrative Rule 19; and Mental Health 101 (provided by the Indianapolis Metropolitan Police Department). The plan is to provide a morning session and an afternoon session.
 - b. The Committee discussed merits of each topic and decided to pursue cultural awareness for one session and mental health for the other session.
8. Distance Learning Modules Revision
 - a. Vicki Davis explained that two of the court personnel distance education modules created in conjunction with NCSC need to be revised. One module is about transcript preparation and the other is a New Employee Orientation which includes a plethora of court basics such as: a history of the courts, the Indiana court structure, customer service, self-represented litigants, ethics, and security.
 - b. Lori Fleeman and Kyle Gillaspie agreed to review the Transcripts module.
 - c. Heather Falks and Chris Nancarrow agreed to review the New Employee Orientation module.
 - d. If Committee members have additional ideas for distance education for court personnel, they are encouraged to reach out to IOCS. Vicki Davis noted that one possibility to increase accessibility for court personnel is to post certain distance education modules on IOCS's public website.
9. Future Meeting Dates
 - a. May 12, 2020, at 1:30 p.m., 8th Floor, Room 873
 - b. August 18, 2020, at 1:30 p.m., 8th Floor, Room 873
 - c. November 17, 2020, at 1:30 p.m., 8th Floor, Room 873
10. New business
 - a. Judge Riggins inquired about the potential issue of a court reporter not receiving an amended request for a transcript from the Appellate Clerk's Office. Kyle Gillaspie explained that the Appellate Clerk's Office only sends amended notices of appeal and that it is the responsibility of the party filing the amended request for transcript to notify the court reporter.
 - b. Washington Circuit Court reported that nearly all paper files have been scanned and suggested that best practices for scanning old documents be addressed in the Records session at the Trial Court and Clerk Employee Conference.
11. The meeting adjourned at 2:13pm.

Respectfully submitted,

Paige Newland

Minutes
Court Personnel Committee Meeting
May 12, 2020; 1:30 p.m.
Remote Meeting

Members Present: Mary DePrez, Chris Nancarrow, Hon. David N. Riggins (Chair), Emily Van Osdol

Staff Present: Vicki Davis, Heather Falks, Kristyn Hill, Ashley Moise, and Ruth Reichard

Guest: Jill Russell

1. Judge Riggins called the meeting to order.
2. The Committee unanimously approved the February 2020 minutes.
3. IOCS Education Update
 - a. Kristyn Hill reported that the Spring Judicial College, the Justice Services Conference, and the Juvenile Judicial Officers Annual Meeting were cancelled as live events. IOCS is working on developing some of the content into distance education courses. Some content has already been developed and is available on the Indiana Courts Education Network, including the two webinars covering emergency preparedness for courts. Court staff members may view these webinars. If court staff members need credentials to access the Indiana Courts Education Network, they should contact education@courts.in.gov.
 - b. The Trial Court and Clerk Employee Conference and Court Security Conference are still scheduled as in-person events at this time. IOCS has developed a contingency plan should the in-person conferences be cancelled. Pre-recorded webinars will roll out for court staff on a monthly basis. Vicki Davis noted that sessions were selected that may also be of interest to judicial officers. CLE/CJE hours will be available for judicial officers who view these webinars. The tentative schedule and topics are as follows:
 1. July: Implicit Bias; Vicarious Trauma
 2. August: Cybersecurity
 3. September: Records Access and Retention
 4. October: Language Access Planning
 5. November: Wellness and Mindfulness; Media in the Court
 6. December: Sovereign Citizens
 7. January: Protection Order E-Filing
 - c. Focus Groups for Court Personnel: Kristyn Hill discussed feedback from the focus groups held Shelby, Lake, Newton, and Hamilton counties. Partial findings from these focus groups are included in the committee meeting attachments. The plan, if possible, is to resume the focus groups later in the year.
 - d. Court Security Conference Update: Kristyn Hill reported that if the Court Security Conference is held in-person, there are two programming options: one is an all-day session on Cultural Awareness; or a half-day session on Mental Health and another half-day session on Sovereign Citizens. As a contingency plan, the Cybersecurity and

Sovereign Citizens webinars will serve a dual purpose for both Trial Court and Clerk Employee Conference and the Court Security Conference.

4. Technology Update

- a. Mary DePrez reported that approximately 320 Zoom licenses have been distributed to judicial officers. Hearings are simulcast on YouTube and removed afterward. The Indiana Office of Court Technology is looking at models that do not use YouTube to webcast the hearings, such as those used in New Jersey and Michigan.
- b. Jill Russell from the Indiana Office of Court Technology provided a demonstration of the Indiana Senior Judge Portal. Judge Riggins suggested making the Indiana Senior Judge Portal accessible via mobile application. Vicki Davis suggested recording a demonstration of the Indiana Senior Judge Portal and making it accessible on the Indiana Courts Education Network. Two separate webinars would be necessary for training consumers of this app: one for senior judge users and one for trial court judges.

5. Court Administrator Training: Institute for Court Management

- a. Ruth Reichard provided an update on the Court Administrator Training from the Institute for Court Management through the National Center for State Courts. There have been nine applications submitted. Five of the applications have been submitted by judicial officers. The application deadline has been extended to July 15, 2020. At least 15 applicants are needed to make the training worthwhile.
- b. Ruth Reichard has reached out to the National Center for State Courts regarding the possibility of converting this into a distance education format. Vicki Davis stated the Court Administrator Training could be postponed until 2021 or 2022. The funds for this training are on account at the National Center for State Courts and do not have to be used in 2020.
- c. Judge Riggins noted this training is worthwhile and there are also barriers to overcome. Specifically, it may be difficult for judges to let go of their court administrators for such a long time commitment especially due to COVID-19.

6. Future Meeting Dates

- a. August 18, 2020, at 1:30 p.m., virtual
- b. Discussion on November 17 Meeting – The Court Administrator Training: Institute for Court Management is scheduled on the same day as the November 17, 2020 Court Personnel Committee meeting. Judge Riggins suggested waiting until the August 18, 2020 Court Personnel Committee meeting to determine whether to change the November meeting date.

Judge Riggins encouraged committee members to reassure and thank their staff during this difficult time.

The meeting adjourned at 2:10 pm.

Respectfully submitted,

Kristyn Hill

Minutes
Court Personnel Committee Meeting
August 18, 2020; 1:30 p.m.
Remote Meeting

Members Present: Terri Berry, Mary DePrez, Kyle Gillaspie, Catherine Haines, Brandi Kirkendall, Hon. Stephenie Lemay-Luken, Hon. Nathan Nikirk, Hon. David Riggins, Chair, and Kathy Williams

Staff Present: Vicki Davis, Heather Falks, Kristyn Hill, Ashley Moise, Paige Newland, and Ruth Reichard

1. Welcome and Introduction of New Committee Members
 - a. Hon. David Riggins called the meeting to order and welcomed new members:
 - i. Hon. Nathan G. Nikirk, Lawrence Circuit Court
 - ii. Jill Acklin, Clark County (soon to be Hamilton County) Court Administrator
 - iii. Terri Berry, Allen County Assistant Director of Court Services
 - iv. Catherine Haines, Hendricks County Court Administrator
2. May Minutes Approval: Judge Lemay-Luken motioned to approve the May minutes, seconded by Terri Berry. The Committee unanimously approved the May minutes.
3. Technology Update
 - a. Mary DePrez reported that Court Technology continues to provide Zoom licenses for courts and reminded the Committee of the court livestreams available on public.courts.in.gov.
 - b. Jay and Sullivan Counties will go live with Odyssey in the next week. Limited staff will be onsite to assist with deployment. Most training has occurred remotely. This will leave nine counties still on JTS. Additional deployments are planned for the remainder of this year and next year with the eventual goal of moving all trial courts to Odyssey by the end of 2022.
 - c. Ms. DePrez also reported that E-filing had decreased at the start of the pandemic. However, according to recent data reports, e-filing has increased once more and is approaching pre-pandemic levels.
 - d. The Court's Innovation Initiative membership and subcommittees are very active. One major project is online dispute resolution (ODR). Two vendors are supplying the tools for pilot programs in the areas of family court and small claims court in a few counties. Each pilot is scheduled for six months, after which the Committee will determine next steps for ODR in Indiana courts.
 - e. Additionally, a new feature coming soon to the public access site is a keyword search function for commercial court documents.
4. Court Personnel Education Update
 - a. Indiana Courts Education Network Accounts
 - i. Kristyn Hill reported that an announcement was made in the May 20 Weekly Bulletin explaining that the summer Court Personnel conference will not be held in person. Rather, there will be a series of distance education courses provided monthly starting in July. Court staff can request an account to the Indiana Courts Education Network to access these upcoming courses. Judicial officers are encouraged to forward this information to their court staff. A reminder of this information as well as an updated course schedule will be released in the August 19 Weekly Bulletin.
 - b. Monthly Court & Clerk Staff Distance Education Courses
 - i. Kristyn Hill reported that the first round of courses has been deployed to court and clerk staff who have requested accounts: Court Preparedness Parts 1 & 2, Vicarious Trauma, and Mindfulness/Wellness.
 - ii. The remainder of the courses to be released, subject to change, are as follows:

- September: Records Access and Retention + Technology, the Internet, and Social Media Security
 - October: Language Access Planning + Race, Equity, and Inclusion
 - November: Media in the Court
 - December: Sovereign Citizens
 - January: Protection Order E-Filing
 - ii. Judge Riggins expressed hope for a return to an in-person annual conference, although the distance education is helpful during this time.
- c. Revision of New Employee Orientation & Transcription Training Modules
- i. Kristyn Hill noted that the NCSC module revisions took a temporary backset when the Education Division suddenly had to “digitize” all its education earlier this year. These are now under review once more and should be ready later this fall. They include Time Management, Transcripts Overview, and New Employee Orientation.
- d. Institute for Court Management Applicants
- i. Ruth Reichard reported that a subcommittee from the Judicial Education Committee reviewed all applications and recommended approval for all:
 - 7 probation officers
 - 6 judges
 - 5 court administrators
 - 1 clerk
 - 1 court reporter
 - 1 director of court services
 - 1 chief of staff/bailiff
 - ii. Acceptance letters will go out later this month. The courses are being adapted to distance delivery which necessitates spreading out the classroom time to multiple half-day sessions. This is designed to not overload attendees with all-day computer training.
 - iii. There is room for all applicants plus some IOCS staff. NCSC may still open the course nationally to fill the last few spots.
- e. Focus Groups for Court Personnel
- i. Kristyn Hill reported that the Education Division is slowly resuming focus groups for court staff which had to be suspended in March. One was conducted remotely on August 14, and court staff in another county completed a written survey.
 - ii. Preliminary findings from focus groups are included in the Committee’s materials. One trend is that new staff often have to rely on seasoned staff for on-the-job training. This observation, along with the continued rise of distance education, the repository of courses we’re building up right now, as well as the need we’ve encountered over time to expand new employee training, we think now is a good time to look into a more formal, robust “new court employee orientation” curriculum (next agenda item).
- f. Court Personnel New Employee Orientation Curriculum
- i. The Education Division requests volunteers for a subcommittee to assist in the development of an expanded new court employee curriculum to supplement the NCSC online orientation module.
 - ii. Suggested membership would be one of each of the following: judge, court reporter, clerk, court administrator (although anyone interested is welcome).
 - iii. The Education Division will continue conducting primary and secondary research of education needs as well as currently existing programs and resources, and work with the Subcommittee to determine how to translate this to our Indiana population in the best way possible.
 - iv. The Committee supports this idea. It’s beneficial for new employees to understand the purpose and function of courts and to develop a sense of duty for their important work.

- v. A few individuals on the Committee volunteered either themselves or their staffs to assist with this project. The Education division will continue its research and reach out accordingly with a project plan.

5. Future Meeting Dates

- a. 2021 Proposed Meeting Dates (all Tuesdays at 1:30pm):
 - i. Feb 23, 2021 (*Originally a different date – amended by vote afterwards*)
 - ii. May 11, 2021
 - iii. August 17, 2021
 - iv. November 9, 2021

Respectfully submitted,

Paige Newland

Minutes
Court Personnel Committee Meeting
December 8, 2020; 12:00 p.m.
Remote Meeting

Members Present: Terri Berry, Hon. David Bonfiglio, Mary DePrez, Heather Falks, Kyle Gillaspie, Brandi Kirkendall, Hon. Chad Kukelhan, Hon. Stephenie Lemay-Luken (guest chair), and Chris Nancarrow

Staff Present: Vicki Davis, Heather Falks, Kristyn Hill, Ashley Moise, Paige Newland, and Ruth Reichard.

1. August Minutes Approval: Judge Lemay-Luken, guest-chair, motioned to approve the August minutes, Terri Berry seconded. The Committee unanimously voted to approve the December minutes.
2. Technology Update:
 - a. Mary DePrez reported that Brown and Martin Counties just went live with Odyssey. Training remotely rather than in-person has been somewhat difficult for both Court Technology staff and county staff. However, everyone has been able to adjust so far. This leaves only seven counties remaining to switch over to Odyssey as well as a few city and town courts.
 - b. Court Technology is also tentatively planning for a new release of Odyssey (R-17) in the third or fourth quarter of 2021.
 - c. Court Technology will also be converting Marion County Juvenile Court from Quest to Odyssey soon. Quest is very different from other case management systems in Indiana, so this will be a new and challenging experience.
 - d. Mary DePrez also demonstrated the newly released Trial Court Calendars feature on the Court's public access website. This is an opt-in feature for courts. It displays court calendars and associated live-streamed hearings. Courts can also link this page on their own websites.
 - e. Finally, Court Technology has also been supporting the Landlord-Tenant Settlement Conference Program which has so far had over 100 interested parties reach out. This program was ready to go when the moratorium on evictions was scheduled to end, but the moratorium was extended. Approximately 40 facilitators have been trained to date. There have already been some success stories so far, which is encouraging. Because the moratorium was extended, the number of participants in the program is not quite at the level expected, but it is good that the program is in place for when the moratorium eventually ends.
3. Education Update
 - a. Indiana Courts Education Network Accounts: Kristyn Hill reported that there have been 179 unique requests for court and clerk staff Network accounts. Some ideas for increasing the number of accounts included requesting a judicial officer to compose

an article for the Indiana Court Times encouraging other judicial officers to obtain Network accounts for their staff, and/or posting an informational announcement to INcite that staff could more easily view themselves.

- b. Monthly Court & Clerk Staff Distance Education Courses: Kristyn Hill reported that eight courses have been deployed so far since July with additional courses planned for the coming months including Race & Equity, Protection Order E-Filing, Sovereign Citizens, New Employee Orientation, Transcripts, and possibly Procedural Fairness. Of all available courses, there have been 176 full or partial completions. It was noted that many court staff are very busy at the moment and may have some additional time at the end of the year to catch up on some on-demand education.
 - c. Revision of New Employee Orientation & Transcription Training Modules: These are nearly ready to go and are planned for deployment in the next couple of months.
 - d. Institute for Court Management: Ruth Reichard reported that the first course, the Purposes and Responsibilities of Courts, occurred on November 12-13 and 17-18 and consisted of 15 hours of virtual classroom time plus some light homework. The majority of attendees were from Indiana. Others were from Arizona, Minnesota, Pennsylvania, Virginia, and Washington.
 - e. Focus Groups for Court Personnel: Kristyn Hill reported that she and Paige Newland met with Washington Circuit Court staff yesterday. Two additional focus groups are scheduled before the end of the year with Johnson Superior 4 and Clark Circuit 4. This brings the total in 2020 to nine focus groups.
 - f. New Employee Orientation Curriculum: Kristyn Hill reported that research is still being done to see what other states are doing. The goal is to add to existing content for newer employees. Suggestions from the Committee included distinguishing county and court employees and other miscellaneous HR-related topics; implicit bias; and trauma-informed care (both from a perspective of helping staff cope and giving them strategies to deal with members of the public). The Committee is encouraged to submit any other ideas for court and clerk staff education to Kristyn or Paige as they arise.
4. Future Meeting Dates
 - a. Feb 23, 2021
 - b. May 11, 2021
 - c. August 17, 2021
 - d. November 9, 2021
 5. Judge Bonfiglio motioned to adjourn; Terri Berry seconded. The meeting adjourned at approximately 1:00pm.

Respectfully submitted,

Paige Newland