

courts & justice
executive
forum 2014



ATTENDEE GUIDE

September 2-4, 2014
The Lodge at Torrey Pines

Empowering people who serve the public®



tyler
technologies

INTRODUCTION


Welcome to the fourth annual Executive Forum!

Our belief when we launched this event four years ago was that jurisdictions of similar sizes face similar challenges, and as all attendees were either in production or implementing our Odyssey® platform, the opportunity for executives to share their experiences and strategies meeting those challenges would be invaluable. That belief has been validated, and participants have also enjoyed building relationships with their peers from around the country and the opportunity to give us direct feedback on both our product direction and our performance.

This year's agenda is focused on developing an effective approach to continuous improvement, using guides like our E-Court Maturity Model and discussing the critical importance of governance in managing these complex multi-jurisdictional initiatives. On the second day, we will take a deeper dive into future products and show an integrated, seamless, paperless process from self-represented initiation to resolution — a vision we have focused on delivering for the last several years.

We trust you will find this meeting a valuable use of your time, and will return home with new connections and fresh ideas that will help you accomplish your mission.

Enjoy the forum!



Bruce Graham

President, Courts & Justice Division



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AGENDA

AT A GLANCE: SCHEDULE

WEDNESDAY, SEPTEMBER 3

Morning: Meetings

Afternoon: Networking activities

Evening: Dinner event

THURSDAY, SEPTEMBER 4

Morning: Breakout sessions

TUESDAY, SEPTEMBER 2

5:30 p.m. - 7:00 p.m.

Check-in and Welcome Reception

The Lodge at Torrey Pines

Arroyo Terrace, Level 1

This event is outside so please bring a sweater or jacket as it may be cool.

WEDNESDAY, SEPTEMBER 3

7:30 a.m. - 8:15 a.m.

Breakfast – *Charles Reiffel Room, Level 2*

8:30 a.m. - 9:00 a.m.

Welcome & Courts and Justice Update **Bruce Graham**

Maurice Braun Ballroom, Level 2

A lot has happened since we met last year in Baltimore, and we've taken the feedback you provided and acted upon it. We will provide an update on the highlights — new initiatives, accomplishments and key product enhancements — that became available in the last year.

9:00 a.m. - 9:45 a.m.

Continuous Improvement of the Court **Bruce Graham**

Maurice Braun Ballroom, Level 2

Moving from a paper-based court to an electronic court doesn't happen all at once, and it takes a lot more than just installing new technology. It is an evolution that requires a multi-year plan and a thoughtful process. Among other things, we will discuss the Electronic Court Maturity Model that we have developed that we think can be a valuable tool for moving the court and its constituents into the digital world. The Model can be used to assess your court's current state, as well as to establish goals and track progress over time — all critical for continuous improvement.

WEDNESDAY, SEPTEMBER 3

9:45 a.m. - 10:00 a.m.	Break
10:00 a.m. - 10:30 a.m.	<p>Effective Governance Strategies for Executing Continuous Improvement Bret Dixon <i>Maurice Braun Ballroom, Level 2</i></p> <p>Setting up committees is important; however, effective governance leads an organization to overcome conflicting agendas, fear of change and those individuals that complicate the business transformation.</p>
10:30 a.m. - 11:15 a.m.	<p>Round Tables on Continuous Improvement <i>Maurice Braun Ballroom, Level 2</i></p> <p>The nature of public sector organizations pose unique governance challenges. We will break into small groups to share ideas and perspectives.</p>
11:15 a.m. - 12:00 p.m.	<p>Readout <i>Maurice Braun Ballroom, Level 2</i></p> <p>Feedback from the round tables will be shared with the larger group.</p>
12:00 p.m. - 1:00 p.m.	Lunch – <i>Charles Reiffel Room, Level 2</i>
Afternoon	Networking Activities
6:30 p.m. - 10:30 p.m.	<p>Dinner at Scripps Seaside Forum <i>Meet in the lobby at 6:15 p.m.</i></p> <p>Located in the heart of Scripps Institution of Oceanography, Scripps Seaside Forum is a tasteful blend of function and style that celebrates Southern California’s unrivaled coastal environment. Join us for a quintessential San Diegan experience as we dine among an unparalleled, stunning oceanfront view. Please bring a sweater or jacket as it may be chilly. The average low in September is 65 degrees.</p>

THURSDAY, SEPTEMBER 4

7:30 a.m. - 8:15 a.m.

Breakfast – *Charles Reiffel Room, Level 2*

8:30 a.m. - 10:00 a.m.

Odyssey Roadmap & Odyssey 2016
Eric Purcell and Amy Puckett

Maurice Braun Ballroom, Level 2

With a development team that now includes approximately 140 engineers, we have great things planned for Odyssey over the next several years. We will highlight recent advancements and pull back the curtain on short- and long-term plans.

10:00 a.m. - 10:15 a.m.

Break

10:15 a.m. - 11:30 a.m.

Breakouts – Next Up — Evolving the Maturity Model

The breakouts will provide additional details about the product roadmap and focus on the remaining gaps in evolving to a completely electronic court.

We are looking for your input on the most important issues and technology needed to drive paper out of four distinct areas of court operations. These interactive sessions will help us determine where to invest future efforts. Select one of the three breakouts below.

• **Court** – *Charles Fries Room, Level 2*

This breakout will focus on the courtroom. Technology issues include electronic case files on the bench, eSignatures, eNotices, proposed orders and electronic task queues.

• **Operations** – *Everett Jackson 3, Level 1*

This breakout will focus on back office operations. Technology issues include searchable PDFs, e-filing, scanning, going paperless and electronic processes between the clerk and the court.

• **Citizens & Attorneys** – *Everett Jackson 2, Level 1*

This breakout will focus on interactions with the public and the bar.

Technology issues include jury summons and excusal, electronic payments, case look up/download, document purchase and pro se litigants.

11:30 a.m. to 12:00 p.m.

Recap from the Breakout Sessions & Closing

We will do a quick recap of the breakout sessions and share closing thoughts.

Please note: Business casual attire is recommended for the business meeting. To ensure your personal comfort, please wear layers and dress accordingly as meeting room temperatures may vary significantly.



Dinner at Scripps Seaside Forum
Wednesday, 6:30 p.m. – 10:30 p.m.
Meet in the lobby at 6:15 p.m.

Casual or business casual attire is recommended for this dinner. Please bring a light jacket or sweater as the evenings may turn cooler.

The Robert Paine Scripps Seaside Forum is an extraordinary, oceanfront facility located in the heart of the Scripps Institution of Oceanography, one of the oldest and largest centers for ocean and earth science research, public service, undergraduate and graduate training in the world. Take in the beautiful views and fresh ocean air as we enjoy cocktails outside, followed by dinner indoors in a relaxed atmosphere with floor to ceiling windows open to the unparalleled oceanfront view.

Scripps Institution of Oceanography

Scripps Institution of Oceanography was founded in 1903 as the Marine Biological Association of San Diego by University of California Zoology professor William Emerson Ritter with support from local philanthropist Ellen Browning Scripps, and later her brother, E. W. Scripps, fully funded Scripps for the first several years. The institution was first housed in the boathouse of the Hotel del Coronado, located on San Diego Bay. It relocated in 1905 to the La Jolla area on the head above La Jolla Cove, and finally in 1907 to its present location. The name was changed to Scripps Institution of Oceanography in October 1925.

NETWORKING ACTIVITIES



WEDNESDAY AFTERNOON

After the morning meetings, we will spend Wednesday afternoon building relationships and sharing experiences more informally. We have planned great activities that will provide the perfect backdrop for networking.

Golf at Torrey Pines

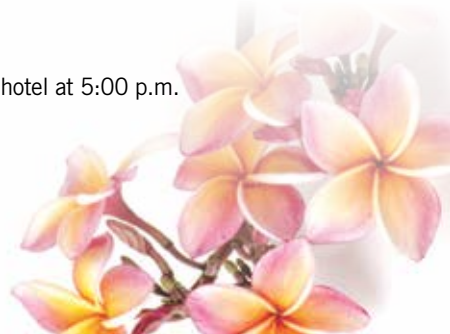
Perched above the cliffs overlooking the Pacific Ocean, Torrey Pines is an iconic golf course. The Rees Jones-designed golf mecca, which features the North Course and South Course, hosts the PGA Tour's Farmers Insurance Open.

Bring your golf clubs and meet in the staging area outside the pro shop to pick up your box lunch and locate your designated golf cart. Your tee time and pairing will be given to you at the check-in and welcome reception on Tuesday evening.

Your Signature Style & Scent

Experience a fun-filled afternoon finding your signature style and scent. Explore beautiful downtown La Jolla and the shopping district, filled with dozens of shops, art galleries and specialty boutiques. Create a fragrance by blending your own custom perfume or cologne and select a mixture of your favorite oils. Perfume experts will mix and bottle your signature scent for the perfect take-home gift!

Meet in the lobby at 1:00 p.m. We will return to the hotel at 5:00 p.m.





Spa Treatment at the Lodge

Located beside a historic, world-renowned nature preserve and its forest of rare pine trees, The Spa at Torrey Pines celebrates La Jolla's coastal freshness of sea, land and air with signature treatments themed around the natural purity of the ocean and sea coast.

Those registered for a spa treatment have received an email confirmation with their treatment selection and time. Please arrive at least 15 minutes prior to your scheduled treatment time.

Kayaking the Sea Caves

The kayaking adventure will provide a unique experience, while you enjoy the unmatched beauty of the Pacific coast, surrounded by amazing caves and cliffs.

Meet in the lobby at 1:00 p.m. The bus will return to the hotel at approximately 4:45 p.m.

Please wear:

- Shoes that can get wet (sport sandals, tennis shoes, flip-flops)
- Bathing suit and/or quick-dry shorts/shirt and rash guard (spandex and nylon or polyester T-shirt)
- Sunscreen

Wet suits (included) will be available upon request. Hats and sunglasses are not recommended as they may get lost in ocean. If you get motion/seasick, we recommend taking medication before you go. Cubbies with changing rooms and space to leave your belongings are available at the shop; however, there will not be enough lockers for everyone. You can leave items on the buses.



Welcome to La Jolla!

La Jolla, outside San Diego, is a hilly seaside community, occupying seven miles of curving coastline along the Pacific Ocean within the northern city limits. Visually dramatic, La Jolla is defined by its rugged coastline of ocean bluffs, sea caves and beaches. Steep canyons and hillsides culminate at the highest point — the scenic outlook on Mount Soledad — which is the site of a World War II memorial. Some say the name La Jolla was derived from the Native American name for cave. Artifacts found in the area indicate the presence of the Cahuilla tribe in a settlement near the shores more than 3,000 years ago. Others contend that it is a version of “la joya” — the Spanish name for jewel.

During the Mexican period of San Diego’s history, La Jolla was mapped as pueblo land and contained about 60 lots. When California became a state in 1850, the La Jolla area was incorporated as part of the chartered city of San Diego. In 1870, Charles Dean acquired several of the pueblo lots and subdivided them into an area that became known as La Jolla Park. Dean was unable to develop the land and left San Diego in 1881. A real estate boom in the 1880s led speculators Frank T. Botsford and George W. Heald to further develop the sparsely settled area.



In the 1890s, the San Diego, Pacific Beach, and La Jolla Railways were built, connecting La Jolla to the rest of San Diego. La Jolla became known as a resort area. To attract visitors to the beach, the railway built facilities, such as a bath house and a dance pavilion. Visitors were housed in small cottages and bungalows above La Jolla Cove, as well as a temporary tent city, erected every summer. Two of the cottages that were built in 1894 still exist — the Red Roost and the Red Rest — also known as the Neptune and Cove Tea Room. Vacant since the 1980s, the cottages are now covered in tarpaulins.

Downtown La Jolla is noted for jewelry stores, boutiques, upmarket restaurants and hotels. Since the establishment of the University of California at San Diego campus in La Jolla in 1966, the community experienced substantial growth and land development. Many art galleries and specialty shops are located in the area, including the San Diego Museum of Contemporary Art at 700 Prospect Street. This museum, founded in 1941, is located just above the waterfront in what was originally the 1915 residence of philanthropist Ellen Browning Scripps.



- Torrey Pines Golf Course
- Torrey Pines
- Scripps Institution of Oceanography
- Downtown La Jolla



MAP



● Meeting Rooms

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