This form is used to initiate Information Technology Advisory Committee (ITAC) projects. It is submitted to [itac@jud.ca.gov](mailto:itac@jud.ca.gov) (or in escalated circumstances, [jctc@jud.ca.gov](mailto:jctc@jud.ca.gov)) for processing, which includes review and consideration for inclusion as a committee annual agenda project. Instructions on completing the request are annotated via the MSWord comments feature.

# Administrative information*(To be completed by requestor, to extent information is known)*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | | | | |  |
| Project Name |  | | ITAC Request ID | <ITAC assigns> |  |
|  | | | | |  |
| Request Title |  | | Other ID | <JCIT assigns> |  |
|  | | | | |  |
| Category | Branchwide Technology Program or Solution  e.g., to develop a proof of concept, pilot solution, process, or event  Branchwide Policy, Standard, Guideline, Study, and/or Report  e.g., to conduct research, survey, report findings, or define a court best practice  Rule or Judicial Council Form  e.g., to systematically analyze and propose amendments to modernize rules of court | | | |  |
|  | | | | |  |
|  | | | | | |
| Dates | Submission Date | Proposed Project Duration | Rationale | |  |
|  |  |  | |  |
|  |  | | | |  |
| Project Cycle | **Regular** (submitted by Sept 30 for inclusion within following year ITAC Annual Agenda)  **Urgent/Escalated** (submitted for immediate consideration; this will be routed to the JCTC) | | | |  |
|  | | | | |  |
|  | | | | | |
|  | | | | |  |
| Request Originator |  | Organization |  | |  |
| Request  Contact | Name | Phone | Email | |  |
|  |  |  | |  |
|  | | | | |  |

# Request Summary *(To be completed by requestor)*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | | | | |
| High-Level Summary |  | | | |
| Description |  | | | |
| Scope (Charge) |  | | | |
| Project Origin |  | | | |
| Outcomes/ Deliverables |  | | | |
| Benefits |  | | | |
| Strategic Alignment | <Select alignment to Strategic Goal or Tactical Plan Initiative> | | | |
| Potential Funding Sources |  | | | |
| Criticality | **High**: Mandated, of high business value, or necessary to maintain usability/stability | | | |
| **Medium**: Provides significant business value or supports non-urgent technology/infrastructure changes | | | |
| **Low:** Nice-to-have enhancements to be addressed time and budget permitting | | | |
| Branch Impact Assessment | **Key Leadership Advisory Bodies**  [Administrative Presiding Justices (APJAC)](http://www.courts.ca.gov/apjac.htm)  [Court Executives (CEAC)](http://www.courts.ca.gov/ceac.htm)  [Trial Court Presiding Judges (TCPJAC)](http://www.courts.ca.gov/tcpjac.htm)  TCPJAC/CEAC Joint Technology Subcommittee  [Trial Court Budget (TCBAC)](http://www.courts.ca.gov/tcbac.htm)  Other: | **JCC Office**  Center for Children, Families and the Courts (CFCC)  Education  Fiscal Services  Human Resources  Information Technology  Legal Services  Office of Governmental Affairs  Other: | | |
| Review [Advisory Bodies by Subject Matter](http://www.courts.ca.gov/advisorybodies.htm) to identify other stakeholder groups.  Other: | | | |
| Workstream Request | Included  Not Included/Not Requested | | | |
| **The following is to be completed by ITAC (not the requestor):** | | | | |
| ITAC Disposition | Accepted  Deferred  Denied | | | |
| Assignment | Projects Subcmte  Rules Subcmte  Joint Appellate Technology  Workstream, Executive Sponsor:  Other: | | | |
|  | | | | |
| By ITAC Chair |  | | Date |  |
|  | | | | |

The next step for “accepted” project requests is completion of the Project Assessment Form. Assignment of dispositions of “deferred” or “denied” does not imply unilateral close of a request life cycle; rather, such dispositions are communicated to the Requestor and likely discussed further.

# Workstream *(To be completed by requestor)*

Include this page only if a workstream would assist with this project. **Provide as much information as possible**; note that some details may change during the review and assessment of this request.

|  |  |  |  |
| --- | --- | --- | --- |
|  |  | | |
| Workstream[[1]](#footnote-1) | Yes, this project would benefit from a workstream. | | |
| Scope of Workstream | Project and Workstream scopes are the same (see Page 2).  Workstream scope is limited/different (please explain): | | |
| Tracks | One track  Multiple tracks (list track name and objective for each): | | |
| Specific Outcome or Deliverable |  | | |
| **Workstream Staffing Checklist** | | | |
| Role | Needed? | Description, including number of resources needed | Requesting JCC Staffing? |
| Executive Sponsor\* |  |  |  |
| Project Manager(s)\* |  |  |  |
| Project Analyst |  |  |  |
| Administrative Support\* |  |  |  |
| Subject Matter Experts (SMEs) |  |  |  |
| Technical |  |  |  |
| Business |  |  |  |
| Legal |  |  |  |
| Justice Partner Liaison |  |  |  |
| Workstream Members |  |  |  |
| Other |  |  |  |

*\* These roles must be filled for workstreams.*

1. Workstreams are *ad hoc* teams formed to address well-defined, tightly scoped, and discrete subprojects to meet the short-term critical technology needs for the branch. Workstreams are a set of distinct court-driven initiatives of a technology project, using a community-style model that executes projects using experts from all appropriate areas of the judicial branch—including trial courts, appellate courts, the Judicial Council, and partners—to lead, participate in, and be accountable for project completion. A workstream’s Executive Sponsor, Project Manager and membership are appointed by the ITAC Chair. [↑](#footnote-ref-1)