

# Probation Committee

## Judicial Conference of Indiana

### Meeting Minutes

March 22, 2024

The Probation Committee of the Judicial Conference of Indiana met by Zoom video conference on March 22, 2024, from 10:30 a.m. to 11:30 a.m. Judge Mark Smith chaired the meeting.

1. **Members present.** The following members were present: Andrew Antrim, Angela Davis, Carolyn Foley, Jeff Marchal, Sally McLaughlin, Celia Pauli, Travis Shields, Doug Tate, and Mark Smith.
2. **Staff present.** Jenny Bauer and Ava Hassel provided staff assistance.
3. **Approval of minutes.** The meeting minutes from October 27, 2023, were approved unanimously on motion and second by Angela Davis and Carolyn Foley.
4. **Probation officer misconduct.** Carolyn Foley reported that the Board of Directors unanimously approved the probation officer revocation policy and the revised amendment at the October 2023 meeting. Jenny Bauer reported that several departments have called about this since the beginning of the year. Ms. Bauer also reported that she is working with Court Technology to develop an online reporting process.
5. **Legislative Update.** Jenny Bauer reported that the 2024 session of the Indiana General Assembly session ended on March 8<sup>th</sup>. She highlighted the following bills of interest from the session: SB 33 on distributions of public safety income tax revenue (court staff defined as court reporter, bailiff, and court administrator); SB 70 on bail and release review commission (Chief Justice and Indiana Judges Association included as members; commission expires June 30, 2026); SB 150 on artificial intelligence and cybersecurity; SB 170 on crimes and election workers; HB 1240 on criminal law issues (makes unlawful carrying of a handgun by a child a waivable offense); and HB 1418 on forensic diversion and drug courts.
6. **JRAC Report.** Jenny Bauer reported that the Justice Reinvestment Advisory Council updated the vision statement, mission statement, and goals from the Evidence-Based Decision-Making Initiative. She also reported JRAC published the Q4 electronic monitoring report and the first annual report. In addition, Ms. Bauer reported that the State JRAC is providing technical assistance to local JRAC's through the Center for Effective Public Policy. The next JRAC meeting is May 3, 2024.
7. **Office of Court Services Update.** Jenny Bauer reported that Jeff Bercovitz retires on March 28 after a stellar 43 years with the Supreme Court. Mary Kay Hudson is leaving IOCS on April 5 to take a position with the National Association of Drug Court Professionals as the chief operating officer. Jenny Bauer also reported that the IOCS Education Division is preparing

sessions on the revised juvenile supervision standards, report writing, and risk assessment for the May Justice Services Conference, which is May 8-10.

8. **Next meeting date.** The next meeting date is May 31, 2024 (10:30 a.m. Eastern time).

Respectfully submitted,

Jenny Bauer  
Indiana Office of Court Services

# Probation Committee

## Judicial Conference of Indiana

### Meeting Minutes

July 26, 2024

The Probation Committee of the Judicial Conference of Indiana met in-person at the Marion County Probation Department Office at 3115 Southeastern Parkway, Indianapolis, Indiana on July 26, 2024, from 10:30 a.m. to 12:00 p.m. Judge Mark Smith chaired the meeting.

**1. Members present.** The following members were present: Andrew Antrim, Andrew Borland, Angela Davis, Mark Smith, and Jason Thompson.

**2. Guests present.** Shannon Chambers attended the meeting on behalf of the Probation Officers Advisory Board as its Chair. Trevor Miller from the Office of Court Technology and Christine Kerl from Marion County Probation also attended the meeting.

**3. Staff present.** Jenny Bauer, Chris Biehn, Kelly Elliott, and Michelle Goodman provided staff assistance.

**4. Approval of minutes.** The meeting minutes from March 22, 2024, were approved unanimously on motion and second by Andrew Antrim and Angela Davis.

**5. New Member appointment.** Mark Smith reported that the committee has one new member, Magistrate Matthew Raper (St. Joseph County). Jenny Bauer reported that Carolyn Foley and Jeff Marchal finished their terms on the committee but were not properly recognized for their service due to the cancellation of the May meeting. She and Judge Smith will reach out to them to thank them for their service.

**6. Probation office misconduct reporting process – update.** Trevor Miller with the Indiana Office of Court Technology reviewed the draft online complaint form for reporting probation officer misconduct. The Committee provided suggestions for the online complaint form. The Committee members agreed that they will serve as testers of the online complaint form prior to its official release. The Committee discussed which platform should house the online complaint form to ensure easy accessibility to judicial officers and chief probation officers.

**7. Juvenile Reports to Courts (PI & PDR).** Michelle Goodman reported the Youth Justice Oversight Committee's Screening and Assessment Workgroup is updating the standard Preliminary Inquiry Report, Pre-dispositional Report, and Modification Report to require inclusion of IYAS assessment results and assessing other requested changes for these

reports. The workgroup seeks feedback to enhance how information is communicated, standardize reporting forms, and build the requirements and instructions. Committee members can send any suggestions for the juvenile reports to Ms. Goodman.

**8. Intrastate Transfer Rules.** Jenny Bauer reported that concerns have been raised that there is a lack of consistency between the counties for intrastate transfers. The Probation Officers Advisory Board is currently reviewing the Intrastate Transfer Rules to address these concerns. The Committee will obtain a report from the Probation Officers Advisory Board on their progress at the next meeting. Ms. Bauer asked members to check with their chief probation officers for examples of issues with transfers and suggestions for how the rules can be improved.

**9. New Juvenile Probation Supervision Standards.** Jenny Bauer reported that the new Juvenile Probation Supervision Standards took effect July 1, 2024. The Casey Foundation has educational videos on their website which address juvenile probation supervision. Ms. Bauer will review the videos to determine if they align with the new Juvenile Probation Supervision Standards, and if so, she will distribute information for the videos to the probation departments.

**10. Justice Reinvestment Advisory Council report.** Michelle Goodman reviewed items discussed at the JRAC Meeting that was held on July 12, 2024. She reported that JRAC continues to support local JRACs and provide technical assistance for their needs. She also reported that JRAC saw a demonstration of the new INjail statewide jail management system. Brittany Kelly, the State Court Behavioral Health Administrator, provided an overview of her role and how she can assist JRAC and its members. Ms. Goodman further reported that FSSA's Division of Mental Health received a federal grant to become a demonstration site for certified community behavioral health centers. She will report back to JRAC the concern that if an individual is released from DOC and not placed on probation, there is no way to notify or flag to the court that any "No Contact Order" should be terminated.

**11. Youth Justice Oversight Committee report.** Michelle Goodman reported on updates from the Youth Justice Oversight Committee. Grant opportunities are being offered in cycles to encourage greater participation. The Commission on Improving the Status of Children is working with problem-solving courts (Safe Baby Courts) and reviewing how to address chronic absenteeism and truancy. The Behavioral Health Workgroup is editing DCS standards for diagnostic assessments. The Transitional Services Workgroup is engaged in information gathering. Chris Biehn reported that the Data Workgroup is working on a data quantity/quality project. Twenty-one counties volunteered for their data to be reviewed to see who is collecting good data, who is struggling, where there are gaps, and identify best

practices. Five of those counties will be selected to adopt the best practices and commit to entering/collecting data in the preferred manner to help establish a protocol moving forward.

**12. Probation Officers Advisory Board report.** Shannon Chambers reported that the Probation Officers Advisory Board is reviewing the standards for the Intrastate Transfer Rules. The educational subcommittee of the Board is currently working with the Indiana Office of Court Services to create educational videos for reviewing various items.

**13. Office of Court Services Update.** Jenny Bauer provided a brief overview of the National Association for Court Management conference she attended in Louisiana. She also reported that Vicki Davis is serving as IOCS' interim director but anticipates a director will be appointed in the coming months. Chris Biehn reported that the Juvenile Detention Alternatives Initiative (JDAI) will be holding a conference in Fort Wayne for JDAI counties, and those counties interested in becoming a JDAI county are also welcome to attend.

**14. Next meeting date.** The next meeting date is October 25, 2024 (10:30 a.m. Eastern time) via Zoom.

Respectfully submitted,

Jenny Bauer  
Indiana Office of Court Services

Kelly Elliott  
Indiana Office of Court Services

**Probation Committee**  
**Judicial Conference of Indiana**

**Meeting Minutes**

**October 25, 2024**

The Probation Committee of the Judicial Conference of Indiana met by Zoom on October 25, 2024, from 10:30 a.m. to 11:40 a.m. Judge Mark Smith chaired the meeting.

**1. Members present.** The following members were present: Andrew Borlund, Angela Davis, Sally McLaughlin, Celia Pauli, Travis Shields, and Mark Smith.

**2. Guests present.** Shannon Chambers attended the meeting on behalf of the Probation Officers Advisory Board as its Chair. Heather Falks from the Office of Judicial Administration, Michelle Goodman from the Office of Court Services, and Lisa Thompson from Court Technology also attended the meeting.

**3. Staff present.** Jenny Bauer provided staff assistance.

**4. Approval of minutes.** The meeting minutes from July 26, 2024, were approved unanimously on motion and second by Celia Pauli and Angela Davis.

**5. Juvenile Reports to Courts (PI & PDR).** Michelle Goodman reported that the Youth Justice Oversight Committee's Screening and Assessment Workgroup is updating the standard Preliminary Inquiry Report, Pre-dispositional Report, and Modification Report to align with HEA 1359 and clean up several areas. The workgroup received feedback during online office hours at the beginning of October. Ms. Goodman highlighted changes made to the reports, which include new fields for Indian Child Welfare Act and interpreter needed, addition of primary email address, adding the diversion tool to the risk assessment section, and a new box for complimentary assessments such as the MAYSI and human trafficking screener. The Committee approved the revisions on motion and second by Angela Davis and Celia Pauli.

**6. Probation officer misconduct.** Jenny Bauer and Heather Falks reported that Hancock County reported an allegation of unethical conduct by a former probation officer Hailey Feltner and requested that the Probation Committee review her certification for possible revocation. Ms. Falks stated that she spoke to Judge Donald Davis after Feltner left employment with the Hancock Probation Department. The county investigated the allegation that Feltner was involved in a romantic relationship with an offender in the Hancock County Behavioral Court while employed as a probation officer. The Committee

discussed the allegation and voted to move forward with a review of Feltner's certification on motion and second by Angela Davis and Sally McLaughlin. Judge Smith requested staff to prepare a notification letter to mail to Feltner.

Ms. Bauer reported that the online process for judges to report unethical conduct by probation officers is ready to be tested. She will send the link to committee members once Court Technology makes it live.

**7. Justice Reinvestment Advisory Council report.** Jenny Bauer reported that the Justice Reinvestment Advisory Council meets next on November 22. JRAC continues to provide technical assistance to Local JRACs and continues to collect electronic monitoring data.

**8. Youth Justice Oversight Committee report.** Jenny Bauer reported that the Youth Oversight Committee met on October 3 and will meet again on December 5. The YJOC website features a juvenile diversion toolkit developed by the Diversion Workgroup.

**9. Probation Officers Advisory Board report.** Shannon Chambers reported that the Probation Officers Advisory Board reviewed the standards for the Intrastate Transfer Rules and will discuss proposed revisions at the November meeting. POAB will send the revisions to the Committee for review at the next meeting.

**10. Office of Court Services Update.** Jenny Bauer reported that the Juvenile Detention Alternatives Initiative (JDAI) will hold the annual inter-site conference in Fort Wayne next week. IOCS staff will present a session on the new juvenile probation supervision standards. JDAI staff plan to expand the conference to more juvenile probation departments in the coming years. Ms. Bauer also reported that the Justice Services Conference will run in conjunction with the Spring Judicial College in April 2025.

**11. Other Business.** Jenny Bauer reported that several counties contacted IOCS recently seeking guidance on handgun safety training for probation officers authorized by the supervising judge to carry a gun. She explained that there was confusion around the statute that requires the training (IC 11-13-1-3.5) and some counties require that the probation officers become special deputies to receive the training. Ms. Bauer requested that Shannon Chamber reach out to the Indiana Law Enforcement Academy about the requirement for probation officer handgun safety training. Ms. Chambers reported that ILEA Director Tim Horthy clarified that "Local sheriff/police agencies may create their own curriculum and are encouraged to do so, as long as the training is provided by a certified Indiana LEO instructor. Each county can add training in other topics if they are inclined. Probation officers do not need to be in a sworn special deputy/reserve status to receive the training. Your authority comes from IC 11-13-1-3.5." Ms. Bauer and Heather Falks will send a memo to judges and chief probation officers with the information from ILEA.

**12. 2025 meeting dates.** The 2025 meeting dates are as follows (10:30 a.m. Eastern time) via Zoom:

January 24

February 28 (if needed)

March 21

April 25 (if needed)

May 30

July 25

October 24

The Committee will designate a meeting as in-person later.

Respectfully submitted,

Jenny Bauer

Indiana Office of Court Services