

**Judicial Staff Education Committee
Draft Minutes
March 20, 2015
10:00 am – 2:00 pm
Arizona Supreme Court – Education Services Division**

| Present In Person: | Present Telephonically: | Absent: |
|---------------------------|---------------------------------|-------------------------|
| Rafaela de Loera, Chair | JT Hilton | Mary Blanco |
| Carla Boatner, Vice Chair | | Susan Holliefield |
| Maryjane Abril | | Joseph P. Legander, III |
| Shelly Bacon | | Gretchen Maynard |
| Theresa Barrett | | Dr. Bernie Ronan, Ph.D. |
| Adam Gage | | Andrew Urias |
| Wendy Perkins | | |
| Marla Randall | AOC Staff in Attendance: | |
| Jodi Rogers | Gabe Goltz | |
| Kathy Schaben | Renu Sapra | Guest: |
| Suzette Williams | Harriet Ramsbacher | N/A |
| | Jeff Schrade | |
| | | |

1. Call to Order and Administrative Business: Meeting was called to order at 10:30am.
 - a. Welcome Members – Members introduced themselves and completed the “If You Knew Me Better” icebreaker.
 - b. Review of October 2014 Minutes – The minutes were reviewed and approved as read.
 - c. Introduction to JSEC Overview – Several weeks ago Chair Rafaela de Loera met with Jeff Schrade, Gabe Goltz and Renu Sapra regarding the future of JSEC. As a result of their discussion Mr. Schrade volunteered to give a synopsis of JSEC’s history to the committee and the environment we work in. This will serve as a refresher for current members as well as an overview/orientation for the two newest members, Adam Gage and Marla Randall. The JSEC PowerPoint handout and the 2014 COJET Compliance report were reviewed. Who is our audience?
 - i. There are currently 5900 full-time and 400 part-time personnel with multiple and differing job classifications, down from the 2007 peak of 10,000+ employees. There are over 190 court locations, large, diverse and spread out.
 - ii. There are 26 different job classifications with widely varying job descriptions within a de-centralized court system.
 - iii. Arizona is the 6th largest geographic state in the US with 60K miles of highways (2.5 times the circumference of the earth).
 - iv. All of this boils down to the fact that we have a challenging audience to reach with a standardized approach to training. The purpose and the challenge is to reach all staff with quality education in an effort to meet judicial branch COJET requirements. How do we do that? There are two

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competing models. For leadership, probation and judicial education, a more direct service model of having court leaders, probation officers and judges attend centralized training sessions is used. That model breaks down somewhat when training judicial staff, however, between funding travel, finding a large enough facility and having the scale and scope to reach everyone. Staff is thinking in terms of a technical assistance model instead of a direct service model; i.e. teaching someone to fish vs. fishing. We have many assets to help with that model including:

1. Over 100 Training Coordinators (TC's) – our most important training asset.
2. Training departments (any county over 400K population must have a dedicated training department; i.e., Pima, Maricopa).
3. Field trainers
4. AOC staff also conducts trainings throughout the entire branch.
5. Court faculty is also an important asset. Last year 450 faculty members served as faculty for Education Services (ESD) training. Most are unpaid and volunteer their time.
6. There are also great webcast and elearning capabilities at the AOC including a growing ability to live stream out of the facility there. This will be tested at the upcoming TC Conference. There is also a broadcast studio at the State Courts Building (SCB) which hosts training sessions. Many of the larger local courts are gaining this capability to provide distance learning as well.
7. Professional organizations like the AZ Courts Association (ACA) and the Joint Council on Court Education (JCCE) also offer training programs.
8. The judicial branch in AZ has a very highly evolved education policy which has become ingrained in our culture. Many other states are just beginning to figure this out for education policies and statewide requirements so we are ahead of the game.

He reviewed the new codebooks put together by Ms. Saprà which contain the authority for the creation of COJET as well as JSEC. Section 1-108 spells out the purpose for JSEC: *“JSEC works with training coordinators statewide to assist in coordinating, directing and providing education and training for all judicial staff.”* He then reviewed the nine specific purposes that JSEC is tasked with completing.

- d. Review of Completed Action Items - Ms. Saprà reviewed the completed action items from the previous meeting. They are:

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- v. New strategic agenda - the strategic agenda was sent to all committee members as requested at the last meeting.
- vi. Update the JSEC website link. The link was sent to all members for review and suggestion of changes/revisions. Members are encouraged to log on and get acquainted with it.
- vii. Numbers from the 2014 BLSC: Sixteen courts and a total of 377 participants attended (in person and remotely), totaling 3016 participant hours. The overall score was 4.61. Comments revealed that some courts are asking for this earlier in the year. The best received session was on social media which fulfilled the yearly ethics requirement. Staffing issues kept many courts from attending.
- viii. A survey was sent out to committee members to get feedback from last year's TC conference. Most of the comments were incorporated into the planning for this year's conference. We are continuing one of the most popular sessions from last year's conference, Tools for Training, during which field trainers, AOC staff and subject matter experts share their expertise and best training tips.
- ix. Results of the sub-committee's discussion of the Excellence in Education awards will be covered later in the agenda.

2. Chair/Vice Chair Updates:

- a. COJET Committee – Ms. De Loera attended her first COJET meeting which was yesterday. Highlights included COJET changes, code changes, and a discussion of the elimination of core curriculum. Members voted to present the idea to the AZ Judicial College (AJC) who will make the actual decision. Mr. Schrade reviewed the rationale for eliminating the core curriculum. The term 'core curriculum' is wide ranging and too broad to the point of becoming somewhat meaningless. It was noted that it was a challenge originally to put the training requirements in place. Now, however, we don't need core in our code – it has become irrelevant and doesn't need to be tracked. Other points of discussion included the approval of the JCA nominees for COJET Excellence in Education award winners who will be recognized at the upcoming judicial conference in June. It was noted that the new network security training must be at least ½ hour long. AOC staff is working on 10-15 minute "micro" trainings which will be packaged in sets of 2 for 30 minutes total. The agenda was finalized for the judicial conference and is awaiting the chief justice's approval. All in all, it appears from each member's updates and reports that the state of education is in great hands.

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- b. 2015 COJET requirements consist of 16 total hours which includes 30 minutes of ethics and 30 minutes of network security training. Ten hours can be non-facilitated and six hours must be live.

- 3. Regional/Local Updates and Subcommittee Reports:
 - a. Arizona Courts Association (ACA) -
 - i. Shelly Bacon reported on the ACA spring conference which will be held April 22 – 24 in Prescott. Rates have increased unfortunately this year.
 - ii. Darendra Day was elected as the incoming president and there are some new members on the board. This is Ms. Bacon’s last year on the board.
 - iii. ACA is still planning to work with Grand Canyon University to create a one day conference for university students for the purpose of giving them an insight into the AZ judicial system.
 - iv. The ACA is looking to piggyback on the 2015 BLSC somehow but exactly how is still open for discussion.
 - b. Joint Council on Court Education (JCCE) -
 - i. Suzette Williams reported that discussion at their January meeting centered around on the new network security requirement; i.e., who will provide the training and how it will be presented. Limited jurisdiction (LJ) field trainers and training coordinators (TC’s) who make up part of the committee are expected to provide operations training at the training center and/or superior court.
 - ii. The committee is currently focusing on their ‘June Jam’ training session to be held June 17 through June 19. They are looking to maximize attendance by emphasizing larger classes and greater numbers of participants (100+) at each session. This means fewer sessions than in previous years.
 - iii. The committee meets again in April to discuss Title VI training.
 - c. Local Updates –
 - i. MaryJane Abril reported that Pima County recently completed a very successful active shooter drill. As part of the activity an hour long DVD was created which they are contemplating releasing for training purposes. Despite some proprietary tactical issues, they are moving forward with releasing a condensed version of the DVD to all courts centering on how the drill was coordinated and set up. Thirteen agencies participated in the drill including 80+ employee volunteers. Phase II planning is in the works.

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- ii. Mr. Schrade mentioned that unfortunately an active shooter situation occurred in Mesa this week. This will be a session topic at the upcoming Judicial Conference.
 - iii. Mr. Goltz reported on the upcoming third week of limited jurisdiction new judge orientation (LJNJO). One third of the 87 or more full-time justices of the peace throughout the state were newly elected last year which presents a unique training challenge for faculty and court staff. There looks to be the same sort of elevated electoral activity at the superior court level. Changes are coming.
4. Court Services Division Update – Theresa Barrett reviewed the Court Services Division (CSD) handout.
- a. There are two 2 new records retention schedules in place for general jurisdiction and limited jurisdiction courts which took effect on January 1, 2015. Potential for training sessions going forward.
 - b. The Task Force on AZ Rules of Civil Procedure is working to re-write the civil procedure rules. This is a huge undertaking and has major training impacts for next year. The goal is to file proposed changes by January 2016 with the new rules taking effect a year after that.
 - c. The Parenting Coordinator Rule Petition Review Committee has filed a Rule 28 petition to clarify and simplify Rule 74 in the AZ Rules of Family Law Procedure. They are currently looking for comments.
 - d. The AZ Commission on Access to Justice has reviewed and ruled on multiple recommendations to be moved “for approval in concept” which allows additional work on the projects to continue. One exciting recommendation is the expansion of self-help resource centers (perhaps this is something JSEC can help with??). Maricopa County is currently working with ASU to help train students to assist customers with navigating through the court system and the completion of forms. Also state libraries are working on a project to educate their librarians on legal information vs. legal advice. This is a great pilot project especially for the rural counties. The commission is also looking to develop ‘virtual’ resource centers. Coconino County will serve as a physical hub so webinars can be broadcast out to rural locations and employees will be available on-site to assist with any questions. The commission also made recommendations to revamp the legal info vs. legal advice training to empower staff to provide better service to the public. Another potential topic for JSEC to potentially get involved with.
 - e. The Committee on the Impact of Domestic Violence and the Courts has introduced a series of COJET accredited micro bench briefing sessions. Judge Million has been a great help with this and AOC staff has enjoyed creating these practical training videos covering all facets of Protective Orders.

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- f. The 2014 annual rules summary was sent out to court leadership in December, 2014. The summary describes the impact the many rule changes will have on the courts.
 - g. New child support guidelines were adopted and approved and will go into effect July 1, 2015.
 - h. Mental health court standards will be adopted on July 1 as well. This will be the first problem solving court in AZ to have actual standards that the courts must follow. A session on these standards will be presented at the AZ Courts Association (ACA) conference in Prescott in April.
 - i. Training began on the AZ Turbo Court tool for law firms.
 - j. There is a new interpreter website available for members of the public who might be interested in learning how interpretive service works.
 - k. A new eBench pilot will premier this summer in Yavapai County.
 - l. A new limited jurisdiction case management system will be introduced sometime during July. Data clean-up is currently ongoing prior to the introduction of the new system.
 - m. AOC domestic violence specialist Kay Radwanski and Kathy Sekardi are the contacts for a well-received 'Toxic PowerPoint' presentation. This is something that could be offered at a future TC conference.
5. Susan Holliefield submitted a report on a very successful day long training held at Gilbert Municipal Court on February 12. The topics included the newest version of minimum accounting standards (MAS) training recently 'freshened up' by the AOC and on orders of protection. They also had three popular lunch and learn sessions focused on digital forensics among other things. A training session on building trust in the workplace taught by Mr. Cornay will be held on June 17.
- a. JT Hilton reported that there are no updates on the limited jurisdiction AJACS but he knows it's coming. His group is almost finished with the initial rollout but has some work left to do with FTR and reporting access. Pima County will be done by the end of March. Feedback has been great and well received.
6. Education Services Updates:
- a. New Membership – ESD staff has updated contact information on the membership list. Please let a staffer know if any corrections are needed.
 - b. New member binders – Binders were updated with new changes and information and given to the new members.
 - c. 2015 TC Conference – Presentations include:
 - i. A plenary session on classroom bias from Dr. Stewart Rhoden.
 - ii. A newly developed network security course is the subject of one of the breakouts. Participants will be able to attend and get their network security credit and then take it back to their courts.

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- iii. Short 'Tools for Training' sessions will be presented as another one of the breakouts. Some of the 'Tools' include: Ms. Holliefield will talk about 'brown bag lunch' training; Mr. Cornay will cover the roster of classes he has available to teach; Kathy Baca will talk about setting up a book club program; Julee Bruno will speak on using Eventbrite, a website which can help manage events and conferences. It is a great, all inclusive resource, potentially free to use if no fees are charged for the event.
 - d. 2015 Excellence in Education Awards – there were five nominations and two winners: Steve Weston and Scott Krishna.
 - e. Code Book – Mr. Schrade reviewed earlier in the meeting.
 - f. TC Website – At the TC Conference, Mr. Schrade will introduce the new TC website which was recently updated.
 - g. 2015 BLSC) – do we want to do it again this year? Form a sub-committee? Want more courts to participate – volunteers? Ms. De Loera, Carla Boatner, and Ms. Schaben volunteered to staff a committee to find the answers to these questions. Ms. Randall also volunteered her field trainers. AOC staff is also looking for volunteers to teach webinars throughout the year. If anyone has classes to offer, please let Ms. Sapra know.
7. JSEC 2015: Goals:
- a. Ms. de Loera started a discussion on what JSEC should be doing in 2015 and beyond. The committee looked at the JSEC website and determined how the updating process will work. A work group consisting of Ms. De Loera, Ms. Randall, Mr. Gage, Jodi Kellerhalls, and Ms. Schaben will work through phone and email to review and perhaps update the mission statement utilizing the information provided earlier by Mr. Schrade. The remainder of the committee will then craft new goals based on the mission statement created by the work group. It was also proposed that the committee find other ways to brand JSEC by doing some of things Mr. Schrade mentioned. For example, add our own faculty skills development or new micro trainings, and/or lead efforts to maximize our faculty by acknowledging, supporting and celebrating them. Having the BLSC branded as a JSEC event is a good start, but we may need to adjust the timing of that conference by having it earlier in the year when the need is greater for all employees.
 - b. Ms. de Loera requested that members respond promptly to any email request from staffer Harriet Ramsbacher regarding attendance at meetings. A quorum of members is need in order to officially conduct business so it is crucial to know ahead of time who is planning on attending. Knowing who is attending is also beneficial to drafting an agenda. By-laws state that if a member needs a proxy, it

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must be requested in writing prior to the meeting. The proxy has to be a person of the same job category as the requestor and cannot be another committee member. This has to be approved by the chair or vice chair. Please send an email request to Ms. de Loera and copy Ms. Ramsbacher if requesting a proxy.

- c. At the next meeting we will address the potential of setting up a faculty skills development training, possibly in a micro training session. Mr. Goltz advised of small training sessions, 5 minute recorded elearning modules, recently created by ESD staffer Jennifer Wildeman on changes to civil traffic laws. These would not necessarily apply for COJET but do provide quick, practical, on-demand training for court employees. This kind of training on specific, basic topics is fairly shelf stable and doesn't need lots of updating.
- d. Ms. De Loera will get with Ms. Sapra about a target date for the BLSC.
- e. Ms. de Loera also mentioned doing some sort of needs assessment to identify job categories/functions. The last one was done over 10 years ago. The goal of the assessment would be to develop new generalized core competencies for court staff. Mr. Gage agreed that it was important for court staff to show people how they contribute to the big picture as it makes them more active and empowered participants. Ms. Barrett suggested that legal information vs. legal advice could fall into one of the core competencies since it touches every job description and falls in line with the strategic plan. Ms. Bacon stated that not just clerks but that every employee in the courthouse including security staff and janitors needs to be included and informed. Ms. Rogers mentioned that all employees have family and friends who ask for advice and employees need to be prepared to handle their requests tactfully and correctly. Mr. Goltz suggested that one of the values of core competencies is that they provide a structure for how to approach training so that it is not rote each year. It also acts as a tool for creating specific training based on the general competencies. This could also be a great way to market JSEC. Mr. Schrade noted that the National Association of State Judicial Educators (NASJE) established core competencies and then created curricula around those competencies. This was a 15 year project that was spearheaded by Karen Thorson who used to work in ESD. It might be interesting to add her to the agenda of a future meeting to get her perspective on the process they used. We might also collect existing core competency models from different organizations and teams within the court. Ms. De Loera thinks it is a great idea to use existing models if they are out there and then shape and mold them to fit the state of AZ. To summarize, for 2015 and possibly 2016, the committee agreed to:
 - 1. Review the website for potential updates
 - 2. Review the current mission statement and goals

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3. Look at the potential of adding to the list of programs we currently offer which are the TC Conference and the BLSC.
 4. Create faculty skills development training, possibly of the micro training variety; i.e., how do I create a learning objective?
 5. Develop a way to reward deserving trainers and faculty; i.e., offering appreciation bags, etc. to use while training as a token of appreciation acknowledgement. We should reach out to TC's to come up with a comprehensive list of faculty.
 6. Look at scheduling the BLSC earlier in the year. Ms. Boatner and Ms. Schaben will work with Ms. de Loera on this.
 7. Create a needs assessment and launch the development of core competencies.
8. Proposed Meeting Dates: please put on calendars
- a. Friday, July 10, 2015
 - b. Friday, October 9, 2015
9. New Business and Call to Public:
- a. No public answered
10. Review of Action Items:
- a. Bring a draft of the needs assessment
 - b. Collect existing competency models for review
 - c. Update on the mission statement/website changes – Ms. de Loera asked for this process to be as expedited as possible so that the rest of the group can move on to updating the goals
11. Adjourn: A motion to adjourn was made by Ms. Randall and seconded by Ms. Bacon. The meeting was adjourned at 1:28pm.