



JUDICIAL COUNCIL OF CALIFORNIA

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MR. MARTIN HOSHINO
Administrative Director,
Judicial Council

March 28, 2016

Hon. Mark Leno
Chair, Joint Legislative Budget Committee
Attn: Ms. Peggy Collins
Legislative Office Building
1020 N Street, Room 553
Sacramento, California 95814

Ms. Elaine M. Howle
California State Auditor
Bureau of State Audits
621 Capitol Mall, Suite 1200
Sacramento, California 95814

Re: *Semiannual Report on Contracts for the Judicial Branch for the Reporting Period of July 1 through December 31, 2015*, as required under Public Contract Code section 19209

Dear Senator Leno and Ms. Howle:

Attached is the report from the Judicial Council required under Public Contract Code section 19209 on original contracts, contract payments to vendors from judicial branch entities, and amendments to those contracts during the reporting period of July 1 through December 31, 2015. Judicial branch entities are the Supreme Court, Courts of Appeal, superior courts, Habeas Corpus Resource Center, and Judicial Council.

As required by Public Contract Code section 19209, the report includes a listing of (1) all vendors or contractors receiving payments from any judicial branch entity and their associated distinct contracts, and (2) for every vendor or contractor receiving more than one payment, the amount of the payment, type of service or good provided, and judicial branch entity receiving the good or service. The report also includes all judicial branch entity contracts that were amended during the reporting period. This is the eighth semiannual report submitted under this reporting

Hon. Mark Leno
Ms. Elaine M. Howle
March 28, 2016
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requirement. The operative date of the Judicial Branch Contract Law was October 1, 2011, and only contracts with payments or amendments after that date are required to be included in the report. This report and all future reports will cover the six-month period, from January 1 through June 30, or July 1 through December 31, as appropriate. The attachments to the report include:

- Superior court reports, from July 1 through December 31, 2015:
 - a. Trial Court Contract Report
 - b. Trial Court Payment Report

- Supreme Court, Courts of Appeal, Habeas Corpus Resource Center, and Judicial Council reports, from July 1 through December 31, 2015:
 - a. Contract Amendment Report
 - b. Payment Report

Note that the report excludes certain payments or contract amendment information that is statutorily restricted, subject to any statutory restrictions on disclosure to third parties, or excluded from reporting.

The report attachments are very large. To save resources, hard copies are not attached. They may be accessed at the following address: www.courts.ca.gov/7466.htm.

If you have any questions related to this report, please contact Mr. Doug Kauffroath, Director, Branch Accounting and Procurement, Judicial Council, at doug.kauffroath@jud.ca.gov.

Sincerely,



Martin Hoshino
Administrative Director
Judicial Council of California

MH/OL/es

Attachments available at www.courts.ca.gov/7466.htm

cc: Members of the Joint Legislative Budget Committee
Diane F. Boyer-Vine, Legislative Counsel
Danny Alvarez, Secretary of the Senate

E. Dotson Wilson, Chief Clerk of the Assembly
Margie Estrada, Policy Consultant, Office of Senate President pro Tempore Kevin de León
Alf Brandt, Legislative Director, Office of Speaker-Elect Anthony Rendon
Anita Lee, Senior Fiscal and Policy Analyst, Legislative Analyst's Office
Tina McGee, Executive Secretary, Legislative Analyst's Office
Tiffany Garcia, Program Budget Analyst, Department of Finance
Peggy Collins, Principal Consultant, Joint Legislative Budget Committee
Julie Salley-Gray, Consultant, Senate Budget and Fiscal Review Committee
Matt Osterli, Consultant, Senate Republican Fiscal Office
Mike Petersen, Consultant, Senate Republican Policy Office
Jolie Onodera, Consultant, Senate Appropriations Committee
Chuck Nicol, Principal Consultant, Assembly Appropriations Committee
Tara Welch, Deputy Chief Counsel, Senate Judiciary Committee
Alison Merrilees, Chief Counsel, Assembly Judiciary Committee
Marvin Deon, Consultant, Assembly Budget Committee
Allan Cooper, Consultant, Assembly Republican Office of Policy & Budget
Paul Dress, Consultant, Assembly Republican Office of Policy & Budget
Cory T. Jaspersen, Director, Governmental Affairs, Judicial Council
Zlatko Theodorovic, Director, Finance, Judicial Council
Doug Kauffroath, Director, Branch Accounting & Procurement, Judicial Council
Laura Speed, Principal Manager, Governmental Affairs, Judicial Council
Pat Haggerty, Principal Manager, Branch Accounting & Procurement, Judicial Council
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Peter Allen, Public Affairs Officer, Public Affairs, Judicial Council
Olivia Lawrence, Supervising Analyst, Branch Accounting & Procurement, Judicial Council
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Yvette Casillas-Sarcos, Administrative Coordinator, Governmental Affairs, Judicial Council



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MR. MARTIN HOSHINO
*Administrative Director,
Judicial Council*

Report Title: *Semiannual Report on Contracts for the Judicial
Branch for the Reporting Period of July 1 through
December 31, 2015*

Summary Citation: Public Contract Code section 19209

Date of Report: February 26, 2016

The Judicial Council has submitted a report to the Legislature in accordance with Public Contract Code section 19209. The following summary of the report is provided under the requirements of Government Code section 9795.

The Judicial Branch Contract Law (JBCL), enacted March 24, 2011, requires judicial branch entities to comply with the provisions of the Public Contract Code applicable to state agencies and departments related to the procurement of goods and services. The JBCL applies to all contracts entered into or amended by judicial branch entities on or after October 1, 2011.

The JBCL also requires the Judicial Council, beginning in 2012, to report to the Joint Legislative Budget Committee and the State Auditor semiannually on contracting activities by judicial branch entities. The reports must contain specific information, including details about payments received by vendors and contractors, and their associated contracts, contract amendments entered into by judicial branch entities with vendors or contractors, and the nature of the services or goods provided under the reported contracts and amendments. The reports exclude payments or contract amendment information that is statutorily restricted or excluded from reporting, information subject to any statutory restrictions on disclosure to third parties, or information on capital cases in active litigation.

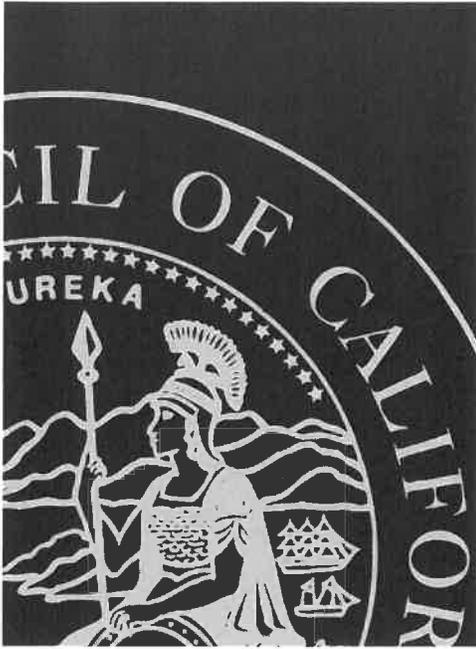
This report covers the period of July 1 through December 31, 2015. The report runs several hundred pages (including attachments). Nearly \$194.5 million in payments was made by the superior courts, and approximately \$196.3 million was made by the state judiciary (Supreme Court, Courts of Appeal, Habeas Corpus Resource Center, and Judicial

February 26, 2016

Page 2

Council). The report lists 9,889 contracts associated with these payments as well as 1,335 contracts with amendments.

The full report can be accessed at www.courts.ca.gov/7466.htm. A printed copy of the report may be obtained by contacting Mr. Doug Kauffroath, Director, Branch Accounting and Procurement, Judicial Council, at doug.kauffroath@jud.ca.gov.



Semiannual Report on Contracts for the Judicial Branch for the Reporting Period of July 1 through December 31, 2015

REPORT TO THE JOINT LEGISLATIVE
BUDGET COMMITTEE AND THE STATE
AUDITOR AS REQUIRED BY PUBLIC
CONTRACT CODE SECTION 19209

FEBRUARY 26, 2016



JUDICIAL COUNCIL
OF CALIFORNIA

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Hon. Tani G. Cantil-Sakauye
*Chief Justice of California and
Chair of the Judicial Council*

Mr. Martin Hoshino
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Mr. Zlatko Theodorovic
Director

BRANCH ACCOUNTING AND PROCUREMENT

Mr. Doug Kauffroath
Director

Ms. Olivia Lawrence
*Supervisor and
Primary Author of Report*

**Semiannual Report on Contracts for the Judicial Branch for the Reporting
Period of July 1 through December 31, 2015:
Report to the Joint Legislative Budget Committee and the State Auditor as
Required by Public Contract Code Section 19209**

February 26, 2016

Introduction

The Judicial Council submits this report to the Joint Legislative Budget Committee and the California State Auditor under Public Contract Code section 19209 to provide information related to procurement of contracts for the judicial branch. The report includes a list of vendors and contractors as required by Public Contract Code section 19209(b). The report further identifies the amounts of payment(s) to the contractors and vendors, the types of services and goods provided, and the judicial branch entity or entities with which the contractors and vendors contracted to provide those goods and services. The report is a summary which includes a list of all new contracts and amended contracts as required by Public Contract Code section 19209(c) and identifies the vendors and contractors as well as the types of services and goods provided under the contract, including any changes to the contract value, type of services or goods, or the contract. Judicial branch entities are the Supreme Court, Courts of Appeal (COA), superior courts, Habeas Corpus Resource Center (HCRC), and the Judicial Council.

Because the operative date of the Judicial Branch Contract Law (JBCL) was October 1, 2011, only contracts entered into or amended after that date are included in this report. This report is developed on a semiannual basis and covers the six-month periods from January 1 through June 30 and July 1 through December 31. This report covers the period from July 1 through December 31, 2015.

Contracts excluded from the report

Public Contract Code section 19204(c) provides that the JBCL “does not apply to procurement and contracting by judicial branch entities that are related to trial court construction, including, but not limited to, the planning, design, construction, rehabilitation, renovation, replacement, lease, or acquisition of trial court facilities.” This section also states that the JBCL “shall apply to contracts for maintenance of all judicial branch facilities that are not under the operation and management of the Department of General Services.” Appropriate exclusions and inclusions based on the above subsections have been made in this report.

Also excluded from the report are the following contracts that are unique to the superior courts and are not subject to the JBCL:

- Contracts (often referred to as memoranda of understanding or MOUs) between a superior court and the sheriff for court security services;

- Contracts between a court and a court reporter, when the court reporter provides services as an independent contractor; and
- Contracts between a court and a court interpreter, when the court interpreter provides services as an independent contractor.

Other reporting features

The Trial Court Contract Report provides a summary of contract activity during the reporting period for each contract on a single line.

Format of the report

The Judicial Council's Branch Accounting and Procurement office is responsible for preparing the report. The portion of the report that relates to the Supreme Court, Courts of Appeal, Habeas Corpus Resource Center, and Judicial Council is extracted by the Oracle Financial System. The information that relates to the superior courts is extracted from the Phoenix Financial System. Because two different information management systems are used, the format and data elements of various portions of the report differ. The four portions of the report are listed below.

- Superior courts:
 1. Trial Court Contract Report
 2. Trial Court Payment Report
- Supreme Court, Courts of Appeal, Habeas Corpus Resource Center, and Judicial Council:
 1. Contract Amendment Report
 2. Payment Report

The chart on the following page explains the differences in the format of the reports and describes the data elements.

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Judicial Branch Contract Reports Comparison of Required Data Elements to Report According to Public Contract Code Section 19209 with the Actual Reports			
Report	Required to be Reported by Statute	Data Element Column Heading	
		Superior Court Reports	Supreme Court, COA, HCRC, and JC Reports
Payment Report	<p>Vendors and contractors receiving any payment.</p> <p>Report each distinct contract between the vendor or contractor and a judicial branch entity.</p> <p>Identify the:</p> <ol style="list-style-type: none"> 1. Amount of payment to the contractor or vendor; 2. Type of service or good provided; and 3. Judicial branch entity (JBE) or entities with which the vendor or contractor was contracted to provide that service or good. 	<p>Vendor Name Vendor ID</p> <p>Contract Number</p> <p>Total Payments Goods/Services</p> <p>JBE</p>	<p>Vendor Name</p> <p>PO/Contract</p> <p>Amount Payment Summary</p> <p>Entity Name</p>
Contract and Contract Amendment Report	<p>For all contract amendments made, identify:</p> <ol style="list-style-type: none"> 1. Vendor or contractor; 2. Type of service or good provided under the contract; 3. Nature of the amendment; 4. Duration of the amendment; and 5. Cost of the amendment. 	<p>Court Contract Vendor ID Vendor Name</p> <p>Last Reported Contract Value</p> <p>Contract Value (New) Contract Value (Changed)</p> <p>Goods / Services (New) Goods / Services (Changed)</p> <p>Contract Duration (New)</p> <p>Contract Duration (Changed)</p> <p>Total Contract Duration</p>	<p>Entity Amendment Number Contract Number</p> <p>Vendor Name</p> <p>Type of Goods/Service Desc. Nature of Amendment Duration (months) Cost of Amendment</p>

This semiannual report includes all the information required by statute. Portions of the report related to the superior courts contain items of information (vendor ID), as listed above, that are not required for the Supreme Court, Courts of Appeal, Habeas Corpus Resource Center, and Judicial Council.

The superior court information includes contracts and contract amendments that were entered into during the reporting period, even if no payments were made. This is additional information

and is not required by the JBCL. The portion of the report related to the Supreme Court, Courts of Appeal, Habeas Corpus Resource Center, and Judicial Council does not include contracts for which no payment was made during the reporting period. The superior court report consolidates all payments to a vendor or contractor under one contract as one payment for the reporting period.

Statistics

On the following pages, a series of tables provides statistical information for the July 1 through December 31, 2015, reporting period. Note that some tables may include totals that may not equal 100 percent, due to rounding.

- **Table 1.** Overall Contract and Payment Statistics
- **Table 2.** Supreme Court, Courts of Appeal, Habeas Corpus Resource Center, and Judicial Council: Payment Statistics Summary
- **Table 3.** Trial Court Payment Statistics: Goods and Services Detail Summary

Because of their size, the detailed reports, including any explanatory footnotes, are posted separately for access and review. They are:

1. Superior court reports, from July 1 through December 31, 2015
 - a. Trial Court Contract Report
 - b. Trial Court Payment Report
2. Supreme Court, Courts of Appeal, Habeas Corpus Resource Center, and Judicial Council reports, from July 1 through December 31, 2015
 - a. Contract Amendment Report
 - b. Payment Report

This space intentionally left blank.

Table 1 provides an overall summary of contracts and payments for the reporting period:

Table 1 Overall Contract and Payment Statistics Reporting Period: July 1 through December 31, 2015		
	Superior Courts	Supreme Court, Courts of Appeal, Habeas Corpus Resource Center, and Judicial Council
Payments:		
Number	17,060	2,944
Dollar amount	\$ 194,478,699	\$ 196,294,991
Number of associated contracts	7,936	1,953
Contracts:		
Original contracts	4,842	*
Value of original contracts	\$ 186,522,681	*
Contracts with amendments	1,014	321
Cost of amendments	\$ 22,874,314**	\$ 110,276,623
* Includes only contracts with amendments as required by statute. ** Includes increases and decreases to contract value, such as changes in contract scope.		

As described below in table 2, a total of \$196,294,991 was paid to vendors by the Supreme Court, Courts of Appeal, Habeas Corpus Resource Center, and Judicial Council.

Table 2 Supreme Court, Courts of Appeal, Habeas Corpus Resource Center, and Judicial Council: Payment Statistics Summary Reporting Period: July 1 through December 31, 2015		
	Vendors	Payments
Supreme Court	104	\$ 3,633,398
Courts of Appeal:		
1st District	37	1,618,878
2nd District	104	3,251,016
3rd District	40	1,377,930
4th District	106	4,261,967
5th District	66	1,935,407
6th District	45	1,608,365
Judicial Council	723	178,308,948
Habeas Corpus Resource Center	51	299,081
TOTAL	1,276	\$ 196,294,991

Table 3, Trial Court Payment Statistics: Goods and Services Detail Summary, on pages 7–8, provides a summary of all payments for goods and services by the trial courts during this reporting period. The table shows 17,060 payments representing approximately \$194.5 million associated with more than 7,936 contracts.

There were 4,842 trial court contracts reported, of which 1,014 were affected by amendments. A small number of contracts may have been affected by changes in account codes. Otherwise, amendments consisted of the following:

- 536 that had an increase in contract value;
- 478 that had a decrease in contract value; and
- 129 that had a change in contract duration.

Table 3
Trial Court Payment Statistics: Goods and Services Detail Summary
Reporting Period: July 1 through December 31, 2015

Goods and Services	Payments	Value	Contracts
ADVERTISING	124	227,330.66	44
BANKING AND INVESTMENT SERV	14	30,333.40	3
COLLECTION SERVICES	76	9,774,649.99	38
CONSULTING SERVICES–TEMP	78	936,327.51	66
CONSULTING/PROFESSIONAL SVCS	1	36,841.29	1
CONTRACTED SERVICES	56	820,981.14	31
COUNTY-PROVIDED SERVICES	132	13,828,164.81	109
COURT-APPOINTED COUNSEL CHA	473	20,161,454.25	159
COURT INTERPRETER SERVICES	2,455	9,165,400.64	240
COURT ORDERED PROFESSIONAL	992	5,100,590.94	565
COURT REPORTER SERVICES	344	3,114,998.42	8
COURT TRANSCRIPTS	1,844	9,058,301.89	20
DUES AND MEMBERSHIPS	109	210,231.68	13
EMPLOYEE RELOCATION	2	4,873.29	1
EQUIPMENT MAINTENANCE	256	1,015,540.92	198
EQUIPMENT RENTAL/LEASE	232	2,829,372.61	177
EQUIPMENT REPAIRS	159	930,088.82	116
FEES/PERMITS	147	2,254,680.07	62
FREIGHT AND DRAYAGE	18	4,676.79	7
GENERAL CONSULTANT AND PROF	822	18,505,170.83	465
GENERAL EXPENSE	10	192,032.75	5
GENERAL EXPENSE–SERVICE	353	1,645,033.35	231
GROUNDS	32	100,833.00	19
INFORMATION TECHNOLOGY	5	355,778.22	3
INSURANCE	126	972,830.92	31
INVESTIGATIVE SERVICES	145	407,987.24	54
IT COMMERCIAL CONTRACT	210	10,149,355.99	177

Goods and Services	Payments	Value	Contracts
IT INTER-JURISDICTIONAL CON	19	590,161.89	14
IT MAINTENANCE	405	10,400,076.79	349
IT OTHER	38	280,460.18	26
IT REPAIRS/SUPPLIES/LICENSE	485	9,205,483.55	395
JANITORIAL	181	6,334,602.80	120
JUROR COSTS	32	36,739.17	5
LABORATORY EXPENSE	57	77,110.59	17
LEGAL	147	1,782,254.85	99
LIBRARY PURCHASES AND SUBSC	487	3,977,899.82	259
MAINTENANCE AND SUPPLIES	256	3,117,485.60	188
MAJOR EQUIPMENT	100	4,658,256.51	91
MEDIATORS/ARBITRATORS	328	1,420,803.79	61
MEETINGS, CONFERENCES, EXHI	161	242,641.10	44
MINOR EQUIPMENT—UNDER \$5K	915	9,965,875.61	795
OFFICE EXPENSE	1,781	4,735,608.01	1,432
OTHER CONTRACT SERVICES	61	1,116,224.25	42
OTHER FACILITY COSTS—GOODS	95	199,487.15	70
OTHER FACILITY COSTS—SERV	68	711,006.44	44
OTHER ITEMS OF EXPENSE	19	66,581.66	7
OTHER TRAVEL EXPENSE	8	1,544.00	1
OTHER-SPECIAL ITEMS OF EXPENSE	2	1,800.00	1
PHOTOGRAPHY	14	50,056.48	7
POSTAGE	21	520,755.37	9
POSTAGE METER	56	966,423.65	28
PRINTING	425	3,021,703.80	315
RENT/LEASE	107	1,751,650.85	74
SECURITY	132	6,381,562.12	82
SHERIFF	369	972,801.64	12
STAMPS, STAMPED ENVELOPES	223	3,075,848.88	104
TELECOMMUNICATIONS	477	6,010,152.35	260
TRAINING	232	547,092.95	76
UNIFORM ALLOWANCE	4	3,878.80	4
VEHICLE OPERATIONS	140	420,806.90	63
Grand Total	17,060	194,478,698.97	7,936

Report Information

Superior courts

1. Trial Court Contract Report

The Phoenix Financial System is not configured to collect information about contracts in a manner that precisely matches the statutory reporting requirements. Below are some key factors to consider when reviewing the contract data related to the superior courts.

- The Trial Court Contract Report includes all contracts and amendments completed within the reporting period because including all contracts is more cost-effective than

developing a report that includes distinct contracts for only the vendors who received more than one payment in the reporting period. *Vendor* is often used synonymously with *contractor* in the report.

- Goods/Services descriptions are determined by the general ledger account(s) entered in the system.
- The only amendment descriptions that can be reported are changes in the overall value or duration of an agreement, or changes in the goods/services provided.
- The Phoenix Financial System cannot distinguish between a true amendment and an error correction. Screens were built to allow superior courts to review transactions included in the report and exclude changes that were error corrections. This design feature affects the accuracy of the data based on a court's ability/availability to review its transactions.

Contract report fields

The chart below contains a list of the report fields and their descriptions.

Field Name	Field Description
Court	Judicial Branch Entity. Name of the superior court with the associated contract.
Contract	Unique identifier for the contract which can be system generated or a court-specific number.
Vendor ID	Unique identifier for the vendor which can be system generated or a court-specific vendor identifier.
Vendor Name	Name of the vendor.
Last Reported Contract Value	When the transaction record is for a contract that has been previously reported, the value in this field will refer to the most recently reported contract value. Only contracts created or amended after January 1, 2012, have been reported.
Contract Value (New)	When the transaction record is for a new contract, the value in this field refers to the known or estimated original contract value.
Contract Value (Changed)	This value will indicate the increase or decrease to the contract value if the contract value changed within the reporting period. It is possible for this to occur in the same reporting period as a new contract.
Goods/Services (New)	When the transaction record is for an original contract, this field provides a description of the goods/services based on the general ledger accounts associated with the contract. The goods/services are rolled up from subaccounts, so descriptions may appear to be duplicates but are really separate subaccounts in the rolled-up category.

Field Name	Field Description
Goods/Services (Changed)	When the transaction record refers to an amendment to the goods/services, this field provides a description of the changed goods/services based on the general ledger accounts associated with the contract. The goods/services are rolled up from subaccounts, so descriptions may appear to be duplicates but are really separate subaccounts in the rolled-up category.
Contract Duration (New)	When the transaction record is for an original contract, this field refers to the original contract duration which is represented in months or a fraction thereof.
Contract Duration (Changed)	When the transaction record refers to an amendment to the current contract duration, the value will indicate the increase or decrease to the contract duration which is represented in months or a fraction thereof.
Total Contract Duration	This field represents the total contract duration, including cumulative changes to the original contract duration. The value is represented in months or a fraction thereof.

2. Trial Court Payment Report

Below are some key factors to consider when reviewing the payment data.

- Goods/Services descriptions are determined by the general ledger account(s) entered in the system.
- A single payment may have multiple lines of data in the file if the payment is for multiple goods/services. Simple sorting by contract number keeps these records together. They can also be sorted by court (JBE) or by vendor.

The chart below contains a list of the report fields and their descriptions.

Field Name	Field Description
JBE	Name of the superior court making the payment.
Contract Number	Unique identifier for the contract under which the payment was made. If the payment was not associated with a contract, this field will be blank.
Goods/Services	Description of the goods/services based on the general ledger account associated with the payment. The goods/services are rolled up from subaccounts, so descriptions may appear to be duplicates but are really separate subaccounts in the rolled-up category.
Vendor ID	Unique identifier for the vendor.
Vendor Name	Name of the vendor.
Total Payments	Total payments to a vendor, reported by court, contract, and goods/services under the contract. Data can be sorted in various ways to obtain totals by court, vendor, contract, goods/services, etc.

Supreme Court, Courts of Appeal, Habeas Corpus Resource Center, and Judicial Council

General rules applicable to these portions of the report

Contract and payment information concerning active litigation on capital cases is not reported at the request of the Habeas Corpus Resource Center under statutory and work-product principles.

1. Contract Amendment Report

Exclusions and explanations in the Contract Amendment Report follow:

- Schedule changes that constitute amendments to a contract indicate the cost of amendment as “0.00,” “n/a,” or “not applicable” because no additional cost was involved.
- “Change of cost and schedule of the work” has an associated cost. Cost changes result from any number of reasons, and there is no specificity for this data element in the Oracle Financial System. Further details related to the basis of the cost change require review of the individual contract.

2. Payment Report

Payments extracted from the Oracle Financial System were reviewed to determine whether they were contractual payments. Any payment types considered “non-contractual items” are excluded from the reporting, including:

- Payroll and other payments to state employees and judicial officers and the related benefits payments;
- Assigned judges’ compensation;
- Appellate court-appointed counsel panel attorney compensation claims (paid on court order);
- Most utilities;
- Postage;
- Travel reimbursements;
- Settlement charges; and
- Trial court allocations.

Some of the above payment types may be included in the superior court reports, such as utilities, postage, and travel reimbursements.

Attachments

Because of their size, the following attachments, including any explanatory footnotes, are posted separately for access and review.

1. Superior court reports, from July 1 through December 31, 2015:
 - a. Trial Court Contract Report
 - b. Trial Court Payment Report

2. Supreme Court, Courts of Appeal, Habeas Corpus Resource Center, and Judicial Council reports, from July 1 through December 31, 2015:
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