

**ACTIVITY REPORTING AND PROPOSAL FORM**

**JUDICIAL COUNCIL DIRECTIVES**

**AOC RESTRUCTURING**

<b>DATE</b>	1/29/2013
<b>PREPARED BY</b>	Mary M. Roberts
<b>OFFICE NAME</b>	<u>Legal Services Office</u>
<b>JUDICIAL COUNCIL DIRECTIVE NUMBER</b>	116
<b>JUDICIAL COUNCIL DIRECTIVE</b>	E&P recommends that the Judicial Council support SEC Recommendation 7 -77(a) and (d), and direct the Administrative Director of the Courts that the Office of the General Counsel should employ and emphasize a customer service model of operation, recognizing a primary goal of providing timely service and advice to its clients, including to internal clients in the AOC and to those courts that request legal advice or services from this office.
<b>SEC RECOMMENDATION</b>	This office must place greater emphasis on being a service provider and in improving how it provides services, including as follows:  (a) Most fundamentally, this division should employ and emphasize a customer service model of operation — recognizing a primary goal of providing timely service and advice to its clients, including to internal clients in the AOC and to those courts that request legal advice or services from this office.
<b>RESPONSE (check applicable boxes)</b>	
<input checked="" type="checkbox"/> This directive has been completed and implemented:	
<p>To address this directive, the Legal Services Office has implemented a matter tracking system, described in more detail in response to JC directive 108, and implemented changes to practices within its Legal Opinions Unit (LOU), which is responsible for providing legal advice to the Judicial Council, AOC, and appellate and trial courts.</p> <p>The matter tracking system tracks legal services matters assigned throughout the LSO, by unit; assigns a level of complexity; tracks completion time and date; and allows for a tickler system to monitor open matters.</p> <p>Within the LOU, the LOU Supervisor closely monitors the status and response time of all LOU matters. Clients are regularly updated on the status of their opinion requests and the content and date of these follow-up client contacts are documented to ensure maximum responsiveness. As urgent client requests are received, the LOU Supervisor reprioritizes and reassigns work as necessary to ensure that urgent client needs are met. To help address the impact of reduced attorney staff in LOU and to meet client needs, attorneys in other units of the Legal Services Office are regularly assigned advice matters, thereby expediting the delivery of requested legal guidance. To speed the review of opinions, and thereby delivery of service to clients, the task of reviewing draft opinions is now performed by both the LOU Supervisor and a Senior Attorney in LOU. Use of outside legal counsel to assist with opinions is also considered, where appropriate and cost-effective.</p> <p>The LSO also will soon undertake additional steps to heighten its existing customer service model of operations. The LSO will institute a practice of circulating statewide legal opinions in draft form to</p>	

presiding judges and court executives for feedback and comment. This client-centered approach is intended to ascertain the practical implications of legal guidance and to ensure that advice delivered is of maximum utility to trial courts. Additionally, the LSO plans to inform court leaders, on a quarterly or bi-annual basis, of significant LSO legal opinions posted to the existing central repository for legal opinions (a secure section of the Serranus website) so that court leaders are reminded of the expanding body of legal guidance available to them.

 File Attachment

This directive is forwarded to the Judicial Council with options for consideration:

 File Attachment

Other:

 File Attachment

**TIMELINE AND RESOURCES FOR IMPLEMENTATION**

<b>IMPLEMENTATION DATE OR PROJECTED IMPLEMENTATION DATE</b>	Ongoing.
<b>RESOURCES REQUIRED FOR IMPLEMENTATION</b>	

**ADDITIONAL IMPLEMENTATION INFORMATION (complete only applicable sections)**

<input type="checkbox"/> <b>PROCEDURES/ POLICIES UPDATED OR DEVELOPED</b>	<p></p> <p> File Attachment</p>
<input type="checkbox"/> <b>TRAINING UPDATED OR DEVELOPED</b>	<p></p> <p> File Attachment</p>
<input type="checkbox"/> <b>SAVINGS</b>	<p></p> <p> File Attachment</p>
<input type="checkbox"/> <b>COST</b>	<p></p> <p> File Attachment</p>
	<p></p>

<input type="checkbox"/> <b>EFFICIENCIES</b>	 File Attachment
<input checked="" type="checkbox"/> <b>SERVICE LEVEL IMPACT</b>	<p>While the LSO strives to maintain a high level of service and is exploring all avenues for doing so, reduced resources impair the ability to provide timely services. The LSO continues to communicate with clients to set due dates, and incoming matters are reviewed for urgency and priority. During intake, the LSO communicates with each client to establish realistic expectations.</p>  File Attachment
<input type="checkbox"/> <b>OTHER</b>	 File Attachment
<b>ADMINISTRATIVE DIRECTOR OF THE COURTS (ADOC) REVIEW AND APPROVAL</b>	
<b>ADOC REVIEW</b>	Administrative Director of the Courts Review Date: <input type="text" value="2/7/2013"/>
<b>EXECUTIVE AND PLANNING (E&amp;P) COMMITTEE REVIEW</b>	
<b>E&amp;P REVIEW</b>	Executive and Planning Review Date: <input type="text" value="2/14/2013"/>