



JUDICIAL COUNCIL OF CALIFORNIA

INFORMATION TECHNOLOGY
ADVISORY COMMITTEE

www.courts.ca.gov/itac.htm
itac@jud.ca.gov

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INFORMATION TECHNOLOGY ADVISORY COMMITTEE

NOTICE AND AGENDA OF OPEN MEETING

Open to the Public (Cal. Rules of Court, rule 10.75(c)(1) and (e)(1))

THIS MEETING IS BEING CONDUCTED BY ELECTRONIC MEANS

THIS MEETING IS BEING RECORDED

Date: October 27, 2021
Time: 12:00 – 1:00 PM
Connection Info: <https://jcc.granicus.com/player/event/1128?&redirect=true>

Meeting materials will be posted on the advisory body web page on the California Courts website at least three business days before the meeting.

Members of the public seeking to make an audio recording of the meeting must submit a written request at least two business days before the meeting. Requests can be e-mailed to itac@jud.ca.gov.

Agenda items are numbered for identification purposes only and will not necessarily be considered in the indicated order.

I. OPEN MEETING (CAL. RULES OF COURT, RULE 10.75(C)(1))

Call to Order and Roll Call

Approval of Minutes (Action Required)

Approve minutes of the following Information Technology Advisory Committee meetings:

- September 15, 2021

II. PUBLIC COMMENT (CAL. RULES OF COURT, RULE 10.75(K)(1))

This meeting will be conducted by electronic means with a listen only conference line available for the public. As such, the public may submit comments for this meeting only in writing. In accordance with California Rules of Court, rule 10.75(k)(1), written comments pertaining to any agenda item of a regularly noticed open meeting can be submitted up to one complete business day before the meeting. For this specific meeting, comments should be e-mailed to itac@jud.ca.gov. Only written comments received by **12 p.m. on October 26** will be provided to advisory body members prior to the start of the meeting.

III. REPORTS AND POSSIBLE ACTION ITEMS (ITEMS 1-7)

Item 1

Chair's Report

Presenter: Hon. Sheila F. Hanson, Chair

Item 2

Judicial Council Technology Committee Update

Update on activities and news coming from this internal oversight committee.

Presenter: Hon. Kyle S. Brodie, Chair, Technology Committee

Item 3

Remote Appearances: Update and Next Steps

Receive an update on the status of SB 241 (Remote Appearances) and next steps.

Presenter: Andrea Jaramillo, Legal Services

Item 4

Court Technology Inventory

Review the branch technology inventory.

Presenter: Heather Pettit, CIO

Item 5

Information Security Office

Receive an update on the next steps for the Information Security Office.

Presenter: Heather Pettit, CIO

Item 6

Potential New Workstream: Courthouse of the Future (Action Required)

Consider a proposal to add a new workstream to the 2020 Annual Agenda.

Presenter: Heather Pettit, CIO

Item 7

2022 Annual Agenda

Discuss ITAC's 2022 Annual Agenda.

Presenters: Hon. Sheila Hanson, Chair
Hon. Louis Mauro, Vice-Chair

IV. ADJOURNMENT

Adjourn



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INFORMATION TECHNOLOGY ADVISORY COMMITTEE

MINUTES OF OPEN MEETING

September 15, 2021

12:00 PM to 1:00 PM

Videoconference

Advisory Body Members Present: Hon. Sheila F. Hanson, Chair; Hon. Louis R. Mauro, Vice Chair; Mr. Mike Baliel; Mr. Jake Chatters; Mr. Brian Cotta; Hon. Julie R. Culver; Hon. Tara Desautels; Mr. Paras Gupta; Hon. Samantha P. Jessner; Hon. James Mize; Hon. Kimberly Menninger; Mr. Snorri Ogata; Mr. Darrel Parker; Hon. Donald Segerstrom; Ms. Jeannette Vannoy; Mr. Don Willenburg; Hon. Theodore Zayner

Advisory Body Members Absent: Assembly member Marc Berman; Ms. Alexandra Grimwade; Hon. Michael S. Groch; Senator Robert Hertzberg (Alex Barnett); Hon. Bruce Smith; Hon. Joseph Wiseman; Mr. David H. Yamasaki

Others Present: Judge Kyle Brodie; Hon. Victor A. Rodriguez; Mr. Douglas Denton; Mr. Kevin Lane; Mr. Mark Dusman; Ms. Jamel Jones; Ms. Jessica Craven; Ms. Andrea Jaramillo; Ms. Jackie Woods and other JCC staff present

OPEN MEETING

Call to Order and Roll Call

The chair called the meeting to order and took roll call.

Approval of Minutes

The advisory body reviewed and approved the minutes of the July 28, 2021, Information Technology Advisory Committee meeting.

There were no public comments received for the September 15, 2021, meeting.

DISCUSSION AND ACTION ITEMS (ITEMS 1 – 5)

Item 1

Chair's Report

Presenter: Hon. Sheila F. Hanson, Chair

Update: Judge Hanson welcomed returning ITAC members and introduced three new members: Justice Truc T. Do, Fourth District Court of Appeal; Mr. Mike Baliel, CIO of Santa Clara Superior Court; and Mr. Anh Tran, CIO of San Joaquin Superior Court. Additionally, she thanked departing member Mr. Paras Gupta, CIO of Monterey Superior Court for his many efforts and the expertise he has contributed to ITAC projects.

Item 2

Judicial Council Technology Committee Update

Update on activities and news coming from this internal oversight committee.

Presenter: Hon. Kyle S. Brodie, Chair, Technology Committee

Update: Judge Brodie gave an update on the Technology Committee's activities. The committee held a closed meeting to consider ITAC's Branchwide Information Security Roadmap Workstream report that will be presented to the Judicial Council on October 1. At two open meetings, the committee approved ITAC's proposal to add criminal cases to the e-filing and e-services rules; received an update on vendor storage proposals and lodged electronic exhibits; and approved the funding model, project recommendations, and allocations to trial courts of Court Modernization Funding FY 2021-2022.

Item 3

Written Workstream and Subcommittee Status Reports (located in materials)

Branchwide Information Security Roadmap Workstream

Hon. Donald I. Segerstrom and Mr. Brian Cotta, Executive Sponsors

E-Filing Workstream

Mr. Snorri Ogata, Executive Sponsor

Electronic Evidence: Rules, Technology, and Pilot Evaluation

Hon. Kimberly Menninger, Executive Sponsor

Identity and Access Management Strategy Workstream

Mr. Snorri Ogata, Executive Sponsor

Action: Approved deadline extension to January 2022.

Rules & Policy Subcommittee

Hon. Julie Culver, Chair

Joint Ad Hoc Subcommittee: Remote Video Appearances in Civil Proceedings

Hon. Julie Culver, Liaison

Item 4

Court Technology Modernization Funding Update

Update on the allocation of the FY 2021-22 Court Technology Modernization Funding.

Presenter: Hon. Kyle S. Brodie, Chair, Technology Committee

Update: Judge Brodie provided an update on the FY 2021-2022 funding process. After trial courts submitted their proposals, they were reviewed by a workstream for compliance with the grant requirements. The workstream did not consider funding. Of the \$25M, \$15M will be allocated to trial court projects, and the remaining \$10M will be used for branchwide projects.

Item 5

Language Access Services Signage and Technology Grant Program, FY 2021-22 (Action Required)

Review and approve the proposed Signage and Technology Grant program recommendations for fiscal year 2021-22.

Presenters: Hon. Victor A. Rodriguez, Chair, Language Access Subcommittee
Douglas G. Denton, Principal Manager, Language Access Services

Action: Judge. Rodriguez reviewed the proposed Signage and Technology Grant allocations, and ITAC approved the recommendations.

A D J O U R N M E N T

There being no further business, the meeting was adjourned.

Approved by the advisory body on .

Information Security Office Update

October 27, 2021



JUDICIAL COUNCIL
OF CALIFORNIA

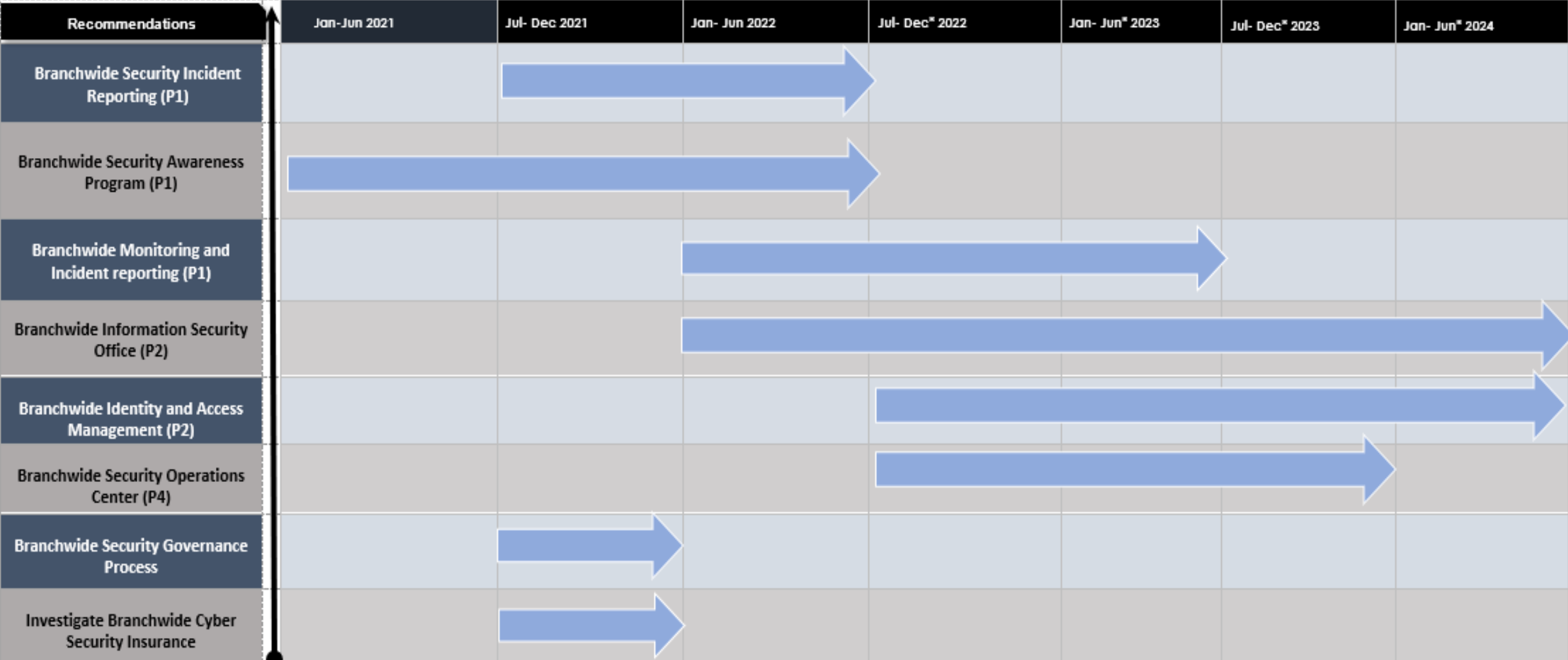


Recommendations

1. Establish a Judicial Council office to support and implement security programs:
 1. Security Awareness
 2. Security Incident Reporting Process for all Judicial Branch Entities
 3. Security Monitoring and Incident Reporting System
 4. Security Operations Center
 5. Standard for Identity and Access Management
 6. Data Classification Framework and Standard
 7. Security Governance
 8. Investigate Cybersecurity Insurance
2. Obtain permanent ongoing funding to support recommended actions.



Roadmap



Information Technology Advisory Committee (ITAC)

Annual Agenda¹—2022

Approved by Judicial Council Technology Committee: _____

I. COMMITTEE INFORMATION

Chair:	Hon. Sheila F. Hanson, Superior Court of California, County of Orange
Lead Staff:	Camilla Kieliger, Sr. Business Systems Analyst, Judicial Council Information Technology
Committee's Charge/Membership: <p>Rule 10.53. Information Technology Advisory Committee of the California Rules of Court states the charge of the Information Technology Advisory Committee. The committee makes recommendations to the council for improving the administration of justice through the use of technology and for fostering cooperative endeavors to resolve common technological issues with other stakeholders in the justice system. The committee promotes, coordinates, and acts as executive sponsor for projects and initiatives that apply technology to the work of the courts.</p> <p>Rule 10.53. Information Technology Advisory Committee sets forth additional duties of the committee.</p> <p>ITAC currently has 25 members. The ITAC website provides the composition of the committee.</p> Subcommittees²: <ul style="list-style-type: none">• Rules & Policy Subcommittee<ul style="list-style-type: none">○ Trial court rules and statutes revisions• Joint Appellate Technology Subcommittee (JATS) [suspended status for 2022]• Joint Ad Hoc Subcommittee on Remote Video Appearances	

¹ The annual agenda outlines the work a committee will focus on in the coming year and identifies areas of collaboration with other advisory bodies and the Judicial Council staff resources

² California Rules of Court, rule 10.30 (c) allows an advisory body to form subgroups, composed entirely of current members of the advisory body, to carry out the body's duties, subject to available resources, with the approval of its oversight committee

All proposed projects for the year are included on the Annual Agenda, as follows:

Workstreams

- **Tactical Plan for Technology Update:** Update the *Tactical Plan for Technology* for effective date 2023-2024.
- **Identity and Access Management Strategy (continued):** Develop a branch identity management strategy.
- **Electronic Evidence: Rules, Technology and Pilot Evaluation (continued):** Investigate and draft technology best practices, standards, and policies, and propose changes to evidence-based rules and statutes.
- **Statewide E-Filing Program Review/Evaluation (continued):** Review and evaluate the existing statewide e-filing program. Expand the number of e-filing manager (EFM) solutions in the program and standardize electronic filing fees across the state.

III. COMMITTEE PROJECTS

New Workstream (Ending 2022)	
1. Tactical Plan for Technology Update	<i>Priority 1</i>
Workstream membership approval date:	<i>Scope category(ies): Policy</i>
<p><i>Project Summary:</i> Update <i>Tactical Plan for Technology</i> for effective date 2023-2024.</p> <p><i>Key Objectives:</i></p> <ol style="list-style-type: none"> a) Initiate workstream, including formation of membership and conduct orientation/kickoff meeting. b) Review, gather input, and prepare an update of the Tactical Plan for Technology. c) Circulate the draft plan for branch and public comment; revise as needed. d) Finalize, and seek approval from ITAC, the Technology Committee, and the Judicial Council. Formally sunset the workstream. <p><i>Objectives met or resolved:</i></p> <p><i>Origin of Project:</i> Specific charge of ITAC per Rule 10.53 (b)(8).</p> <p><i>Status/Timeline:</i> December 2022</p> <p><i>Fiscal Impact:</i></p> <p><input type="checkbox"/> This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</p> <p><i>Resources:</i></p> <ul style="list-style-type: none"> • <i>ITAC:</i> Workstream, Sponsor: Hon. Sheila Hanson • <i>Judicial Council Staffing:</i> Information Technology • <i>Collaborations:</i> Broad input from the branch and the public 	

Existing Workstream (Ending 2021)	
2. Identity and Access Management Strategy	Priority 1
Workstream membership approved September 25, 2018	Scope category(ies): Possibilities, Prototypes, Pilot, Policy/Procurement
<p>Project Summary: Develop a branch identity management strategy.</p> <p>Key Objectives:</p> <p>(a) Present findings and recommendations to, and seek approval from, ITAC, the Technology Committee and, if appropriate, the Judicial Council. Formally sunset the workstream.</p> <p>Objectives met or resolved:</p> <ul style="list-style-type: none"> • <i>Phase 1: Develop and issue an RFP for a statewide identity management service/provider; identify and select (completed 2018).</i> • <i>Recommend changes to Rules of Court as needed and work with the Rules & Policy Subcommittee to draft them.</i> • <i>Develop the roadmap for a branch identity management strategy and approach.</i> • <i>Determine policies and processes for identity management (including proofing and access management).</i> • <i>Ensure linkage and alignment with other branchwide initiatives such as E-Filing, SRL Portal, Next Generation Hosting, CMS Migration and Deployment.</i> • <i>Coordinate and plan with JCIT regarding operational support.</i> <p>Origin of Project: Previously, this was a sub-task of the e-filing initiative. The item was promoted to its own annual agenda initiative given its many touchpoints with other workstreams (including Self-Represented Litigants E-Services, Next-Generation Hosting, E-filing Strategy, etc.). <i>Tactical Plan for Technology 2017-18, 2019-20, and 2021-22.</i></p> <p>Status/Timeline: December 2021</p> <p>Fiscal Impact:</p> <p><input type="checkbox"/> This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</p> <p>Resources:</p> <ul style="list-style-type: none"> • <i>ITAC: Workstream, Sponsor: Mr. Snorri Ogata</i> • <i>Judicial Council Staffing: Information Technology, Legal Services, Branch Accounting and Procurement</i> • <i>Collaborations: CEAC, TCPJAC, and their Joint Technology Subcommittee</i> 	

Existing Workstream (Ending 2021)

3. Electronic Evidence: Rules, Technology and Pilot Evaluation

Priority 1

Workstream membership approved September 25, 2019

*Scope category(ies):
Policy; Pilot*

Project Summary: Consider existing pilots and court practices along with available technology pertaining to the use of electronic evidence; propose changes to rules and statutes related to electronic evidence; develop a framework for successful possible future pilots.

Key Objectives:

Based on findings from Phase 1 and evaluation of existing local pilots and other court practices:

- (a) Investigate and report on existing local pilots and court practices, including policies and standards, for transmitting, accepting, storing, and protecting electronic evidence.
- (b) Research and recommend available technology and services that would support transmission, acceptance, storage, and protection of electronic evidence.
- (c) Develop a framework for successful possible future pilots, including use case scenarios, costs and benefits, and success criteria
- (d) At the completion of these objectives, present findings and recommendations to, and seek approval from, ITAC, the Technology Committee and, if appropriate, the Judicial Council. Formally sunset the workstream.

Objectives met or resolved:

- *Develop and propose changes to Rules of Court and statutes related to electronic evidence in collaboration with the Rules and Policy Subcommittee.*

Origin of Project: *Tactical Plan for Technology 2017-18, 2019-20, and 2021-22.*

Status/Timeline: December 2021

Fiscal Impact:

This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.

Resources:

- *ITAC:* Workstream, Sponsor: Hon. Kimberly Menninger
- *Judicial Council Staffing:* Information Technology, Legal Services
- *Collaborations:* CEAC, TCPJAC, ITAC Rules and Policy Subcommittee, and other advisory bodies as needed

Continued Workstream (Ending 2021)	
4. Statewide e-Filing Program Review/Evaluation	Priority 2
Workstream membership approved: 6/17/2021	Scope category(ies): Possibilities; Policies
<p>Project Summary: Review and evaluate the existing statewide e-filing program. Expand the number of e-filing manager (EFM) solutions in the program and standardize electronic filing fees across the state.</p> <p>Key Objectives:</p> <ul style="list-style-type: none"> • Explore the strengths and weaknesses of current e-filing programs and practices across the state. • Explore benefits of statewide EFM solutions inclusive of development opportunities and potential funding sources. • Evaluate standardizing e-filing transaction fees across the state. • Review e-filing rules and statutes to clarify language and improve consistency across the branch. • At the completion of these objectives, present findings and recommendations to, and seek approval from, ITAC, the Technology Committee and, if appropriate, the Judicial Council. Formally sunset the workstream. <p>Objectives met or resolved:</p> <ul style="list-style-type: none"> • <i>Identify core team (sponsor and leads); form group membership; hold kickoff meeting(s).</i> <p>Origin of Project: Tactical Plan for Technology 2021-2022; branch-identified business need.</p> <p>Status/Timeline: December 2021</p> <p>Fiscal Impact:</p> <p><input type="checkbox"/> This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</p> <p>Resources:</p> <ul style="list-style-type: none"> • <i>ITAC:</i> Workstream: Sponsor: Snorri Ogata • <i>Judicial Council Staffing:</i> Information Technology, Legal Services • <i>Collaborations:</i> ITAC Rules and Policy Subcommittee 	

Ongoing Project	
5.1 Trial Court Rules and Statutes Revisions	<i>Priority 1^{3,4}</i>
Will be updated after October 25, 2021, subcommittee meeting	<i>Scope category(ies): Policy</i>
<p>Project Summary: Revise statutes and the California Rules of Court for the trial courts to support e-business. In collaboration with other advisory committees, as needed, review rules and statutes and develop recommendations for amendments to align with modern business practices.</p> <p>Proposals within the scope of this item include:</p> <ul style="list-style-type: none"> (a) Develop legislative and rule proposals for electronic exhibits and evidence based on the needs identified by the Electronic Evidence Workstream including defining "lodged electronic exhibits," permitting courts to use vendors for storage of electronic exhibits and evidence; and removing requirements that clerks return exhibits if they are in electronic format. (b) Assist the Criminal Law Advisory Committee (CLAC) with the development of legislative and rule proposals for remote video proceedings in criminal matters including having a Rules and Policy Subcommittee member serve on the CLAC working group. (c) Develop a proposal to amend permissive electronic filing and electronic service rules to reference Penal Code section 690.5. <p>Origin of Project: <i>Tactical Plan for Technology 2019-20 and 2021-22.</i> Public comments. Standing item on the agenda.</p> <p>Status/Timeline: Ongoing.</p> <p>Fiscal Impact:</p> <p><input type="checkbox"/> This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</p> <p>Resources:</p> <ul style="list-style-type: none"> • <i>ITAC:</i> Rules & Policy Subcommittee, Chair: Hon. Julie R. Culver • <i>Judicial Council Staffing:</i> Legal Services, Information Technology, Governmental Affairs • <i>Collaborations:</i> Appellate, Civil & Small Claims, Criminal Law, Traffic, Family and Juvenile Law, and Probate and Mental Health advisory committees; TCPJAC, CEAC and their Joint Technology, Rules, and Legislative Subcommittees 	

³ For rules and forms proposals, the following priority levels apply: 1(a) Urgently needed to conform to the law; 1(b) Urgently needed to respond to a recent change in the law; 1(c) Adoption or amendment of rules or forms by a specified date required by statute or council decision; 1(d) Provides significant cost savings and efficiencies, generates significant revenue, or avoids a significant loss of revenue; 1(e) Urgently needed to remedy a problem that is causing significant cost or inconvenience to the courts or the public; 1(f) Otherwise urgent and necessary, such as a proposal that would mitigate exposure to immediate or severe financial or legal risk; 2(a) Useful, but not necessary, to implement statutory changes; 2(b) Helpful in otherwise advancing Judicial Council goals and objectives.

Existing One-Time Project (Ending 2022)	
5.2 Remote Video Appearances in Civil Proceedings	<i>Priority 1</i>
To be updated pending SB 241	<i>Scope category(ies): Policy</i>
<p>Project Summary: Develop legislative and rule proposals to further the recommendations of the Commission on the Future of California’s Court System (Futures Commission) relating to video remote appearances by parties, counsel, and witnesses for most noncriminal court proceedings (pursuant to directive to ITAC from the Chief Justice).</p> <p>Key Objectives:</p> <ul style="list-style-type: none"> (a) Continue participating in a joint ad hoc subcommittee with Civil and Small Claims, Family and Juvenile Law, and Probate and Mental Health Advisory Committees to develop legislative and rule proposals to allow video remote appearances in most civil court proceedings. (b) Work cooperatively with the ITAC Rules and Policy subcommittee, when needed. <p>Origin of Project: In April 2017, the Futures Commission recommended allowing remote video appearances at trials and evidentiary hearings in civil matters. In May 2017, the Chief Justice directed ITAC to consider feasibility and resource requirements for implementing pilot projects for remote video appearances. ITAC formed the Remote Video Appearances Workstream for this purpose, which issued its final report and recommendations to ITAC, including policy recommendations in August 2019.</p> <p>Status/Timeline: December 2021, effective by January 2022 (Anticipate that legislative proposal would go to the council in January 2021, and to the Legislature in 2021, with rule proposals to be developed concurrently.)</p> <p>Fiscal Impact:</p> <ul style="list-style-type: none"> <input type="checkbox"/> This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials. <p>Resources:</p> <ul style="list-style-type: none"> • <i>ITAC:</i> Hon. Julie R. Culver • <i>Judicial Council Staffing:</i> Information Technology, Legal Services, Center for Families, Children & the Courts, Governmental Affairs • <i>Collaborations:</i> ITAC Rules and Policy Subcommittee; Civil and Small Claims, Family and Juvenile Law, and Probate and Mental Health Advisory Committees 	

Potential One-Time Project	
6. Placeholder for Projects Assigned by the Ad-Hoc Workgroup on Post-Pandemic Initiatives (P3)	<i>Priority 1</i>
	<i>Scope category(ies):</i> TBD
<p><i>Project Summary:</i> The Ad Hoc Workgroup on Post-Pandemic Initiatives (P3) is currently working to identify successful court practices that emerged during the COVID-19 pandemic. P3 recommendations may be referred to specific advisory bodies for development and/or implementation.</p> <p><i>Key Objectives:</i></p> <p>(a) TBD</p> <p><i>Origin of Project:</i> Ad Hoc Workgroup on Post-Pandemic Initiatives</p> <p><i>Status/Timeline:</i> TBD</p> <p><i>Fiscal Impact:</i></p> <p><input type="checkbox"/> This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</p> <p><i>Resources:</i></p> <ul style="list-style-type: none"> • TBD 	

IV. LIST OF 2021 PROJECT ACCOMPLISHMENTS

#	Project Highlights and Achievements
1.2	<p>Futures Commission Directive: Voice-to-Text Language Services Outside the Courtroom (Completed)—The Voice-to-Text Language Services Outside the Courtroom Workstream was asked to explore available technologies to assist limited-English-proficient customers at service counters and in self-help centers. The workstream’s efforts were informed by recommendations of the Commission on the Future of California’s Court System that the judicial branch pilot technology solutions to allow two individuals who speak different languages to converse without the assistance of an interpreter. The workstream presented its final report to ITAC on October 2, 2020, to the Technology Committee on October 9, 2020, and the Judicial Council on January 22, 2021. A branchwide pilot program now has 14 courts enrolled. Judicial Council Report; Presentation Slides; Demonstration; Video.</p>
2	<p>Tactical Plan for Technology 2021-2022 (Completed)—The workstream presented the final Tactical Plan to ITAC on January 27, the Technology Committee on February 8, and the Judicial Council on March 12, 2021. The updated Plan focuses on enhancing electronic access to courts and court services and promoting more efficient business practices. The plan identifies specific initiatives the judicial branch is pursuing, in areas such as case management systems, electronic records, remote video appearances, language access services, online dispute resolution, security, and data analytics. Judicial Council report, presentation and video.</p>
5	<p>Data Analytics: Assessment and Report (Completed)—The workstream was charged with recommending a data analytics strategy for the branch that included developing branchwide data and information governance policy recommendations. The policy concepts detailed in the final report lay the foundation for future policy development and will help execute a new vision for data analytics in the judicial branch: to analyze, use, and share data to inform decision-making in order to enhance and expand vital and accessible court services for all the people of California. The workstream presented its final report and recommendations to ITAC on March 24, the Technology Committee on April 12, and the Judicial Council on May 21, 2021. Report; Presentation; Video.</p>
6	<p>Disaster Recovery to Cloud (Completed)—ITAC formed the Disaster Recovery Phase II workstream to leverage the Court Innovation Grant awarded to the Superior Court of Monterey County to pilot the Disaster Recovery Framework Guide and Toolkit and modernize the approach to implementing disaster recovery using cloud-based technologies. The Phase II Workstream completed its objectives with the approval of the Disaster Recovery to Cloud (DR2C) Roadmap by ITAC on March 24 and the Technology Committee on April 12, 2021. The DR2C Roadmap validates, builds, and expands on some of the concepts and technologies documented in the Phase I Disaster Recovery Framework. It is intended to serve as a reference for courts interested in establishing a new disaster recovery program or in refreshing their existing program using emerging technologies, including cloud-based solutions.</p>
7	<p>Online Dispute Resolution (ODR) Research (Completed)—The workstream’s final report was accepted by ITAC on April 28, and by the Technology Committee on June 24, 2021. The Online Dispute Resolution Workstream was tasked with developing a roadmap for courts interested in pursuing online dispute resolution (ODR). Specifically, the workstream’s focus was on researching the ODR landscape nationwide and existing court-offered ODR programs. Based on those findings, the workstream suggested practice areas and potential applications for ODR in the judicial branch, as well as guiding principles and key considerations when making plans for</p>

	ODR.
8	Branchwide Information Security Roadmap (Completed) —The workstream was tasked with defining methods, activities and initiatives for expanding and strengthening branch information security capabilities, and for creating an overarching strategy for educating courts on information security end user education, risk management, and incident response. The workstream’s recommendation to establish a Judicial Council Office of Security to support and implement a variety of security programs was approved by ITAC on June 23, the Technology Committee on August 9, and the Judicial Council on October 1, 2021.
11.1	Rules & Policy Subcommittee (Ongoing) —The subcommittee circulated three proposals for public comment. One rule proposal (amend permissive electronic filing and electronic service rules to reference Penal Code section 690.5) was approved by the Judicial Council on October 1, 2021. One rule proposal (governing “lodged electronic exhibits”) and one legislative proposal (authorize use of vendors to store exhibits and evidence in electronic format) have been deferred pending a recommendation of the Rules and Policy Subcommittee on whether to revise and re-circulate them in 2022.
11.2	Joint Ad Hoc Subcommittee on Remote Video Appearances —ITAC, in collaboration with Civil and Small Claims, Family and Juvenile Law, and Probate and Mental Health Advisory Committees, developed a legislative proposal to enact Code of Civil Procedure, § 367.7, to provide statutory authority for courts to permit remote video appearances in any civil actions or proceedings including trials and evidentiary hearings. SB 241 (which was signed into law) contains language broader in scope than the proposal the joint ad hoc subcommittee developed last year. The bill requires that the council develop rules, which will likely be referred to the Civil and Small Claims Advisory Committee. The joint subcommittee may therefore have outlived its use.