



Judicial Council of California · Administrative Office of the Courts

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REPORT TO THE JUDICIAL COUNCIL

For business meeting on: October 28, 2014

Title	Agenda Item Type
Trial Courts: Allocations from the State Trial Court Improvement and Modernization Fund for Fiscal Year 2014–2015	Action Required
Rules, Forms, Standards, or Statutes Affected	Effective Date
None	October 28, 2014
Recommended by	Date of Report
Hon. Laurie M. Earl, Cochair, Trial Court Budget Advisory Committee	October 9, 2014
Zlatko Theodorovic, Cochair, Trial Court Budget Advisory Committee	Contact
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Executive Summary

After the council approved the fiscal year (FY) 2014–2015 allocations funded from the State Trial Court Improvement and Modernization Fund (IMF) in April 2014, the Governing Committee of the California Center for Judicial Education and Research presented the FY 2014–2015 and FY 2015–2016 Judicial Branch Education Plan to the council. The proposed plan was approved by the council in April. In order to implement this newly approved plan, the line item allocation for several IMF-funded education programs needs to be adjusted to reflect the required funding amounts for the programs with no change to the total, previously approved IMF allocation amount of \$1.414 million.

Recommendation

The Trial Court Budget Advisory Committee (TCBAC) recommends that the Judicial Council, effective October 28, 2014, implement a one-time allocation adjustment to the IMF FY 2014–2015 allocations related to 11 education programs managed by the staff of the Judicial Council's

Center for Judiciary Education and Research (CJER). Specifically, eight of 11 programs need to be increased by a total of \$68,000 and three of 11 programs need to be decreased by a total of \$68,000 in order to reflect the specific required allocation amounts for these programs. The net change to the council-approved allocations totaling \$1.414 million is zero (see Attachment A, row 16, column C).

Previous Council Action

At its April 25, 2014 meeting, the council approved FY 2014–2015 IMF allocations totaling \$78.4 million (see Attachment J3, row 81, column B), which include CJER’s allocations by program totaling \$1.414 million (see Attachment B, row 31, column B).

Rationale for Recommendation

The CJER Governing Committee and its nine Curriculum Committees finalized their education program planning and funding needs analyses after providing initial estimates of CJER’s IMF allocation needs to the TCBAC. Those estimates were provided to the TCBAC in early November 2013, and the council approved CJER’s allocations for each program in April 2014 based on those initial cost estimates. Consequently, the line items of the IMF allocation approved by the council in April 2014 did not reflect the final prioritization work of the CJER Governing Committee. Although the proposed adjustments do not alter the total approved allocation amount of \$1.414 million, the allocation adjustments to some of the programs are necessary to implement the first year of the approved Judicial Branch Education Plan for FY 2014–2015 and FY 2015–2016.

In short, the adjusted allocations to the funded programs provide greater accuracy than was available prior to completion by the CJER Governing Committee, Curriculum Committees, and the staff of the Judicial Council of their funding needs and programs prioritization and analyses (see Attachment A, column B).

The proposed allocation changes affect 11 programs. Eight of them are increasing the amount and three of them are decreasing the funding. There is a net change of zero to the council approved allocation totaling \$1.414 million. The details are as follows (see Attachment A, column C):

1. The primary drivers for the following changes are the addition of a biannual course for judges experienced in a probate assignment and some additional programming in the area of evidence:
 - a) Advanced education for experienced judges—\$22,000
 - b) Primary assignment orientation and overviews—\$11,000
 - c) Judicial Institutes—\$9,000
 - d) Regional and local judicial education courses—(\$3,000)
 - e) B.E. Witkin Judicial College of California—(\$10,000)

2. The primary driver for the following change is the cost of delivering the Core 40 classes as statewide programs. Prior year experience demonstrated a need to more fully capture the number of lodging rooms required to enable access to these programs by participants from all trial courts:
 - a) Managers and supervisors training—\$12,000

3. The primary drivers for the following changes are the absence of the biannual Trial Court Judicial Attorneys Institute in FY 2014–2015 and an updated estimate of the cost to offer the Core Leadership and Training Skills class as a statewide program:
 - a) Regional and local court staff education courses—\$4,000
 - b) Course personnel institutes—(\$55,000)

4. The primary drivers for these changes are the need for faculty training and expanded curriculum development in the area of domestic violence next fiscal year, and the need, based on prior experience, to more accurately estimate the cost of the Basic Faculty Development Course:
 - a) Trial court faculty statewide education program—\$7,000
 - b) Faculty development—\$2,000
 - c) Curriculum committee for state education plan development—\$1,000

Comments, Alternatives Considered, and Policy Implications

This item was not circulated for public comment. No comments concerning the TCBAC’s recommendation were received. The TCBAC did not consider any alternatives to this recommendation.

Implementation Requirements, Costs, and Operational Impacts

There are no implementation requirements or operational impacts.

Attachments

1. Attachment A: Proposed Adjustments to FY 2014–2015 STCIMF Allocations for Education Programs
2. Attachment B: Judicial Council–Approved FY 2014–2015 STCIMF Allocations for All Programs and Projects

Proposed Adjustments to FY 2014-2015 STCIMF Allocations for Education Programs

	Project and Program Title	Judicial Council Approved Allocation (4/25/2014)	CJER Proposed Allocation (5/15/2014)	Proposed Transfer Amount (\$)
		A	B	C
1	Advanced Education for Experienced Judges	34,000	56,000	22,000
2	Manager and Supervisor Training	34,000	46,000	12,000
3	Primary Assignment Orientation and Overviews	263,000	274,000	11,000
4	Judicial Institutes	150,000	159,000	9,000
5	Trial Court Faculty - Statewide Education Program	249,000	256,000	7,000
6	Regional and Local Court Staff Education Courses	11,000	15,000	4,000
7	Faculty Development	28,000	30,000	2,000
8	Curriculum Committee - Statewide Education Plan Development	1,000	2,000	1,000
9	Regional and Local Judicial Education Courses	9,000	6,000	(3,000)
10	B.E. Witkin Judicial College of CA	180,000	170,000	(10,000)
11	Court Personnel Institutes	132,000	77,000	(55,000)
12	Orientation for New Trial Court Judges	121,000	121,000	-
13	Leadership Training - Judicial	55,000	55,000	-
14	Distance Education - Satellite Broadcast	137,000	137,000	-
15	Distance Education - Online Video, Resources, Webinar	10,000	10,000	-
16	Total	1,414,000	1,414,000	-

Judicial Council--Approved FY 2014-2015 STCIMF Allocations For All Programs and Projects

	Project and Program Title	FY 2013-14 Judicial Council Approved Allocation ¹	FY 2014-15 Judicial Council Approved Allocation		
			Total	AOC Support	Local Assistance
		A	B = C + D	C	D
1	Judicial and Court Operations Services Division	8,616,000	8,432,600	-	8,432,600
2	Trial Court Security Grants	1,200,000	1,200,000	-	1,200,000
3	Total, Office of Security	1,200,000	1,200,000	-	1,200,000
4	Self-represented Litigants Statewide Support	100,000	100,000	-	100,000
5	Domestic Violence - Family Law Interpreter Program	20,000	20,000	-	20,000
6	Self-Help Center	5,000,000	5,000,000	-	5,000,000
7	Interactive Software - Self-Rep Electronic Forms	60,000	60,000	-	60,000
8	CFCC Educational Programs	90,000	90,000	-	90,000
9	CFCC Publications	20,000	20,000	-	20,000
10	Total, Center for Families, Children and Courts	5,290,000	5,290,000	-	5,290,000
11	Orientation for New Trial Court Judges	95,000	121,000	-	121,000
12	B.E. Witkin Judicial College of CA	160,000	180,000	-	180,000
13	Primary Assignment Orientation and Overviews	239,000	263,000	-	263,000
14	Leadership Training - Judicial	50,000	55,000	-	55,000
15	Judicial Institutes	110,000	150,000	-	150,000
16	Advanced Education for Experienced Judges	31,000	34,000	-	34,000
17	Regional and Local Judicial Education Courses	8,000	9,000	-	9,000
18	<i>Subtotal, Mandated, Essential & Other Education for Judicial Officers</i>	<i>693,000</i>	<i>812,000</i>	-	<i>812,000</i>
19	Manager and Supervisor Training	31,000	34,000	-	34,000
20	<i>Subtotal, Essential/Other Education for CEOs, Managers and Supervisors</i>	<i>31,000</i>	<i>34,000</i>	-	<i>34,000</i>
21	Court Personnel Institutes	120,000	132,000	-	132,000
22	Regional and Local Court Staff Education Courses	10,000	11,000	-	11,000
23	<i>Subtotal, Essential and Other Education for Court Personnel</i>	<i>130,000</i>	<i>143,000</i>	-	<i>143,000</i>
24	Trial Court Faculty - Statewide Education Program	236,000	249,000	-	249,000
25	Faculty Development	25,000	28,000	-	28,000
26	Curriculum Committee - Statewide Education Plan Development	1,000	1,000	-	1,000
27	<i>Subtotal, Faculty and Curriculum Development</i>	<i>262,000</i>	<i>278,000</i>	-	<i>278,000</i>
28	Distance Education - Satellite Broadcast	137,000	137,000	-	137,000
29	Distance Education - Online Video, Resources, Webinar	10,000	10,000	-	10,000
30	<i>Subtotal, Distance Learning</i>	<i>147,000</i>	<i>147,000</i>	-	<i>147,000</i>
31	Total, Office of Education / CJER	1,263,000	1,414,000	-	1,414,000
32	Trial Court Performance Measures Study	13,000	13,000	-	13,000
33	Court Access and Education	331,000	347,600	-	347,600
34	Court Interpreter Program	140,000	168,000	-	168,000
35	2015 Language Needs Study (every 5-year)	314,000	-	-	-
36	California Language Access Plan (one-time funding in FY 2013-14)	65,000	-	-	-
37	Total, Court Operations Special Services Office	863,000	528,600	-	528,600
38	Judicial Council and Court Leadership Services Division	12,251,200	12,299,700	2,120,000	10,179,700
39	Litigation Management Program	4,500,000	4,500,000	-	4,500,000
40	Judicial Performance Defense Insurance	920,600	966,600	-	966,600
41	Subscription Costs - Judicial Conduct Reporter	15,600	17,100	-	17,100
42	Trial Courts Transactional Assistance Program	451,000	451,000	-	451,000
43	Jury System Improvement Projects	18,000	19,000	-	19,000
44	Alternative Dispute Resolution Centers	75,000	75,000	-	75,000
45	Complex Civil Litigation Program	4,001,000	4,001,000	-	4,001,000
46	Regional Office Assistance Group (Support)	1,460,000	1,460,000	1,460,000	-
47	Total, Legal Services Office	11,441,200	11,489,700	1,460,000	10,029,700
48	Audit Contract	150,000	150,000	-	150,000
49	Internal Audit Services (Support)	660,000	660,000	660,000	-
50	Total, Internal Audit Services	810,000	810,000	660,000	150,000

Judicial Council--Approved FY 2014-2015 STCIMF Allocations For All Programs and Projects

	Project and Program Title	FY 2013-14 Judicial Council Approved Allocation ¹	FY 2014-15 Judicial Council Approved Allocation		
			Total	AOC Support	Local Assistance
		A	B = C + D	C	D
51	Judicial and Court Administrative Services Division	61,250,180	57,639,900	12,407,800	45,232,100
52	Contract for OPEB Valuation Report (every 2 years)	600,000	-	-	-
53	Budget Focused Training and Meetings	50,000	50,000	-	50,000
54	Treasury Services - Cash Management (Support)	238,000	238,000	238,000	-
55	Trial Court Procurement (Support)	244,000	244,000	244,000	-
56	Enhanced Collections (Support)	625,000	-	-	-
57	Total, Fiscal Services Office	1,757,000	532,000	482,000	50,000
58	Employee Assistance Program for Bench Officers	34,000	-	-	-
59	Workers Compensation Program Reserve ¹	719,800	1,231,000	-	1,231,000
60	Human Resources - Court Investigation	100,000	94,500	-	94,500
61	Trial Court Labor Relations Academies and Forums	30,000	34,700	-	34,700
62	Total, Human Resources Services Office	883,800	1,360,200	-	1,360,200
63	Telecommunications Support ¹	15,608,480	11,705,000	-	11,705,000
64	Judicial Branch Enterprise License and Policy	5,122,800	5,268,500	-	5,268,500
65	Interim Case Management Systems	1,650,600	1,246,800	-	1,246,800
66	Data Integration	3,906,900	3,903,600	577,100	3,326,500
67	California Courts Technology Center (CCTC)	9,465,100	10,487,200	1,892,200	8,595,000
68	Jury Management System	600,000	600,000	-	600,000
69	CLETS Services/Integration	515,200	433,400	114,000	319,400
70	CCPOR (ROM)	675,800	585,600	116,300	469,300
71	Testing Tools - Enterprise Test Management Suite	582,500	624,300	-	624,300
72	Uniform Civil Fees	385,000	343,000	343,000	-
73	Justice Partner Outreach / E-Services	572,000	200,700	200,700	-
74	Adobe LiveCycle Reader Service Extension (Starting from FY 2013-14)	129,800	133,700	-	133,700
75	V2 CMS (new - non-reimbursed costs from TCTF starting from FY 2014-15)	2,646,700	647,500	96,500	551,000
76	V3 CMS (new - non-reimbursed costs from TCTF starting from FY 2014-15)	4,789,200	5,658,100	1,276,000	4,382,100
77	Total, Information Technology Services Office	46,650,080	41,837,400	4,615,800	37,221,600
78	Phoenix Financial and Human Resources Services (Including Support)	11,934,300	13,885,300	7,310,000	6,575,300
79	Judicial Council's Court-Ordered Debt Task Force - New	25,000	25,000	-	25,000
80	Total, Trial Court Administrative Services Office	11,959,300	13,910,300	7,310,000	6,600,300
81	Total Expenditure or Allocation	82,117,380	78,372,200	14,527,800	63,844,400

Note:

1. A) The allocation amount includes two items that were approved by the JC after its initial approved allocations on 8/23/2013: a) new allocation of \$719,749 for Workers' Compensation Program Reserve; b) increase allocation of \$6,868,480 for Telecommunication Support. B) The total allocation (line #81) includes \$7,435,900 V2 and V3 CMS costs that are currently paid from TCTF. Without this amount, the IMF allocation is \$74,681,400.
2. The amount displayed in this column is based on the report from Oracle Financial that includes the expenditures, encumbrances, and purchase orders as of 3/31/2014.