


## ACTIVITY REPORTING AND PROPOSAL FORM

### JUDICIAL COUNCIL DIRECTIVES AOC RESTRUCTURING


<b>DATE</b>	3/29/2013
<b>PREPARED BY</b>	Mary M. Roberts
<b>OFFICE NAME</b>	<u>Legal Services Office</u>
<b>JUDICIAL COUNCIL DIRECTIVE NUMBER</b>	119
<b>JUDICIAL COUNCIL DIRECTIVE</b>	E&P recommends that the Judicial Council direct the Administrative Director of the Courts to place emphasis on reducing bottlenecks for advice, contracts, and other projects. More effective tickler and tracking systems for opinions, contracts, and other documents should be put in place.
<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: (d) Emphasis must be placed on reducing bottlenecks for advice, contracts, and other projects. More effective tickler and tracking systems for opinions, contracts, and other documents should be put in place.
<b>RESPONSE (check applicable boxes)</b>	
<input checked="" type="checkbox"/> This directive has been completed and implemented:	
<p>To address resource constraints office-wide, ensure appropriate supervision and allocation of work, and provide a more effective tickler and tracking system for opinions, contracts, and other documents, the Legal Services Office (LSO) developed a matter tracking system that 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 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). LSO has found the matter tracking system to be an effective way to track the workload of all legal services units, including requests for opinions, contracts, and other documents.</p> <p>In addition to implementation of the matter tracking system, the LSO has taken other actions to reduce bottlenecks for advice, contracts, and other projects. Within the Legal Opinions Unit, to help address the impact of reduced attorney staff and meet client needs, attorneys in other units are regularly assigned advice matters, thereby expediting delivery of requested legal guidance. In addition, to speed review of opinions, a senior attorney now shares with the supervising attorney the responsibility to review draft opinions. With respect to contracts and other documents, LSO also is working closely with the Business Services Unit of the Fiscal Services Office (FSO), including meeting monthly with the FSO Assistant Director responsible for the Business Services Unit, in an effort to assist the Business Services Unit in timely delivery of completed contracts.</p> <p>It is important to note that LSO does not consider the activities above to be one-time solutions as LSO will continue to monitor the services provided on an ongoing basis. The LSO is currently proactively working with its Judicial Council liaisons on several LSO related-activities (i.e., potential</p>	

LSO restructuring, evaluation of outside counsel cost-effectiveness, and the role of the Chief Counsel), and LSO's focus on timely customer service will be included as a component of these activities. The AOC is targeting the June 2013 council meeting to report back on these efforts and will be happy to provide future updates to the council on LSO's ongoing commitment to customer service 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**

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

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

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

	<input type="text"/> <input type="button" value="File Attachment"/>
<input type="checkbox"/> <b>EFFICIENCIES</b>	<input type="text"/> <input type="button" value="File Attachment"/>
<input type="checkbox"/> <b>SERVICE LEVEL IMPACT</b>	<input type="text"/> <input type="button" value="File Attachment"/>
<input type="checkbox"/> <b>OTHER</b>	<input type="text"/> <input type="button" value="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="4/10/2013"/>
<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="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:<br/>Minimum effort; quickly addressed; initial response sufficient; no follow-up expected; up to 1 hr</p> <input checked="" type="radio"/> | <p>CLASS II:<br/>Medium effort; initial response and some research/follow-up; 1-8 hrs</p> <input type="radio"/> | <p>CLASS III:<br/>Substantial effort; major research/follow-up; complex; 8-40 hrs</p> <input type="radio"/> | <p>CLASS IV:<br/>Time intensive or long-term project; 40+ hrs</p> <input type="radio"/> |
|--|---|---|---|

Any other AOC, including LSO, staff involved:

Any other notes: