

EDRM Releases an Open Call for Contributors for Key Projects

Four cornerstone initiatives seek community contributors to advance global eDiscovery best practices

CORBETT, OR, UNITED STATES, January 22, 2026 /EINPresswire.com/ -- Leading the way for global best practices in eDiscovery, the [Electronic Discovery Reference Model \(EDRM\)](#) announced that several key projects are seeking contributors: the [ESI Protocol Project](#), the Discovery Workflows Project, the AI-Ethics and Bias Project, and the Testimony Evidence Reference Model (TERM) Project.

Why Join an EDRM Project?

"The resources that EDRM teams create have proven invaluable for judges, lawyers and other legal professionals involved with eDiscovery, information governance, data privacy and other legal technology, including evolving ai tools," said David R. Cohen, Chair of the EDRM Board of Project Trustees and co-Trustee of the ESI Protocol Project. "Volunteering for an EDRM team not only benefits the bench, bar and clients, but also provides networking and thought leadership opportunities that can be very satisfying and intellectually stimulating for our contributing team members."

About These Key Projects

ESI Protocol Project

"ESI protocols need not be controversial or a trap for the unwary. The goal of the ESI Protocol Project is to identify consensus on the essential elements of a sound production protocol and to offer neutral guidance on disputed issues, enabling counsel to streamline discussions and use concise, practical language to resolve them," explained Craig D. Ball, EDRM General Counsel and co-Trustee of the EDRM ESI Protocol Project.



Discovery Workflows

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*Khrhysna “Khrys” McKinney,
Principal at EDRM Trusted
Partner KL McKinney*

This project examines the full discovery workflow, beginning with document classification to eliminate redundant, obsolete, and trivial (ROT) data and isolate signal from noise. It then addresses information protection, with a continuous focus on building actionable knowledge throughout the process. The team’s goal is to deliver practical guidance across each stage of discovery, highlighting where technology and AI can drive efficiency, reduce risk, and improve overall outcomes.

“What’s unique about this project is the incorporation of the case strategy aspects throughout the discovery process,” explained Cristin Traylor, Senior Director of AI Transformation & Law Firm Strategy at EDRM Trusted Partner, Relativity and Discovery Workflows Project Trustee. “It’s important to have workflows that help surface the harmful and helpful facts of your case so that you can get the best possible outcomes for your clients.”

AI Ethics and Bias Project

As artificial intelligence becomes embedded across legal lifecycles, ethical considerations and bias risks can no longer be treated as secondary concerns. The Electronic Discovery Reference Model AI Ethics and Bias Project addresses the real-world consequences of deploying AI in legal practice, focusing on the effects of AI on people, processes, and outcomes.

Current projects advance two initiatives: the development of a Bias Issue Spotting Guide to help legal and technical professionals identify bias in AI-enabled workflows, and an exploration of the ethical implications of workforce displacement resulting from increased automation. Together, these efforts position legal professionals not only to meet ethical obligations, but to lead responsibly as AI adoption reaches scale.

“These projects create space for informed, practical dialogue across disciplines,” said Khrhysna “Khrys” McKinney, Principal at EDRM Trusted Partner KL McKinney. “By engaging with peers from throughout the EDRM community, participants strengthen their ability to evolve practices with strategic clarity and ratified confidence. This work invites professionals to step beyond the limits of their own roles and contribute to solutions that reflect the full complexity of the legal and technology ecosystem.”

Testimony Evidence Reference Model (TERM) Project

As automation, AI-assisted transcription, and digital platforms reshape how testimony is

captured and used, managing testimonial evidence now presents challenges that go well beyond traditional discovery. These developments call for new approaches, ones that can effectively support testimony management in today's complex legal environment.

The Testimony Evidence Reference Model (TERM) Project, a legal technology initiative, addresses this need by developing practical frameworks that span the full lifecycle of testimony. This includes identification, preservation, access, ethical reuse, privacy protection, and adaptation to technological change.

To that end, the TERM Project builds on and complements the Electronic Discovery Reference Model (EDRM) and its AI Ethics and Bias Project, with a focused emphasis on people, processes, and outcomes. The initiative is structured around four working groups: Acquisition and Generation, Accessibility and Utilization, Emerging Technologies, and Workflow and Deliverables. Together, these groups produce actionable guidance for managing testimony responsibly across a range of legal contexts.

By embedding ethics, transparency, and trust into legal workflows, the TERM Project furthers EDRM's commitment to principled innovation. It also invites legal and technology professionals to contribute to open, practical resources for the broader legal community.

"The EDRM wasn't explicitly designed to identify and illuminate best practices for testimony," said Michael Okerlund, CEO of CloudCourt and co-Project Trustee. "Our team has started exploring a complimentary, purpose-built model that equips legal professionals with cleaner tools and trustworthy guidance."

The TERM Project is led by:

- Michael Okerlund, CEO of CloudCourt
- Jeffrey Soldridge, Sr. Trial Specialist at Proskauer Rose
- Emily Chaidez, Attorney at Buchalter
- Sheila Grela, Paralegal at Buchalter

How Projects Work

EDRM charters projects based on organic community demand when eDiscovery professionals identify an area of practice that takes too much time and resources to re-invent the wheel. These global, multidisciplinary teams are led by more than one Project Trustee; all are welcome to participate, including both sides of the "v". More experienced professionals shape the project and lead drafting, while newer, less experienced professionals in the substantive areas are welcomed for project management, illustration, and, especially, reading for general understandability. Projects are not commercially sponsored, and participants are encouraged to "take their employer hat off" to facilitate consensus. Project output is published under Creative Commons International 4.0, allowing the widest use, including commercial use, with attribution back to EDRM.net.

Your voice matters.

Interested in collaborating and contributing? Contact info@edrm.net to join the movement.

About EDRM

Empowering the global leaders of eDiscovery, the Electronic Discovery Reference Model (EDRM) creates practical resources to improve eDiscovery, privacy, security, and information governance. Since 2005, EDRM has delivered leadership, standards, tools, guides, specifications, and frameworks to improve best practices worldwide. EDRM has an international presence in 145 countries, spanning 6 continents and growing, and an innovative support infrastructure for individuals, law firms, corporations, and government organizations seeking to improve the practice and provision of data and legal discovery. Learn more about the EDRM at EDRM.net.

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