

# CONFERENCE OF CIRCUIT COURT ADMINISTRATORS MEETING

**Minutes  
January 30, 2018**

## **Conference Members Present:**

Doug Hofstedt (Chair)

Matthew Barrett (Vice-Chair)

Melissa Batie

Sondra Battle

Jennifer Keiser

Joy Keller

Judy Lohman

Stephanie Medina

Tim Miller

Eunice Plank

Judy Rupp

Anne SanGiovanni

Tim Sheridan

Sandy Smith

Lori Tabor-Finch

Bobbie Warnken

Deborah Zrioka

## **Administrative Office of the Courts:**

Lynne Murphy

## **Deputy Court Administrator Guests:**

Nancy Faulkner

Erica Payne-Santiago

A meeting of the Conference of Circuit Court Administrators was held on January 30, 2018, at the Judiciary Education & Conference Center, beginning at 10:00 AM. Doug Hofstedt began the meeting by welcoming everyone. He then called for approval of the minutes from the November 28, 2017 meeting. Anne SanGiovanni moved for their approval. The motion to approve was seconded by Joy Keller and passed.

## **POI Lists in CONNECT – *Theresa Nudell/Lee Robinson/Jennifer Boswell***

- Matt introduced this topic, explaining that a total count of POIs is needed, so all Court Administrators must update their lists.
- Theresa gave an overview of the POI process. The first entry point for POIs is now CONNECT. All new hire information should be entered into CONNECT first. CONNECT begins the chain of pushing out to Active Directory, ServiceNow ticket, CourtNet phone directory, MDEC, etc. To access the page in CONNECT, you follow these steps: Main Menu – HCM Systems – Insights, Search. All info needs to be entered so it can be cascaded down to other applications. Lists can be exported into Excel.

- HR is asking that lists are updated at least quarterly, making sure business phones and email addresses are entered. In the event that changes need to be made, they can be done under: Main Menu – HCM Systems – Manager Self-Service – POI Maintenance Request (Karen Fary will email instructions). Information is distributed overnight and accounts are created/updated by the next day.
- Mindy explained that POIs have their own individual profiles, so they are able to access and update their own information. The POIs get pulled into the COOP Insight, which lists emergency contact information.
- Questions/Concerns:
  - Searching has been a challenge for a few Court Administrators. Karen Fary will send tip sheets with instructions on how to select specific court and departments, and how to search. Lynne will post the tip sheets on the CCCA SharePoint site. Karen is also happy to visit courts in person to assist, if need be.
  - The Court Administrators feel that they need tip sheets for POIs because they require help understanding how to register for courses.
  - Doug mentioned that it has been difficult to get the law clerks' log-ins changed over to Odyssey because of the shared email address.
    - There is a group on the ServiceNow team that is looking at access forms to consolidate into one point of entry. This is still in the design phase.

### **JUDICIAL NEEDS ANALYSIS – *Jamie Walter/Brad Powers***

- A PowerPoint presentation was given on the Judicial Workload Assessment. The report has been finalized and has been sent downtown with the budget.
- Jamie walked everyone through the entire process of the study. The study began in October 2015, data was gathered in 2016, findings were reviewed and the model was refined throughout 2017, and the report was finalized in December 2017.
- Several innovations were made in the current study:
  - The participant pool was expanded to include magistrates, senior judges, standing examiners, and commissioners.
  - Problem-Solving Courts were included.
  - Adjustments were made to the day and year values.
  - An increased participation rate was observed.
- The workgroup is comprised of five judges from District Court and four judges from Circuit Court, two magistrates, and one commissioner.
- Case types included adult and juvenile drug courts, truancy reduction, and other problem-solving courts.
- In the time study from April 18-May 15, 2016, 92% of judges participated, and 96% of magistrates did.
- The Quality Adjustment portion compared what is versus what should be. This consisted of the Sufficiency of Time Survey results and the Q&A sessions. Delphi groups were used, with the expert members adjusting data as they saw fit. Most case types did not change.
- Calculating need is based on:

- Filing counts
- Case weights
- Judicial Officer year value
- The rounding rules have also changed. The old method used a total county workload approach, while the new one uses an average workload per judge approach. This places judges in counties of all sizes on equal footing.
- The filing average has been updated and is no longer a 10-year average with projection. It is now a 3-year average. This better represents the courts' current needs, as the 10-year period reaches back too far to provide accurate enough data.
- The FY19 Judicial Needs results project the FY2019 original filings based on the average of FY15, FY16, and FY17. They include both the quality adjusted case weights and the administrative adjustment.
  - In Circuit Court, four jurisdictions showed an increased judge need for FY19.
  - Statewide, a total of seven additional judges are needed.
- Decisions:
  - Statewide case weights will be used for Circuit Court and District Court, with no small versus large location weights.
  - The day values for 205.5 days are 6 hours/day for case-related matters in the Circuit Court, and 5.5 hours/day for District Court matters.
  - Administrative adjustments included 0.25 FTE for circuit courts in small counties, and 0.5 FTE for large counties.
- Questions/Comments:
  - Jamie will send the report to the Court Administrators for their reference.
  - Doug asked, if the results reflect an overabundance of judges, do judges have to be eliminated? Jamie advised that it is up to the AOC and the legislature.

### **DATA DASHBOARD – Brad Powers**

- Brad provided a walk-through of the site. Data from 2012-2016 is posted. The 2017 will be added soon, at which time comparison features will be added to the site. The goal is to go back
- Users can compare years, counties, and totals from one circuit to another.
- After reviewing the site traffic, it was determined that right now most of the viewers are Judiciary employees. The hope is to expand awareness to others outside the Judiciary, as well. The intended audience includes Judiciary employees, but also the public, the media, and others.
- There are two links on the mdcourts.gov site that can be reached, either by doing a Google search, or by navigating to the Courts tab, then E-Services.
- When working with the charts, the hover tool allows users to view the chart's data. The entire chart can be pasted to a report from the site, if necessary. In addition to the chart view, there is data view, which is more like a spreadsheet and can be exported to Excel.

### **LEADERSHIP CONFERENCE RESULTS & FEEDBACK**

- All in all, the feedback from the conference was very positive. Most attendees gave an overall rating of 4.5 out of 5, with an enjoyment level of 4.6.

- Jamie can get copies of the evaluations from the attendees and send them to the Court Administrators.
- General feedback included:
  - Liked having time with teams, and the dialogue between jurisdictions
  - Enjoyed the food
  - People are enthusiastic and committed to their jobs.
  - Judge Burke feels like Maryland is ahead of the curve with leadership and other initiatives.
  - The judges appreciated having another judge there.
  - Everyone enjoyed completing the Meyers-Briggs personality test.
  - Some felt fatigued by the end of day two, while others felt that two days were sufficient.
  - Many people would have liked more unstructured time.
  - Presenters thought that AOC should have been there to lend their perspective.
  - Some people are experiencing “initiative fatigue”, and want to absorb the changes that have already occurred before making any additional changes.
- Court Administrators’ feedback:
  - Doug Hofstedt thought it was a great program for leadership. He enjoyed the personality tests and comparing his results with others on his team. In his office, small follow-up meetings have been implemented to touch base and further explore everyone’s personality traits and how they complement each other.
  - Sondra Battle shared that she and Judge Tillerson Adams both enjoyed the Meyers-Briggs presenter. They held a directors’ retreat at the Prince George’s County Circuit Court and brought back the speaker to lead the discussion.
  - Joy Keller heard from one judge that they felt there were too many meetings at the courthouse. Joy recommended executive meetings as a result of the conference. Understanding personalities based on the Meyers-Briggs results has proven helpful in understanding why people do what they do, and the manner in which they do them.
  - Judy Rupp wonders what would have been different if people were grouped with employees from varying sizes of jurisdictions.

**THE RECORDXCHANGE PROJECT UPDATE & FEEDBACK – *Matt Barrett***

- Matt distributed copies of the announcement flyer. Administrators may look at the site to view the order form for their reference.
- There is a 3-year contract with revenue sharing in place. There have not been any unexpected issues yet, but the volume of requests is small compared to other larger courts.
- The message system is built in if someone submits an order and there is no existing information to provide.
- The program has resulted in less foot traffic, and has eliminated having to make CDs and mail them out.
- The program is not JIS internet-based.
- If anyone would like to test it, they are directed to contact Matt Barrett, and he can walk them through without having to deal directly with a sales rep.
- Anne Arundel County Circuit Court is looking at it next month (February), and will then make a decision.

## **COMMITTEE INVOLVEMENT BY CONFERENCE MEMBERS – Doug Hofstedt**

- Doug asked everyone to review and discuss the committees, and to come back with a list of Administrators who are interested, if vacancies are still available.

## **JUDICIARY UPDATES – Pam Harris**

- Ms. Harris delivered a PowerPoint presentation on major trends, efforts, and accomplishments of the Judiciary from 2016-2017.
- Many changes are occurring, and have been for some time now. Change is difficult, but employees seem to be growing more excited about doing good things. One of those changes is the roll-out of MDEC, and Pam encouraged everyone to focus on the positive aspects of the transition.
- There were many accomplishments in FY2016, including being ranked 4<sup>th</sup> in the nation as a National Leader to Access in Justice by the Justice Index. Access to justice resources were expanded with self-help and language services, use of problem-solving courts increased, \$24 million was given for grant-funded programs throughout Maryland, and MDEC was launched in all nine Eastern Shore counties.
- In FY2017, the self-help centers continued to thrive, serving more than 121,000 litigants, and the Judiciary received the ABA 2017 Louis M. Brown Award for “Meritorious Recognition” for the network of self-help centers. The Court Statistics Project “Reporting Excellence Award 2017” was received for trial court caseloads, and the Judiciary was honored by MAACM with the John Neufeld Award for the implementation of the electronic land records recording system. In addition to these awards, advancements were made in bail reform, and baseline safety and security measures were implemented in courts throughout the state. Tier 1 basic security is now believed to be funded across the state.
- MDEC
  - As a part of the MDEC project, there are several groups that are vital to its implementation. They are:
    - MDEC Executive Steering Committee (Major Project Executive Steering Subcommittee)
    - MDEC Advisory Committee – In March, Baltimore will move onto the Advisory Committee. After that, Prince George’s County will, and Baltimore will roll off.
    - MDEC SMEs (Subject Matter Experts) – Because MDEC is comprised of two systems, case management and File & Serve, SMEs need to be trained to understand how attorneys file, as well as how the courts handle filings.
    - MDEC User Group – This group is new, and has been established to support and enhance MDEC users in their business process and reporting, and to provide users with an environment in which they can exchange ideas about best practices. Their first meeting was last Monday, January 22<sup>nd</sup>, and Debbie Zrioka shared that was very informative. Ms. Harris would like more than just clerks to be a part of the group, even though it is mostly used by them.
  - Pam discussed the Rules pertaining to MDEC, and changes being made. After learning that certain government agencies have access to MDEC but should not, a rewrite for

Secure CaseSearch is occurring. This will be stepping it down three levels to narrow access for agencies.

- Tyler Technologies believes that they will be finished with MDEC roll-outs by November 2019. If not, another solution will be sought.
- FY2019 BUDGET SUBMISSION: The budget submitted included a 3.5% increase for grant employees, as well as clerks' raises, and judges' raises. Governor Hogan is looking at a 2% COLA and a one-time bonus option.
- JOINT CONFERENCE: Ms. Harris would like to see next year's Joint Conference planned now, in advance. She is committing to funding it.
- Pam would like representation on Judicial Council committees and subcommittees, so they have a voice. There are only two weeks allotted for completion and submittal of the application forms, so that needs to be done promptly.
- Ms. Harris met with the Conference of Circuit Court Clerks because she is concerned about the turnover rate. She would like to talk with the Court Administrators about transition planning and leadership training for new Clerks. Doug Hofstedt shared that an orientation would be a great idea, as Anne Arundel County will be getting a new Clerk. Judy Rupp said that the Education Committee has discussed an orientation for new Clerks, possibly in January. That will be educational, but Pam would also like to target the leadership aspect.
- Questions/Comments:
  - Doug Hofstedt asked where the Records Retention Schedule goes to be approved. Pam explained that it goes to the Archives, to Tim Baker, for approval.
  - Tim Sheridan asked when the DCM plans will be approved, as almost everyone is waiting to hear about the approval status. Pam will check with Jamie Walter.
  - Tim Sheridan asked that the AOC would consider an audio data storage system, using a cloud system, in the interest of sharing costs. Pam said that she will take it to the Court Technology Committee for their consideration, and Bobbie Warnken said that the District Court has a pilot system. She will send court administrators the information.

## **OTHER BUSINESS**

- Per an email from Pam Harris, Doug asked for ideas for future CCA meeting topics. The goal is to plug in staff from the AOC to present on those topics.
- The switch from county computers to state computers was brought up for discussion. Judy Lohman shared that so far, the transition has been smooth. According to Jenn Keiser, a pilot might be happening in Howard County Circuit Court, putting in state computers. She also said that some issues have been fixed, but not all. These issues were broached in the MDEC Advisory meeting, and they are being worked on. Anne SanGiovanni and Melissa Batie expressed that wifi has been a problem in their courts.

## **COMMITTEE UPDATES**

### ❖ **JUDICIAL COUNCIL – *Tim Sheridan***

- The Records Retention Schedule was discussed, as were revisions to Secure CaseSearch.

- A program is being piloted in Odyssey to allow District Courts to send text notifications to litigants about their upcoming court dates.
- ❖ **CONFERENCE OF CIRCUIT JUDGES – *Doug Hofstedt***
    - A meeting was held on January 8, 2018.
    - David Lashar from the Maryland Department of Health gave an update.
    - Judge Cox led a discussion about having a designated mental health judge, and also Jewish holidays and trial dates.
    - Judge Viki Pauler spoke on bench warrant execution in other jurisdictions.
- ❖ **CONFERENCE OF CIRCUIT COURT CLERKS – *Matt Barrett***
    - Judge Everngam presented on the topic of signatures.
    - Human Resources gave a presentation regarding the salary restructure.
    - Most of the discussion was clerk-related business, and therefore not relevant for the Court Administrators.
- ❖ **COURT TECHNOLOGY – *Matthew Barrett***
    - Text messaging notification is in its pilot stages, involving design and development. The public defender sites will be the test sites, and clients will be given the option to sign up when they sign on with the public defender. It is still very early in the planning stage, but this will eventually spread to all case types statewide, sending reminder alerts right before an event.
    - Password requirements will be changing. The number of characters will increase from 12 characters to 16, and the passwords will be good for 180 days before expiring. Four of the special character types must be used.
- ❖ **COURT ACCESS – *Judy Lohman***
    - This spot is now vacant, and they are looking for a replacement. Administrators are to let Doug know if they are interested in the position.
- ❖ **SPECIALTY COURTS & DOCKETS – *Judy Rupp***
    - Judy was not there for this portion of the meeting.
- ❖ **ADR – *Tim Sheridan***
    - There is a new Chair for the group.
    - The telephone call/opening meeting will take place this week.
    - Tim will send the minutes to everyone.
    - The Research & Grants Subcommittee meets next week.
- ❖ **SENIOR JUDGES – *Sondra Battle***
    - The last meeting took place on January 9, 2018. Chief Judge Barbera, Judge Hotten, and Judge McDonald discussed new certification for senior judges, including a consolidated application form. Applications must be completed online.
    - Chief Judge Morrissey shared legislative updates.
    - The Senior Judges survey will collect information regarding services being received in the jurisdictions where they serve.

- The Senior Judges have not had any issues with MDEC, as far as they know. If any Administrator knows of any, Sondra asks that they let her know.
- ❖ **JUDICIAL ASSISTANTS – *Teri Scherer***
- Teri was not present for the meeting.
- ❖ **COURT OPERATIONS – *Sandy Smith***
- The last meeting took place on October 16, 2017, but the minutes have not yet been officially approved. Once they are, Sandy will share them.
  - The Records Retention group presented their report, which was approved.
  - The Case Management Subcommittee, Forms Subcommittee, and Joint Communications & Access Subcommittee gave reports. There was no report from the Courthouse Equity Subcommittee. The Clerk of Court Accounting Manual Workgroup also presented updates.
  - The Jury Manual was presented and approved.
- ❖ **JURY USE – *Sandy Smith/Anne SanGiovanni***
- Only the draft minutes are ready as of right now.
  - The Jury Manual will be presented to the Judicial Council.
  - A new audit finance workgroup was founded, but they have not done anything just yet.
  - They are working with Jury Plus to correct errors in jury statistics.
  - There are new brochures, and possibly a video, for grand juries, similar to the one for trial jurors.
  - It was shared that some people living close to county lines are receiving court summonses from the other county, where they do not reside. Those people are being sent back.
  - Jury commissioners would like a place on the forms to specify which ADA accommodation is being requested. This is not viable, so it will not be changed.
  - The next meeting is scheduled to take place on February 22, 2018, and Sandy will send the minutes once they are finalized.
- ❖ **CASE MANAGEMENT – *Tim Sheridan and Jenn Keiser***
- No meeting has been held yet.
- ❖ **COURTHOUSE EQUITY – *Stephanie Medina***
- There will be a meeting on February 13, 2018.
  - The sliding scale funding model is still being reviewed.
  - Minutes will be distributed after the February 13<sup>th</sup> meeting.
- ❖ **FORMS – *Nancy Faulkner***
- The first meeting took place a couple of weeks ago.
  - This group will meet 3 or 4 times a year, with all other work being conducted via email.
  - Most people on the committee are District Court employees, so it is beneficial to have Circuit Court representation.



- ❖ **COURT REPORTING WORKGROUP – *Teri Scherer***
  - Teri was not present.
- ❖ **RECORDS RETENTION WORKGROUP – *Jenn Keiser***
  - No updates, other than what was already shared.
- ❖ **EDUCATION – *Judy Lohman***
  - This group needs to be classified as a committee on future agendas. Lynne will make the change.
- ❖ **PROFESSIONAL DEVELOPMENT – *Tim Sheridan/Melissa Batie***
  - Both Tim and Melissa were unable to attend the last meeting.
  - The class for judicial assistants is nearly complete and should be rolling out soon.
- ❖ **TECHNOLOGY TRAINING – *Doug Hofstedt***
  - Doug emailed everyone the minutes earlier this morning.