

From: Doug Rowe <drowe@berrydunn.com>

Date: August 31, 2020 at 2:19:44 PM EDT

To: Therese Corsones <tcorsones@vtbar.org>, "Loewer, Jeffery" <Jeffery.Loewer@vermont.gov>

Cc: "Gabel, Patricia" <Patricia.Gabel@vermont.gov>

Subject: RE: E-Filing Fees Groups

Hi Teri. Please find attached the Participant Memo that you may distribute to the two VBA committees. Once we receive date and time options from you we will continue the process of scheduling these two VBA committee focus group meetings. In terms of the two-hour duration for our meetings, we are asking each group to commit to the two-hour timing. As you can imagine, we are interviewing several affinity groups in September (per the plan), and want to ensure that each group receives the same level of attention. At the end of the focus group meeting with the e-filing fees committee, should we determine that additional time is required then we can schedule another meeting. As you know, these meetings are intended to be information gathering sessions, and not "solutioning" workshops designed to identify a specific e-filing fees solution. As such, any documentation that you can provide to our team in advance of these meetings will help to ensure that each meeting's maximum effectiveness and efficiency.

I look forward to hearing from you regarding date and time options for September.

Thank you Teri,
Doug

Doug Rowe, PMP | Principal

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<http://www.berrydunn.com/industries/justice-and-public-safety>

<image003.png>

From: Therese Corsones <tcorsones@vtbar.org>

Sent: Sunday, August 30, 2020 3:12 PM

To: Doug Rowe <drowe@berrydunn.com>; Loewer, Jeffery <Jeffery.Loewer@vermont.gov>

Cc: Gabel, Patricia <Patricia.Gabel@vermont.gov>

Subject: RE: E-Filing Fees Groups

Hi Doug:

Thanks very much for your response. I inquired on Friday about not having heard back about the scheduling since your original email on August 11 indicated that the scheduling would take place during the weeks of August 17 and 24. Thank you for letting us know that the scheduling will take place this coming week, instead.

I'll send a doodle poll Monday to the two groups in the hopes of arriving at 3-4 2-hour timeslots for each group in September. You've indicated that you'll select one of the 2-hour timeslots for each group,

separately. Just as a heads up, I anticipate that it will take more than one 2-hour timeslot for the alternative e-file group to meet with you to examine alternatives to the current per use e-filing fee.

Your August 11 email also referenced Participant Memos with the scheduling of interviews during the weeks of August 17 and 24. I couldn't tell from the last email if Participant Memos will be provided at the time of the meetings in September, instead, or provided at the time that the meetings are scheduled? I ask because I had told the groups that they should expect Participant Memos per the original schedule and anticipate they may ask when the Memos should be expected given the new information in your latest email. Thanks, Doug!

Teri

From: Doug Rowe <drowe@berrydunn.com>

Sent: Friday, August 28, 2020 5:36 PM

To: Therese Corsones <tcorsones@vtbar.org>; Loewer, Jeffery <Jeffery.Loewer@vermont.gov>

Cc: Gabel, Patricia <Patricia.Gabel@vermont.gov>

Subject: RE: E-Filing Fees Groups

Teri, thank you for your continued support of our efforts as we advanced towards the development of the report required to satisfy Act 120. As you know, our efforts this week focused on distributed the web-based survey (to the VBA committees and several other e-filing stakeholder groups). Our focus next week will be to schedule the focus group meetings with the various affinity groups, including the two VBA committees. I do believe that we will take you up on your offer to assist in scheduling the two committees to meet with BerryDunn. If you could identify 3-4 2-hour timeslots between September 3 and the end of September when your committees could meet, then provide those potential dates to me, that would be helpful. We will then schedule each of the committees into one of those timeslots; providing Participant Memos at that time.

Thank you for your assistance!

Doug

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<image004.png>

From: Therese Corsones <tcorsones@vtbar.org>

Sent: Friday, August 28, 2020 4:13 PM

To: Doug Rowe <drowe@berrydunn.com>; Loewer, Jeffery <Jeffery.Loewer@vermont.gov>

Cc: Gabel, Patricia <Patricia.Gabel@vermont.gov>

Subject: RE: E-Filing Fees Groups

Hi Doug:

I'm sorry for the repeat emails, but would like to know when the alternative e-file fee meeting will be scheduled. The diminishing timeline is making us very nervous.

Also, as far as I know, no one on the VBA Committees has received an email with participant memos or to set up the interviews in September. It's my understanding that the emails were to have gone out during the weeks of August 17 and 24. Please let me know if there's anything I can do to help facilitate. Thanks, Doug!

Teri

From: Therese Corsones
Sent: Friday, August 21, 2020 10:39 AM
To: Doug Rowe <drowe@berrydunn.com>; Loewer, Jeffery <Jeffery.Loewer@vermont.gov>
Cc: Gabel, Patricia <Patricia.Gabel@vermont.gov>
Subject: RE: E-Filing Fees Groups

Hi Doug:

Do you still anticipate sending an email with a link to the survey this week? I haven't seen it, and wanted to make sure that I don't miss it.

As mentioned below, the alternative e-filing fee group would like to meet as soon as possible to examine alternatives to the e-filing fees. We're mindful of the seven weeks that have already gone by since Act 120 was passed, and the considerable work that will need to be done for the report to the Legislature in October.

I assume that you've received the attached Executive Summary of the E-filing Fees Study Committee Report, as well as the attached E-filing Fees Study Committee Report. The Senate Judiciary Committee had requested the Report, and requested those provisions in Act 120 that require the Judiciary to meet with representatives of the VBA and other court users to examine alternatives to the current e-filing charges and to report to the Legislature. A number of the members of the alternative e-filing fee group worked extensively on the E-Filing Fees Study Committee Report. They would like to continue the work of examining alternatives to the per-use fees, now per the Act 120 directive. Please advise when a first meeting can be scheduled. Thanks very much.

Teri

From: Therese Corsones
Sent: Friday, August 14, 2020 10:13 AM
To: Doug Rowe <drowe@berrydunn.com>; Loewer, Jeffery <Jeffery.Loewer@vermont.gov>
Cc: Gabel, Patricia <Patricia.Gabel@vermont.gov>
Subject: RE: E-Filing Fees Groups

Thanks so much, Doug. This is helpful. We'll plan to distribute the survey to anyone who has used the new system and wishes to take the survey.

I'll let the alternative e-filing fee group know that you will set up a separate meeting with them. If that could be done sooner rather than later, it would be great. Act 120 speaks to examining alternatives to the current (per use) e-filing charges, and the group would like to get started as soon as possible examining those alternatives. Thanks again!

Teri

From: Doug Rowe <drowe@berrydunn.com>
Sent: Thursday, August 13, 2020 4:56 PM
To: Therese Corsones <tcorsones@vtbar.org>; Loewer, Jeffery <Jeffery.Loewer@vermont.gov>
Cc: Gabel, Patricia <Patricia.Gabel@vermont.gov>
Subject: RE: E-Filing Fees Groups

Hi Teri. Sorry for the delayed response. I have been using the terms "focus groups," "affinity groups," and "interviews" interchangeably. When we send you the email that includes the link to the web-based survey, please feel free to distribute it throughout the VBA as you deem appropriate. Though we don't intend to hold separate focus groups for the two tracks (e-filing experience; e-filing service charges), it probably makes sense to schedule the two VGA committees as separate meetings.

I hope that clarifies things a bit more.

Thank you,
Doug

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<image004.png>

From: Therese Corsones <tcorsones@vtbar.org>
Sent: Wednesday, August 12, 2020 4:14 PM
To: Doug Rowe <drowe@berrydunn.com>; Loewer, Jeffery <Jeffery.Loewer@vermont.gov>
Cc: Gabel, Patricia <Patricia.Gabel@vermont.gov>
Subject: RE: E-Filing Fees Groups

Thanks, Doug. Are the focus groups in addition to the interviews referenced in the first email? Can others besides those identified as part of the "affinity groups" take the survey? Lastly, will there be a separate track of interviews/focus groups for the alternative e-filing fee aspect of the bill? I see that as separate from the court users aspect. Sorry to be so dense!

Teri

From: Doug Rowe <drowe@berrydunn.com>
Sent: Wednesday, August 12, 2020 1:41 PM
To: Therese Corsones <tcorsones@vtbar.org>; Loewer, Jeffery <Jeffery.Loewer@vermont.gov>
Cc: Gabel, Patricia <Patricia.Gabel@vermont.gov>
Subject: RE: E-Filing Fees Groups

Hi Teri. For the surveys, you will receive an email from the Court with background information and a link to the web survey. I would recommend that you forward that email to the members of the two VBA committees that you have provisioned. The survey questions have been developed, and web-surveys nearly ready to distribute; thank you for the offer though! Additionally, there will be a single web survey that asks questions about the user's experience with e-filing as well as fee structures. Remember that the web surveys are intended to inform the focus group meetings, where we intend to gather the majority of our data points to inform the report.

We plan to conduct many of the focus groups as "affinity groups." You can decide if you wish to include both of the VBA committees in a single focus group meeting, or separate them (since the topics of discussion will be different). BerryDunn will be facilitating the focus group meetings.

Thanks,
Doug

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<image004.png>

From: Therese Corsones <tcorsones@vtbar.org>
Sent: Wednesday, August 12, 2020 9:08 AM
To: Doug Rowe <drowe@berrydunn.com>; Loewer, Jeffery <Jeffery.Loewer@vermont.gov>
Cc: Gabel, Patricia <Patricia.Gabel@vermont.gov>
Subject: RE: E-Filing Fees Groups

Hi Doug:

So nice to hear from you! Thank you for the information for stakeholders. I had a few questions. Will others besides those who have been identified in the different groups be able to take the survey? Are the survey questions available for review? Did you want our input into the survey questions? Will the interviews be one on one, or will they involve members of the different groups together? Who will be conducting the interviews?

I assume that the process for evaluating the e-filing fees will be different than the process for gathering court user feedback through surveys and interviews. Is there a separate information-gathering process for the "alternative filing fee" aspect of the Act 120 charge? Our alternative e-filing fee group has

questions about the e-filing fee options. If it's easier to call, my cell phone is 802-345-1101. Thanks, Doug!

Teri

From: Doug Rowe <drowe@berrydunn.com>
Sent: Tuesday, August 11, 2020 5:27 PM
To: Therese Corsones <tcorsones@vtbar.org>; Loewer, Jeffery <Jeffery.Loewer@vermont.gov>
Cc: Gabel, Patricia <Patricia.Gabel@vermont.gov>
Subject: RE: E-Filing Fees Groups

Good afternoon Teri. As you know, the Judiciary has engaged BerryDunn to assist in facilitating the gathering of feedback and developing the report per Act 120. Our plan is multi-faceted, including conducting a survey of interested stakeholders using a web-based survey tool, requesting and receiving any preliminary documentation that you and others may have to inform the report, and interview "affinity groups" of stakeholders.

As you may remember from your earlier work with the Judiciary on the NG-CMS project (I recently came across a photo of the NG-CMS cake that you baked and was nostalgic), we plan to issue Participant Memos to the interested stakeholders as we are working with them to schedule a timeslot to conduct the interviews. I expect that we will be doing that within the next couple of weeks (our plan calls for interviews to be conducted in September). Prior to this activity, we plan to issue the web-based survey to the interested stakeholders. You and your teams should expect to receive the survey early next week. It will be brief, is mostly objective, and has a question at the end that provides the opportunity for additional reflection.

To summarize our current schedule:

- | | |
|---|---|
| • Web-based survey issued: | Week of August 17 th |
| • Participant Memos and Scheduling of Interviews: | Weeks of August 17 th and 24 th |
| • Conducting the interviews: | Throughout September |
| • Developing the interim report: | Early October |
| • Presentation of the interim report: | Late October |

I hope this is helpful,
Doug

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<image004.png>

From: Therese Corsones <tcorsones@vtbar.org>
Sent: Tuesday, August 11, 2020 4:43 PM
To: Loewer, Jeffery <Jeffery.Loewer@vermont.gov>

Cc: Gabel, Patricia <Patricia.Gabel@vermont.gov>; Doug Rowe <drowe@berrydunn.com>
Subject: RE: E-Filing Fees Groups

Hi Jeff:

I don't mean to be a pest, but it would be helpful to know when we can expect the participant memo and the first meeting dates. I assume that separate meetings are being set up for the court users group and the alternative e-filing fee group. Both groups are concerned that it is taking so long to set up initial meeting dates, now that it's been six weeks since the bill was signed and the groups were set up in accordance with the bill. Thanks, Jeff.

Teri

From: Therese Corsones
Sent: Tuesday, August 4, 2020 12:55 PM
To: Loewer, Jeffery <Jeffery.Loewer@vermont.gov>
Cc: Gabel, Patricia <Patricia.Gabel@vermont.gov>; Doug Rowe <drowe@berrydunn.com>
Subject: RE: E-Filing Fees Groups

Hi Jeff:

Attached are listings of the groups we've discussed. I'm the contact person for each group. Please let me know when we can expect the participant memo. Thanks very much!

Teri

From: Loewer, Jeffery <Jeffery.Loewer@vermont.gov>
Sent: Tuesday, August 4, 2020 12:32 PM
To: Therese Corsones <tcorsones@vtbar.org>
Cc: Gabel, Patricia <Patricia.Gabel@vermont.gov>; Doug Rowe <drowe@berrydunn.com>
Subject: RE: E-Filing Fees Groups

Teri,

Thanks for your email. We're making good progress on our outreach plan, including identifying the different stakeholder groups. Please let me know what groups you have put together to represent the Vermont Bar Association and who are the individuals in those groups so that we can avoid duplication. Also, will you be the contact for your groups, or are there individuals in the VBA groups who will be the contacts? Once we have identified the contact people for the stakeholder groups, we will send out a participant memo explaining the process and requesting participation.

Thank you for your collaboration with respect to this outreach.

Regards,

Jeff

From: Therese Corsones <tcorsones@vtbar.org>
Sent: Tuesday, August 4, 2020 8:16 AM
To: Loewer, Jeffery <Jeffery.Loewer@vermont.gov>
Subject: RE: E-Filing Fees Groups

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Hi Jeff:

I'm sorry to keep bothering you, but it's now been over a month since H.961 was signed and we've been asking for the first meeting date. The two groups that were set up specifically to meet with the Judiciary per the topics referenced in H.961 (court users' experience with the Odyssey file and serve system to date and alternatives to the current e-filing charges) are anxious to meet so that information can be gathered for the legislative report due in October. Thanks, Jeff!

Teri

From: Loewer, Jeffery <Jeffery.Loewer@vermont.gov>
Sent: Thursday, July 23, 2020 3:21 PM
To: Therese Corsones <tcorsones@vtbar.org>
Subject: RE: E-Filing Fees Groups

Teri,

Thank you for the follow up. As I mentioned previously, we are working with Doug Rowe of BerryDunn on this effort, and Doug is preparing the necessary materials to facilitate gathering information for this report from the wide group of stakeholders of our system. I will forward your concerns about scheduling to Doug and we will be in touch.

Regards,

Jeff Loewer

From: Therese Corsones <tcorsones@vtbar.org>
Sent: Thursday, July 23, 2020 2:25 PM
To: Loewer, Jeffery <Jeffery.Loewer@vermont.gov>
Subject: RE: E-Filing Fees Groups

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Hi Jeff:

Any progress on setting up a first meeting date? I'm sorry to bother you during what I'm sure is a hectic time, but we're mindful of the Legislature's deadline and would like to be sure that the information going into the report is timely gathered. In response to inquiries I'm getting, can I say that we'll get a date before the end of the month? Thanks, Jeff!

Teri

From: Therese Corsones
Sent: Thursday, July 9, 2020 6:15 AM
To: Loewer, Jeffery <Jeffery.Loewer@vermont.gov>
Subject: RE: E-Filing Fees Groups

Sounds great, Jeff – thanks!

Teri

From: Loewer, Jeffery <Jeffery.Loewer@vermont.gov>
Sent: Wednesday, July 8, 2020 4:02 PM
To: Therese Corsones <tcorsones@vtbar.org>
Subject: RE: E-Filing Fees Groups

Teri,

I appreciate the below information regarding the input the VBA is preparing on this topic. The Judiciary will be in touch shortly as we plan the process of outreach and evaluation that will inform our report to the Legislature.

Regards,

Jeff

Jeff Loewer

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From: Therese Corsones <tcorsones@vtbar.org>
Sent: Wednesday, July 8, 2020 8:56 AM
To: Loewer, Jeffery <Jeffery.Loewer@vermont.gov>
Subject: E-Filing Fees Groups

EXTERNAL SENDER: Do not open attachments or click on links unless you recognize and trust the sender.

Hi Jeff:

I hope that you had a nice 4th of July holiday! I'm now back and wanted to follow up on our call last Thursday. To repeat what I mentioned about the two groups that the VBA is setting up to meet with the Judiciary per H.961, the "court users" group includes an SA rep, a PD rep, an access to justice rep, a pro se litigant rep and individual reps from the civil, family and probate dockets who have utilized the Odyssey File and Serve system in the Windham, Windsor and/or Orange Units. It's also been suggested that we include a law enforcement rep and a state agency rep. The "alternative e-filing fees" group includes individual reps from the civil, family and probate dockets, an access to justice rep, a low bono rep, a pro se litigant rep, and a rep from the E-Filing Fees Study Committee. Please let me know when we can set up the first meeting. Thanks!

Teri

<e-filing Participant Memo - VBA.pdf>

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