

Minutes
Court Personnel Committee Meeting
February 21, 2023; 12:00 p.m.

Members Present: Kyle Gillaspie, Catherine Haines, Jim Hunter; Hon. David Riggins (chair)

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

1. Judge Riggins called the meeting to order.
2. Minutes Approval: Kyle Gillaspie moved to approve the November Minutes. The Committee voted unanimously to approve the November minutes.
3. Technology Update:
 - a. Mary DePrez reported that party access went live on MyCase on February 6. Indiana is excited to be among the first states to implement something like this. Background: 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.
 - b. Odyssey Deployments: Wabash City Court is going live next week, and New Castle City Court is scheduled for March.
 - c. OCT continues to offer "Tech Talks," a series of webinars on specific technology FAQs. The next Tech Talk will cover party access.
 - d. The Jail Management System will be piloted first in Martin County starting at the end of February.
4. Education Update
 - a. Mary Mitchell reviewed feedback from the most recent Court Personnel Conference survey. Major takeaways include:
 - i. 63% felt it was an overall positive experience; we would like to see this number increase.
 - ii. Attendees wanted more sessions and more role-specific content.
 - iii. 17% of attendees had 19 or more years of experience; this could offer an opportunity to foster more peer-learning engagement in the future.
 - b. Mary outlined the results of a SWOT analysis (strengths, weaknesses, opportunities, and threats) conducted by the Education team for the annual conference:
 - i. Strengths: cross team networking; statewide networking; broad topics; numerous breakout sessions; and in-person learning

- ii. Weaknesses: location; content is sometimes too broad; lacks position-centric skills training; only one in-person event per year; insufficient technical training for software applications
- iii. Opportunities: role-based tracks; more breakout sessions; change location; more than one in-person event per year; more online learning; assess training needs of specific roles; communication with educational materials related to roles; general increase of training throughout the year
- iv. Threats: IOCS staffing to meet training demand; budget; lack of clarity/communication on the role of IOCS in owning/contributing to education for each court personnel role
- v. IOCS recommendations:
 1. In person conference changes: increase number of sessions; more job-centric topics; expand networking opportunities; increase clarity of session descriptions
 2. Structure in-person conference to enhance attendee connection/networking
 3. Continue quarterly networking events for court administrators
 4. Offer at least two live webinars for entire audience, one of which will be Transcripts. The other proposed topic is Cybersecurity.
 5. Create a “Courts 101” video series for new employees
- c. Virtual Education Update: Vicki Davis reported on some recent attendance and engagement statistics compiled by staff:
 - i. The attendance breakdown of the 2022 conference shows 331 attendees representing 60 counties. Staff will check the 2018 and 2019 numbers to see if other counties have been recently represented.
 - ii. There are 241 active court personnel accounts in the Indiana Courts Education Network. Between 2019—present, there were 620 course completions.
- d. 2023 Summer Conference (July 11): Kristyn Hill reviewed the current agenda and highlighted the three sets of concurrent sessions (last year had two) plus a post-conference networking session open to all attendees. Staff also plans to include a conferee list with contact information to attendees.
- e. 2024 Summer Conference: There are two potential locations for the 2024 conference; one in north Indianapolis and another in Noblesville. Staff will keep the Committee updated.
- f. Court Administrator Training: upcoming networking/webinar topics include employee onboarding; succession planning; and other employment management considerations.

- g. LMS Testing: Kathy Wasson explained that the Education Division is exploring a potential upgrade or switch to a new learning management system. Committee members are invited to serve as test users for any new systems in the decision-making process.
- h. Further Discussion:
 - i. The Committee discussed increasing post-conference survey engagement by offering a QR code for quick access as well as promoting the changes to the conference based on last year's survey. Hopefully, as attendees see their input and ideas come to fruition, more will want to offer feedback in the future.
 - ii. The Committee discussed the proposed amendment to Trial Rule 74, particularly in regards to computer-aided transcription. Could the conference incorporate some kind of list of available transcription services and/or vendor tables? This will be further considered.

5. Future Meeting Dates

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

Meeting adjourned at 12:48pm.

Respectfully submitted,

Paige Newland

Minutes
Court Personnel Committee Meeting
May 23, 2023; 12:00 p.m.

Members Present: Ms. Lori Fleeman; Hon. Paul Freed; Kyle Gillaspie, Hon. Kim Hall; Hon. Chad E. Kukulhan; Mr. Chris Nancarrow; Hon. David Riggins (chair); and Ms. Kathy Williams

Staff Present: Mary DePrez; Kristyn Hill; Mary Mitchell; and Ashley Moise

1. Judge Riggins called the meeting to order.
2. Minutes Approval: Lori Fleeman moved to approve the May Minutes. The Committee voted unanimously to approve the May minutes.
3. Technology Update:
 - a. Mary DePrez reminded the Committee that party access went live on MyCase on February 6. Court Technology receives around 100 access code requests per weekday and 30-40 over the weekend. The process is going well so far. The Records Access and Management Committee recommends that in situations where members of the public are unable to provide identification to the Clerk when requesting a code (driver's license, state-issued ID, etc.), then the Clerk should default to putting in the request to the Office of Court Technology to mail the code instead.
 - b. In the recent legislative session, Court Technology received a directive to create a way search for information across multiple Court applications at once (Odyssey, Protection Order Registry, Offender Management System, and more). With the permitless carry law recently passed, law enforcement no longer has a singular system to search to determine whether someone can legally possess a firearm.
 - c. Court Technology is working to secure a grant to rebuild the Protection Order Registry with more modern technology as well as synchronize it more closely with Odyssey, particularly for the disposition of cases.
 - d. The Jail Management System (JMS) is live in Martin County; Court Technology is working with Grant County and Elkhart County for the next two pilots. JMS is a massive project with data conversion being one of the biggest challenges.
4. Education Update
 - a. 2023 Trial Court and Clerk Employee Conference (July 11): Kristyn Hill reported that registration will open on May 31st. The theme for this conference is "practically speaking," which emphasizes practical takeaways for attendees. Session descriptions are written in a straightforward manner and directed towards specific audiences. There will be a self-directed learning center with information tables and other resources attendees can explore at their own pace. A huge thanks to Mary's team in the Office of Court Technology who are providing a lot of support for this conference.
 - b. 2024 Trial Court and Clerk Employee Conference: Kristyn reported that the location for the 2024 is switching to a venue in Noblesville. Attendees will be given "save the date" bookmarks at the 2023 conference.

5. Court Administrator Training Update:

- a. Networking: (April 13): Kristyn reported that the April 13th event focused on transitioning, onboarding, and training new employees.
- b. Networking: In-person (July 11): This will be an opportunity for all court and clerk staff to convene at the conference for an end-of-day wrap up session led by Loretta Oleksy and Jill Carnell of The Thought Kitchen. They will explore key takeaways from the conference and reinforce the plenary themes of communication and improving working relationships.
- c. Networking: (October 26): This Zoom session will focus on employee transition and succession planning.

6. Court Administrator Professionalizing:

- a. Mary Mitchell reported that there has been interest among some court administrators to “professionalize” their role. Currently, there are no specific standards of education, experience, etc. in Indiana. Qualifications are determined at the discretion of the hiring judicial officer. This is similar in our neighboring states of Ohio and Michigan, although both of those states have a Court Administrator Association.
- b. The Committee engaged in a robust discussion about the pros and cons of standardizing requirements for court administrators and court staff in general. There was significant concern that unless salary schedules were implemented along with other requirements (like education), it would make it exceedingly difficult for smaller counties to attract adequate talent. More discussion is needed on this topic.

7. Court Reporter Orientation: Mary asked the Committee to consider topics to include in a new court reporter training program. Suggestions include: making entries, QCSR codes, preparing orders, keeping a timeline of when things are taken under advisement to avoid “lazy judge” motions, calendaring, and more. Lori Fleeman, Clark County Court Reporter, will send Kristyn and Mary a list of additional recommendations.

8. Other Business: Judge Riggins, who is rotating off the Committee, thanked everyone for their participation and service and emphasized the important work of the Court Personnel Committee.

9. Future Meeting Dates

- a. November 28, 2023
- b. 2024 Dates TBA

Meeting adjourned.

Respectfully submitted,

Paige Newland

Minutes
Court Personnel Committee Meeting
August 22, 2023; 12:00 p.m.

Members Present: Jill Acklin; Emily Anderson; Hon. W. Gregory Coy; Lori Fleeman; Kyle Gillaspie; Hon. Monica Gilmore; Jim Hunter; Hon. Chad E. Kukelhan; Hon. Stephenie Lemay-Luken (chair); Chris Nancarrow; Rhonda Rohrer; Hon. Michelle Waymire, Magistrate; Kathy Williams

Staff Present: Vicki Davis; Mary DePrez; Heather Falks; Kristyn Hill; Mary Mitchell; and Ashley Moise

1. Judge LeMay Luken called the meeting to order. New Committee members were welcomed and introduced.
2. Minutes Approval: The Committee voted to approve the May minutes.
3. Technology Update:
 - a. MyCase party access project: Mary DePrez reported that Court Technology is currently seeking feedback from parties on how the new party access system is working for everyone.
 - b. Recently, Indiana Legal Services requested that Court Technology increase the visibility of expungement markers in MyCase, both in search results and within the actual case itself. Currently, it is not always immediately apparent that a certain case is expunged.
 - c. The Jail Management System (JMS) is live in Martin County; Court Technology is working with Grant County and Elkhart County for the next two pilots at the end of this year or next year. JMS is a massive project with data conversion being one of the biggest challenges.
 - d. Court Technology might be upgrading to a new Odyssey release in the coming months or next year, contingent upon a variety of factors including testing.
4. Education Update
 - a. 2023 Trial Court and Clerk Employee Conference (July 11):
 - i. Mary Mitchell gave a high-level review of the feedback. Nearly half of respondents had six years or less of experience with the court, so that could factor into next year's programming. It might be beneficial to have concurrent tracks specifically for newer and seasoned court staff.
 - ii. Otherwise, overall feedback for the conference at large was more positive this year than last year. The sessions had been planned with a lot of intentionality, so this was encouraging. At least half of respondents reported that they were able to build peer connections, and the networking elements were appreciated.
 - iii. The self-directed learning center was well received, especially the Court Technology and Language Access tables.

- iv. The Committee discussed including District Tables next year; this could be beneficial for further networking and sharing of best practices.
 - b. Transcripts Webinar on August 16: Thank you to Kyle Gillaspie for serving as excellent faculty for this webinar and answering all the follow-up questions. The recording will be posted to the Indiana Courts Education Network soon.
- 5. Court Administrator Training Update:
 - a. Networking: In-person (July 11): Kristyn reported that Loretta Oleksy and Jill Carnell of The Thought Kitchen served as facilitators for an end-of-conference wrap up geared primarily toward court administrators. They explored key takeaways from the conference and sought to reinforce the plenary themes of communication and improving working relationships.
 - b. Networking: (October 26): This Zoom session will focus on employee transition and succession planning.
- 6. Wellness Subcommittee
 - a. The focus of this subcommittee will be supporting the planning of wellness-related educational offerings for judicial officer conferences as well as community supervision and court personnel events. Membership will include one representative from the Education Committee; one from the Court Personnel Committee; one from the Judges and Lawyers Assistance Program (JLAP); a representative from the Probation Officer Advisory Board (POAB); and four or five additional judicial officers recommended by the Education Committee or JLAP. Judge Kimberly Bacon will serve as an Education Committee liaison; Judge Darrin Dolehanty will serve as a JLAP liaison. Jill Acklin agreed to serve as Court Personnel liaison; IOCS will reach out to a recommended judicial officer liaison.
- 7. Court Reporter Orientation: Kristyn asked the Committee to continue thinking about good topics for a revised court reporter training program. Something that would be very useful is having seasoned court reporters from other courts and/or counties be available to train new court reporters. Committee members from Hamilton and Clark Counties volunteered to assist with this when needed, depending on staff availability.
- 8. Future Meeting Dates
 - a. November 28, 2023
 - b. 2024 Dates TBA

Meeting adjourned.

Respectfully submitted,

Paige Newland

Minutes
Court Personnel Committee Meeting
November 28, 2023; 12:00 p.m.

Members Present: Jill Acklin; Emily Anderson; Hon. W. Gregory Coy; Lori Fleeman; Hon. Paul Freed; Kyle Gillaspie; Hon. Monica Gilmore; Catherine Haines; Jim Hunter; Mag. Brandi Kirkendall; Hon. Chad E. Kukelhan; Hon. Stephenie Lemay-Luken (chair); Chris Nancarrow; Hon. Nathan Nikirk; Rhonda Rohrer; and Mag. Michelle Waymire

Staff Present: Vicki Davis; Mary DePrez; Amy Elson; Heather Falks; Mary Mitchell; Ashley Moise; and Paige Newland

1. Judge LeMay Luken called the meeting to order.
2. Minutes Approval: Mag Waymire motioned to approve the August minutes; Jill Acklin seconded. The Committee voted unanimously to approve the August minutes.
3. Technology Update:
 - a. MyCase party access project: Mary DePrez reported that so far this is going well and is being expanded to other counties as well as Jefferson County GAL/CASA.
 - b. Court Technology is testing a new Odyssey release tentatively scheduled to go live in Q1 of 2024.
 - c. Court Technology received a federal grant to rewrite the Protection Order Registry (POR) and improve the interface between the POR and Odyssey. Sometimes when a criminal case gets dismissed, the associated no-contact order might not be dismissed accordingly due to inadequate communication between the systems.
4. Education Update
 - a. Language Access Webinar (December 14): Mary Mitchell reported that this has been advertised via the Weekly Bulletin. Manpreet Kaur (Office of Diversity, Equity and Inclusion) will be presenting.
 - b. Court and Clerk Personnel Education Survey: Mary outlined the education plan for 2024 based on the survey which had 57 respondents.
 - i. The most effective type of education reported was in-person; in light of this, staff are interested in creating a second in-person training opportunity that would move around the state. The Committee agreed that for 2024, October is the best timeframe.
 - ii. The 2023 summer conference featured an increased number of sessions and a self-directed learning center with resource tables. Respondents were interested in having a pre-conference social opportunity in the future.
 - iii. For virtual education, staff will be increasing the number of webinars from two to four for general court staff, maintaining quarterly court administrator networking, and adding some court reporter networking opportunities. Topic

ideas include: BMV, Exhibits, Court Security, Protective Orders, Records Retention, Block Scheduling/Bailiff Training, etc.

- iv. The Committee is interested in exploring funding/scholarship options for court staff for training.
- v. Requested action item for the Committee: identify at least one seasoned person in their office who could potentially serve as a resource and/or mentor for newer staff.

5. Future Meeting Dates

- a. March 5, 2024
- b. May 14, 2024
- c. August 13, 2024
- d. November 19, 2024

Meeting adjourned.

Respectfully submitted,

Paige Newland