

## ACTIVITY REPORTING AND PROPOSAL FORM

### JUDICIAL COUNCIL DIRECTIVES AOC RESTRUCTURING


<b>DATE</b>	6/11/2013
<b>PREPARED BY</b>	Zlatko Theodorovic
<b>OFFICE NAME</b>	<u>Fiscal Services Office</u>
<b>JUDICIAL COUNCIL DIRECTIVE NUMBER</b>	37
<b>JUDICIAL COUNCIL DIRECTIVE</b>	E&P recommends that the Judicial Council direct the Administrative Director of the Courts to require that the Finance Division track appropriations and expenditures by fund, and keep a historical record of both so that easy year-to-year comparisons can be made. This can be done by unit, division, or by program, whichever provides the most informed and accurate picture of the budget.
<b>SEC RECOMMENDATION</b>	The Finance Division (Fiscal Services Office) should track appropriations and expenditures by fund, and keep a historical record of both so that easy year-to-year comparisons can be made. This can be done by unit, division or by program — whichever provides the audience with the most informed and accurate picture of the budget.
<b>RESPONSE (check applicable boxes)</b>	
<input type="checkbox"/> This directive has been completed and implemented:  <div style="border: 1px solid black; height: 15px; width: 100%;"></div> <div style="border: 1px solid black; padding: 2px; width: fit-content;">📎 File Attachment</div>	
<input type="checkbox"/> This directive is forwarded to the Judicial Council with options for consideration:  <div style="border: 1px solid black; height: 15px; width: 100%;"></div> <div style="border: 1px solid black; padding: 2px; width: fit-content;">📎 File Attachment</div>	
<input checked="" type="checkbox"/> Other:  EXTENSION BEING REQUESTED TO OCTOBER 2013  The AOC FSO tracks appropriations and expenditures by fund. The information has been tracked this way since the inception of the AOC as required by Department of Finance and to comply with State of California Legal Basis Accounting. The Oracle financial system has maintains all of this information dating back to 1996-97. Additionally, the Judicial Branch display in the annual Governor's Budget and supporting schedules provide appropriations and expenditures by fund. Year to year comparisons for units or divisions are generally more accurate within a short period of time given the organizational re-structure of the AOC that has occurred over time.	

Also, the AOC Fiscal Services Office conduct regular reviews of budget and expenditure information to ensure divisions/offices are functioning within available resources. This includes monthly budget forecasting for the remainder of the fiscal year as well as year-end planning activities. AOC staff also provides these budget support services to the Supreme Court, Courts of Appeal, and the Habeas Corpus Resource Center.

After the end of this fiscal year, FSO will review existing reports and develop a standard year-end summary to facilitate comparative year-to-year funding changes.

AOC staff will continue to review existing processes and procedures to determine what improvements can be implemented on an ongoing basis.






It should be recognized that the administration and maintenance of policies and procedures is an ongoing process of continuous improvement, and although milestones can be achieved, this is an ongoing process.

 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"/>  File Attachment
<input type="checkbox"/> <b>EFFICIENCIES</b>	<input type="text"/>  File Attachment
<input type="checkbox"/> <b>SERVICE LEVEL</b>	<input type="text"/>

<b>IMPACT</b>	<input type="text" value="File Attachment"/>
<input type="checkbox"/> <b>OTHER</b>	<input type="text"/> <input type="text" 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="6/13/2013"/>
<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="6/17/2013"/>