


ACTIVITY REPORTING AND PROPOSAL FORM

JUDICIAL COUNCIL DIRECTIVES AOC RESTRUCTURING

DATE	3/29/2013
PREPARED BY	Mary M. Roberts
OFFICE NAME	<u>Legal Services Office</u>
JUDICIAL COUNCIL DIRECTIVE NUMBER	108
JUDICIAL COUNCIL DIRECTIVE	E&P recommends that the Judicial Council support SEC Recommendation 7 -72(b) and direct the Administrative Director of the Courts to direct implementation of fundamental management practices to address underperformance of staff members and provide better supervision and allocation of work.
SEC RECOMMENDATION	<p>The Legal Services Office's current level of approximately 75 positions, including more than 50 attorney positions, should be reduced. To achieve the reduction, the following areas should be reviewed and considered, and appropriate actions taken:</p> <p>(b) Despite the large number of management positions, management systems and processes are particularly lacking in the Legal Services Office. Implementing fundamental management practices to address the underperformance of staff members and provide better supervision and allocation of work should produce efficiencies that can result in reductions.</p>
RESPONSE (check applicable boxes)	
<input checked="" type="checkbox"/> This directive has been completed and implemented:	
<p>The Legal Services Office (LSO) is improving upon past management practices and implementing new management practices for supervising staff and allocating work in light of this directive and the fact that the Legal Services Office staffing levels have been reduced over the past year from a total of 69 employees (including 50 attorneys) to a total of 50 employees (including 38 attorneys) through transfers, retirements (including a recent retirement of the Transactions and Business Operations Managing Attorney), resignations, and the Voluntary Separation Initiative Program. The number of employees referenced here excludes the 5 employees in the Secretariat Unit, who were part of the LSO in February 2012, but who have since formed a new office, Judicial Council Support Services.</p> <p>To address resource constraints office-wide and ensure appropriate supervision and allocation of work, the LSO developed a matter tracking system, which was implemented on February 1, for a 90-day trial and evaluation period. The matter tracking system tracks matters from assignment to completion date, assigns a level of complexity for each matter, and provides a uniform tickler system for review of open matters. As part of the system, attorneys log all legal services matters (e.g., requests for legal advice and contracts) and LSO management receives weekly updates about open and closed matters and may review the assignment log at any time.</p> <p>The matter tracking system has proven to be both an efficient and effective way to track legal services office-wide and to support appropriate allocation of incoming work and supervision of open matters. The LSO has made minor changes to the matter tracking form since February 1 to improve ease of use and effectiveness of the form (see attached Matter Log).</p>	


With respect to the direction that fundamental management practices be implemented to address underperformance of staff members and provide better supervision and allocation of work, LSO supervisors and managers are participating in the six-part management training program for AOC management and supervisors that was launched in January 2013. The six courses are intended to provide a framework for all AOC management teams to ensure consistent management practices across the organization on topics such as dealing with conflict and performance issues, providing tools to support staff, and performance management and evaluation.

It is important to note that LSO does not consider the activities above to be one-time solutions as LSO will continue to monitor its management practices. The LSO is currently proactively working with its Judicial Council liaisons on several LSO related-activities (i.e., potential LSO restructuring, evaluation of outside counsel cost-effectiveness, and the role of the Chief Counsel), and LSO's focus on staff supervision and the allocation of work will be included as a component of these activities. The AOC will be happy to provide future updates to the council on LSO's ongoing commitment to this directive at the council's request.




MatterLog.pdf
 Adobe Acrobat Document
 562 KB

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



File Attachment

Other:



File Attachment

TIMELINE AND RESOURCES FOR IMPLEMENTATION

IMPLEMENTATION DATE OR PROJECTED IMPLEMENTATION DATE	<input type="text"/>
RESOURCES REQUIRED FOR IMPLEMENTATION	<input type="text"/>

ADDITIONAL IMPLEMENTATION INFORMATION (complete only applicable sections)

<input type="checkbox"/> PROCEDURES/ POLICIES UPDATED OR DEVELOPED	<input type="text"/>  File Attachment
<input type="checkbox"/> TRAINING UPDATED OR DEVELOPED	<input type="text"/>

	<input type="text"/> <input type="button" value="File Attachment"/>
<input type="checkbox"/> SAVINGS	<input type="text"/> <input type="button" value="File Attachment"/>
<input type="checkbox"/> COST	<input type="text"/> <input type="button" value="File Attachment"/>
<input type="checkbox"/> EFFICIENCIES	<input type="text"/> <input type="button" value="File Attachment"/>
<input type="checkbox"/> SERVICE LEVEL IMPACT	<input type="text"/> <input type="button" value="File Attachment"/>
<input type="checkbox"/> OTHER	<input type="text"/> <input type="button" value="File Attachment"/>
ADMINISTRATIVE DIRECTOR OF THE COURTS (ADOC) REVIEW AND APPROVAL	
ADOC REVIEW	Administrative Director of the Courts Review Date: <input type="text" value="4/10/2013"/>
EXECUTIVE AND PLANNING (E&P) COMMITTEE REVIEW	
E&P REVIEW	Executive and Planning Review Date: <input type="text" value="4/17/2013"/>

MATTER LOG FOR: #: Assigned by database

Open date:

End date:

Requestor:

- Supreme Court
- 1 DCA (SF)
- 2 DCA (LA)
- 3 DCA (Sac)
- 4 DCA (SD)
- 5 DCA (Fresno)
- 6 DCA (SJ)

Superior Court of California, County of:

- | | | | | | | |
|------------------------------------|-----------------------------------|---------------------------------|---------------------------------------|-------------------------------------|--------------------------------|--|
| <input type="radio"/> Alameda | <input type="radio"/> Glenn | <input type="radio"/> Marin | <input type="radio"/> Placer | <input type="radio"/> San Mateo | <input type="radio"/> Sutter | <input type="radio"/> Judicial Council |
| <input type="radio"/> Alpine | <input type="radio"/> Humboldt | <input type="radio"/> Mariposa | <input type="radio"/> Plumas | <input type="radio"/> Santa Barbara | <input type="radio"/> Tehama | |
| <input type="radio"/> Amador | <input type="radio"/> Imperial | <input type="radio"/> Mendocino | <input type="radio"/> Riverside | <input type="radio"/> Santa Clara | <input type="radio"/> Trinity | |
| <input type="radio"/> Butte | <input type="radio"/> Inyo | <input type="radio"/> Merced | <input type="radio"/> Sacramento | <input type="radio"/> Santa Cruz | <input type="radio"/> Tulare | |
| <input type="radio"/> Calaveras | <input type="radio"/> Kern | <input type="radio"/> Modoc | <input type="radio"/> San Benito | <input type="radio"/> Shasta | <input type="radio"/> Tuolumne | |
| <input type="radio"/> Colusa | <input type="radio"/> Kings | <input type="radio"/> Mono | <input type="radio"/> San Bernardino | <input type="radio"/> Sierra | <input type="radio"/> Ventura | |
| <input type="radio"/> Contra Costa | <input type="radio"/> Lake | <input type="radio"/> Monterey | <input type="radio"/> San Diego | <input type="radio"/> Siskiyou | <input type="radio"/> Yolo | |
| <input type="radio"/> Del Norte | <input type="radio"/> Lassen | <input type="radio"/> Napa | <input type="radio"/> San Francisco | <input type="radio"/> Solano | <input type="radio"/> Yuba | |
| <input type="radio"/> El Dorado | <input type="radio"/> Los Angeles | <input type="radio"/> Nevada | <input type="radio"/> San Joaquin | <input type="radio"/> Sonoma | | |
| <input type="radio"/> Fresno | <input type="radio"/> Madera | <input type="radio"/> Orange | <input type="radio"/> San Luis Obispo | <input type="radio"/> Stanislaus | | |

- AOC: CFCC CJCS COSS EDUC EXEC FSO HCRC HR ITSO JCSS
 LSO OAS OC OGA OJBCP OREFM OS SPO TCAS TCLO

Other Public Entity:

Person making request (name):

- APJ
- ACA
- Attorney
- PJ/Asst. PJ
- CEO
- Public
- Judicial Officer
- Other court staff
- Other:

Request (brief description):

Response and/or product (brief description): Type of advice: Reference #(LOU, LEU etc.)

Level of effort:

- | | | | |
|--|---|---|---|
| <p>CLASS I:
Minimum effort; quickly addressed; initial response sufficient; no follow-up expected; up to 1 hr</p> <input checked="" type="radio"/> | <p>CLASS II:
Medium effort; initial response and some research/follow-up; 1-8 hrs</p> <input type="radio"/> | <p>CLASS III:
Substantial effort; major research/follow-up; complex; 8-40 hrs</p> <input type="radio"/> | <p>CLASS IV:
Time intensive or long-term project; 40+ hrs</p> <input type="radio"/> |
|--|---|---|---|

Any other AOC, including LSO, staff involved:

Any other notes:

Open matter

Close matter

Reset Form