



MIDYEAR BOARD MEETING
Saturday, February 3, 2024
BALBOA BAY
8:30 am – 3:30 pm PST

Board Book available on [Board Page](#)

AGENDA

1. **President's Report** (20 minutes) *Rick Pierce*
 - a. Approval of December 5 Board Meeting Minutes (**Action Item**)
2. **President-Elect's & Conference Development Report** (10 minutes) *Tina Mattison*
 - a. Know before you go for first time attendees
 - b. Create FAQ
 - c. Create commercial advertisement for annual
 - d. Create comparison of mid-year and annual conferences
 - e. Communicate hosting opportunities
3. **Vice President Report** *Kelly Hutton*
4. **Secretary/Treasurer's & CORE® Committee Report** (30 minutes) *Greg Lambard*
 - a. Budget update
 - b. SJI Funds
 - c. CORE® Committee update:
 - i. Curriculum Review – Focusing on IT
 - ii. Curriculum Review – Focusing on DEI
 - iii. CORE Champion Trainings – Expanding beyond conference sessions
 - iv. Creating generic PPT slides and Executive Summaries for curriculum
 - v. Getting/Training more CORE presenters
 - vi. Adding self-assessment exercises to curriculums
 - vii. Having NACM speakers discuss CORE courses and NACM
 - viii. Build Your Own CORE Course (**Action Item**)
 - ix. One Day Training SRT (**Action Item**)
5. **Immediate Past President's Report** (10 minutes) *Jeffrey Tsunekawa*
 - a. Board Candidacy announcement – April 22
 - i. Deadline of June 7



6. Governance Committee Report (20 minutes)

Brandon Kimura/Nicole Garcia

- a. Ethics Code Review
- b. Original Resolution
- c. Operations Manual (**Action Item**)
- d. Bylaws Technical Edits (**Action Item**)
- e. VOP Survey
- f. SOP address
- g. National Agenda
- h. NACM Strategic Plan

7. Membership Committee Report (30 minutes)

Kristie Collier/Cheryl Stone

- a. Membership Survey Results
- b. NACM Swag contest
- c. New Member Quarterly Zoom
- d. Membership Benefits

8. Communications Committee Report (30 minutes)

Dawn Palermo

- a. Court Express
- b. Court Manager
- c. Guides
- d. Podcasts
- e. Social Media
- f. Webinars
- g. Website
 - i. Maintenance contract renewal
 - ii. Next web projects
 - iii. 2023 Year End Website Report

9. DEI Committee Report (15 minutes)

Roger Rand

- a. Webinar – SCOTUS Decisions II
- b. Customized Inclusivity Training
- c. Resource Gathering
- d. Conference Presentations

10. Partner Reports & Updates (20 minutes)

- a. David Namasaki – NAPCO
- b. Jeff Schrader – NASJE
- c. Jeff Shorba – COSCA
- d. Michelle White - SJI
- e. Letter from Jonathan Mattiello - SJI
- f. Letter from Hon. Mark Pfeiffer - CCJSCA

11. NCSC Report

Jennifer Haire



12. New Business/Open Discussion

All

- a. Board Health- What can, or should we do to ease the burden on some of our directors?
- b. NCSC Contract Renewal – include AI Guide updates

13. Executive Session (if needed)

All

14. Adjourn



BOARD MINUTES

December 5, 2023 – 1:30 PM ET

Present: Rick Pierce, Kelly Hutton, Greg Lambard, Brandon Kimura, Kristie Collier, Roger Rand, Nicole Garcia, Creadell Webb, Dawn Palermo, Jeffrey Tsunekawa, Tina Mattison, Nate Mingo, Jude Del Preore, Jennifer Haire, and Erin Carr

1. President

- a. Minutes – correct bottom of page 3 for Communications meeting. **Greg moved to approve the minutes with the correction. Dawn seconds the motion. The motion passed unanimously.**
- b. SJJ approved the 2024 conference grant submission. Jonathan warned that if congress doesn't pass budget, all agencies will have a 1% cut in funding.
- c. Rick attended the NCSC Board of Directors Meeting. He also met with Jesse on concerns over additional revenue that NACM could obtain via advertising.
- d. NACM is now recognized by the National Guardianship Network as a partner.
- e. NCJFCJ DEI Collaborative Report – Roger attended on Nov 18 and shared that Edwin said NCSC is working on a speaker's bureau and wants to expand services as clearinghouse. Merrill Hirsch asked if NACM would consider working with ABA on replacing master with court appointed neutral, and if NACM would support the change when it's submitted.
- f. JTC/Global Advisory – Jeffrey reviewed the agenda from the winter JTC meeting.
 - i. NACM AI Guide – currently having meetings with subject matter experts. The guide will be published in Issu.
- g. IJIS – Looking to do a series of webinars on various topics. Cybersecurity was one of the topics but it ranged beyond that.

2. President-Elect

- a. Midyear and annual speakers have been notified. The CJ and new SCA will be in attendance at midyear. Roger and Erica Payne-Santiago are working on mini-videos to get people familiar with the conference app.

3. Vice President

- a. Site visits – **Kelly made a motion to select Harrah's in Atlantic City for midyear 2025 conference, and to give the Officers the ability to review and approve the final contract. Tina seconds the motion.** Rick asked if there were any questions - Kristie asked about transportation. The city will be giving \$5,000 stipend that can be used to provide Uber codes, American Airlines



National Association for Court Management

Strengthening Court Professionals

has a shuttle to Atlantic City, and there is public transportation. **All in favor, none opposed. The motion passed unanimously.**

- b. **Kelly made a motion to select Omaha, NE, and the Hilton for the 2025 annual site and to give the Officers the ability to review and approve the final contract.** *Nicole seconds the motion.* No discussions. **All in favor, none opposed. The motion passed unanimously.**
- c. Kelly asked that the board start addressing the approved strategic planning items during committee meetings.
- d. CORE will hold off on collecting the \$10 fee for nonmembers until ACGI can track courses and collect funds.

4. Secretary/Treasurer & CORE® Committee

- a. SJI Grant was approved for 2024. The main changes are extra funding for rural trainings and a change in the amount of match funding for the Center.
- b. CORE – Committee broke into 7 working groups on various items. Reviewing curriculum for DEI and IT.

5. Immediate Past President

- a. The past presidents have not met recently. Jude asked that Jeffrey select past presidents to hold a session at annual to talk about leadership.
- b. Jeffrey met with Katie Hempill and Brandon regarding the Maui fundraiser for Orange County. Tina mentioned there will be 2 tickets to Disneyland that can be raffled off.

6. DEI Committee

- a. Roger shared that the DEI goals are to have 2 webinars and revise the committee page to be resource focused, and to create and submit recommendations for conference sessions. In relation to the goals, one webinar has been completed and collaborated with the communications committee. Two conference sessions have been approved for midyear and one confirmed for annual so far. Roger and Creadell are working together on a customizable training for court administrators and leaders on creating and maintaining an inclusive workplace.

7. Communications Committee

- a. Webinars
 - i. The SCOTUS webinar will be in early 2024.
 - ii. Increasing Court Appearance webinar March 2024.
 - iii. April 22 CORE Leadership webinar with TJ BeMent.



National Association for Court Management

Strengthening Court Professionals

- b. A NACM member asked if NACM wanted to still be on Twitter/X with all of the political discussions going on. Roger suggested that the social media subcommittee discuss and give a recommendation to the Board regarding X and then also offer other social media platforms for NACM to join.
- c. Survey monkey upgrade – Roger provided the benefits of the Teams Premier license. **Roger made a motion to upgrade the NACM survey monkey account to a Teams Premier license at \$2,700 annual and \$75/month. Greg seconds the motion. All in favor, none opposed. The motion passed unanimously.**
- d. Dawn asked what NACM wants to do for Court Professionals month. Brandon offered that the Governance committee is working on an original resolution that will highlight court professionals.

8. Governance Committee

- a. Brandon shared the honorarium policy for webinar speakers. **Brandon made a motion to adopt the NACM policy regarding honorarium payments for webinar speakers as proposed on 11/8 and as amended on 12/5. Creadell seconds the motion. All in favor, none opposed. The motion passed unanimously.**
- b. Brandon shared the policy regarding sponsored webinars or articles. **Brandon made a motion to adopt the NACM policy regarding sponsored webinar or article as appearing on the screen incorporating edits from the current discussion. Dawn seconds the motion. All in favor, none opposed. The motion passed unanimously.**
- c. Nicole shared the policy regarding republication of NACM materials. **Nicole made a motion to approve the draft republication policy with incorporated changes. Greg seconds the motion. All in favor, none opposed. The motion passed unanimously.**

9. Membership Committee

- a. Roger mentioned the membership survey that was shared prior to the meeting and asked that everyone look at it.
- b. MY Conference Scholarships – Kristie asked for input on the scholarship document and will make noted revisions shared by the board.

10. NCSC Report

- a. Jennifer mentioned that NCSC has a survey open about the website and asked that everyone take the survey. There are two webinars in December.

11. Other Business - none



National Association *for* Court Management

Strengthening Court Professionals

12. **Executive Session** – not needed

13. **Adjourn** – The meeting was adjourned at 3:53pm.

Recording: <https://nationalcenterforstatecourts.box.com/s/3w7j6jqegpdiodcecg0gпки6fmm5p3c>



National Association for Court Management

Strengthening Court Professionals

Conference Development Committee Progress Report Form – 2023-2024

	Report	Due Date	Submission Date
	Fall Progress Report	September 15, 2023	
X	Midyear Progress Report	January 12, 2024	
	Annual Progress Report	June 28, 2024	

Project	Project Status	Strategic Priority? (Yes/No)	Discussion Needed? (Yes/No)	Board Action Needed? (Yes/No)	If Yes to discussion or action, please describe whats needed
Know before you go for first time attendees	Webinar being created by Roger Mini videos created to show how to log into App, what is in the App	Y	N	N	
Create FAQ	Not done yet	Y	N	N	
Create commercial advertisement for annual	Done by New Orleans Visitor Bureau – will roll it out on Tuesday at lunch. We can have Communications post it in Social Media after conference.	Y	N	N	
Create comparison of mid-year and annual conference	Done by Janet Cornell in Court Express; Will pull this out again for annual	Y	N	N	

Project	Project Status	Strategic Priority? (Yes/No)	Discussion Needed? (Yes/No)	Board Action Needed? (Yes/No)	If Yes to discussion or action, please describe whats needed
Communicate Hosting opportunities	<p>Roger and Kristie created a timeline and have sent out the hosting email.</p> <p>Tina worked with Erin and Melinda Brooks to set up Zoom room for virtual attendees to go into before and during conference.</p>	Y	N	N	

Time needed at meeting for Committee report: **5-10 minutes**
Submitted by: Tina Mattison
Date: 1/18/24



National Association for Court Management

Strengthening Court Professionals

CORE® Committee Progress Report Form – 2023-2024

	Report	Due Date	Submission Date
	Fall Progress Report	September 15, 2023	
X	Midyear Progress Report	January 12, 2024	
	Annual Progress Report	June 28, 2024	

Project	Project Status	Strategic Priority? (Yes/No)	Discussion Needed? (Yes/No)	Board Action Needed? (Yes/No)	If Yes to discussion or action, please describe what's needed
<ul style="list-style-type: none">a. Curriculum Review – Focusing on IT (Greg)b. Curriculum Review – Focusing on DEI (Rich)c. CORE® Champion Trainings – Expanding beyond conference sessions (Charles)d. Creating generic PowerPoint slides and Executive Summaries for each curriculum (Norman)e. Getting/Training more CORE® presenters (Greg)f. Adding self-assessment exercises to curriculums (Phil)g. Having NACM speakers discuss CORE® courses and NACM (Jude)	All workgroups have been meeting on a regular basis	Y	Y	N	I'll provide an update of the various workgroups progress.

Time needed at meeting for Committee report:

Submitted by: Greg Lambard

Date: 1/18/24

Build Your Own CORE® Program

Program Description:

The NACM CORE® is a comprehensive training program for court managers. NACM's intent in promoting these competencies goes beyond providing competencies for professionals working in court administration but to also promote excellence in the administration of justice and court management. The CORE® has been structured to provide consistent information across all competencies. Through the build your own program option your group/organization can select which curricula you would like covered and how many days/hours you would like the presentation to be. Each curriculum requires a minimum of 60-90 minutes of time and can be presented for up to 16 hours. Presenters for your program will be determined based on the content selected. All programs are designed to be interactive and participants are encouraged to share and discuss successes and challenges in their courts. These programs will also qualify for the CORE® Champion Program if the participant is a member of NACM.

Costs:

If a meeting space and presentation equipment are provided by the group/organization the cost for the program will be limited to presenter travel, per diem, and hotel stay.

Presenters:

Presenters will be selected upon receipt of training dates for the requesting organizations. Cost of travel will be taken in to consideration when selecting presenters.

The CORE® Curriculum Overview:



NACM and CORE® Overview (Required for all Programs)

- What is NACM and how can it benefit your group/organization
- Define what is the CORE® and how it can benefit your court
- Understand the CORE® Champion Program

Learning Objectives by Curriculum:

Public Trust and Confidence:

- Describe the importance of public trust and confidence to the credibility of judicial branch
- Identify the inherent connections between public trust and confidence and the principles of procedural fairness
- Demonstrate the ways that local courts assess public trust and confidence

Purposes and Responsibilities of Courts:

- Describe why courts exist and the major purposes that courts carry out
- Summarize the role of courts as an independent third branch of government, an institution, and an organization; and how its role impacts and complements the other two branches of government
- Articulate the practical impact and relevance of the purposes and responsibilities of courts to their jurisdiction, day-to-day court operations, and their job

Leadership:

- Understand the traits, habits, and models of leadership
- Understand the importance of leadership, credibility, trust, and ethical behaviors
- Design and foster an appropriate organizational culture that encourages and mobilizes change and engages staff

Strategic Planning:

- Identify factors that can inform and affect strategic planning processes and the implementation of strategic plans
- Encourage and foster strategic thinking and foresight in court organizations as precursors to effective strategic decision-making and strategic planning
- Recognize attributes of different court cultures and assess their potential implications for change management

Court Governance

- Define court governance principles and structure
- Identify various organization and governance models, observe and explore their own court organization, and list the inherent complexities of courts as public organizations
- Know the importance of governance and how it is needed for effective leadership

Caseflow and Workflow

- Define caseflow management and why it is important
- Identify system wide caseflow practices and court policies and evaluate strengths, weaknesses, and areas for opportunities for improvement
- Lead a learning organization by changing mindsets, mentoring staff and leading change

Operation Management:

- Recognize the role of operations management within the court organization
- Identify court operations services and programs
- Understand the various infrastructure and support needed in court organizations

Public Relations

- Understand the courts role in public relations
- Identify and recognize the challenges facing courts today in relation to its ability to discharge the constitutional mandate to uphold the rule of Law and the public's interest in and right to information
- Understand the changing definition of media and the involvement of social media platforms

Educational Development

- Define why education is important as a tool for growth in the court system
- Identify the available resources, support, and need for educational development with the court organization
- Understand adult education principles

Workforce Management

- Define the components of workforce management
 - NOTE: Specific components of workforce management could be highlighted more in-depth during this session (onboarding, performance management, staff development, employee satisfaction, etc.)
- Identify appropriate methods and gaps in relation to workforce management with the court system

Ethics

- Define ethics and why it is important
- Identify differences in ethics codes, their own court's code and other codes, model codes and some from specific states and courts
- Evaluate the degree of knowledge and commitment staff and court officials have toward their court's ethics code

Budget and Fiscal Management

- Define budget and fiscal management and why it is important
- Understand basic accounting principles, how to create a budget, and develop justification for budgetary needs.

Accountability, and Court Performance:

- Define court accountability and why it is important
- Utilize court performance measurement tools and practices to identify, design, and address the effectiveness of caseflow plans, practices, and policies
- Lead a learning organization by changing mindsets, mentoring staff and leading change

SAMPLE AGENDA

Court Management Unleashed: A Power-Packed One-Day Training

7:45 a.m. – 8:00 a.m.	Registration and Check-In
8:00 a.m. – 8:30 a.m.	Welcoming Remarks, Introduction of Presenters, & Introduction of Participants <i>Presenters Name</i>
8:30 a.m. – 8:45 a.m.	What is NACM and What is the CORE® <i>All</i>
8:45 a.m. – 10:15 a.m.	Leadership <i>Presenters Name</i>
10:15 a.m. to 10:30 a.m.	Break
10:30 a.m. - 12:00 p.m.	Purposes and Responsibilities of Courts and Public Trust and Confidence <i>Presenters Name</i>
12:00 p.m. - 1:00 p.m.	Lunch
1:00 p.m. – 2:30 p.m.	Caseflow Management, Accountability and Court Performance <i>Presenters Name</i>
2:30 p.m. – 2:45 p.m.	Break
2:45 p.m. – 4:30 p.m.	Operations Management <i>Presenters Name</i>
4:30 p.m. – 5:00 p.m.	Wrap-Up <i>Presenters Name</i>
5:00 p.m.	Adjourn





CORE® Competency Achievement Program (CORE® Champion)

One-Day Training Structured Response Test

NAME:

JOB DESCRIPTION:

COURT:

STATE:

EMAIL:

Title of Course/Session: Court Management Unleashed
Completed on:

Leadership

What kind of leader are you? How do you utilize your skills as a leader to create and maintain an inclusive and collaborative environment? (at least 6 sentences)

Governance

What is court governance and why is it important? What does your court's governance structure look like? Is it effective? Why or why not? If not effective, what would you change? (at least 6 sentences)

Caseflow Management

What is caseflow management? Do you have caseflow practices in your court? Using the exercise completed at the training, how can you update current practices to make a current practice more efficient? (at least 6 sentences)

Accountability and Court Performance

Do you have court performance measures within your court? If yes, what are they and have they been successful? If no, what is a court performance or accountability measure that you

would like to see implemented in your court and why? What kind of data do you think would be helpful to share with your stakeholders? (at least 6 sentences)

Operations Management

The courts are complex organizations with a wide array of departments and functions that need to be maintained to support court operations.

- How has your court altered court operations due to statutory/rule changes and/or in response to demographics, trends, and social changes? What are some of the challenges that you have faced in navigating these changes? (at least 6 sentences).

Please consider this a professional submission and give thought to answers and relate or apply session content to your court and challenges, even if you are not in the court administrator position. Remember to do a grammar and spell check. Your attention to these expectations will expedite the review of your submission.

Affirmation of Observation/Participation		
As a member or interested member of NACM, I affirm that I observed a presentation named above CORE® content.		
_____	_____	_____
Name	Title	Date

Return form to CORE@nacmnet.org



National Association for Court Management

Strengthening Court Professionals

Governance Committee Progress Report Form – 2023-2024

	Report	Due Date	Submission Date
	Fall Progress Report	September 15, 2023	
X	Midyear Progress Report	January 19, 2024	1/5/24
	Annual Progress Report	June 28, 2024	

Project	Project Status	Strategic Priority? (Yes/No)	Discussion Needed? (Yes/No)	Board Action Needed? (Yes/No)	If Yes to discussion or action, please describe what is needed
Ethics Code Review	Progressing forward.	Y	N	N	
Original Resolution	Beginning drafting and beginning to plan next steps.	N	Y	N	Discussion of next steps and buy-in of NACM.
Operations Manual (incorporating three policies previously approved by the Board)	Incorporation completed and submitted to Board in preparation for this Board meeting.	N	N	Y	Review and approval.
Bylaws Technical Edits	Technical edits completed and submitted to Board in preparation for this Board meeting.	N	N	Y	Review and approval.

Time needed at meeting for Committee report: 10 min.

Submitted by: Brandon and Nicole

Date: 1/5/24



National Association *for* Court Management

Strengthening Court Professionals

Membership Committee Progress Report Form – 2023-2024

	Report	Due Date	Submission Date
	Fall Progress Report	September 15, 2023	
X	Midyear Progress Report	January 12, 2024	January 11, 2024
	Annual Progress Report	June 28, 2024	

Project	Project Status	Strategic Priority? (Yes/No)	Discussion Needed? (Yes/No)	Board Action Needed? (Yes/No)	If Yes to discussion or action, please describe what's needed
Membership Survey	Present survey results	Yes	Yes	No	Discuss results
NACM Swag Contest	Will release in February	No	No	No	
New Member Qrtly Zoom	On the calendar and ready to go	Yes	No	No	
Membership benefits	This is next on Cheryl's list to review before the end of June	No	No	No	

Time needed at meeting for Committee report: **30 minutes**

Submitted by: Kristie Collier and Cheryl Stone

Date: January 11, 2024



National Association *for* Court Management

Strengthening Court Professionals

Communications Committee Progress Report Form – 2023-2024

	Report	Due Date	Submission Date
	Fall Progress Report	September 15, 2023	
X	Midyear Progress Report	January 19, 2024	January 12, 2024
	Annual Progress Report	June 28, 2024	

Project	Project Status	Strategic Priority? (Yes/No)	Discussion Needed? (Yes/No)	Board Action Needed? (Yes/No)	If Yes to discussion or action, please describe what's needed
Court Express	Next Issue will come out early February 2024 after the Midyear conference.	N	N	N	
Court Manager	Winter Edition-Volume 38/1 submission deadline January 15. Issue to be posted March 4. Spring Edition- 38/2 submissions due April 8 and will be posted June 3.	Y	N	N	
Guides	<ol style="list-style-type: none"> 1. AI Guide Committee meeting – online publication by July 2024 2. Court Security Guide Revision – Nate Mingo is organizing a group to revise the guide. Goal is to have complete by annual conference. 	Y	N	N	
Podcasts	Peter is working on next podcasts on AI. Next episode to come out January 19 then February 19. Over 24,000 clicks so far.	N	N	N	
Social Media	Natalie and her subcommittee are working to continually update social media sites. Subcommittee requests several days' notice for a posting. Request for NACM videos to be pushed out on social media. Social Media Terms of Use.	Y	N	Y	

Webinars	4-6 webinars planned for NACM Year: 1. February 22, 3PM ET SCOTUS decision and Native American Impact 2. March 4, 3PM ET – Increasing Court Appearance (Ideas42) 3. March 19, 2PM ET – From Parchment to Pixels – AI (Tyler) 4. April 22, 3PM ET-NACM CORE Leadership 5. August 27 or 29 – Tyler Webinar 6. Fall – AI Guide	Y	N	N	
Website –	The CORE website has transitioned. The Committee pages are finalized. Maintenance contract needs to be renewed. Need to discuss next steps for website	N	Y	Y	Discussion necessary on maintenance contract and next projects for website.

Time needed at meeting for Committee report: **30 minutes to update on projects, maintenance contract and next projects for website revision.**

Submitted by: Dawn Palermo

Date: January 12, 2024



From

Always Be Creating

916 C Avenue
Virginia Beach, VA 23451

Estimate ID

2024063

Issue Date

01/18/2024

Subject

Q2-Q4 2024 Website Maintenance

Estimate For

**National Association for Court
Management**

300 Newport Avenue
Williamsburg, VA 23185-4147

Description	Unit Price	Amount
Provide up to five (5) hours of website updates, maintenance, and assistance per month for nine (9) months. April – December 2024 \$625/month	\$5,625.00	\$5,625.00

Estimate Total \$5,625.00

Notes

Invoices will be sent quarterly at the beginning of each quarter. All invoices are due within 20 business days of receipt. 2% late fees per month applied after 30 days; any costs involved in the collection of a debt including attorney's fees and court costs will be the responsibility of the customer.



National Association *for* Court Management

Strengthening Court Professionals

DEI Committee Progress Report Form – 2023-2024

	Report	Due Date	Submission Date
	Fall Progress Report	September 15, 2023	
X	Midyear Progress Report	January 12, 2024	
	Annual Progress Report	June 28, 2024	

Project	Project Status	Strategic Priority? (Yes/No)	Discussion Needed? (Yes/No)	Board Action Needed? (Yes/No)	If Yes to discussion or action, please describe whats needed
Webinar – SCOTUS Decisions II – <i>Haaland v. Brackeen</i>	Scheduled for 2/22 3PM ET	Y	N	N	
Customized Inclusivity Training	Pilot Interview Scheduled for 2/16	N	N	N	
Resource Gathering	In Progress	Y	N	N	
Conference Presentations	MidYear and Annual	Y	N	N	

Time needed at meeting for Committee report: 15

Submitted by: Roger Rand

Date: 1/16/2024



MEMORANDUM

To: National Association for Court Management, Board of Directors
From: Jonathan Mattiello, Executive Director
Date: 1/2/2024
Subject: Report to the NACM Board

Background

The [State Justice Institute](#) (SJI) was established by Congress (42 U.S.C. 10701 et seq.) in 1984 to award grants to improve the quality of justice in state courts, and foster innovative, efficient solutions to common issues faced by all courts. SJI is a non-profit corporation governed by an 11-member [Board of Directors](#) appointed by the President and confirmed by the Senate. By law, the President must appoint six state court judges, and one state court administrator, from a nomination list provided by CCJ. The President also appoints four members of the public – no more than two of whom may be of the same political party.

SJI is unique in both its mission and how it seeks to fulfill it. Only SJI has the authority to assist all state courts – criminal, civil, juvenile, family, and appellate – and the mandate to share the success of one state’s innovations with every state court system. SJI is currently operating off a second continuing resolution for FY 2024 funding that expires on February 2, 2024.

SJI Grant Support to NACM

Since FY 2010, SJI has supported 15 grants to NACM totaling approximately \$2.24 million. These grants have supported the NACM midyear and annual conferences, development of the NACM Core®, and special white papers. NACM has been a testing ground for new trends, such as SJI’s focus on opioids, human trafficking, public trust and confidence, behavioral health, and pandemic response in the state courts. NACM’s willingness to make resources available online, specifically videos from the meeting events which are posted on its YouTube channel, has been well-received by SJI’s social media audience and key stakeholders. The wide reach of NACM’s conference programming provides SJI with a unique opportunity to support core state court curriculum development and integration.

Recently, SJI awarded a grant that will enable NACM to support the 2024 conferences and regional educational opportunities. As in previous years, NACM will develop and implement educational sessions that target several of SJI's Priority Investment Areas.

SJI Priority Investment Areas

SJI will continue leveraging funding whenever possible to help the state courts address the most critical issues in FY 2024. Each fiscal year, SJI allocates significant financial resources to support its Priority Investment Areas. The [Priority Investment Areas](#) are applicable to all grant types.

SJI strongly encourages potential grant applicants to consider projects addressing one or more of these Priority Investment Areas and to integrate the following factors into each proposed project:

- Evidence based, data-driven decision making
- Cross sector collaboration
- Systemic approaches (as opposed to standalone programs)
- Ease of replication
- Sustainability

For FY 2024, the Priority Investment Areas are listed below in no specific order:

Opioids and Other Dangerous Drugs, and Behavioral Health Responses

Behavioral Health Disparities

Research indicates that justice involved persons have significantly greater proportions of mental, substance use, and co-occurring disorders than are found in the public. SJI supports cross-sector collaboration and information sharing that emphasizes policies and practices designed to improve court responses to justice-involved persons with behavioral health and other co-occurring needs.

Trauma-Informed Approaches

Judges, court staff, system stakeholders and court-involved persons (defendants, respondents, and victims) alike may be impacted by prior trauma. This is particularly, but not exclusively, true for those with mental illness and/or substance use disorders. SJI supports trauma-informed training, policies and practices in all aspects of the judicial process.

Promoting Access to Justice and Procedural Fairness

Procedural Fairness

A fundamental role of courts is to ensure fair processes and just outcomes for litigants. SJI promotes the integration of research-based procedural fairness principles, policies, and practices into state court operations to increase public trust and confidence in the court system, reduce recidivism, and increase compliance with court orders.

Self-Represented Litigation

SJI promotes court-based solutions to address increases in self-represented litigants; specifically making courts more user-friendly by simplifying court forms, providing one-on-one assistance, developing guides, handbooks, and instructions on how to proceed, developing court-based self-help centers, and using Internet technologies to increase access. These projects are improving outcomes for litigants and saving valuable court resources.

Language Access

SJI supports language access in the state courts through remote interpretation (outside the courtroom), interpreter training and certification, courtroom services (plain language forms, websites, etc.), and addressing the requirements of [Title VI of the Civil Rights Act of 1964 and the Omnibus Crime Control and Safe Streets Act](#).

Reducing Disparities and Protecting Victims, Underserved, and Vulnerable Populations

Disparities in Justice

SJI supports research and data-driven approaches that examine statutory requirements, policies, and practices that result in disparities for justice-involved persons. These disparities can be because of inequities in socio-economic, racial, ethnic, gender, age, health, or other factors. In addition to identifying disparities, SJI promotes systemic approaches to reducing disparities.

Human Trafficking

SJI addresses the impact of federal and state human trafficking laws on the state courts, and the challenges faced by state courts in dealing with cases involving trafficking victims and their families. These efforts are intended to empower state courts to identify victims, link them with vital services, and hold traffickers accountable.

Rural Justice

Rural areas and their justice systems routinely have fewer resources and more barriers than their urban counterparts, such as availability of services, lack of transportation, and smaller workforces. Programs and practices that are effective in urban areas are often inappropriate and or lack supported research for implementation in rural areas. SJI supports rural courts by identifying promising and best practices, and promoting resources, education, and training opportunities uniquely designed for rural courts and court users.

Guardianship, Conservatorship, and Elder Issues

SJI assists courts in improving court oversight of guardians and conservators for the elderly and incapacitated adults through visitor programs, electronic reporting, and training.

Advancing Justice Reform

Criminal Justice Reform

SJI assists state courts in taking a leadership role in reviewing fines, fees, and bail practices to ensure processes are fair and access to justice is assured; implementing alternative forms of sanction; developing processes for indigency review; promoting transparency, governance, and structural reforms that promote access to justice, accountability, and oversight; and implementing innovative diversion and re-entry programs that serve to improve outcomes for justice-involved persons and the justice system.

Juvenile Justice Reform

SJI supports innovative projects that advance best practices in handling dependency and delinquency cases; promote effective court oversight of juveniles in the justice system; address the impact of trauma on juvenile behavior; assist the courts in identification of appropriate provision of services for juveniles; and address juvenile re-entry.

Family and Civil Justice Reform

SJI promotes court-based solutions for the myriad of civil case types, such as domestic relations, housing, employment, debt collection, which are overwhelming court dockets.

Transforming Courts

Emergency Response and Recovery

Courts must be prepared for natural disasters and public health emergencies, such as pandemics. SJI supports projects that look to the future of judicial service delivery by identifying and replicating innovations and alternate means of conducting court business because of pandemics and natural disasters such as hurricanes, earthquakes, and wildfires.

Cybersecurity

Courts must also be prepared for cyberattacks on court systems, such as denial of service and ransomware attacks on court case management systems, websites, and other critical information technology infrastructure. SJI supports projects that assist courts in preparing for, and responding to, these attacks, and share lessons-learned to courts across the United States.

Technology

SJI promotes and supports innovative technology projects that will improve court processes and procedures, including technology projects that: streamline case filing and management processes, thereby reducing time and costs to litigants and the courts; provide online access to courts to litigants so that disputes can be resolved more efficiently; make structural changes to court services that enable them to evolve into an online environment. Additionally, SJI supports the examination of potential integration of Artificial Intelligence (AI) into court processes, including identification of positive outcomes and potential limitations of AI.

Strategic Planning

Courts must rely on a deliberate process to determine organizational values, mission, vision, goals, and objectives. SJI promotes structured planning processes and organizational assessments to assist courts in setting priorities, allocating resources, and identifying areas for on-going improvements in efficiency and effectiveness. Strategic planning includes elements of court governance, data collection, management, analysis, sharing; and sustainable court governance models that drive decision-making. Strategic plans and outcomes should be communicated to judges, court staff, justice partners, and the public.

Training, Education, and Workforce Development

State courts require a workforce that is adaptable to public demands for services. SJI supports projects that focus on the tools needed to enable judges, court managers, and staff to lead their courts in future reform efforts.

Key Initiatives in FY 2024

COVID-19, Access to Justice, and the State Courts

The COVID-19 pandemic has deeply impacted the U.S. justice system. State courts, attorneys, and all justice-involved people have drastically altered the way they conduct business due to the pandemic. As courthouses closed and court systems moved to virtual interactions, the court community rallied to respond to the ever-growing demands of justice-involved people, as any slowdown or restrictions on court operations would have significant implications for essential services and urgent matters such as detainees and inmates, victims of violence, parents/guardians with custody issues, and tenants facing evictions. State courts at all levels across the country have implemented strategies to continue providing access to justice.

In immediate response to the pandemic, SJI supported the Conference of Chief Justices (CCJ) and Conference of State Court Administrators (COSCA) [Pandemic Rapid Response Team](#) (RRT) in March 2020. With SJI funding, the RRT has been addressing the impact of the pandemic on state courts. The COVID-19 Emergency Funding and the PPPI Phase I grants were focused on providing immediate communication, collaboration, and tools to quickly respond to the needs of courts during the COVID-19 pandemic. Phase II was primarily aimed at identifying areas of innovation and working with courts, through the [Implementation Labs](#), to foster broader implementation and sustainability of effective methods for providing court services in a safe, fair, and efficient manner. SJI recently awarded a Phase III grant for the RRT to identify the “new normal courts” and document: 1) how they are operating; 2) the new procedures that were developed; 3) what supportive policies are necessary; 4) what technologies are needed.

Previously, SJI funded a first of its kind [National Pandemic Summit](#) at the University of Nebraska Medical Center in May 2019. The summit included court leaders, public health officials, legislators, and executive branch officials from 25 states and three territories. The summit focused on the need for states to plan and prepare for a pandemic, which would ultimately prove incredibly valuable to the COVID-19 response.

SJI identified [Emergency Preparedness and Cybersecurity](#) as one of its [Priority Investment Areas](#) for FY 2020, and has invested considerable resources into supporting the courts in pandemic planning, response, and recovery activities. SJI is supporting [projects](#) that look to the future of judicial service delivery by identifying and replicating innovations and alternate means of conducting court business because of the pandemic. SJI values a system change approach (as opposed to the replication of narrowly focused programs or projects) that emphasize the use of case triage to match cases and parties to appropriate resources and services both within and outside the courthouse, and support increased information for self-represented litigants. This also includes the use of technology innovations such as online dispute resolution (ODR), portal development, virtual hearings, and other efforts to allow court business to be conducted outside of the courthouse. Finally, since many practices have not yet been measured or evaluated, these projects will include a review of costs and benefits, not only to the courts, but also to court users.

Opioids, Emerging Drug Abuse, and Mental Illness: State Court Behavioral Health Collaborative Grant Program

The impact of the opioid crisis touches every aspect of the nation's public safety and judicial system. According to the U.S. Department of Health and Human Services/Substance Abuse and Mental Health Services Administration (SAMHSA) data, the criminal justice system is the single largest source of referral for substance abuse treatment. Drug-related arrests involving opioids are skyrocketing. In many communities, court dockets and probation caseloads are filled with individuals with opioid use disorders. Access to treatment is limited, particularly in rural communities. The shift from prescription opioid abuse to heroin and fentanyl use is causing a dramatic spike in overdose deaths in some regions of the United States, particularly the Midwest and in the South.

In response, SJI funded a comprehensive strategy for responding to the challenges facing state courts in addressing the national opioid crisis. In partnership with CCJ, the Conference of COSCA, and other key stakeholders, funding was provided to create the CCJ/COSCA [National Judicial Opioid Task Force](#) (NJOTF). This initiative identified and documented inter-branch activities to address the opioid crisis.

In addition to the impact of opioid abuse on criminal courts, the nation's family and juvenile courts, and child welfare systems, are also deeply impacted. A report by DHS/Administration for Children and Families shows that from FY 2000 to 2019, the percentage of removals nationally due to parental substance abuse increased 18.5 percent to 38.9 percent – an increase of 20.4 percentage points.¹ Thirteen (13) states report that 50 percent or more of the removals are due to parental substance abuse.²

Adverse childhood experiences (ACES) significantly impact the likelihood of future substance abuse, violence, and justice system involvement.³ Prevention and intervention strategies, such as early identification of trauma and trauma-informed treatment, can significantly reduce the impacts of ACES. With SJI support, the National Center for State Courts (NCSC), the Institute for Intergovernmental Research (IIR), the National Council of Juvenile and Family Court Judges (NCJFCJ), and The National Judicial College (NJC) have developed a collaboration to assist state courts in addressing the impact of opioids on children and families.

Additionally, SJI is partnering with the U.S. Department of Justice/Bureau of Justice Assistance (BJA), and the Centers for Disease Control (CDC) to provide funding to rural demonstration sites through the Rural Responses to the Opioid Epidemic (RROE) initiative. The RROE is part of a series of demonstration projects associated with BJA's [Comprehensive Opioid, Stimulant, and Substance Abuse Program](#) (COSSAP). SJI funding is enabling the demonstration sites to

¹ U.S. Department of Health and Human Services, Administration for Children and Families (2020). <https://www.acf.hhs.gov/sites/default/files/documents/cb/afcarsreport27.pdf>

² U.S. Department of Health and Human Services. Administration for Children and Families, Children's Bureau, Adoption and Foster Care Analysis and Reporting System (AFCARS) (2019 v1).

³ Levenson, Jill, and Grady, Melissa (2016). *Childhood Adversity, Substance Abuse, and Violence: Implications for Trauma-Informed Social Work Practice*. Journal of Social Work Practice in the Addictions. Vol. 16, Issue 1-2.

include the state courts in their work, and ensuring courts have the resources they need to contribute to the overall objectives of each site.

Building upon the RROE, and with funding from SJI, the NCSC, in partnership with [Rulo Strategies](#), launched the Rural Justice Collaborative (RJC) in January 2021 to showcase the strengths of rural communities, and highlight the cross-sector collaboration that is a hallmark of rural justice systems. The work under the RJC is supported by a cross-sector advisory council composed of rural judges, along with additional stakeholders in the justice, child welfare, and behavioral health, and public health systems. The RJC [Online Resource Center](#) launched in late Spring 2021, and serves as a national clearinghouse of promising and innovative rural justice practices. The RJC is identifying mentor sites that will host virtual or in-person site visits, answer questions from other rural communities via phone, email, or webinars, and participate in conferences and workshops to share promising and innovative rural justice practices.

SJI also is supporting the CCJ/COSCA National Judicial Task Force to Examine State Courts' Response to Mental Illness (MHTF). The MHTF is currently:

- Developing resources, best practices and recommend standards to address mental illness and the state courts response.
- Expanding the NCSC mental health [website](#) to create a centralized repository for state courts interested in improving court and community responses.
- Providing resources to improve caseload management of civil commitment cases as well as felony and misdemeanor cases involving persons with mental illness.
- Providing education by developing national, regional, and statewide training and education opportunities for judges and court practitioners.
- Developing guides and resources on the Sequential Intercept Model, and adapt the SJI-funded Arizona Presiding Judge Guide titled, [Fair Justice for Persons with Mental Illness: Improving the Courts Response](#) for use nationally.
- [Building capacity](#) of state and national court leader to lead and implement reforms.

Action Blueprint for Racial Justice

A joint CCJ/COSCA resolution, [In support of Racial Justice and Equity for All](#), was adopted in 2020 that documented the commitment of national state court leadership “to intensify efforts to combat racial prejudice within the justice system, both explicit and implicit ... so that justice is not only fair to all but also recognized by all to be fair.” The Blueprint, through the four established working groups: 1) fairness and awareness, 2) systemic change, 3) increasing diversity of the bench, bar, and court workforce, and 4) communication and implementation is providing comprehensive, data-informed guidance to state courts to find solutions to racial justice issues.

SJI provided initial grant support to the NCSC in FY 2021 for the development, testing, and dissemination of an organizational assessment tool that will enable judicial leaders to determine how best to ensure racial and ethnic fairness in their courts. Following on these efforts, SJI awarded a larger grant in FY 2022 to support the [Blueprint for Racial Justice](#), which is:

- Developing a set of guiding principles to evaluate existing practices and potential reforms, along with training on the principles.
- Developing Toolkits and resources on evidence-based practices and policies that effectively address disparities in case outcomes.
- Providing supporting tools and materials for court professionals, such as data standards that include definitional and data mapping guidance.
- Drafting model rules or statutes addressing racial disparities, which will also include the guiding principles.
- Launching a strategic process to enable state courts to work with high schools, colleges, law schools, bar associations, and other partners to expand diversity of the bench and justice system workforce.

Child Abuse and Neglect, Juvenile Justice Reform, and the State Courts

SJI has funded many innovative projects that have implemented broader juvenile justice reform at the national, state, and local levels. The report⁴ accompanying the FY 2023 House Commerce, Justice, Science, and Related Agencies (CJS) Appropriations Bill included the following language:

The additional funding is provided to enhance the Institute's efforts to improve the quality of justice in State courts and address the unique challenges of the opioid epidemic, mental health issues, juvenile justice, child abuse, and court technology.

In response, SJI [awarded grants](#) through a special Request for Applications (RFA) process in FY 2023. The purpose of these grants is to further improve state court efforts in addressing child abuse and neglect. The projects will enhance state and local court ability to handle challenging cases, and better serve youth and their families. The projects are also addressing one or more of the following key principles:

- Keeping families together;
- Ensuring access to justice;
- Cultivating cultural responsiveness;

⁴ The FY 2022 Senate CJS Bill did not have an accompanying report.

- Engaging families through alternative dispute resolution techniques;
- Ensuring child safety, permanency, and well-being;
- Ensuring adequate and appropriate family time;
- Providing judicial oversight;
- Ensuring competent and adequately compensated representation; and,
- Advancing the development of adequate resources.

In addition to meeting all other application requirements, SJI gave priority consideration for funding to projects that focused on institutionalizing, replicating, and/or building on national best practices and procedures surrounding child abuse and neglect case processing. Projects do not duplicate existing activities supported by other sources, such as the U.S. Department of Health and Human Services/Children's Bureau's Court Improvement Program.

Conclusion

SJI remains the only source of federal or private funding dedicated exclusively to improving the quality of justice in the state courts. There is a strong national interest in continuing to support the state courts, as there is with federal funding for state and local law enforcement, corrections, prosecution, and public defense. The state courts handle over 99 percent of all the cases in the United States.⁵

Civil actions – foreclosures, tort, contract, small claims, probate, mental health, and civil appeals cases – constitute a growing area for state courts as the population ages, discovery delays increase, appeals courts are inundated with dissatisfied litigants and substantive legal challenges, and rental markets are saturated with homeowners displaced by foreclosures. SJI has experienced an increase in grant applications seeking assistance to help the state courts become more administratively effective, so that they can address these issues. SJI support provides the state courts with significant opportunities to reorganize, innovate, and improve service delivery to the public.

SJI will continue leveraging its grant funding whenever possible to help the state courts address the most critical issues in FY 2024. The effectiveness of the state courts is critical to ensuring that the public experiences the justice guaranteed by the Constitution. SJI to continue to work with its partners to identify issues that impact all courts, fostering innovative solutions, and sharing information on successful approaches nationwide.

⁵ National Center for State Courts. Court Statistics Project. 2018. *State Court Caseload Digest*.

MIDYEAR REPORT OF CCJSCA TO NACM

Greetings from the Council of Chief Judges of State Courts of Appeal (“CCJSCA”) and thank you for the opportunity to update the NACM board and its members on our organization’s recent activities.

At the time of writing this report, we have recently concluded another fantastic annual conference of our membership in Charleston, South Carolina. As is our mission, the educational and collegiality functions were all designed to better equip our members—Chief Judges from across the country at their respective state courts of appeal—to serve their respective appellate courts better. We always aim to find speakers that provide common sense practical use nuggets as well as speakers that remind us why we chose this profession in the first place. And, as you are well aware, sometimes leaders from courts—like you—need other leaders in similar court settings to lean on throughout the year; hence, it is always a goal of ours to promote collaboration with one another. This conference hit every mark we strive for and it served to re-energize us for the year to come.

As we now look forward to 2024, we have a new and energetic slate of committee chairs who are dedicated to serving our membership throughout the year by developing informational resources on our web site (ccjsca.org); crafting Chief Chat Zoom discussions on topics of timely interest throughout the year; and developing video educational presentations for Chief Judges at every stage of their term as Chief Judge. We are particularly interested in being a support network for new Chief Judges and our membership committee is always reaching out to new Chiefs to offer assistance from CCJSCA. We presently have Chief Judge members from 40 of the 42 states who have intermediate courts of appeal and we believe the remaining two states will soon join our organization as well.

We are happy to be a source of collective wisdom and friendship amongst fellow Chief Judges of state courts of appeal across the country, but also with our teammates in the delivery of judicial branch services—court administrators and management professionals comprising the NACM membership. In the spirit of such friendship, please let me know how I may be of service to NACM during 2024.

And, finally, thank you for allowing us to partner with NACM to collaborate on our unified mission of providing justice to the citizens we serve as efficiently, intelligently, and compassionately as possible. We value your friendship and wisdom!

Mark D. Pfeiffer, Judge
Missouri Court of Appeals—Western District
CCJSCA President 2023-24