



Judicial Council of California
Trial Court Budget Advisory Committee

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TRIAL COURT BUDGET ADVISORY COMMITTEE
FUNDING METHODOLOGY SUBCOMMITTEE

MINUTES OF OPEN MEETING

October 25, 2023
12:15 p.m. – 1:15 p.m.

<https://jcc.granicus.com/player/event/2946>

Advisory Body Members Present: Judges: Hon. Jonathan B. Conklin (Cochair), Hon. Judith C. Clark, Hon. Wendy G. Getty, Hon. David C. Kalemkarian, and Hon. Kevin M. Seibert.

Executive Officers: Mr. Chad Finke (Cochair), Ms. Krista LeVier, Mr. David W. Slayton, Mr. Neal Taniguchi, and Mr. David H. Yamasaki.

Advisory Body Members Absent: Hon. Patricia L. Kelly, Mr. James Kim, and Mr. Brandon E. Riley.

Others Present: Mr. John Wordlaw, Mr. Zlatko Theodorovic, Ms. Fran Mueller, Ms. Donna Newman, and Ms. Rose Lane.

OPEN MEETING

Call to Order and Roll Call

The chair welcomed the members, called the meeting to order at 12:15 p.m., and took roll call.

Approval of Minutes

The subcommittee approved minutes from the June 28, 2023 and August 2, 2023 Funding Methodology Subcommittee (FMS) meetings.

DISCUSSION ITEMS (ITEM 1)

Item 1

Estimate-based Workload Model for Trial Courts (Discussion Only – No Action Required)

Discuss an estimate-based workload model for the trial courts.

Notes: Opening the discussion, the subcommittee was provided a recap of the recent Trial Court Presiding Judge Advisory Committee and the Court Executive Advisory Committee meetings, which included a review of branch budget advocacy, the current Budget Change Proposal (BCP) based approach to obtain funding, and alternatives for stable, adequate, and predictable funding for the branch.

Background information was presented on the well-established Resource Assessment Study (RAS) and Workload Formula (WF) process that is currently utilized by the Judicial Council of

California (JCC). A summary of how FMS relates to the work completed by the Data Analytics Advisory Committee (DAAC) was also provided.

Additionally, the differences between the current and alternative budgeting methodologies were discussed. It was stated that the current RAS/WF process uses filings as workload metric. While there are other state budget entities that use workload measures (enrollment, caseload, and population) to adjust their budget appropriations, trial court budgets are not adjusted using that type of methodology. Rather, trial court budgets use the BCP process to increase funding levels. For context, an advisory member shared the estimate-based methodology used in the executive branch and explained the advantages of this type of estimate-based methodology.

Questions on how the courts would account for new workload was raised. It was stated that the estimate-based model would assess the increased workload, to the extent legislative changes occur. The estimate-based methodology would provide opportunities to include increases in workload through premises that would become part of the methodology in the future.

Further questions regarding how this would impact other funding sources such as the Improvement and Modernization Fund were asked. An advisory member informed the subcommittee that the funding sources could potentially be pulled into the proposed new model and is a consideration that would need to be addressed if implemented. The proposed methodology may not be inclusive of all funding needs and would be an evolutionary process.

FMS members shared concerns with predicting workload, geographical growth, and inflation challenges. Members also emphasized the importance of providing the subcommittee greater details on how an estimate-based methodology would be developed, including addressing issues such as funding floors, policy changes, inflation, and methods to project filings.

Closing remarks by the cochair stated further discussion and potential action items may be scheduled for the FMS to consider an estimate-based workload model for the trial courts. The future discussions are to include the Chair of DAAC.

ADJOURNMENT

There being no further business, the meeting was adjourned at 1:10 p.m.

Approved by the advisory body on March 7, 2024.