

PROPOSED MINUTES  
LOUISIANA CLERKS OF COURT ASSOCIATION  
CLERKS ONLY MEETING  
Monday, November 18, 2024  
1:30 p.m.  
Natchitoches, LA

The Louisiana Clerk of Court Association Clerks Only meeting was held on Monday, November 18, 2024, at 1:30 p.m. President Louis Perret called the meeting to order.

**Invocation and Pledge:**

Jeff Skidmore gave an opening prayer, and Randy Briggs led the Pledge of Allegiance.

**Roll Call:**

Secretary Chelsey Richard Napoleon called the roll with the following Clerks present:

Laura Faul, Stacy Hurst, Bridget Hanna, Erin Hebert, Connie Desselle, Brian Lestage, Jill Sessions, Mike Spence, H. Lynn Jones II, Cherie Lott, Susan Racca, Andy Anders, Lisa Lobrano Burson, Doug Welborn, Randall Deshotel, Randy Briggs, David Ditch, Rick Arceneaux, Louis Perret, Annette Fontana, Linda Cook, Jason Harris, Tifani Thomas, David Stamey, Chelsey Richard Napoleon, Darren Lombard, Dana Benson, Kim Turlich-Vaughan, Becky Ewing Miller, Robin Hooter, Stuart Shaw, Melissa Morris, Shelly Salter, Shane LeBlanc, Laura Blanchard, Christina Lee, Theresa Robichaux, Diane Meaux Broussard, Jeff Skidmore, Holli Vining, Amanda Gross-Thies, and Stewart Hughes.

**Oath of Office**

Chelsey Richard Napoleon administered the oath of office to Lynn Jones and Shane LeBlanc as supplemental board members.

**Approval of the Minutes of the April 1, 2024 Clerks Only meeting**

A motion to approve the prior minutes was made by Lynn Jones and seconded Bridget Hanna. The motion was passed with no opposition.

**Approval of the Minutes of the 2024 Conference Opening and Final Session on April 2 & 4, 2024**

A motion to approve the prior minutes was made by Lynn Jones and seconded by Bridget Hanna. The motion was passed with no opposition.

**Financial Reports**

Treasurer Jill Sessions presented Association Financial Statements as of June 30, 2024:

Assets		Liabilities and Capital	
Total Current Assets	\$614,877	Total Current Liabilities	\$11,924
Total Property and Equipment	\$6,219	Total Capital	\$630,699
Total Other Assets	\$21,527	Total Liabilities and Capital	\$642,623
Total Assets	\$642,623		

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Income Statement FYTD	
Total Revenue	\$ 1,197,372
Total Expenses	\$ 1,197,254
Net Income	\$ 118

Treasurer Jill Sessions presented the Retirement Financial Statements as of June 30, 2024:

Assets		Investments	
Total Current Assets	\$64,761,207	Total Investments	\$751,471,986
Total Other Assets	\$3,168,979		
Total Assets	\$819,402,172		
Liabilities			
Total Reserve Balances	\$818,100,014		
Total Current Liabilities	\$1,302,057		
Total Liabilities (Reserves)	\$819,402,171		

Income Statement FYTD	
Total Contributions	\$46,755,500
Total Investment Income	\$89,365,405
Total Investment Expenses	\$3,653,198
Total Other Additions (Net Loss)	\$55,976
Total Deductions	\$58,024,015
Net Increase	\$74,387,715
Administrative Expenses	\$886,027

Treasurer Jill Sessions presented the Insurance Financial Statements as of June 30, 2024:

Total Current Assets	\$3,665,417	Total Current Liabilities	\$523,470
Total Other Assets	\$2,732,860	Total Liabilities	\$1,594,470
Total Assets	\$6,398,278	Total Reserves	\$4,803,808
		Total Liabilities and Reserves	\$6,398,278

Income Statement FYTD	
Total Revenue	\$8,348,573
Total Claims	\$8,491,671
Total Expenses	\$172,697
Other Income	\$151,756
Net Income (Loss)	(\$164,039)

A motion was made by Randy Briggs and seconded by Susan Racca to receive all financial reports as presented. The motion was passed.

### **LACCRMA Board Report**

Brian Lestage expressed his honor in succeeding Mark Graffeo as Chairman of the board and continuing his work. The board is reviewing its current administrator, King (formerly Hunt Insurance), to explore cost-saving options with Louisiana-based companies. Debbie Hudnall is working with Gallagher to gather information, with King informed and supportive of the review.

The last insurance review was 20–30 years ago, making this effort timely. Current claims are minimal, and any potential policy change would take effect on July 1, with evaluations starting in January.

### **LCRAA Report**

Rick Arceneaux presented the Financial Statements as of October 31, 2024.

<b>Balance Sheet</b>	
Total Assets	\$8,082,459
Current Liabilities	\$ 16,664
Total Net Position	\$8,065,794
Total Liabilities and Net Position	\$8,082,459

<b>Income Statement FYTD</b>	
Total Revenue	\$702,547
Total Pool Expenses	\$277,683
In-Grant Expenses	\$374,033
Administrative Expenses	\$97,484
Net Loss	\$46,653

### **Insurance Trust Report**

Debbie Hudnall shared updates on the 2025 insurance renewals and key changes. Health insurance premiums increased by 7%, below the standard 10-15%. Retirees' United Healthcare Medicare Advantage premiums increased 45%, from \$188 to \$274 monthly, but the out-of-pocket maximum on prescriptions decreased from \$4,000 to \$2,000. Dental premiums stayed the same, while vision increased by 25%. Life and disability premiums remained unchanged.

The high deductible plan now has a \$1,700 individual deductible for Tier 1 and \$2,050 for Tier 2. The PPO plan's deductible increased to \$1,000 for Tier 1 and \$1,200 for Tier 2.

Debbie reminded employees not to enroll in Medicare Part A unless they retire, as it stops HSA contributions. She suggested employees evaluate their options, such as switching plans or adjusting budgets, and noted retirees who are Medicare eligible are required to move to United Healthcare plan.

### **Retirement and Relief Fund Report**

Debbie Hudnall provided the current list of retirees receiving a monthly benefit as required annually by statute.

Debbie informed the Clerks that a parish had mistakenly paid retirement on overtime pay, which is not allowed by law. Salary refers to regular compensation for duties, not including bonuses, vacation or sick leave, overtime, terminal pay, or other irregular payments. Bonuses are not allowed, but some clerks give extra checks, which are permitted under certain rules, but retirement cannot be paid on the extra check either.

The retirement system made \$74 million in the past year, and more details will be shared at the Retirement Board meeting.

To protect the system, raises over 10% are capped for retirement calculations.

### **Supplemental Compensation Fund Report**

Shane LeBlanc presented the supplemental financial report as of October 31, 2024.

<b>Assets</b>		<b>Liabilities and Capital</b>	
Total Current Assets	\$369,912	Total Current Liabilities	\$175,500
Total Other Assets	\$156,742	Total Capital	\$351,154
Total Assets	\$526,654	Total Liabilities and Capital	\$526,654

<b>INCOME STATEMENT YTD</b>	
Total Revenue	\$675,611
Total Expenses	\$ 709,900
Net Loss	(\$34,289)

### **Executive Board-Strategic Planning**

Louis Perret presented the strategic planning meeting report emphasizing the importance of reassessing the association's direction, with a goal to increase clerk involvement including the idea of holding future meetings in Alexandria for easier attendance. The Executive Board also discussed the following:

**GroupMe:** GroupMe, managed by Bridget Hanna, was praised for its' utility in professional communication, and new clerks were encouraged to ask experienced clerks for advice. The platform should be used for work-related purposes only.

**Best Practices Manual:** A best practices manual is in the works, with a focus on creating guides such as the marriage license process, and Melissa Hebert, a retired chief deputy, may assist in developing it once her personal situation permits.

**Retirement of Controller:** With Chris planning to retire sometime in the future, there is a need to start planning for his replacement as controller, seeking someone with a CPA background and business knowledge, to be trained.

**Executive Director Succession:** Succession planning for the executive director role is underway, with a team effort needed for the hiring process. New clerks were encouraged to get involved and help shape the future of the Association.

**Support for Smaller Parishes:** The association discussed providing support for smaller parishes facing financial difficulties, with funds potentially being used for technology upgrades, but not for salaries. The Association is aware of potential legislative changes that may affect finances.

**Standardization of Fees:** There is growing discussion around the standardization of subscription and copy fees across the Association, with an emphasis on creating uniformity in fees.

### **COMMITTEE REPORTS**

**By-Laws Committee Report:** Parliamentarian Stuart Shaw thanked the committee for their support and shared that he and Louis had met to discuss the difficulties smaller clerks face when traveling to conferences. They proposed holding one afternoon meeting in a more central location to make it easier for those who face travel hardships. The idea is to ensure more clerks can participate in the Association, especially those who couldn't attend previous elections. The committee decided to take more time to discuss potential amendments to the By-Laws and consider the implications of the proposal before voting. They plan to continue discussions and report soon.

**Education Committee Report:** Kim Turlich-Vaughan stated that the 72nd Annual Institute will be held from February 18-21 at the Baton Rouge Marriott. The goal is to attract more attendees with better accommodations, even though the venue is more expensive than the previous location.

The institute will cover topics such as the 2024 elections, necessary improvements, and closed party primaries, as well as ethics, sexual harassment, judicial courthouse security, deferred compensation, and other relevant office matters.

The committee is coordinating the final agenda and plans to send it out soon, possibly in January or late December, depending on the election schedule.

**2025 Conference:** The 2025 conference will take place from May 12th to 16th in Lafayette, and all attendees are encouraged to close their offices for the week and participate in the event. Clerk Broussard,

Clerk Blanchard, and Clerk Ditch will spend a day visiting Iberia, St. Martin, Vermilion, and Lafayette Parishes, where exciting activities are planned.

There will be special lunches to honor chief deputies for their hard work, and smaller offices are encouraged to allow their chief deputies to attend that part of the conference. Educational sessions will cover key topics, with 2 or 3 sessions being planned to meet essential needs.

### **EXECUTIVE DIRECTOR REPORT**

**Required Training:** Debbie Hudnall took a moment to remind everyone about the mandatory training for the end of the year. These include ethics training, which can be completed online, cybersecurity training, which is available through the state or on a disc provided by the Association, and sexual harassment

training, which is also offered by the Association. It was emphasized that both clerks and their staff must complete these trainings.

**WEP and GPO Legislation Update:** Debbie presented the updated on a bill to eliminate Windfall Elimination Provision (WEP) and Government Pension Offset (GPO) has passed in the House and is now moving to the Senate, where it has strong support.

WEP reduces Social Security benefits for those with a government pension. However, if you worked 30 years in the private sector, you will not be affected. GPO cuts Social Security benefits based on your spouse's earnings if you also have a government pension. You can contact your senators to urge them to support the bill, as it would benefit government workers like teachers, firefighters and clerks.

**Department of Corrections (DOC) Online Submission:** Debbie reported that DOC has asked clerks to upload and manually input inmate information into their portal, which could create extra work and liability for clerks. Clerks are responsible for ensuring the data is accurate, which could be problematic if mistakes occur. She urged Clerks to upload UCO's with enough data to identify defendant.

It may be beneficial to set up a meeting with the DOC to discuss this matter, as they may not have the authority to request this additional work. Furthermore, a new data-sharing system between courts, the DOC, and other agencies is currently being tested.

A new information exchange system is being developed to improve data sharing between clerks, sheriffs, the DOC, and other agencies by identifying missing or incorrect data in reports.

Pilot testing will involve a few volunteer parishes to refine the system and address any issues. Volunteers are needed to participate in this program and provide feedback. Caddo, Caldwell, Ascension and Terrebonne volunteered.

**E-Filing and Reporting Updates:** Currently, 58 clerks are e-filing, with 46 using I3, 5 using Tyler, and the rest using other systems. Many parishes are also reporting various case types, including land, marriage, civil, probate, criminal, and juvenile cases, through the portal.

**Car Allowance:** A legislative auditor questioned if the 10% expense allowance should be included in calculating the 15% car allowance for clerks. The laws are unclear on "annual salary" versus "annual compensation," and past AG opinions on similar cases add confusion. Legal experts are exploring legislation to resolve this.

**DCFS:** DCFS is using Green Court for case management, which will handle e-filing. This approach consolidates filings through a central system, potentially increasing efficiency. A \$30,000 invoice from I3 for integrating the system was forwarded to DCFS. They agreed to cover this cost. DCFS personnel are reportedly resistant to e-filing due to the additional workload, though progress is being made.

**Health Savings and Deferred Compensation Limits:** The 2025 HSA contribution limits are set at \$4,310 for individuals and \$8,550 for families.

For deferred compensation, individuals aged 49 and under can contribute up to \$23,500, while those aged 50 and over can contribute up to \$31,000.

Under the Secure 2.0 "Super Catch-Up" provision, individuals aged 60 to 63 are allowed to contribute up to \$34,750. Additional catch-up provisions also account for years missed and proximity to retirement eligibility.

**Clerk's Salary Fund and Office Supplies:** The police jury is obligated to fund necessary office furniture, equipment, and record books for the clerk's office. Clerks may use surplus funds in their salary accounts for office needs or renovations, adhering to public bidding laws. At the end of a term, excess funds (beyond half of the last year's revenue) must be returned to the parish treasury, up to the amount the governing authority gave to the Clerk.

**AI Technology for Clerks:** A company has claimed that its AI technology can index 200,000 documents in just four hours. Test data from two parishes, covering both new and old records, has been submitted to evaluate the accuracy of the AI.

If proven effective, this technology could have several applications, including reindexing old records, which could save months of manual labor. It could also validate the accuracy of current indexing by comparing AI results to human indexing. Additionally, the technology could streamline double blind indexing by allowing a single person to perform indexing, with the AI verifying accuracy and flagging errors.

Currently, the results of the tests are pending. If successful, the AI technology could be funded as a technology investment.

**Hurricane Helene Relief:** Debbie reported on the fundraising effort for hurricane victims, which raised over \$5,700 in gift cards to support employees and communities affected by recent natural disasters in Tennessee.

## **LEGISLATION**

**E-Filing and E-Recording Legislation:** Clerks are already required to have e-recording capabilities, but filers are not currently mandated to use them. There is a proposal to make e-recording mandatory for professionals such as attorneys and bankers. While this modernization effort is likely to receive mixed feedback, local professionals, such as title attorneys, may resist the change.

E-filing will become mandatory starting January 1, 2026. Clerks had agreed to support this mandate if filers are responsible for handling their own redacting tasks. However, there may be legislative efforts to repeal or amend the mandatory e-filing provision.

**Registry of the Court Funds:** Holli Vining presented the update. The topic of improving the interest earned on registry of the court funds was raised. Currently, the interest earned (usually 1%) is minimal, leading some to suggest increasing the percentage to something higher, like 5% or 10%.

However, to move forward with this, it needs to be proposed to the Judicial Council by next October. The amount of interest earned would need to be documented to support the request.

**Pauper Statutes Reform:** Holli Vining commented that Judge Mike Tidman has suggested a reform to pauper statutes, proposing a \$2,000 cap on pauper cases. Once that cap is reached, there would be a review to assess whether the status should be extended, potentially with a period for expiration or review.

This would also require collecting tax returns and other financial information from those seeking pauper status, and it would need legislative backing, with a focus on securing support from the community.

**Clerk Safety and Legal Concerns:** Some clerks expressed concerns about handling dangerous materials like fentanyl, as it is toxic and harmful. There was mention of possibly introducing a law that would make it illegal to bring such substances into courthouses. There were also questions about handling specific cases involving sovereign citizens who file excessive, confusing paperwork.

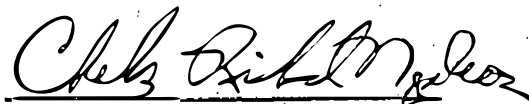
**NEW BUSINESS:** None

**OTHER COMMENTS:** Host Clerk David Stamey informed the Board that a donation had been received from the local historic district to help defray the cost of the Winter meetings. He then reminded everyone of the evening's banquet event.

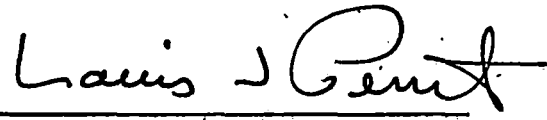
**ADJOURNMENT:** There being no further business, the meeting adjourned.

Respectfully submitted,

APPROVED:



Chelsey Richard Napoleon, Secretary



Louis Perret, President