

Workload-Based Allocation & Funding Methodology

AB 1058 Funding Allocation
Joint Subcommittee

July 31, 2017

WAFM

- Workload model based upon the Resource Assessment Study (RAS)
- Calculates an estimate of funding needed, by court, for non-judicial, filings-driven functions
- Compares the estimated funding need to available funding
- Establishes methodology for allocation if available funding is less than funding needed



WAFM

- RAS calculated the number of employees needed.
- Total cost of employees is then calculated
- Salary is calculated using an average cost adjusted for cost of labor differences
- Actual retirement and health costs are included



WAFM

- An estimation of non-personnel costs needed for operations
- Higher amounts are provided for small court expenses due to lack of economy of scale
- A base funding floor to reflect the minimum level of funding needed to operate regardless of filings



Bureau of Labor Statistics Factor

- Identifies labor cost differences between courts. (e.g., San Francisco labor is more expensive than Sacramento labor)
- Local government is used as the comparison for most, except in counties with high proportions of state employment
- Three-year average used to smooth any fluctuations



WAFM

Small Court Adjustments:

- FTE Allotment Factor
- OE&E per FTE
- Absolute and graduated funding floors



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WAFM

What it doesn't include:

- Costs associated with programs that have dedicated funding sources
- Such programs include AB 1058 grant program, enhanced collections, dependency counsel, security, subordinate judicial officers, and interpreters



WAFM

What it doesn't require:

- How courts structure positions
- The number and make up of court staff
- The actual salaries courts pay specific classifications



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How was WAFM Implemented?

- 2013-2014 allocations were used to establish historical base
- Judicial Council approved a five-year transition plan through 2017-2018:
 - **2013-2014** – 90% historical vs. 10% WAFM
 - **2014-2015** – 85% historical vs. 15% WAFM
 - **2015-2016** – 70% historical vs. 30% WAFM
 - **2016-2017** – 60% historical vs. 40% WAFM
 - **2017-2018** – 50% historical vs. 50% WAFM



How was WAFM Implemented?

- Any new money appropriated for general trial court operations is allocated using WAFM
- For each new dollar received, a dollar of historical base funding is then reallocated using WAFM

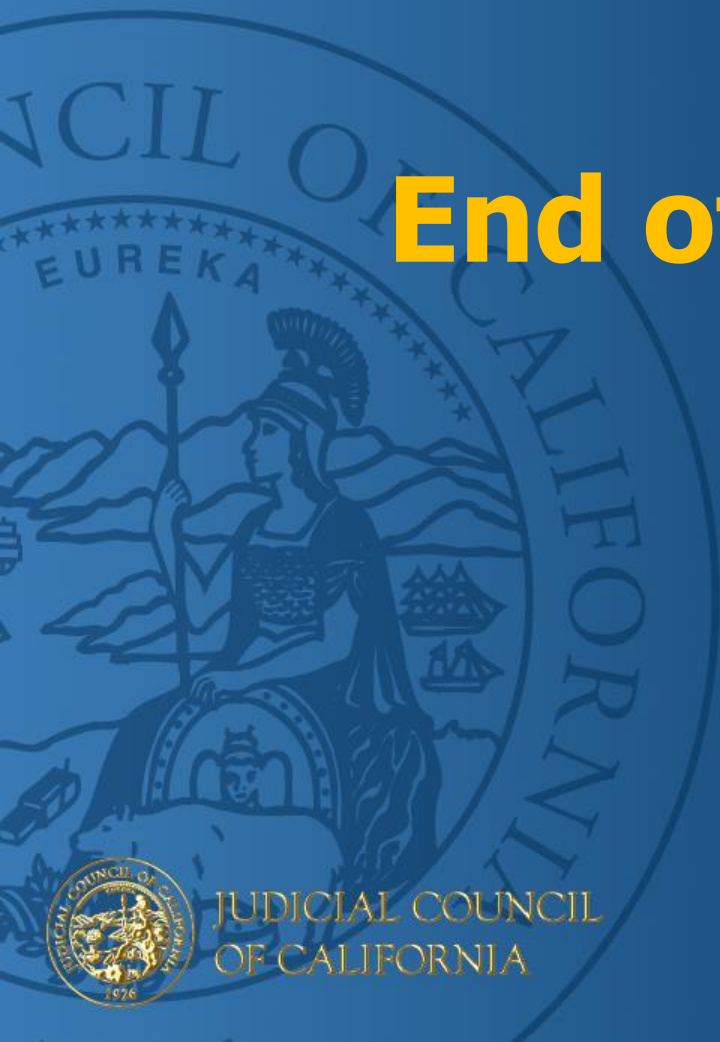


Funding Methodology Subcommittee

- This subcommittee, formed in July 2013, focuses on the ongoing review and refinement of WAFM
- The subcommittee established a work plan which is updated annually



End of Presentation



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