



**THE AMERICAN UNIVERSITY**

**CRIMINAL COURTS TECHNICAL ASSISTANCE PROJECT**  
Institute for Advanced Studies in Justice  
The American University Law School  
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A Program of the  
Adjudication Division  
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FINAL REPORT OF THE  
EDUCATIONAL WORKSHOP SESSIONS  
CONDUCTED FOR THE 1979 ANNUAL CONFERENCES  
OF THE  
NATIONAL ASSOCIATION FOR COURT ADMINISTRATION  
AND THE  
NATIONAL ASSOCIATION OF TRIAL COURT  
ADMINISTRATORS

Submitted To:

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## I. INTRODUCTION

At the request of the Adjudication Division of LEAA and under the authorization of Purchase Order No. 9-0961-J-LEAA\* the Criminal Courts Technical Assistance Project prepared the educational workshop materials for the 1979 Annual Conferences of the National Association for Court Administration (NACA) and the National Association of Trial Court Administrators (NATCA). The conferences were held simultaneously in Sarasota, Florida July 9-13 with the educational workshop sessions comprising a total of nine hours of the conference program for each organization.

The topics of the educational program were trial court financial, personnel and records management and were addressed in three three-hour sessions (one session for each of the topics covered). Each workshop session was introduced with a brief plenary group presentation and then broken down into six small workshop groups (15-20 members each) organized on the basis of large, medium and small size courts. The plenary sessions (one session of a short lecture and two sessions of videotapes) were designed to assist participants in quickly focusing upon key management issues presented in the hypothetical management problems developed in the program materials and to assure a common ground of discussion for each of the individual workshop groups. Each workshop group was led by a workshop leader who had been previously designated by the Project and oriented first by phone and then with written materials prior to the Conference. The discussions of each workshop group were reported in a concluding plenary session each day, with final commentary on the various approaches suggested by the workshops made by the consultant who had been designated by the project as a resource for the particular topic discussed.\*\*

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\* Additional support was provided by the Courts Technical Assistance Project under LEAA Contract No. J-LEAA-011-78, Assignment No. 56A.

\*\*These consultants were: Harry O. Lawson (Financial Management); David Saari (Court Management); Ernest Short (Records Management); Robert Tobin (Personnel Management).

The following report describes the background and purpose of the educational workshop sessions, summary observations of the workshop discussions in each topic area and presents a discussion of management issues raised in the videotape presentations. Accompanying this report are a set of the workshop materials prepared for the Conference and the videotapes developed for the financial and personnel management problems. Two sets of participant evaluations were conducted: one at the close of each workshop session and the other approximately one month following the Conference. Analysis of these evaluations, along with workshop leader comments and a financial report will be submitted to the Adjudication Division by September 30.

## II. BACKGROUND AND PRELIMINARY PLANNING

Initial interest in conducting an educational program focusing on financial, personnel and records management for the annual conferences of these organizations was generated during the Court Management Project, which was conducted under LEAA-NILE sponsorship during the period August 1, 1977 - August 31, 1978. During the course of that project, NATCA and NACA provided representatives to the Project's Advisory Board and worked with project staff in various phases of project activity. At one point in the project, a survey of all NATCA and NACA members (as well as members of the Conference of State Trial Judges) was conducted to identify management objectives of the courts surveyed and various problems encountered dealing with financial, personnel and records management functions.\* The results of this survey were used to plan the content and approach of each of the Trial Court Management Series Reports and were also reported in the Project's Executive Summary.

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\* Caseflow Management issues were also addressed; publication of the caseflow report, however, was deferred by LEAA.

In August 1978, representatives from NATCA and NACA wrote to American University staff to indicate the intention of each of the organizations to use the Trial Court Management Series as the basis for their next annual conference programs and to ask what assistance might be available in developing appropriate educational programs. A meeting was held in Washington in February 1979 with representatives from NATCA and NACA, LEAA's Adjudication Division and NILE, and American University to discuss the specific program interests of the organizations and the nature of assistance that might be available. Since the scope of work necessary to coordinate and develop the educational programs was beyond the resources of the Criminal Courts Technical Assistance Project, Adjudication Division and NILE staff explored the potential resources which their respective offices might provide. In May, funding of the educational program effort was provided through a Purchase Order issued by the Adjudication Division, with additional staff support and resources provided by American University under the Criminal Courts Technical Assistance Contract.

In early 1979, a special printing was made of 500 copies of the Trial Court Management Series Reports for distribution to each of the NATCA and NACA members and judges who had assisted the project with field study and/or had responded to the project survey of management objectives and problems. In preparation for the Conference Workshop program, each of the recipients of the Trial Court Management Reports was later surveyed to determine the specific utility of the reports, areas in which additional information might be helpful, and specific topics which recipients hoped the Workshops would address. Although all comments were analyzed, particular attention was given to responses to three questions:



- (1) What aspects of the reports do you feel will be unrealistic to implement in your jurisdiction?
- (2) What types of training materials would make these reports more useful to you?
- (3) What aspects of the reports would you like to see addressed at the Workshops?

Responses to these questions indicated that a major concern among recipients seeking to implement suggestions in the reports was lack of control over the functions involved, the need for help in developing strategies for internal management and interagency relationships, and the desire to learn how other jurisdictions had overcome problems in these areas.

On May 23, 1979, a planning meeting was held with representatives from NATCA, NACA, LEAA, the Courts Technical Assistance Project and four consultants selected by the Project to help with the development of workshop materials and to coordinate the educational workshop program. These consultants were: R. Dale Lefever (personnel management); Ernest H. Short (records management); Robert Tobin (financial management); and David Saari (program coordination). A fifth consultant, Harry O. Lawson, could not attend the meeting but worked with Project staff in developing the financial management problem.

The meeting discussions focused upon various types of educational materials that might be developed and specific interests of the organizations' members. Each topic was addressed in terms of areas of interests identified by survey respondents and other court staff, and alternative approaches the workshops materials might take. In the end, it was decided to build each workshop session around a hypothetical management problem which demonstrated a range of management issues and interrelated activities and concerns which court managers must perform. It was also decided to use a mix of formats to include videotape presentations, situation vignettes, and problem

descriptions. Perhaps the most important conclusion of the meeting, however, was the overall theme for the educational program and the goal which all of the educational sessions should seek. The theme of the program would be the improvement of the analysis capabilities of the participants and the goal of each session would be to improve each participant's capacity to analyze his or her management problems, and particularly skills required for problem definition, researching appropriate information and developing alternative solutions. In developing the materials, the Project also kept in mind their potential utility to state judicial education programs, each of which would receive a set of the program materials after their pilot-testing at the Conference.

Following the meeting, the consultants developed hypothetical management problems in the areas of their expertise and developed discussion guidelines for use by the workshop leaders. During this period, project staff worked with David Saari to identify individuals in each organization who might serve as workshop leaders. During early June, Mr. Saari contacted 67 individuals of whom 36 agreed to serve as workshop leaders and an additional eight agreed to serve as alternates. Mr. Saari talked with each workshop leader at length to explain the purpose of the conference, the role of the workshop leader and the nature of the hypothetical management problems that were being developed for the specific subject involved. Orientation materials were then sent to the workshop leaders and subsequent telephone conversations were had with many to discuss various aspects of the program.

Development of the hypothetical management problems - which formed the basis for the workshop programs - was completed by the consultants by mid-June and then prepared for inclusion in the educational program material packet which was distributed at the Conference. Preliminary distribution of these materials was made to several local court administrators and clerks who agreed to provide volunteer services to the Project in developing

videotape materials which would demonstrate the range of management issues, problems, decisions and alternatives which were raised by the workshop problems in the financial and personnel areas. The "volunteers" who made the tapes were Mrs. Margaret Kostriksky, Chief Clerk of the Maryland District Court; Larry Polansky, Executive Officer of the District of Columbia Courts; Mr. Saari; and Ms. Evelyn Blakeley, a temporary secretary working at American University. Mr. Saari developed an introductory presentation for each tape and a commentary on the management issues raised (Section IV below).

An overview of the Educational Workshop sessions was presented by Mr. Saari to members of NATCA and NACA at their opening meeting July 9. Approximately 225 attendees participated in the workshops of both organizations, included among these attendees were representatives from the Judicial Education Programs in Georgia and Michigan - states which were developing staff training programs on these topics and which expressed willingness to attend the sessions and make suggestions to the Project regarding the utility of the Educational Program to state judicial education efforts.

Although the program materials developed for each organization's educational programs were identical, differences were noted by the Project in the approach which each group of workshop participants developed in addressing the hypothetical problems. These differences are described in the summary workshop observations below.

### III. SUMMARY OBSERVATIONS OF THE WORKSHOP DISCUSSIONS

Each workshop group reported its discussions at the concluding plenary session each day. While frequently different approaches were suggested for specific problems identified and management issues raised, there was generally a consensus regarding the objectives a manager should seek in managing each of the topic areas addressed. Certain areas of divergence, however, were noted in the way each organization's attendees approached some of the problems presented and certain comments by the consultants in observing

these sessions deserve mention.

NATCA and NACA workshop attendees appeared to have a basic disagreement as to the "adequacy" of the budget available to the hypothetical court system described in the workshop problem. Most NATCA workshops could not stay within the budget guidelines presented. NACA workshops, however, had little difficulty in this regard and most concluded with a surplus. Although priorities identified by the various workshops differed, greater divergence in resource allocation was noted among the NATCA workshop participants, with greater consensus on priorities reflected in the NACA workshop discussions.

In the personnel area, Bob Tobin made a critical distinction at the close of the workshop sessions between approaching personnel problems from the perspective of the management analyst and approaching them from the standpoint of human beings who must work together every day. The latter point had not been significantly addressed in any of the workshops of either organization. Stylized personnel management routines may look great on paper, he noted, but are hard to make work. Everyone pays lip service to personnel management principles but it is extremely difficult to get a sincere public discussion of the real person-to-person issues that render personnel management so difficult. He identified five specific personnel management areas in which he felt these kinds of problems were particularly apparent:

- (1) EEO and the managerial paranoia about being charged with discrimination;
- (2) the self-destructiveness of giving a frank and unflattering evaluation of someone with whom you must work very closely;
- (3) the case of personnel procedures as a defense mechanism rather than as an affirmative tool;
- (4) the constant management pressure from above to force supervisors to perform an evaluation role, never a popular one;
- (5) the link between pay raises and evaluation and the reluctance of a supervisor to see his people lose raises while a fellow-supervisor overrates all his people and gets them raises.

Although workshop discussions of neither NATCA or NACA had dealt openly with these concerns, NACA participants on the whole appeared to have had more experience with personnel performance appraisal, with many of the NACA attendees illustrating specific procedures and policies used in their courts.

The records management topic appeared to hold much more interest for NACA attendees than for NATCA. This difference in interest is most likely due, in large part, to differences in the make-up of the memberships of the two organizations. The NACA membership is composed of many administrators from lower jurisdiction trial courts, clerks of court and administrators who may fill a deputy or other department head position, whereas the NATCA membership appears to be predominantly administrators of general jurisdiction trial courts. The NACA membership appeared to have more interest in records management because they were more directly responsible for that activity on a daily basis within their courts. The membership of NATCA appears to have little direct responsibility for the day-to-day aspects of records management although some interest was evident in specialized aspects of records management such as technological developments (microfilming, etc.).

#### IV. ISSUES RAISED BY THE VIDEOTAPE PRESENTATIONS

##### A. Financial Management

The purpose of the financial management tape was to help the workshop attendees quicken their understanding of the financial problems presented in the workshop materials and to supplement the written material by making the budget problem come alive. The tape attempts to create the discipline that is necessary to enable an official to put together issues of time, government finance, policy and constraints. Each of these issues is openly addressed in the tape as well as reflected in the problems which make up the environment of the hypothetical court.

Part of making a budgetary presentation come alive is to view the role of the county executive and the role of the court representatives as somewhat adversarial. Throughout the tape, questions and comments come to the surface which are basically adversarial in nature and define the relationships that evolve in this budgetary encounter. There are those who have the dollars and can appropriate them and tax the public to raise them -- i.e., the county government. There are those who are asking for the dollars, who cannot raise them and who simply have to depend on other units of government (whether state, city or county) to raise the money to support the governmental function they represent -- i.e., the courts.

In this situation, those who have the dollars must listen to those who don't have dollars and, fundamentally, it's an unequal relationship to begin with. This is the setting which the tape seeks and the underlying theme of the discussions. The questions that are asked and the comments that surface indicate that the adversarial relationship is not hostile but, rather, a questioning one which places the judiciary at the local level within the context of a larger frame of reference - i.e., a larger governmental unit that has many departments and many divisions each of which is asking for more than the constraints will allow. The adversarial role, therefore, sharpens the choices and creates the discipline needed for dealing with the budgetary process.

There are five clear needs presented in the budget problem and they must be met while conforming to six general constraints of the county, plus the confusion resulting from the legislative speedy trial mandate requiring added local expenses without state support. The difficulties of creating governmental functions at one level of government and paying for them at another are thrust upon the budgetary process.

In addition to these general issues explored in the tape, there are several specific points raised in the tape which deserve discussion:

### 1. The Meeting Setting

The tape starts off with a statement that there is only 20 minutes available and that the county executive needs help. He is confused; he has had many budget presentations. He may have had 20 or 30 prior budget presentations at which there are an endless array of questions about county finances, especially in the 260 large metropolitan areas where county governments finance a wide range of governmental services. The task of the court administrator is to realize that he has only a very brief period to present the budget and that the presentation should assist in clarifying and orienting the county official because, indeed, he has a much wider span of budgetary problems than are ever met by the courts.

### 2. The Role of Numbers

Some of the numbers presented were tested by the county administrator to see what meaning they had. What content lies behind a number? How broadly can it be understood? A county executive tends not to assume that he knows or can understand every number presented to him in a week or two of budgetary presentations from all of the different agencies in a county government.

### 3. The Role of Time

The time factors is a vital and critical variable in the examination of this particular budget and both the presentors and the county executive attempt to push very hard when it comes to issues of time. Do we need this full-time person? Do we have to make long-term commitments? Discuss your needs in twenty minutes.

### 4. Nature of the Adversarial Relationships Involved

There was an excellent opportunity at the beginning of the tape for a county executive to have played "Mr. Hardnose"; he could have put down

anybody who said they didn't know what their difficulties were. When the court administrator said he didn't know the nature of his problem, he allowed the county executive a very wide margin to invade the administrator's professional standing. The county executive, however, chose to ignore this opportunity because it seemed evident that there was some basis for saying that he didn't know and that there was some real rationale for a full-scale study even though it was put in terms of obtaining additional county funds. The reason for not hitting hard at that point was, again, because the adversarial relationship is not one of hostility. It is one of attempting to work with people in a cooperative relationship and the budgetary presentation is not an opportunity to run somebody into the ground because they simply say they don't know, although there was obviously a division of opinion on this issue in the workshop sessions.

The county executive did, however, try to challenge the budget presentors. He suggested to them that the courts were simply a division of the county government and that they had to stay within the bounds. He also suggested that nepotism was possible on a contract and that the court administrator was only suggesting a contract for a friend. Neither instance, however, gave rise to acceptance of the challenge -- in large part because the court officials are experienced and know it's not worth arguing about these kinds of issues during a budget presentation.

##### 5. County Policy v. Court Policy

The county executive spent some time announcing county policy in direct opposition to court needs. He indicated that it would be county policy to drop federal programs when federal funds dried up. It was on this basis that he attacked the CETA program. However, if the county's policy is to drop a federal program when federal dollars dry up, how can a judiciary get itself into a position where it wants more money and wants



to retain CETA employees while the rest of the county doesn't? How can it ask for different treatment?

#### 6. Trade-Offs

The meeting explores some interesting trade-off issues ranging from ways to deal with space and microfilming to alternative ways of handling litigation. The meeting concludes, however, with the requestors wanting \$105,000 and the county government allowing only \$85,000. Someone must come up with a better package than presented so far. Even though there are mandated expenses required by the Legislature, there are also mandated equities among county units of government (of which the courts are viewed as one). Far more trade-offs must be explored and seriously considered before a satisfactory resolution can develop.

#### B. Personnel Management

The personnel hypothetical developed for the workshop required a specific example and scenario to help attendees understand the range of issues and problems represented in the written materials. The major themes depicted in the tape and illustrated in the written materials are:

- (1) The quick descent into extreme difficulty during a performance appraisal. The court executive is trying to play "Joe Cool" but somehow his behavior becomes outrageous although characterized by a well-meaning, but bumbling, foolishness.
- (2) The extreme complexity that happens every day in courthouses attempting to develop new programs, especially in the personnel field.

The tape provides an opportunity to see the kinds of mistakes clustered together into a compressed twenty-minute presentation, that can be made in instituting a performance appraisal system. The tape is a comedy of errors leading to undesired results performed by a well-intentioned court administrator who is not too bright, who is perhaps too much guided by outside experts in the field of personnel management and who is not sufficiently

knowledgeable to conduct the interviews in a sound way or even to set up the entire program change on a solid foundation.

There is a definite misapplication of knowledge from personnel fields and essentially the court administrator is attempting to apply knowledge about personnel management in a highly technocratic style. He has taken ideas methodically and purposefully with good intentions, and then applies them in an organization without much feeling for the underlying consequences that will affect the informal human relations that exist in the organization. The court administrator fails to realize the extent of the judge/assignment clerk relationship and how pervasive that relationship is and how deeply it affects the employee. He also fails to realize that the relationships among the judges can become strained by relationships between court administrators and assignment clerks.

Despite the problems resulting from this misapplication of personnel management principles, there is a fundamentally fair question being asked on the tape: how can we try something new in employee relationships? How can we mix good and bad news about performance evaluations of a specific employee? How can we open up the relationship to healthy criticism without completely upsetting the entire organization? These most difficult questions in personnel management underlie the entire videotape presentation and make for great difficulty for those who accept the fact that there is a great deal of knowledge and insight that one can gain by applying the better ideas available in the field of personnel management.

In addition to these fundamental management issues, other questions are raised regarding personnel relations, evaluation and behavior. Can we be honest in employee relations? Can we appraise without a written job description? How should change be commenced in a court system, especially

change that involves the evaluation of employee behavior? How much secrecy can be allowed because employees cannot have all that they want that is in their files? How can secrecy affect the appraisal process? The comment made about the "one big happy family" is a perfect illustration of sexist comments by a court administrator who has basically a sexist orientation toward employees. He may be substituting his own father-figure image in his own mind for that of the judge who frequently plays the father-figure image in court employee relationships. Although the appraisal process tries to build trust, it can, in fact, be used to destroy trust as it does in the tape. Finally, there is a confusion resulting from the expectations of a variety of sources and this confusion is reflected in the employee's concept of her role and relations with the lawyers who criticize her performance, her fellow workers, the court administrator, the judge. The court administrator is in a very difficult position when he tries to weave these various expectations into the performance appraisal process he is conducting. The entire interview descends very rapidly into a threatening posture:

"Do you have complaints about me?"

"I have something in writing on you and I'm not going to share it with you except in a general way."

"Not having a job description does make it difficult to perform employee appraisals."

"It might seem like the criticism is fuzzy about the way you do things but I don't have anything better."

"You should take the criticism of your work to heart because we do want to have one big happy family here."

"So what if your feelings are hurt because we are really trying to build an objective process and one that helps you and creates more trust between employers and employees."

"All the employees work for me." (and yet, later, the court administrator is told that the judge can pull the rug out from under him and not allow him to conduct performance appraisals of his employees)

"I am confused about my job here more so than ever."

The videotape demonstrates the different perspectives regarding the purpose and value of an employee performance appraisal -- from the employee's viewpoint, the court administrator's, the judge's. It also raises the question of who should be involved in the evaluation: the supervisors? the judges? the court administrator? In any event, employee problems should be dealt with when they occur. Moreover, it is extremely difficult to keep the performance appraisal process objective and non-threatening and it is extremely difficult to convey bad news to anybody, whether they are an employee or a friend. The process subjects itself and the participants to great stresses which produce outcomes that are often hard to predict.

#### V. SUMMARY

The Workshop Program was a product of many individuals and reflected a cooperative work effort begun a number of months ago. Interest in the topics addressed had been generated long before the program was conducted. Indeed, the heavy involvement of NATCA and NACA members in planning the program and conducting the sessions in large part explains the success which the sessions had. Although a variety of educational techniques were woven into the Workshop Program, perhaps the most effective technique for stimulating discussion and dramatizing key issues was the videotape presentations. The capability of the videotape as a device for training and for bringing individuals of diverse backgrounds and interests together quickly and effectively was particularly well suited to the complex material presented in the financial and personnel problems. However, no educational device should be overused and the mix of problem approaches and workshop formats undoubtedly accounts for the high level of interest which the sessions appeared to command.

If the program is conducted again, certain modifications might be made in the problem scenarios to make them more applicable to specific subgroups

represented at the Conferences. Workshop leaders have been asked to make suggestions in this regard and their comments, together with the participant evaluations and post-conference assessments, should provide a useful guideline for educational program planning in the future.

What will be the long-term value of the Program? It is impossible to measure. The educational program format and materials appeared to be well received by the conferees. Interest in the program was consistently high -- even among experienced court administrative staff -- and several of the attendees have inquired into the possibility of replicating the sessions for court administrative staff in their home states. In terms of future behavioral change in the participants -- a criteria by which many educators measure the success of their efforts -- no conclusions can be given. The type of problem analysis and problem solving skills which the program sought to develop requires a long educational process. Many attendees have already had a strong foundation; others were beginning. Regardless of the various experience levels of the participants, it appears that this educational program made a contribution to their professional development and may in many cases have some affect upon the way local court systems are managed.

APPENDIX A

WORKSHOP LEADERS

1. NACA Conference
2. NATCA Conference

NACA CONFERENCE

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NACA CONFERENCE  
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NATCA CONFERENCE

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Allan D. Hamilton (Finance)  
Court Administrator  
Superior Court, Eastern  
Judicial Circuit of Georgia  
Room 311, 133 Montgomery Street  
Savannah, Georgia 31401

John J. Hogan (Finance)  
Superior Court Administrator  
Rhode Island Superior Court  
250 Benefit Street, Room 506  
Providence, Rhode Island 02903

Robert Horey (Finance)  
Court Administrator  
Room 336  
Palm Beach Courthouse  
West Palm Beach, Florida 33401

Dennis E. Howard (Personnel)  
Ninth Judicial District Court  
Administrator  
Minnesota Supreme Court  
Beltrami County Courthouse  
Bemidji, Minnesota 56601

Wilbur McDuff (Records)  
Executive Officer  
Circuit Court  
Room 700 Dade County Courthouse  
73 West Flagler  
Miami, Florida 33130

Julia Newman (Finance)  
District Administrator  
14th Judicial District  
Moffat County Courthouse  
Craig, Colorado 81625

Kenneth Palmer (Records)  
Judicial Planning and  
Evaluation Administrator  
Supreme Court  
Supreme Court Building,  
Sub-Basement  
Tallahassee, Florida 32304

Charles H. Starrett, Jr. (Finance)  
Court Administrator  
Court of Common Pleas of  
Allegheny County  
621 City-County Building  
Pittsburgh, Pennsylvania 15219

Jack Thompson/Gordon Allison (co-leader) (Personnel)  
Court Administrator  
Fulton Co. Superior Court  
136 Pryor St., S.E., Room 707  
Superior Courthouse  
Atlanta, Georgia 30303

Clyde Webber (Personnel)  
Clerk of Court  
7th Judicial District  
Parish of Concordia  
P.O. Box 790  
Vidalia, Louisiana 71373

Frank Zolin (Personnel)  
Executive Officer  
Los Angeles Superior Court  
220 Courthouse  
111 North Hill Street  
Los Angeles, California 90012

APPENDIX B

EDUCATIONAL PROGRAM GUIDE

NACA  
NATCA

BEST AVAILABLE COPY

NATIONAL ASSOCIATION FOR COURT ADMINISTRATION  
EDUCATIONAL PROGRAM  
GUIDE

TUESDAY - JULY 10, 1979

1:00 - 3:00 Opening Group Session Room  
Edward McConnell - 1:00 - 1:45 Gulf-to-Bay  
Robert Tobin - 1:45 - 2:00 Banquet\*  
Ernest Short - 2:15

WEDNESDAY - JULY 11, 1979 RECORDS MANAGEMENT

9:00 - 12:00 Workshops

Leader

1. David Cable - Saginaw, Mich. (M/S)\*\* Gulf Side  
2. G. Terry Aragon - Boulder, Colo. (L) \*\*\* Bay Side  
3. Ruth Hodapp - St. John, Missouri & Betty Smith - Littleton, Colo. (M/S) Gulf Side  
4. Joan Ragan - Clayton, Missouri (M/S) Bay Side  
5. John Delaney - Kettering, Ohio & Marilyn Seibert - Kettering, Ohio (M/S) Seascope Lounge  
6. William O'Leary - Phoenix, Ariz. (L) Roof Garden Restaurant

THURSDAY - JULY 12, 1979 FINANCIAL MANAGEMENT

8:30 - 11:30 Workshops

Leader

Room

1. James Farrar - Grand Rapids, Mich. (L) Seascope Lounge  
2. Joyce Allen Sizer - Westminster, Colo. & Lana Hanrahan - Broomfield Hills, Mich. (M/S) Gulf Side  
3. John Minor - Odessa, Texas (M/S) Roof Garden Rest.  
4. Lewis Collins - St. Louis, Mo. (L) Bay Side  
5. Lorraine Nelson - Bellevue, Wash. (M/S) Gulf Side  
6. Rosemarie Storey - St. Louis, Mo. (L) Bay Side

FRIDAY - JULY 13, 1979 PERSONNEL MANAGEMENT

9:00 - 12:00 Workshops

Leader

Room

1. Randy Kirkland, Orlando, Fla., and Curtis Powers, Gainesville, Fla. (L) Roof Garden Rest.  
2. Ben K. Wright - Rocky River, Ohio (L) Gulf Side  
3. Joanne Cantrill - Fairborn, Ohio (M/S) Bay Side  
4. Deborah Lee - Longmont, Colo. (M/S) Bay Side  
5. Todd Barton - St. Joseph, Michigan (L) Gulf Side  
6. Byron Kane - San Francisco, Calif. (M/S) Seascope Lounge

2:00 - 3:00 Summary: Workshop Observations  
David J. Saari  
Joint Educational Session NACA  
and NATCA

Gulf-to-Bay  
Banquet

Alternate Workshop Leader: Jo Wycoff - Flagstaff, Ariz.

\* Gulf-to-Bay Banquet room splits into the Gulf Side and Bay Side rooms.

\*\* L - Courts in Large Jurisdiction

\*\*\* M/S - Courts in Medium and Smaller Jurisdiction

**NATIONAL ASSOCIATION OF TRIAL COURT ADMINISTRATORS  
EDUCATIONAL PROGRAM  
GUIDE**

**TUESDAY - JULY 10, 1979**

12:45 - 2:30	Opening Group Session	<u>Room</u>
12:45 - 1:30	Chesterfield Smith	Sandcastle Ballroom *
1:30	Ernest Short - Records	
2:00	Robert Tobin - Finance & Personnel	

**WEDNESDAY - JULY 11, 1979 FINANCIAL MANAGEMENT**

9:00 - 12:00 Workshops

<u>Leader</u>		<u>Room</u>
1. Robert Horey - West Palm Beach, Fla.	(M/S)**	Kings Court
2. John Hogan - Providence, R.I.	(L)***	Lido 1
3. Gordon Griller - St. Paul, Mn.	(L)	Lido 2
4. Julia Newman - Craig, Colo.	(M/S)	Knights Lounge
5. Allan Hamilton - Savannah, Ga.	(M/S)	Sarasota 1
6. Charles Starrett - Pittsburg, Pa.	(L)	Sarasota 2

\* Sandcastle Ballroom splits into the Lido and Sarasota rooms.

\*\* M/S - Courts in Medium and Smaller Jurisdiction

\*\*\* L - Courts in Large Jurisdiction

**THURSDAY - JULY 12, 1979 PERSONNEL MANAGEMENT**

9:00 - 12:00 Workshops

	<u>Leader</u>		<u>Room</u>
1.	Clyde Webber - Vidalia, La.	(M/S)	Sarasota 1
2.	Jim Arnold - Anchorage, Alaska	(M/S)	Knights Lounge
3.	Nancy Hall - Oakland, Calif.	(L)	Kings Court
4.	Frank Zolin - Los Angeles, Calif.	(L)	Lido 1
5.	Gordon Allison - Phoenix, Ariz. & Jack Thompson - Atlanta, Ga.	(L)	Lido 2
6.	Dennis Howard - Bemidji, Minn.	(M/S)	Sarasota 2

**FRIDAY - JULY 13, 1979 RECORDS MANAGEMENT**

10:00 - 1:00 Workshops

	<u>Leader</u>		<u>Room</u>
1.	Wilbur McDuff - Miami, Fla.	(L)	Lido 1
2.	Stan Collis - Oakland, Calif.	(L)	Sarasota 1
3.	Ken Palmer - Tallahassee, Fla.	(L)	Lido 2
4.	Robert L. Frye - Eau Claire, Wisc.	(M/S)	Sarasota 2
5.	Jacque Alexander - Little Rock, Ark.	(M/S)	Kings Court
6.	Paul Kester - Doylestown, Penna.	(M/S)	Knights Lounge

2:00 - 3:00	Summary: Workshop Observations David J. Saari Joint Educational Session NACA and NATCA	Gulf-to-Bay Holiday Inn Lido Beach
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Alternate Workshop Leaders: Frank Habershaw - Tallahassee, Fla.  
Lewis P. Stephenson - Seattle, Wash.  
Al Szal - San Diego, Calif.

APPENDIX C

WORKSHOP EVALUATIONS

NACA: Financial Management  
Personnel Management  
Records Management

NATCA: Financial Management  
Personnel Management  
Records Management

FINANCIAL MANAGEMENT WORKSHOP EVALUATION

NATCA CONFERENCE

Jurisdiction of your court:

\_\_\_ Limited

Number of judges in your court \_\_\_

\_\_\_ General

Number of nonjudicial staff in  
your court \_\_\_

\_\_\_ Unified (Limited and General)

20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	3	2	1
Excellent				Very Good				Satisfactory				Unsatisfactory							

For items 1-4, please write the appropriate number in the box after the question.

1. How relevant was the total content of the program to your needs and interests? The term total content refers to support material as well as the presentation.

2. How useful do you expect the total content of the program to be for you back on the job?

3. How useful do you expect the total content of the program to be for you in developing your career.

4. What is your overall impression of the program?

PERSONNEL MANAGEMENT WORKSHOP EVALUATION

NATCA CONFERENCE

Jurisdiction of your court:

Limited

Number of judges in your court

General

Number of nonjudicial staff in your court

Unified (Limited and General)

20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	3	2	1
Excellent				Very Good				Satisfactory				Unsatisfactory							

For items 1-4, please write the appropriate number in the box after the question.

1. How relevant was the total content of the program to your needs and interests? The term total content refers to support material as well as the presentation.
  
2. How useful do you expect the total content of the program to be for you back on the job?
  
3. How useful do you expect the total content of the program to be for you in developing your career.
  
4. What is your overall impression of the program?



RECORDS MANAGEMENT WORKSHOP EVALUATION

NATCA CONFERENCE

Jurisdiction of your court:

Limited

Number of judges in your court

General

Number of nonjudicial staff in  
your court

Unified (Limited and General)

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	3	2	1
Excellent				Very Good				Satisfactory				Unsatisfactory							

For items 1-4, please write the appropriate number in the box after the question.

1. How relevant was the total content of the program to your needs and interests? The term total content refers to support material as well as the presentation.

2. How useful do you expect the total content of the program to be for you back on the job?

3. How useful do you expect the total content of the program to be for you in developing your career.

4. What is your overall impression of the program?

FINANCIAL MANAGEMENT WORKSHOP EVALUATION

NACA CONFERENCE

Jurisdiction of your court:

Limited

Number of judges in your court

General

Number of nonjudicial staff in  
your court

Unified (Limited and General)

20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	3	2	1
Excellent				Very Good				Satisfactory				Unsatisfactory							

For items 1-4, please write the appropriate number in the box after the question.

1. How relevant was the total content of the program to your needs and interests? The term total content refers to support material as well as the presentation.

2. How useful do you expect the total content of the program to be for you back on the job?

3. How useful do you expect the total content of the program to be for you in developing your career.

4. What is your overall impression of the program?

PERSONNEL MANAGEMENT WORKSHOP EVALUATION

NACA CONFERENCE

Jurisdiction of your court:

\_\_\_ Limited

Number of judges in your court \_\_\_

\_\_\_ General

Number of nonjudicial staff in  
your court \_\_\_

\_\_\_ Unified (Limited and General)

20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	3	2	1
Excellent				Very Good				Satisfactory				Unsatisfactory							

For items 1-4, please write the appropriate number in the box after the question.

1. How relevant was the total content of the program to your needs and interests? The term total content refers to support material as well as the presentation.

2. How useful do you expect the total content of the program to be for you back on the job?

3. How useful do you expect the total content of the program to be for you in developing your career.

4. What is your overall impression of the program?

**RECORDS MANAGEMENT WORKSHOP EVALUATION**

**NACA CONFERENCE**

**Jurisdiction of your court:**

Limited

Number of judges in your court

General

Number of nonjudicial staff in  
your court

Unified (Limited and General)

20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	3	2	1
Excellent				Very Good				Satisfactory				Unsatisfactory							

For items 1-4, please write the appropriate number in the box after the question.

1. How relevant was the total content of the program to your needs and interests? The term total content refers to support material as well as the presentation.

2. How useful do you expect the total content of the program to be for you back on the job?

3. How useful do you expect the total content of the program to be for you in developing your career.

4. What is your overall impression of the program?

APPENDIX D

POST CONFERENCE ASSESSMENT

NACA  
NATCA

**EDUCATIONAL WORKSHOP EVALUATION  
MACA CONFERENCE**

July 1979

**Jurisdiction of your court:**

- \_\_\_\_\_ Limited  
 \_\_\_\_\_ General  
 \_\_\_\_\_ Unified (Limited and General)

Number of judges in your court \_\_\_\_\_

Number of nonjudicial staff  
in your court \_\_\_\_\_

Years of experience in court administration \_\_\_\_\_

20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	3	2	1
Excellent					Very Good					Satisfactory					Unsatisfactory				

For items 1-4, please write the appropriate number in the box after the question.

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5. What was particularly worthwhile about the program? Why?

Financial: \_\_\_\_\_  
 \_\_\_\_\_

Personnel: \_\_\_\_\_  
 \_\_\_\_\_

Records: \_\_\_\_\_  
 \_\_\_\_\_

**EDUCATIONAL WORKSHOP EVALUATION**  
**NATCA CONFERENCE**

July 1979

Jurisdiction of your court:

- \_\_\_\_\_ Limited  
 \_\_\_\_\_ General  
 \_\_\_\_\_ Unified (Limited and General)

Number of judges in your court \_\_\_\_\_  
 Number of nonjudicial staff in your court \_\_\_\_\_

Years of experience in court administration \_\_\_\_\_

20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	3	2	1
Excellant					Very Good					Satisfactory					Unsatisfactory				

For items 1-4, please write the appropriate number in the box after the question.

- |   |                          |                          |                          |                          |
|---|--------------------------|--------------------------|--------------------------|--------------------------|
|   |                          | <b>FINANCIAL</b>         | <b>PERSONNEL</b>         | <b>RECORDS</b>           |
| 1. How <u>relevant</u> was the total content of the program to your needs and interests? The term total content refers to support material as well as the presentation. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. How <u>useful</u> do you expect the total content of the program to be for you back on the job?  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. How <u>useful</u> do you expect the total content of the program to be for you in developing your career?  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. What was you overall impression of the program?  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

5. What was particularly worthwhile about the program? Why?

**Financial:** \_\_\_\_\_  
 \_\_\_\_\_

**Personnel:** \_\_\_\_\_  
 \_\_\_\_\_

**Records:** \_\_\_\_\_  
 \_\_\_\_\_

**END**