



Georgia Commission on Dispute Resolution Meeting *(Virtual)**

Wednesday, August 9, 2023

2:30 – 4:00 p.m.

AGENDA

- I. Welcome: Chief Judge M. Cindy Morris
- II. Recognition of GODR Summer Intern Bradley Tyer Jones
- III. Roll call
- IV. Meeting Minutes from May 3, 2023: *Approved via email*
- V. Standing Committee Reports:
 - a. Budget and Personnel Committee: Judge Clarence Cuthpert, Jr.
 - b. Ethics Committee: Judge Renata Turner
 - c. Training and Credentials Committee: Ms. Melissa Heard & Ms. Nicole Hull
 - d. Outreach Committee: Mr. Hal Gray, Esq.
 - e. DV Rules Committee: Ms. Peggy Wilson
- VI. GODR Report: Ms. Tracy Johnson & Ms. Karlie Sahs
 - a. 2023 Neutral Registration Renewal
 - b. 2023 Training Renewals
 - c. Data Collection Plan
 - d. ADR Institute – November 16
 - e. Program Directors' Conference – November 15-17
 - f. Strategic Projects update
 - g. Upcoming conferences:
 1. Georgia Council Court Administrators – September 24-27
 2. Program Directors' Conference – November 15-17
 3. ADR Institute – November 16
- VII. New Business: Action Item
 - a. Revisions to Appendix C, Chapter II
 - b. Probate Court Mediation Implementation Plan & Budget
- VIII. Chairman's Report: Chief Judge Morris
 - a. GCDR Succession Plan
 - b. November 29th Strategic Planning Session
- IX. Old Business
- X. 2023 Commission Dates: November 29 @ the State Bar of Georgia *(in person)*
- XI. Adjournment

*Please send an email to gaodr@georgiacourts.gov no later than COB on August 8, 2023, for the zoom information.



Georgia Commission on Dispute Resolution Meeting Minutes Wednesday, August 9, 2023

Chair M. Cindy Morris called the meeting to order. In addition to Chief Judge Morris, Commission members and Office staff present were:

Chief Judge Clarence Cuthbert Jr.; Mary S. Donovan, Esq.; Presiding Judge Sara L. Doyle; Herbert H. (Hal) Gray III, Esq.; Nicole W. Hull, Esq.; Representative Rob Leverett; Judge Carrie B. Markham; Judge Pandora E. Palmer; Judge Vic Reynolds; Judge Renata D. Turner; and Peggy McCoy Wilson.

Tracy B. Johnson, Executive Director; and Karlie A. Sahs, Deputy Director.

JC/AOC staff members present were Carole Collier, Esq., Staff Attorney; Shimike Dodson, Assistant Director of Research; Stephanie Hines, Judicial Services Division Director; and Kristy King, Information Technology Program Manager.

The following guests observed: Lynn Ansley, 7th District Court Administrator; Abby Carter, Gwinnett Courts ADR Program; Tina Cloud, Fulton County Juvenile Court ADR Program; Lakesiya Cofield, Fulton County ADR Program; Melissa Coston, Columbia ADR Program; Linda Jezerinac, 7th JAD ADR Program; Libby Le Tourneau, Chatham County Juvenile Court; Rebecca Lew, Cobb County Superior Court ADR Program; Valerie Lyle, 9th JAD ADR Program; Pam Manning, The Mediation Center of the Coastal Empire; Alisha Markle, Chatham County Juvenile Court; Lindsay Mobley, Coweta County ADR Program; Liesl Owen, Sixth Judicial Administrative District ADR Program; Carlene Redmond, Cobb Judicial Circuit Juvenile Court ADR Program; Kathleen Sterne, Esq., Clayton Judicial Circuit ADR Program; Senior Judge James Tuten, Brunswick County ADR Program; Bradley Tyer Jones, former GODR Intern; Joshua Weeks, Conasauga Juvenile Court; Brittany Whaley, 7th JAD ADR Program; and Charity Williams, 7th JAD ADR Program.

I. Welcome

Chief Judge Morris called the meeting to order at 2:30 p.m.

II. Recognition of GODR Summer Intern Bradley Tyer Jones

Ms. Karlie Sahs recognized Bradley Tyer Jones for her time assisting the Office/Commission.

III. Roll Call of GCDR Members

Chief Judge Morris asked Ms. Sahs to conduct a roll call of all GCDR members.

IV. Meeting Minutes from May 3, 2023: *Approved via email*

The minutes of the May 3 Commission meeting were approved prior to the meeting via e-mail vote on June 2, 2023.

V. Standing Committee Reports:

a. Budget and Personnel Committee: Chief Judge Clarence Cuthpert, Jr.

Budget documents were included in the meeting materials. Chief Judge Cuthpert provided a review of the fiscal year-end report (from July 1, 2022, through June 30, 2023).

Revenue funds were significantly more than the previous fiscal year. However, the expenditures continue to exceed the revenue in an intentional attempt to spend down reserves through strategic projects [these correspond to the GCDR Strategic Plan]. An updated budget report for the FY24, which includes continued funding for the strategic projects, will be reported at the November meeting.

No further budgetary issues or personnel matters were noted.

b. Ethics Committee: Judge Renata Turner

The Committee on Ethics last met on April 10, 2023. Judge Turner provided a review of the 2023 Ethics matters to date.

The Committee has received eight (8) complaints. Of these, two (2) have been dismissed and six (6) complaints are currently under investigation and pending Committee review. The Committee also received six (6) applications requiring Committee review. Of these six (6) applications, five (5) have been approved and one (1) is pending review.

There are no pending appeals at this time.

The Ethics Committee will meet next on August 14, 2023.

c. Training and Credentials Committee: Ms. Nicole Hull, Esq.

The Training and Credentials Committee met on July 28, 2023, and considered two (2) appeals, both requesting of an extension of the registration timeline. Both requests were granted. With the exception of completing the practicum requirements, these applicants had completed the remaining training requirements for the categories they sought registration in. Due to a mix of personal matters and a confusion over the requirements to finalize their registration with the GCR, they did not meet the deadline to register. The applicants were allotted 90 days to complete their practicum requirements and register with the GCR.

Ms. Hull shared that the Committee approved a change to the effective date for registration of those interested in registration in the Probate Mediation category. Details of the Probate Mediation Implementation Plan were presented to the Commission for a vote under the meeting agenda Action Items.

Ms. Hull further reported that, at its last meeting, the Committee reviewed and approved a request for an exception to the requirement for primary trainers

outlined in the Training Program Guidelines. Further, the Committee is reviewing a request to expand applicable case types for the General Civil Mediation observation requirement.

In accordance with the Training Program Renewal Schedule, the 2023 training renewal includes Domestic Relations Mediation (training and practicum) applications. Training providers were notified on July 31, 2023, that the renewal process would begin October 1 and end December 29. There are currently eight (8) training providers for the Domestic Relations category (including practicum).

The Honorable Rebecca Crumrine Rieder (GCDR and Training & Credentials Committee member) has agreed to lead a working group to review the registration category of Early Neutral Evaluation for possible inclusion of other evaluative processes such as Judicially Hosted Settlement Conference and Late Case Evaluation.

The Committee's next meeting is scheduled for September 29, 2023.

d. Outreach Committee: Mr. Hal Gray

The Outreach Committee last met on July 24, 2023. Mr. Gray provided the following Committee updates:

1. ADR Program Director Orientations – For several years, the GODR Executive Director has traveled to meet with new court ADR program directors in person for an informal “orientation”. Tracy met with Ms. Shannon Watts in Valdosta on June 21 and will meet with Ms. Jan East in Dublin on August 21.
2. Following the GCDR approval of the *Filing Fee Policy* and *Policy on Maintaining Good Standing*, GODR published the Court Program Handbook – a comprehensive guide for new and existing programs – and made it immediately available to all court ADR program directors. Mr. Gray thanked Ms. Johnson and Ms. Sahs for their work on developing and publishing the material. The Court Program Handbook may be viewed [here](#).
3. Program Director Quarterly Meeting – These meetings are held quarterly and have been helpful in maintaining an open line of communication with programs, providing timely updates, and receiving feedback. The most recent meeting was held on June 14, 2023, via Zoom. A summary is provided to all program directors following each meeting, and a recording is sent upon request.
4. Conflict Resolution Week – The State Bar of Georgia Dispute Resolution Section is hosting a Mediation Day virtual event on October 19, during Conflict Resolution Week. Mr. Gray and Ms. Johnson will give a presentation on the Commission and its current initiatives.
5. 2023 Program Directors’ Conference – A change has been made to the previously planned one-day event for court ADR program directors; the group is now invited to participate in the first Probate Mediation training session November 15-17, 2023, at the State Bar of Georgia Conference Center.

Feedback from this event will be used to strengthen the curriculum before the general training will be offered in 2024. Ms. Sahs discussed details later in the meeting.

The Committee's next meeting is set for October 30, 2023.

e. Domestic Violence Rules Committee: Ms. Peggy McCoy Wilson

Ms. Johnson reported on behalf of Ms. Wilson. The Committee last met on May 15, 2023. Agenda items included the Online Screening Tool (OST) metrics and mediation in Temporary Protective Order (TPO) cases.

Ms. Johnson noted that, at the May 15 meeting, Committee members were provided with a report for the OST data collected from the period between October 5, 2022, and May 5, 2023. A trending increase in screening responses was noted (25,564 total), which indicates increased use of the GODR-hosted software. Committee suggestions were made to include "TRAINER DEMO" as an option for "County where case is filed", for the purposes of training demonstration without impact to county-related data. Also, updates to the "Submitted By" field were made where "plaintiff" is now "plaintiff/petitioner" and "defendant" is now "defendant/respondent". These updates are now live.

Ms. Johnson further noted that she and April Ross, Executive Director of the Georgia Commission on Family Violence, coordinated a meeting of the two Commissions to discuss the ongoing topic of mediation in TPO cases. The meeting was held earlier on the same day as the GCDR meeting. Attending for GCDR was Chief Judge Morris, Raye Rawls, and Peggy Wilson along with Ms. Johnson and Ms. Sahs. Attendees decided that the next step will be to research jurisdictions outside of Georgia to determine if this practice is happening in other areas and, if so, to evaluate what may be gleaned from their processes, procedures, and/or rules.

The Committee does not currently have any upcoming meetings scheduled.

VI. GODR Report: Ms. Tracy Johnson & Ms. Karlie Sahs

a. 2023 Neutral Registration Renewal

The 2023 neutral registration annual renewal period will open on October 1 and remain open through 12:00pm on December 31, 2023. The late renewal period for neutral registration is the following January 1 through February 28/29 (annually).

b. 2023 Training Renewals

The 2023 training renewal period will open on October 1 and remain open through December 29, 2023. This year, all approved Domestic Relations Mediation training programs will be required to apply for re-approval. The training renewal calendar through 2026 can be found on the GODR website here: <https://godr.org/trainers/>.

c. Data Collection Plan

The new data collection plan was previously approved by GCDR. GODR is working with JC/AOC to expand on this plan by creating a data dictionary. Those court ADR programs which are not using ScheduleADR (the GODR-supported case management system) will need to update their software and/or case management mechanism in order to ensure they are compliant with the data collection plan. The data dictionary will assist those programs' software developers in ensuring the data points match those in ScheduleADR.

Additionally, Ms. Johnson was saddened to announce the departure of Mr. Jeffrey Thorpe, JC/AOC Research Manager, who was previously assigned to GODR. Ms. Shimike Dodson has been named the JC/AOC Assistant Director of Research and, with the Stephanie Hines, JC/AOC Division Director, will be primary contact for the time being. Ms. Johnson thanked Mr. Thorpe for his assistance to GCDR/GODR over the last seven (7) years.

d. ADR Institute – November 16

The 30th Annual ADR Institute will be held on Thursday, November 16, 2023, at the State Bar of Georgia Conference Center. The agenda has been set, and GODR staff continues to update publications with session information as it is received by presenters.

Registration opened on August 1, and there is an early bird rate through the end of the month. Regular registration will be open from September 1 through November 5. There are currently 123 total registrations, with twice as many people registered for the livestream as in-person (as expected). A slight hiccup with the registration process was swiftly resolved by JC/AOC immediately following the opening of registration. Sponsorship opportunities also opened on August 1, and GODR has received commitments from three (3) groups (two diamond sponsorships and one silver).

Ms. Sahs recognized and thanked Kristy King (JC/AOC IT Program Manager); Jasmine Jackson (JC/AOC Front End Developer); and Kriste Pope (JC/AOC Information Systems Analyst) for their hard work and assistance with this event. Ms. Sahs also demonstrated both the registration page (<https://godr.org/adr-institute/>) and the event website (<https://www.adr-institute.com/>).

e. Program Directors' Conference – November 15-17

This year's Court ADR Program Directors' Conference (PD Conference) will be held on November 15 to 17, 2023, at the State Bar of Georgia Conference Center. There will be an overlap with the ADR Institute, which will happen on November 16 at the same location. The PD Conference will act as the first trial run of the full Probate Mediation training. GCDR Members were sent a survey and asked to indicate whether they were interested in attending the PD Conference or ADR Institute (or neither). Those who did not record their preference before the survey closed are asked to reach out to GODR as soon as possible so that the necessary accommodations can be made.

f. Strategic Projects Update

The current Strategic Project Plan covers 2021-2023. The Commission will meet on November 29, 2023, to discuss an updated plan for 2024-2026.

1. **Neutral Registration System:** Ms. Kristy King provided an update regarding the Georgia Courts Registrar (GCR) integration. GCR has migrated to AWS (Amazon Web Services), where other JC/AOC websites and programs are housed. JC/AOC's Information Technology team is preparing to solicit feedback for design and efficiency improvements.
2. **Court Outreach – Expansion and Enhancement:** GODR developed an implementation plan for the roll out of Probate Mediation, which was presented to the Commission for review and approval during New Business. The Probate Mediation Implementation Plan includes education and/or training for all stakeholders.

There are no new updates for Juvenile Court support.

3. **Case Management System:** This project has been completed.
Update: The total number of court ADR programs currently using ScheduleADR is 18. A few other programs are testing the system before deciding whether to adopt it. Any programs not using or testing ScheduleADR but interested in its use should reach out to Ms. Johnson.
4. **Public Education/Resources:** GODR's former intern, Mr. Onaolapo Obilade (fall 2021), had worked on developing public resources for the GODR website. The latest intern (summer 2023) intern continued this work by completing a comprehensive review of godr.org from four (4) perspectives: the general public, prospective registered neutrals, existing registered neutrals, and ADR training programs. This task was completed, and the information will be used to identify and fill information gaps. Additionally, Kennesaw State University professor and former GCDR member Dr. Timothy Hedeem has recently filmed mediation preparation videos for mediation participants. These videos are currently being edited and once finalized, will be shared with GODR for publication.
5. **Expansion of neutral services:** This project has been completed.
Update: There is an upcoming 1.5-hour, mediator-only child support calculator training scheduled for September 15. Additionally, GODR staff has been asked by the GA Child Support Commission to support their upcoming 3-hour child support guidelines, calculator, and income deduction order training scheduled for August 23 at the State Bar of Georgia Conference Center.
6. **Court Program Support:** The Court Program Handbook has been published, as mentioned during the Outreach Committee report. There are no other new updates.
7. **Statewide Partnerships:** There are no new updates to this project. However, Ms. Sahs asked Ms. Hull to share any developments with a

potential partnership with the GA Department of Education (GDOE). Ms. Hull explained that the GDOE is already using registered neutrals exclusively, but there is much to explore regarding the congruence of agency-specific interests.

8. **DV Rules and ADR Conference** were discussed earlier in the meeting. **Online Dispute Resolution, and Annual Report:** No new updates to report.

Case Management System, Expansion of Neutral Services, and UMA, and ADR Conference: Projects completed.

g. Upcoming Conferences

1. **Georgia Council of Court Administrators: September 24-27**
St. Simons Island: Ms. Johnson and Ms. Sahs will attend
2. **Program Directors' Conference: November 15-17**
State Bar of Georgia, Atlanta
3. **30th Annual ADR Institute: November 16**
State Bar of Georgia, Atlanta; <https://www.adr-institute.com/>

VII. New Business

a. Action Items

1. Revisions to Appendix C, Chapter II

During the Ethics Committee report, Judge Turner also presented the Committee's proposed revisions to the Supreme Court ADR Rules, Appendix C, Chapter II. She asked Ms. Carole Collier to provide a synopsis of the revisions.

Ms. Nicole Hull moved to adopt the revisions to Supreme Court ADR Rules, Appendix C, Chapter II as presented. Ms. Peggy McCoy Wilson seconded this motion. All present members voted in favor; Judge Turner held a proxy vote for absent GCDR member Mr. Patrick O'Connor, and Judge Morris held a proxy vote for absent GCDR member the Hon. Rebecca Crumrine Rieder.

These revisions will now be prepared for presentation to the Supreme Court of Georgia for their review and approval.

2. Probate Court Mediation Implementation Plan & Budget

Ms. Johnson presented the Probate Court Mediation Implementation Plan and Budget, which included preliminary timelines for education and outreach. GODR will sponsor five (5) trainings for mediator-participants put forth by the court ADR program directors. Each training will have a

maximum of 21 participants. The fee for the training will be significantly discounted to \$250, which will help offset GODR costs. The referring court ADR program may choose to cover the cost of this training in exchange for a pledge of pro bono hours. Mediators completing this training will be eligible for registration in the Probate Mediation category.

These trainings will be co-facilitated by Ms. Eleanor Crosby Lanier, who has been central to the development of this project, along with Barbara Koll, who developed such training many years ago for the Justice Center of Atlanta and successfully implemented a mediation program in the Probate Court of Fulton County. Existing trainers interested in becoming approved providers in the Probate Mediation category will be invited to take part in these trainings and will be given all materials for free use as a core component their future curriculum.

Judge Markham remarked that the probate mediation initiative has been well thought through and will be a positive move for both the probate courts and the citizenry in Georgia. Chief Judge Morris and Ms. Johnson thanked Judge Markham for her participation and support of the initiative.

The budget for this project had previously been approved by the GCDR Committee on Budget and Personnel.

A motion was made by Presiding Judge Doyle to approve the Probate Court Implementation Plan & Budget, which was seconded by Ms. Hull. All present members voted in favor; Judge Turner held a proxy vote for absent GCDR member Mr. Patrick O'Connor, and Judge Morris held a proxy vote for absent GCDR member the Hon. Rebecca Crumrine Rieder.

VIII. Chairman's Report: Chief Judge Morris

a. GCDR Succession Plan

Chief Judge Morris explained that she recently met with Justice John J. Ellington regarding the Supreme Court's request for a GCDR succession plan. Recommendations for such plan will be shared for discussion at the November 29 Strategic Planning meeting. Any Commission member who wishes to roll off the Commission now is encouraged to reach out to Chief Judge Morris.

b. November 29th Strategic Planning Session

Chief Judge Morris shared that GCDR is nearing the end of the 2021-2023 Strategic Plan and Projects, and a session is needed to create the new plan and corresponding projects. The Strategic Planning session has been scheduled for November 29 at 11:00 a.m. ET. Attendance is important, and lunch will be provided.

IX. Old Business

There was no old business to report.

X. 2023 Commission Dates: November 29

The next meeting is scheduled for November 29, at 2:00 p.m. at the State Bar of Georgia in Atlanta. The 2024 meeting dates will be set before the November 29 meeting.

XI. Adjournment

The meeting concluded at approximately 3:38 p.m.

[Minutes prepared by Karlie A. Sahs and Tracy B. Johnson]

[Minutes approved via email September 8, 2023]