

Minutes
Court Personnel Committee Meeting
February 22, 2022; 12:00 p.m.

Members Present: Jill Acklin, Lori Fleeman, Kyle Gillaspie, Catherine Haines, Hon. Dana Kenworthy; Brandi Kirkendall, Chris Nancarrow, Hon. Nathan Nikirk, Hon. David Riggins (chair), Rhonda Rohrer, and Kathy Williams

Members not Present: Terri Berry, Hon. Paul Freed, Hon. Chad Kukelhan, Stephenie LeMay-Luken, Hon. Larry Medlock, Hon. James Osborn, and Shelley Septer.

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

Judge Riggins called the meeting to order at 12:01 pm

1. Kristyn Hill introduced the new IOCS Learning Consultant, Mary Mitchell.
2. November Minutes Approval: Jill Acklin moved to approve the November Minutes. Chris Nancarrow seconded the motion. Committee voted unanimously to approve the November minutes.
3. Technology Update: Kristyn Hill provided a technology update on behalf of Mary DePrez.
 - a. Odyssey deployment is complete for the trial courts. All 92 counties are up and running. There are still about 13 city and town courts that are not using Odyssey. There are 8 juvenile courts and 1 probate court using QUEST.
 - b. A press release went out this morning on the new Attorney Dashboard. It is a new feature on mycase.in.gov for attorneys. An attorney can view all e-notices, individual calendars showing scheduled court hearings for the attorney, quick links, and a list of the attorney's pending cases in Odyssey.
 - c. IOCT continues to address party access on mycase.in.gov. A party will be able to request a PIN number from mycase.in.gov or in the clerk's office. More to come on that functionality.
 - d. Court technology is working on a jail management system. IOCT identified three pilot counties: Martin, Grant and Elkhart. Federal grant funds were obtained in order to continue to improve the criminal history records at Indiana State Police. The new jail management system will interface with Odyssey, the Protection Order Registry, SRS and other applications. We hope to start our first pilot in the 4th quarter of this year.
 - e. Judge Riggins mentioned that his staff has struggled with TCN numbers with trying to clear them and match them up.
4. Education Update:
 - a. December 8: When the Unexpected Happens: Kristyn Hill reviewed the December 8, 2021 – When the Unexpected Happens webinar, for which 61 participants registered. The webinar recording is also available on ICEN. All webinar comments and feedback were positive.

- b. 2022 Memo and on-demand content: Kristyn Hill reviewed the information from the Memo and the list of courses on ICEN. Kristyn further reported that currently a total of 338 clerks and court staff have accounts on the network.
 - i. IOCS is working on 3 upcoming recorded trainings by Heather Falks on Hiring, Firing and Personnel Management, Internal Investigations, and ADA Accommodations for Managers. Courses will be available on ICEN by late spring or summer.
 - ii. Recent rules and legislation will also be recorded and placed on the ICEN network.
 - iii. Transcript training would also be recorded and placed on ICEN. Committee discussion clarified that an update would be completed each year.

- 5. 2022 Trial Court and Clerk Employee Conference
 - a. Annual Conference: July 12, 2022 at the Marriott East. Kristyn Hill presented the agenda for the conference and mentioned that attendance would likely be restricted to 300 -350 due to social distancing. The last in-person conference from 2019 included 391 participants.
 - b. Discussion of sessions yielded the following input:
 - i. Nuts and Bolts 10 Lessons Learned from the Pandemic panel discussion:
 - 1. Include a wide range of county size panel participants
 - 2. How to handle exhibits in virtual hearings
 - 3. Jury trials in the pandemic
 - 4. Addressing challenging community members and/or jurors
 - ii. Ex Parte Communication:
 - 1. Staff receiving emails from angry litigants – when to pass along
 - 2. Victims in criminal cases (requesting changes to no contact orders)
 - 3. Foster parent reports (some counties do not know they can file them)
 - 4. Can combine Ex Parte Communication with Due Process topic
 - iii. Wellness Session – review topic ideas from Terry Harrel
 - 1. Provide Resilience and Secondary Trauma at conference
 - 2. Include a session on Working with Difficult People on network
 - 3. Suggestion to include Incorporating Breaks into Workday
 - c. Kristyn Hill discussed adding a networking session for court administrators and court reporters at end of the conference. Committee members expressed approval for its inclusion and placement at the end of the day. IOCS will explore if this could be presented at lunch and if other state court administrators could participate in this session.

- 6. Court Administrator Training Proposal: Mary Mitchell reviewed the proposed training plan for court administrators, detailing the 9 recommendations. The committee supports the idea of judges and chief probation officers utilizing some of the training too, particularly the HR topics and ethics. Following a discussion, Jill Acklin moved to approve the recommendations and the committee voted to unanimously approve all 9 recommendations:
 - a. Provide monthly written communication with relevant learning content and resources to increase knowledge (articles, wellness blog, highlight LMS courses, upcoming

- training etc.), and to create a sense of community (highlight a monthly success story, include a monthly tip from a court administrator, a picture from recent training, etc.)
- b. Create a quarterly Zoom networking session (In-person for July when Court Personnel Conference meets).
 - c. Launch 3 lunch and learn events that cover requested topics (table below).
 - d. Develop training to deliver NACM Core Competencies using a combination of ICM courses and “mini courses” developed (delivered virtually - both asynchronously and synchronously, and in-person) to include pre-work and case studies.
 - e. Develop online recorded content for several HR topics that include printable resource references.
 - f. Add a court administrator track to the annual Court Personnel Conference (complete).
 - g. Evaluate the utility of adding a second day to the Court Personnel Conference (enable more in-person sessions for NACM principles and to foster camaraderie among the group) or add a separate one day training.
 - h. Create resources for distribution and posting on LMS (COOP templates, Hiring dos and don'ts, onboarding guides etc.).
 - i. Encourage attendance to other management training through POPAI Management Institute, The Justice Management Institute, and Society of Human Resource Management (SHRM) as deemed beneficial by IOCS Education Division.
7. Institute for Court Management 2021-2022 courses:
Ruth Reichard reported that an Indiana cohort comprised of 22 individuals finished the Budget & Fiscal Management class on February 3-4, 10-11. The final course, Workforce Management, commences Oct. 18-19 and 25-26, after which approximately 25 will be certified court managers.
8. Future Meeting Dates: The Committee confirms meetings will be virtual.
- a. May 24, 12pm
 - b. August 23, 12pm
 - c. November 15, 12pm
9. Meeting adjourned at 12:53 pm.

Respectfully submitted,

Mary Mitchell

Minutes
Court Personnel Committee Meeting
May 24, 2022; 12:00 p.m.

Members Present: Jill Acklin, Terri Berry, Hon. Paul Freed, Kyle Gillaspie, Hon. Dana Kenworthy; Hon. Chad Kukelhan, Chris Nancarrow, and Hon. David Riggins (chair)

Staff Present: Heather Falks, Linda Girard, Kristyn Hill, Mary Mitchell, Ashley Moise, and Paige Newland

1. Linda Girard, IOCS Education Attorney, was introduced to the Committee.
2. February Minutes Approval: Kyle Gillaspie moved to approve the February Minutes. Judge Kenworthy seconded the motion. Committee voted unanimously to approve the February minutes.
3. Technology Update: Mary DePrez reported that Court Technology staff continue to work on party access for mycase.in.gov. Due to staff turnover, however (particularly developers), the timeline continues to be extended. Mary estimates the third or fourth quarter for rollout. Mary also anticipates the jail management system to rollout by the end of the year.
4. Education Update
 - a. Kristyn Hill reported that three of four planned HR courses have now been recorded; two are currently available on the Indiana Courts Education Network. Thank you to Heather Falks for her work in preparing and delivering these presentations.
 - b. Registration for the July 12 Trial Court and Clerk Employee Conference will open in the June 1 Weekly Bulletin. Kristyn Hill reviewed updates to the program agenda.
 - i. Caseflow and Workflow Management Parts 1 and 2 will be led by Cyril Miller, Director of Judicial Planning for the Supreme Court of Virginia and instructor for the Institute for Court Management.
 - ii. Two court administrators from Michigan will lead a networking session and discuss their court administrator association.
 - iii. Heather Falks will present a session on ethics including professional boundaries, ex parte communication, and due process. The Committee discussed some practical scenarios that would be helpful to include.
 - c. Transcripts for Court Reporters: Thank you to Committee member Kyle Gillaspie for serving as faculty for the Transcript Update webinar on July 19. This topic is well-suited for the webinar format; it allows Kyle to get

through his entire presentation without interruption and preserves all questions in writing to be addressed afterwards.

- d. First Amendment Auditor Webinar: This webinar is targeted towards all judicial branch employees and will tentatively occur in August. Content will include an overview of First Amendment rights, best practices for addressing media inquiries, and de-escalation best practices from law enforcement.
5. Court Administrator Training Update: Mary Mitchell thanked the Committee for their input and approval of the proposed court administrator education plan.
- a. The first step was an April 14 Zoom networking event over the lunch hour. Future iterations may have adjusted times to accommodate multiple time zones.
 - b. There will also be an in-person networking event at the July 12 conference as mentioned previously. Two court administrators will speak about their experience starting a court administrator association in Michigan.
 - c. The next Zoom networking session is tentatively scheduled for October. The current proposed topic is COOP planning.
 - d. Court administrators will also be encouraged to view the HR courses Heather Falks is in the process of recording.
 - e. Two lunch-and-learns are scheduled for June 22 and November 18. The June event will cover media relations and the November event will address ethics.
 - f. The Committee also requested a newsletter. IOCS staff are exploring options to create this.
6. Institute for Court Management Courses: Kristyn Hill reported that the final ICM course for the Indiana cohort will be Workforce Management in October. After this class, there will be about 25 Certified Court Managers in Indiana.
7. Future Meeting Dates
- a. August 23
 - b. November 15

Meeting adjourned at 12:21pm.

Respectfully submitted,

Paige Newland

Minutes
Court Personnel Committee Meeting
August 23, 2022; 12:00 p.m.

Members Present: Jill Acklin, Lori Fleeman; Hon. Paul Freed, Kyle Gillaspie, Hon. Kim Hall; Jim Hunter; Hon. Dana Kenworthy; Hon. Chad Kukelhan, Hon. Larry Medlock; Chris Nancarrow, Hon. Nathan Nikirk; and Hon. David Riggins (chair)

Staff Present: Vicki Davis, Heather Falks, Linda Girard, Kristyn Hill, and Mary Mitchell

1. Judge Riggins called the meeting to order and welcomed new Committee members: Judge Kim Hall, Starke Circuit Court and Jim Hunter, Madison Circuit Court Administrator.
2. May Minutes Approval: Jill Acklin moved to approve the May Minutes. Heather Falks seconded the motion. The Committee voted unanimously to approve minutes.
3. Technology Update:
 - a. Mary DePrez reported that several City and Town Courts are interested in switching to Odyssey: Butler City, Blufton, New Castle, and likely Wabash. There are currently 12 City and Town Courts not using Odyssey. At least two courts use CSI which will no longer support JTS after the end of 2022.
 - b. A recent update from Tyler Technologies has caused significant issues for e-filing for the past three weeks. Performance has improved somewhat and the Office of Court Technology (OCT) continues to work with Tyler to fully solve the issues.
 - c. OCT has received two federal grants (and has a third grant pending) to build a jail management system. The first go-live county will be Martin, which currently has no formal jail management system. The next two interested counties are Grant and Elkhart. OCT recently hired a subject matter expert from Hendricks County to assist with this project.
4. Education Update
 - a. Mary Mitchell reported that 313 attended the Trial Court and Clerk Employee Conference on July 12. Based on feedback, 53% of respondents had 1-6 years of experience, while 17% had 19+ years of experience. Those with greater experience were more likely to offer positive feedback.
 - b. Overall, attendees preferred the practical sessions and enjoyed the networking opportunities. Attendees would like to have more specific and role-based content moving forward.
 - c. Some on the Committee agreed that there should be more practical, day-to-day content for specific audiences (court reporters, court administrators, etc.) and that session descriptions should be identified as such. Perhaps there could be regional in-person or Zoom conferences to narrow the learning focus. In particular, Odyssey/INcite/technology-based training is always helpful.

- d. Vicki Davis noted that staff will look into other venues for events starting in 2024.
 - e. The Committee is encouraged to think through what they would like to see for court personnel education in 2023 and be ready to discuss at the next meeting.
5. Transcripts Webinar: July 19
- a. Kristyn Hill reported that 109 attended this webinar. Thank you to Kyle Gillaspie for serving as faculty once more. Even when there are no as many substantial appellate rule updates, the Q&A portion of the webinar is very helpful. Future iterations of this webinar might have an extended Q&A component.
6. First Amendment Auditor Webinar: August 12
- a. Kristyn Hill reported that 99 attended this program which focused on legal boundaries and first amendment rights, freedom of the press, employee rights, skillful communication and de-escalation. Thank you to Heather Falks from the Office of Judicial Administration as well as Amanda Wishin (IOCS staff attorney), Kathryn Dolan (Supreme Court Public Information Officer), Judge Marc Rothenberg from Marion County, Captain David Roberts, Major Bryce Wolf, and Magistrate Jason Reyome who served as faculty.
7. Recent Legislation and Expungements On-demand Recording
- a. Kristyn Hill reported that staff from IOCS (attorneys Mindy Pickett and Henry Flores) and OCT (Gaye Lynn Strickland) recorded an on-demand training that will be available shortly on the Indiana Courts Education Network. This training combined elements from the Recent Legislation and Court Technology sessions from the July conference.
8. Court Administrator Training
- a. There has been a stronger effort to increase court administrator training this year, including a dedicated education track at the July conference; multiple lunch and learns on topics like media relations and ethics; and multiple networking sessions on topics like continuity of operations.
9. Institute for Court Management
- a. Upon completion of the final course in October of this year, there will be 25 new certified court managers in Indiana.
10. Future Meeting Dates – 2023 dates to be determined.

Meeting adjourned.

Respectfully submitted,

Paige Newland

Minutes
Court Personnel Committee Meeting
November 15, 2022; 12:00 p.m.

Members Present: Jill Acklin, Hon. Paul Freed, Kyle Gillaspie, Hon. Kim Hall; Jim Hunter; Hon. Dana Kenworthy; Hon. Chad Kukelhan, and Hon. David Riggins (chair)

Staff Present: Vicki Davis, Mary DePrez, Ashley Moise, Heather Falks, Linda Girard, Kristyn Hill, and Mary Mitchell

1. Judge Riggins called the meeting to order.
2. August Minutes Approval: Jill Acklin moved to approve the August Minutes. The Committee voted unanimously to approve the August minutes.
3. Technology Update:
 - a. Mary DePrez reported that several City and Town Courts are going live with Odyssey in the near future: Blufton City Court (December 1); New Castle City Court (Feb-March); and Wabash City Court (TBD). Eight additional city and town courts remain that have not converted to Odyssey.
 - b. The Party Access project is proceeding. The Records Access and Management Committee approved a recommendation to the Supreme Court to implement Phase I: parties who have cases publicly accessible on MyCase may request a code to be mailed or provided in-person by the Clerk's Office that will allow them to receive access to all case documents including confidential documents. Phase II would allow access to completely confidential cases not currently visible on MyCase.
 - c. OCT has begun offering "Tech Talks," a series of webinars on specific technology FAQs. Topics include: unclaimed funds, e-filer review application, jury management system, task manager tips, and the 1099 process. Suggestions for future topics are welcome. Please send ideas to Mary DePrez or the Help Desk. Recordings of previous Tech Talks are available in the Odyssey cheat sheets or in INcite.
 - d. OCT is piloting a project with the Court's Innovation Initiative in Marion County to send text reminders of hearing dates for DC, DN, and JP case types.
 - e. The Jail Management System will be piloted first in Martin County in early 2023 with probable expansion into Grant and Elkhart Counties afterwards.
4. Education Update
 - a. Mary Mitchell reviewed feedback from the August 12 First Amendment Auditor webinar. Faculty included Magistrate Jason Reyome and Judge Marc Rothenberg from Marion County; Heather Falks and Kathryn Dolan from the Indiana Supreme Court; and Captain David Roberts and Major Bryce Wolf from the Marion County Sheriff's Office. Overall, attendees responded favorably and indicated clear takeaways to implement in their courts, including de-escalation techniques and other

- general security measures. A recording is available on the Indiana Courts Education Network.
- b. Staff have created a survey for those who attended the summer conference. The results of this survey as well as feedback from a focus group will help inform the education plan for 2023.
 - c. Court administrators have given positive feedback on the quarterly networking sessions. The Committee discussed the possibility of creating similar networking sessions for court reporters, perhaps on a weekly basis. Staff will also look into the possibility of creating an email listserv for court staff.
 - d. Kristyn Hill reported on some upcoming education programs:
 - i. The 2023 Trial Court and Clerk Employee Conference will be Tuesday, July 11. Results from the aforementioned survey and focus group will inform session content.
 - ii. A transcripts webinar is planned for the summer with Kyle Gillaspie. More time will be allotted for Q&A.
 - iii. Court Administrator training recap: networking and lunch-and-learn topics in 2022 and early 2023 include continuity of operations planning; ethics; and job descriptions.
 - e. ICM: Kristyn reported that the Indiana cohort finished the Certified Court Manager program with the Institute for Court Management as of October 19, 2022.

5. Future Meeting Dates

- a. February 21, 2023
- b. May 23, 2023
- c. August 22, 2023
- d. November 28, 2023

Meeting adjourned.

Respectfully submitted,

Paige Newland