

Judicial Information Systems Council Meeting (JIFFY)
Odyssey Steering Committee (OSC)
Meeting Minutes
Judicial Information Division (JID)
Thursday, January 17, 2013
9:36 - 11:46 a.m.

JIFFY Voting Members Present:

Judge Michael Bustamante, Chair
Judge Karen Mitchell, Vice Chair
Judge Stan Whitaker
Judge Camille Martinez-Olguin (video)
Judge Judith Nakamura
Greg Ireland
Tobie Fouratt
Robert Mead
Judge Alan Kirk
Judge Richard Knowles (phone)
Dennis Jontz (video)

Guests Present:

Oscar Arevalo
Orlando Ulibarri (video)
Deb Williamson
Bill Hopkinson
Nick Behrmann
Karen Janes
David Torres
Jamie Goldberg
Frank DiMaggio (video)
Theresa Delgado (video)

Non-Voting Members Present:

Chief Justice Petra Jimenez-Maes
Steve Prisoc
Artie Pepin
Renee Cascio

OSC Members Present:

Judge Sharon Walton
Arlene Baca
Wendy Jones
Michelle Jones (video)
Marlin Mackey

JID Staff Present:

Grace Catanach
Annie Hall
Suzanne Winsor
Pat Mente

I. Approval of Agenda: Judge Bustamante called the meeting to order at 9:36 a.m. The agenda was accepted as presented.

II. Budget and Revenue:

JID Revenue Pipeline. Oscar Arevalo reported that revenue is down but the hope is that collections will return to normal in the months ahead. Revenue is down in part due to Fiscal not having received the MVD transfer as of yet. Mr. Arevalo referred to the handout sheet entitled "Fund 1100 (SCAF) All Sources (SCAF Reg, \$10 Civil and Red Light)" and explained that it has been necessary to dip into the SCAF regular fund balance. Revenue for December is 1.5 million and 1.9 million has been spent and the thought is that when the transfer comes from MVD that will balance out the difference. Fund balances at the end of December with the red light camera funds is showing 1 million. Mr. Arevalo cautioned that

the only money spent should be on critical expenditures. To date, cash obligations have been met.

- Artie Pepin pointed out in a positive light, E-filing has paid for itself and should continue to do so in the future.
- Mr. Arevalo reported that LFC recommended \$349,600 for the statewide automation fund which will completely cover building leases and some additional salary benefits while DFA's recommendation was \$177,000 for the same request.
- Overall for the AOC, LFC's recommendation is approximately \$600,000 higher than DFA.
- Both DFA and LFC recommended the Odyssey update requests for Metro Court and the Court of Appeals which totals approximately \$530,000.
- DFA recommended in special appropriations \$1,700,000 for IT equipment with \$600,000 slated for the First Judicial District.
- There is General Fund money in the Capital Bill totaling \$1,393,000 for purchases of furniture and security equipment.

III. Odyssey Steering Committee. Judge Mitchell welcomed the OSC members to the combined JIFFY and OSC meeting. Judge Mitchell reported that all of the FACTS courts have been converted to Odyssey one year ahead of schedule and under budget. Judge Mitchell stated that the success of the project was in part due to JEC helping with the training budget, the courts cooperation regarding staff training and the numerous hours the JID staff worked in order to make this project a success.

- Marlin Mackey presented the Odyssey Steering Committee Case Management report. Mr. Mackey referred to the handouts entitled "Odyssey Case Management Project Statewide Rollout-Project Hours" and "Budget vs Actual, Project Life and Project to Date". Metro Court has been tracked since July of 2010. Metro has used 7285 hours of their 11,414 budget hours. The 4129 remaining is thirty five percent of the total left to complete the criminal part of their rollout. In response to Greg Ireland's question regarding Metro Courts' hours being significantly more than the district courts, Mr. Mackey explained that more customization was needed in Metro Court than in the district courts. Renee Cascio added that some of Metro Court's enhancements which have not been implemented in the other courts, will be useful for the entire court system. Mr. Mackey reported that the total cost for the Odyssey project is approximately \$11.9 million. Recent contracts with other states which have implemented the Tyler product are approximately \$30 million.
- Mr. Mackey referred to the handout entitled "Odyssey Parking Lot List - January 15, 2013". Mr. Mackey and Ms. Cascio summarized progress to date, on each of the items on the Priority 1 grouping. One example was the demo of Session Works for judges that was set up outside of the JIFFY meeting room for the members to examine and try out. Mr. Mackey pointed out that the cost to the courts for hardware to run Session Works would be between \$1000-\$1400 per device. All E-filing for civil and probate is set to be completed by Monday, March 25, 2013. The maintenance for the Odyssey system was completely

covered by the filing charges which Mr. Mackey anticipates will also be the case in 2013.

Action Item: Marlin Mackey to test current products on the market which would enable judges who do not possess an iPhone or iPad the ability to download their calendars onto phones such as Droids. Mr. Mackey will report his findings at the next meeting.

IV. Odyssey Success Factors and Lessons Learned. Judge Mitchell referred to the Handout entitled “Odyssey Success Factors”. Judge Mitchell stated that one of the overriding factors contributing to the success of the Odyssey project was that the legacy FACTS, was not adequate. As a result of this, the user community was ready for a change and was open to learning the Odyssey program. Judge Mitchell pointed out that usually projects of this size only have a twenty five percent success rate and if they are successful, end up taking longer and costing more than the initial projection.

- Karen Janes pointed out that court staff were asked for their ideas which gave them a voice in the choices made and were given demonstrations of the program before implementation.
- Judge Bustamante stated that overall, staff were very good at controlling the plan and creating a template that could be followed. Judge Bustamante noted that the ability to maintain consistent staffing, along with excellent management of the project from the top down, were key to the success of the Odyssey project. Judge Bustamante complemented Marlin Mackey and Tom Edwards for consistently encouraging staff and always insisting on full disclosure without blame.
- Artie Pepin stated that if he were to do the project over again, he would build in to the budget and appropriation request an expansion of staff by twenty percent.
- Mr. Prisoc explained that part of the luck was a result of the fact that Tyler had just developed the product and because of the recession they did not have the number of contracts that they have today.
- Ms. Cascio attributes much of the success of the project to John Todd who was very knowledgeable about how the application worked. As a result of this, he was able to give the business analysts at JID enough information to do more of the vendor work such as mapping and configuration. This was a plus because JID is the ongoing support team for the program.
- Mr. Pepin explained that it is necessary to take an active role in the choice of the vendor’s project manager as well as the internal project manager.
- Judge Mitchell stated that it is important to do an open, honest risk assessment before beginning any new project. Judge Mitchell cited the scope creep as a risk to major projects.
- Chief Justice Maes stated that the training of the court staff was done in a way that gave them the support, encouragement and confidence to believe that they had the ability to master the program. Employing other clerks to assist with the rollouts was another way for the clerks to observe that others had become

competent in learning Odyssey. Involving the users in the selection process of the product and not just accepting the whole package as was the case with FACTS allowed the court staff to feel that they had some say in the process. The Supreme Court was very supportive of the implementation of the Odyssey project. Chief Justice Maes expressed her appreciation of the JID staff, the members of JIFFY and all of court staff throughout the state.

V. IV & V. Nick Behrmann explained that the role of IV & V is to help with risk management in the areas of anticipation, identification and mitigation. Mr. Behrmann identified the three risk factors for Metro Court as: 1) Odyssey not meeting Metro's needs, 2) the implementation schedule and 3) the transition to operations. Mr. Behrmann pointed out that the largest risk is that of transition to operations. Finally, he noted that it is time to look at the statewide implementation and all of the integration that is needed in order to make the Metro project successful.

- Judge Nakamura mentioned that two more people had been hired specifically to work on Odyssey.
- Judge Walton expressed her appreciation to Judge Nakamura for being a great leader at Metro, and noted that she would be missed. Judge Nakamura will be transferring to the Second Judicial District.

VI. Odyssey Judges User Group & Charge Code Sub-Committee. Judge Mitchell discussed progress made by the Charge Code Sub-committee and commented on the following:

- The AODA's office does not wish to create a generic or open charge code even though they are aware of the magistrate courts' need for it at this time. The agreement at the Charge Code Committee meeting was to add a G at the end of codes in order to distinguish them as generic. This would allow clerks to take in a complaint without having to make a determination as to the exact charge under which it should be filed. The OJUG committee determined that initially it would be possible to sentence on those open charges, except in cases such as DWI. Open count charges would be examined and reports would be run to determine how often these charges are being utilized, and what districts have the highest numbers of open charges and why. Judge Mitchell pointed out that the law allows for open count charges and that it is not necessary to have a subsection in a charging document, however the charge code used by DA's requires having subsections.
- The Charge Code Sub-committee agreed to make the Odyssey charge code table styling consistent with the AODA's table with regard to capitalization and letters. All significant words in a charge would be capitalized. An example of this would be *Driving While License Suspended or Revoked* and all words would be capitalized except for the word or.

Judge Mitchell moved that JIFFY approve creating generic codes as appropriate for charges. Judge Nakamura seconded. No opposition noted. Motion carried.

V. CIO Report. Steve Prisoc presented the handout entitled "CIO Report for January 17, 2013".

Mr. Prisoc congratulated Judge Nakamura on her move to the 2nd district, thanked Renee Cascio, Marlin Mackey and Tom Edwards for their contributions to the success of the Odyssey project.

Action Item: Artie Pepin requested that the members of JIFFY read the article located at New Mexico Courts (inside) website entitled “NCSC Limited Workload Study Final Report” before the next JIFFY meeting and a discussion of the article will be added to the next JIFFY agenda.

VI. Purchase Requests. Mr. Prisoc reported that JID / AOC will be purchasing \$45,000 worth of monitors and video codecs for the 1st district’s new building. The First Judicial district will reimburse JID for \$45,000 following the Legislative Session. JID is also providing telecommunications support in order for both court locations to remain functional during the move and to test all of the equipment in the new building. JID will be providing consulting and troubleshooting as well as two servers which will allow the 1st district to operate in two locations simultaneously.

VII. Review and Approval. Judge Bustamante stated that he will leave the Odyssey Steering Committee (OSC) structure intact. There will be some personnel changes and it will no longer be necessary for OSC to meet on a monthly basis.

VIII. Future Meetings. The next meeting will be held on February 21, 2013, 9:30 a.m. at the Judicial Information Division.

IX. Adjourn. Judge Bustamante adjourned the meeting at 11:46 a.m.