

Management & Leadership: Strategies for all Courts

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Let's figure out who
is here today:

How many people
work in your office?

a. 5 or less

b. 6-10

c. 10-20

d. More than 20

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Agenda



Policies and Procedures



Managing Staff

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Policies and Procedures

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Policy vs. Procedure

Policy – what the management expects from employees (what)

Procedure – detailed description of how the instructions in the policy should be carried out (how)

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How do you set
policies/procedures in
your office?

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Different Approaches

- Judge handles it exclusively
- Judge collaborates with staff
- Clerks and other staff provide their current procedures to the judge, then the judge either finalizes or works with staff to finalize procedures
- What benefits/drawbacks do you see to each approach?

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Do you have a written
policy/ procedure
manual?

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Benefits of Written Manuals

- Great for training
- Provide clear expectations
- **What else??**

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Tips on Crafting Policies/Procedures

Simple

Easy to read/understand

Relevant

Enforceable

Follow all applicable county policies/procedures, canons, state laws, etc.

Reviewed by multiple people to check the above

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Policies/Procedures to Include

◆ Professionalism & Ethics

- Dress code
- Demeanor
- Social media
- Following judicial canons/other ethics
- Legal advice vs. info
- **What else?**

◆ Job duties

- Filing cases
- Setting hearings & trials
- Juries
- Handling money
- Coverage due to absence
- **What else?**

• Communication

- Phones
- Email
- Website maintenance
- Mail
- **What else?**

◆ HR

- Timekeeping
- Pay periods
- Remote work
- Vacation, Sick time, etc.
- Discipline
- **What else?**

• Other Categories??

Note: TJCTC's Justice Court Clerks Do's and Don't's List (*on the Charts and Checklists webpage*) can be a good jumping off point for some categories!

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Example #1 – Time Off Request

- Department Managers or Clerk II Sr. will approve and schedule time off requests.
- Leave will be approved on a first come, first serve basis.
 - No more than 2 civil clerks Monday through Friday.
 - No more than 2 criminal clerks Monday and Friday, and 3 clerks Tuesday through Thursday.
- Leave requests will be approved/denied as quickly as possible, so the requestor may confirm or alter plans.
- Leave requests must be submitted no later than 48 hours in advance except in case of emergencies in which a physician's note may be required.
- Vacation, personal days, or sick time may only be granted to time that is accrued and available for use.

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Example #2 – Deposit Procedure

- Each clerk will have an assigned locked money bag and cashiering station.
- End of shift – create and save a till total report documenting all tender types.
- After balancing the till to items in the bag, the clerk electronically signs the report and reconciles and closes the till.
- The signed report is emailed to a supervisor, and the money bag is surrendered to verify the items and report match.
- Upon verification, the supervisor electronically signs the report and emails to the Deposit Clerk.
- The locked bag is then secured in the office safe.

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Example #2 – Deposit Procedure (continued)

- A manager (Deposit Clerk), who is not a cashier and not assigned to the mail log, prepares the physical bank deposit.
- The Deposit Clerk opens the money bags for that day and verifies that the contents in each bag balances to that clerk's individual till report.
 - Deposit Report - runs the Deposit Analysis Report which displays the totals by tender.
 - Scans & Attaches - Checks and Money orders to the electronic deposit report.
 - Manual Deposit Slip & Bank Bag – Prepares one of each per bank account.
 - Bank bag is placed in the safe.
- A detailed and combined report is emailed to the Accounting Division of the JP office who finalizes the deposit in the case management software system.

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Let's Practice!

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Activity #1: Practice Writing Your Own

Choose a topic and practice drafting some clear and effective policies and procedures on that topic:

- **Dress Code**
- **Social Media**
- **Difficult Customer (if escalation is needed)**
- **Flexible Workplace/Remote Work**
- **Disciplinary Action**

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Activity #2: Brainstorm

Make a list of everything
your actual office needs
policies/procedures for.

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Resources

- Example Policies/Procedures from Tarrant County Pct. 1 and Polk County Pct 2 (in handouts)
- Officeholding Deskbook
 - <https://www.tjctc.org/tjctc-resources/Deskbooks.html>
 - Legal Information vs. Legal Advice Guidelines and Instructions
 - Justice Court Clerks Do's and Dont's List
- Texas Association of Counties Resources for County Officials <https://www.county.org/Resources-for-County-Officials>
- US Office of Disability Employment Policy <https://www.dol.gov/agencies/odep>

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Managing Staff

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Basic Guidelines

- Follow your policies and procedures!
- Professionalism
- Consistency
- Compassion

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What are common issues that may arise related to managing staff and how do you handle them?

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Addressing Problems

- Identify issues
- Communication
- Options
- Monitoring and Evaluation

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Moving from Co-Worker to Supervisor

- How relationships are impacted
- Establishing boundaries
- What else?

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Further Thoughts/Questions?