



# JUDICIAL COUNCIL OF CALIFORNIA

EXECUTIVE AND  
PLANNING COMMITTEE

[www.courts.ca.gov/epmeetings.htm](http://www.courts.ca.gov/epmeetings.htm)  
[executiveandplanning@jud.ca.gov](mailto:executiveandplanning@jud.ca.gov)

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## EXECUTIVE AND PLANNING COMMITTEE

### NOTICE AND AGENDA OF OPEN MEETING

*Updated on December 7, 2021*

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

THIS MEETING IS BEING CONDUCTED BY VIDEOCONFERENCE

THIS MEETING IS BEING RECORDED

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**Date:** Thursday, December 9, 2021  
**Time:** 12:10 p.m. to 1:00 p.m.  
**Public Videocast:** <https://jcc.granicus.com/player/event/1306>

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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 a recording of the meeting must submit a written request at least two business days before the meeting. Requests can be e-mailed to [executiveandplanning@jud.ca.gov](mailto:executiveandplanning@jud.ca.gov).

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

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

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##### **Call to Order and Roll Call**

##### **Approval of Minutes**

Approve the draft minutes of the November 2, 2021, meeting.

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

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This meeting will be conducted by videoconference with a livestream available for the public. As such, the public may submit comments for this meeting in writing only. In accordance with rule 10.75(k)(1) of the California Rules of Court, 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 [executiveandplanning@jud.ca.gov](mailto:executiveandplanning@jud.ca.gov) or mailed or delivered to Judicial Council of California, 455 Golden Gate Avenue, San Francisco, California 94102, attention: Cliff Alumno. Only written comments received by 12:10 p.m. on Wednesday, December 8, 2021, will be provided to the committee members prior to the meeting.

**III. DISCUSSION AND POSSIBLE ACTION ITEMS**

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**Item 1**

**Agenda Setting for January 21, 2022, Judicial Council Meeting (Action Required)**

Review draft reports and set the agenda for the Judicial Council meeting in January.

*Presenters: Various*

**Item 2**

**2022 Annual Agenda: Trial Court Presiding Judges Advisory Committee (Action Required)**

Review the draft annual agenda of the Trial Court Presiding Judges Advisory Committee.

*Presenters: Hon. Marsha G. Slough, Executive and Planning Committee Liaison*

*Hon. Theodore C. Zayner, Chair, Trial Court Presiding Judges Advisory Committee*

*Mr. Corey Rada, Judicial Council and Trial Court Leadership,*

*Leadership Support Services*

**Item 3**

**2022 Annual Agenda: Court Executives Advisory Committee (Action Required)**

Review the draft annual agenda of the Court Executives Advisory Committee.

*Presenters: Mr. Kevin Harrigan, Chair, Court Executives Advisory Committee*

*Ms. Donna Ignacio, Judicial Council and Trial Court Leadership,*

*Leadership Support Services*

**Item 4**

**Center for Judicial Education and Research Advisory Committee: Request for Transfer of Responsibility for All Supreme and Appellate Court Education Curriculum to Appellate Practice Curriculum Committee (Action Required)**

Review a request from the Center for Judicial Education and Research Advisory Committee to transfer responsibility for all Supreme Court and appellate court education curriculum to the Appellate Practice Curriculum Committee.

*Presenter: Ms. Karene Alvarado, Center for Judicial Education and Research*

**Item 5**

**Report on Data and Information Governance Policy Concepts: Update from Joint Working Group (No Action Required)**

Receive a progress report on the joint working group established by the Executive and Planning Committee and the Technology Committee to review the report and develop staff direction.

*Presenter: Hon. Marsha G. Slough, Joint Working Group Member*

**IV. ADJOURNMENT**

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**Adjourn**



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## EXECUTIVE AND PLANNING COMMITTEE

### MINUTES OF OPEN MEETING

Tuesday, November 2, 2021

12:00 to 1:00 p.m.

Videoconference

**Advisory Body Members Present:** Hon. Marsha G. Slough (Chair), Hon. Samuel K. Feng (Vice-chair), Hon. Marla O. Anderson, Hon. Carin T. Fujisaki, Mr. Kevin Harrigan, Hon. Dalila C. Lyons, Hon. Ann C. Moorman, Hon. David M. Rubin, and Hon. Theodore C. Zayner

**Advisory Body Members Absent:** Hon. Stacy Boulware Eurie and Ms. Gretchen Nelson

**Committee Staff Present:** Ms. Amber Barnett and Mr. Cliff Alumno

**Staff Present:** Ms. Deanna Adams, Ms. Michele Allan, Ms. Karene Alvarado, Mr. Nicholas Armstrong, Mr. Chris Belloli, Ms. Deirdre Benedict, Ms. Deborah Brown, Ms. Mary Bustamante, Ms. Sherry Celio, Ms. Lisa Chavez, Ms. Roma Cheadle, Mr. Blaine Corren, Ms. Angela Cowan, Ms. Shelley Curran, Mr. Mike Etchepare, Ms. Nicole Davis, Mr. Douglas Denton, Ms. Audrey Fancy, Mr. Michael Giden, Ms. Kristin Greenaway, Ms. Anne Hadreas, Mr. Sal Lempert, Mr. Eric Long, Mr. Chris Magnusson, Mr. Jason Mayo, Mr. Edward Metro, Ms. Fran Mueller, Ms. Brandy Olivera, Mr. Corey Rada, Ms. Leah Rose-Goodwin, Ms. Anne Ronan, Ms. Michelle Rotherham, Mr. David Smith, Ms. Penne Soltysik, Ms. Laura Speed, Ms. Lynette Stephens, Mr. Zlatko Theodorovic, Ms. Millicent Tidwell, Mr. Catrayel Wood, Ms. Martha Wright, and Ms. Josely Yangco-Fronda

#### OPEN MEETING

##### Call to Order and Roll Call

The chair called the meeting to order at 12:00 p.m. Mr. Alumno took roll call and made the opening announcements.

##### Approval of Minutes

The committee reviewed the draft minutes of the September 29, 2021, conference call.

**Action:** *With one abstention (Justice Fujisaki), the committee approved the minutes of the September 29, 2021, conference call.*

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**DISCUSSION AND ACTION ITEM**

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**Item 1**

**Agenda Setting for November 19, 2021, Judicial Council Meeting (Action Required)**

The committee reviewed available draft reports and set the agenda for the Judicial Council meeting in November.

**Action: The committee:**

**(1) Set the agenda for the November 19, 2021, Judicial Council meeting by approving reports for placement on the business meeting agenda; and**

**(2) Approved placement of the following two items on the consent agenda of the November 19, 2021, Judicial Council business meeting contingent upon the approval of the Rules Committee:**

- **21-170 (Rules and Forms | Judicial Branch Education: Extension of Judicial College Deadline); and**
- **21-183 (Rules and Forms | Judicial Branch Administration: Emergency Rule on Use of Technology for Remote Appearances).**

**Item 2**

**Superior Court of Sacramento County: Extension of One Temporary Subordinate Judicial Officer Position Serving in Support of Pretrial Pilot Program (Action Required)**

The committee reviewed a request by the Superior Court of Sacramento County for authorization to extend through June 30, 2022, a limited term subordinate judicial officer position working in support of the court's Pretrial Pilot Program.

**Action: The committee unanimously confirmed the extension to June 30, 2022, of a limited term subordinate judicial officer position working in support of the court's Pretrial Pilot Program.**

**Item 3**

**Superior Court of Kern County: Creation of Temporary Subordinate Judicial Officer Position to Staff Pretrial Release Program (Action Required)**

The committee reviewed a request by the Superior Court of Kern County for the creation of a temporary subordinate judicial officer position authorized through June 30, 2023, to staff the court's new pretrial release program funded under Senate Bill 129 (Stats. 2021, ch. 69).

**Action: The committee unanimously confirmed the creation of a temporary limited term subordinate judicial officer position authorized through June 30, 2023, to staff the court's new pretrial release program funded under Senate Bill 129.**

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**ADJOURNMENT**

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With the business concluded, the meeting was adjourned at 12:30 p.m.

Approved by the committee on [insert date].



# Judicial Council of California

## Meeting Agenda

### Judicial Council

Please visit  
courts website at  
[www.courts.ca.gov](http://www.courts.ca.gov) to  
view live meeting on  
January 21, 2022

Meeting materials  
are available through  
the hyperlinks in  
this document.

*Open to the Public Unless Indicated as Closed  
(Cal. Rules of Court, rule 10.6(a))*

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Friday, January 21, 2022

Videoconference

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#### **CLOSED SESSION (RULE 10.6(B))—PLANNING, PERSONNEL, AND DISCUSSION PROTECTED BY THE ATTORNEY-CLIENT PRIVILEGE**

Session: 9:00 a.m. – 9:30 a.m.

Transitional Break: 9:30 a.m. – 9:40 a.m.

#### **OPEN SESSION (RULE 10.6(A)) — MEETING AGENDA**

*A link to the live videostream of the meeting will be available in the Meeting Information Center approximately 15 minutes prior to the start of the open session. In the event the preceding closed session adjourns late, the start time of the public session may be delayed.*

Open Session Begins: 9:40 a.m.

#### **Call to Order**

10 minutes

#### **Public Comment**

*This meeting will be conducted via videoconference. Public comments will be accepted in writing only. Submit written comments for this meeting by 1:00 p.m. on Wednesday, January 19, 2022, to:*

[judicialcouncil@jud.ca.gov](mailto:judicialcouncil@jud.ca.gov)

*Visit the link below and follow the instructions provided under the “Written Comments” section.*

<http://www.courts.ca.gov/28045.htm>

*Comments received after the deadline will not be delivered to Judicial Council members.*

**Approval of Minutes**

**22-064**            **Minutes of November 19, 2021, Judicial Council Meeting**

**Chief Justice's Report**

*20 minutes*

**Administrative Director's Report**

**22-065**            **Administrative Director's Report**

*15 minutes*

**Judicial Council Internal Committee Reports**

**22-066**            **Presentation | Judicial Branch Budget Committee**

**Speakers:**        Hon. David M. Rubin, Chair

*10 minutes*

**22-067**            **Written Reports**

**CONSENT AGENDA**

*5 minutes*

*A council member who wishes to request that any item be moved from the Consent Agenda to the Discussion Agenda is asked to please notify Roma Cheadle at 415-865-7640 at least 48 hours before the meeting.*

[22-001](#)            **Judicial Council-Sponsored Legislation | Authorization for Remote Appearances and Expansion of Defendant Personal Presence Provisions in Criminal Proceedings (Action Required)**

**Summary:**        The Legislation Committee and the Criminal Law Advisory Committee (CLAC) recommend that the Judicial Council sponsor legislation to amend Penal Code sections 977, 1043, 1043.5, 1148, and 1193, and to enact Penal Code section 977.3. The proposed legislation would provide statutory authority for remote criminal proceedings, provide statutory authority for courts to order the physical presence of a misdemeanor defendant, and expand a defendant's right to waive their physical and remote presence in a felony case.

[22-018](#)**Judicial Branch Technology | Identity and Access Management (Action Required)****Summary:**

The Judicial Council Information Technology Advisory Committee (ITAC) recommends that the Judicial Council accept the Identity and Access Management Workstream final report. The judicial branch has been rapidly implementing digitally driven processes and enabling information sharing to meet increasing expectations and a growing reliance on digital access to court information. Acknowledging these important changes, ITAC initiated the Identity and Access Management Workstream to explore and make recommendations related to providing and safeguarding access to court information. The workstream presents three recommendations made to meet goals and objectives defined in the Tactical Plan for Technology, all of which support the overarching goal to increase access to justice.

[22-031](#)**Trial Court Budget | Funding Allocation Methodology for General Fund Supplement to Address Federally Funded Dependency Representation Program Shortfall (Action Required)****Summary:**

The Judicial Branch Budget Committee recommends approval of the Trial Court Budget Advisory Committee recommendation that up to \$30 million provided for court-appointed counsel in dependency cases appropriated in the 2021-22 Budget Act be allocated and distributed according to a methodology that will ensure that any shortfall in federal foster care funding because of federal guidance limiting eligible activities for reimbursement can be addressed consistent with the intent of the Legislature in appropriating the funds..

[22-020](#)**Trial Court Budget | 2020-21 Final One-Time Reduction for Fund Balances Above the 3 Percent Cap (Action Required)****Summary:**

Pursuant to Government Code section 77203(b), a trial court may carry over unexpended funds in an amount not to exceed 3 percent of the court's operating budget from the prior fiscal year. The Judicial Branch Budget Committee recommends approving a final one-time reduction allocation of \$7,669,000 related to the fund balance cap in 2020-21 and prior-year excluded funds, as required by Government Code section 68502.5(c)(2)(A), which nets to \$232,000 after adjusting for \$7,437,000 in funds held on behalf of trial court reductions.

[22-019](#)**Trial Court Budget | Children's Waiting Room Fund Balance Cap Adjustments (Action Required)****Summary:**

The Fiscal Planning Subcommittee of the Trial Court Budget Advisory Committee recommends the Judicial Council approve children's waiting room fund balance cap adjustments for seven superior court requests. The total amount requested would increase fund balance caps by \$2.3 million.

[22-017](#)**Trial Courts | Trial Court Trust Fund Funds Held on Behalf of the Trial Courts (Action Required)****Summary:**

The Fiscal Planning Subcommittee of the Trial Court Budget Advisory Committee recommends that the Judicial Council approve eight new and three amended Trial Court Trust Fund funds to be held on behalf of the trial courts requests totaling \$5.1 million from seven trial courts. Under the Judicial Council-adopted process, a court may request reduced funding as a result of the court exceeding the 3 percent fund balance cap, to be retained in the Trial Court Trust Fund for the benefit of that court.

**DISCUSSION AGENDA**[22-005](#)**Judicial Council | 2022 Legislative Priorities (Action Required)****Summary:**

Each year, the Judicial Council sponsors legislation and adopts legislative priorities to further key council objectives to establish priorities for the upcoming legislative year. Last year, the council's legislative priorities focused on implementing efficiencies in the courts, investing in the judicial branch, and expanding remote access to the courts. Staff recommends that the Legislation Committee recommend to the Judicial Council a similar approach for the 2022 legislative year.

**Speakers:**

Hon. Marla O. Anderson, Chair, Legislation Committee  
Mr. Cory T. Jaspersen, Governmental Affairs

*15 minutes*

[22-016](#)**Trial Court Budget | Delegation of Trial Court Trust Fund Authority to the Judicial Council Administrative Director (Action Required)****Summary:**

The Judicial Branch Budget Committee recommends approving the delegation of Trial Court Trust Fund authority to the Judicial Council Administrative Director to transfer funding allocations approved by the council from one program or project to another, subject to any restrictions or conditions provided by the Judicial Council.

**Speakers:**

Hon. David M. Rubin, Chair, Judicial Branch Budget Committee  
Mr. Zlatko Theodorovic, Budget Services

*10 minutes*



[22-021](#)**Allocations and Reimbursements to Trial Courts | Court Interpreters Program Funding and Allocation Methodology (Action Required)****Summary:**

The Judicial Branch Budget Committee recommends the Judicial Council approve an ongoing, workload-based allocation methodology for Court Interpreters Program funding, including cross assignments, benefit cost changes, and unspent funds effective July 1, 2022.

**Speakers:**

Hon. David M. Rubin, Chair, Judicial Branch Budget Committee  
Hon. Jonathan B. Conklin, Chair, Trial Court Budget Advisory Committee  
Mr. Zlatko Theodorovic, Budget Services

*15 minutes*

[22-063](#)**Trial Court Budget | Senate Bill 170: Funding for Court Reporters in Family Law and Civil Law Case Types****Summary:**

The Trial Court Budget Advisory Committee recommends the Judicial Council approve a proportional allocation methodology of the ongoing \$30 million included in the 2021 Budget Act to all trial courts to increase the number of court reporters in family law and civil law case types effective 2021-22.

**Speakers:**

Hon. Jonathan B. Conklin, Chair, Trial Court Budget Advisory Committee  
Ms. Rebecca J. Fleming, Vice-chair, Trial Court Budget Advisory Committee

*10 minutes*

[22-062](#)**Trial Court Budget | Senate Bill 170: Funding for Increased Transcript Rates****Summary:**

The Trial Court Budget Advisory Committee recommends the Judicial Council approve a proportional allocation methodology of the ongoing \$7 million included in the 2021 Budget Act to all trial courts to cover the costs associated with increased transcript rates effective in 2021-22.

**Speakers:**

Hon. Jonathan B. Conklin, Chair, Trial Court Budget Advisory Committee  
Ms. Rebecca J. Fleming, Vice-chair, Trial Court Budget Advisory Committee

*10 minutes*

[22-022](#)**Judicial Branch Education | Fiscal Years 2022-2024 Education Plan (Action Required)****Summary:**

The Center for Judicial Education and Research Advisory Committee recommends approving the fiscal years 2022-24 Education Plan, effective July 1, 2022. Through the work of its standing curriculum committees, the CJER Advisory Committee developed this plan for CJER education programs and products that will enable its judicial branch constituencies to fulfill the education requirements and expectations outlined in rules 10.451-10.491 of the California Rules of Court.

**Speakers:**

Hon. Kimberly A. Gaab, Chair, Center for Judicial Education and Research Advisory Committee

Ms. Karene Alvarado, Center for Judicial Education and Research

20 minutes

**INFORMATION ONLY ITEMS (NO ACTION REQUIRED)**[22-030](#)**Court Facilities | Trial Court Facility Modifications Report for Quarter 1 of Fiscal Year 2021-22 (Action Required)****Summary:**

This informational report to the Judicial Council outlines the allocations of facility modification funding made to improve trial court facilities in the first quarter (July through September) of fiscal year 2021-22. To determine allocations, the Trial Court Facility Modification Advisory Committee reviews and approves facility modification requests from across the state in accordance with the council's *Trial Court Facility Modifications Policy*.

[22-006](#)**Report to the Legislature | 2020-21 Court Facilities Trust Fund Expenditures****Summary:**

Pursuant to Government Code section 70352 (c), the Judicial Council is required to submit a report on the actual expenditures from the Court Facilities Trust Fund to the Legislature after the end of each fiscal year. On December 31, 2021, the Judicial Council's Budget Services staff submitted the *2020-21 Court Facilities Trust Fund Expenditures*, which reported the fund expended \$143.2 million in 2020-21.

[22-014](#)**Report to the Legislature | Allocation of New Judgeships Funding in 2020-21****Summary:**

Pursuant to the Budget Act of 2007 (Stats. 2007, ch. 171, 172) the Judicial Council is required to report annually to the Legislature on the allocation of funding for support of new judgeships authorized in 2007-08 until all judgeships are appointed and new staff hired. On January 1, 2022, the Judicial Council's Budget Services staff submitted the *Report on Allocation of Funding in 2020-21 for Support of New Judgeships Authorized in 2007-08*.

[22-015](#)**Report to the Legislature | Electronic Recording Equipment****Summary:**

Government Code section 69958 requires the Judicial Council to report to the Legislature semiannually on the purchase and lease of any electronic recording equipment that will be used to record superior court proceedings. During the reporting period of January 1 through June 30, 2021, four courts reported spending a combined total of \$235,571 for equipment or related items.

[22-003](#)**Report to the Legislature | Measures to Promote Fair and Efficient Administration of Justice****Summary:**

The Judicial Council must adopt and annually report on judicial administration standards and measures that promote the fair and efficient administration of justice per Government Code section 77001.5. The attached report, *Standards and Measures That Promote the Fair and Efficient Administration of Justice*, reports on Judicial Branch progress in the following areas: (1) providing equal access to courts and respectful treatment for all court participants; (2) case processing, including the efficient use of judicial resources; and (3) general court administration.

[22-012](#)**Report to the Legislature | Receipts and Expenditures from Local Courthouse Construction Funds****Summary:**

Under Government Code section 70403, the Judicial Council is required to submit a report accounting for all receipts and expenditures from local courthouse construction funds to the Legislature, the Joint Legislative Budget Committee, and the Department of Finance by January 1 of each year. On December 31, 2021, the Judicial Council's Budget Services staff submitted the report Receipts and Expenditures From Local Courthouse Construction Funds.

[22-052](#)**Report to the Legislature | State Trial Court Electronic Filing and Document Service Accessibility Compliance****Summary:**

Assembly Bill 103 (Stats. 2017, ch. 17), the public safety bill approved by the Governor on June 27, 2017, amended Code of Civil Procedure section 1010.6(g), which requires that any system for the electronic filing and service of documents used by a California trial court must be accessible to individuals with disabilities as provided in the statute. The amendment also requires the council to submit four reports between June 2018 and December 2023 to the appropriate committees of the Legislature relating to the trial courts that have implemented a system of electronic filing and service of documents. This December 2021 report is the third of the four required reports.

[22-009](#)**Report to the Legislature | State Trial Court Improvement and Modernization Fund Expenditures in 2020-21****Summary:**

Pursuant to Government Code section 77209(i), the Judicial Council is required to submit a report on the use of the State Trial Court Improvement and Modernization Fund to the Legislature by December 31 of each year. On December 31, 2021, the Judicial Council's Budget Services staff submitted the State Trial Court Improvement and Modernization Fund Expenditures for 2020-21.

[22-008](#)**Judicial Branch Budget | Statewide Collection of Court-Ordered Debt for 2020-21****Summary:**

Pursuant to Penal Code section 1463.010 and Government Code section 68514(a), the Judicial Council is required to submit a report with information related to the collection of court-ordered debt to the Legislature, the Joint Legislative Budget Committee, and the Department of Finance by December 31 of each year. On or before December 31, the Judicial Council's Budget Services staff submitted the *Report on Statewide Collection of Court-Ordered Debt for 2020-21*.

[22-013](#)**Report to the Legislature | Trial Court Trust Fund Revenue, Expenditure, and Fund Balance Constraints for 2020-21****Summary:**

Pursuant to Government Code sections 68502.5(b) and 77202.5(b), the Judicial Council is required to submit a report to the Legislature that provides financial data for trial courts from all fund sources, which is displayed by individual trial court with totals and fund balances for all courts. The report must be submitted on or before December 31 following the close of each fiscal year. On December 31, 2021, the Judicial Council staff submitted the Report of Trial Court Trust Fund Revenue, Expenditure, and Fund Balance Constraints for 2020 -21, to the Legislature.

[22-061](#)**Trial Courts | Public Notice by Courts of Closures or Reduced Clerks' Office Hours****Summary:**

Government Code section 68106 directs (1) trial courts to notify the public and the Judicial Council before closing courtrooms or clerks' offices, or reducing clerks' regular office hours; and (2) the council to post all such notices on its website and relay them to the Legislature. This report lists the latest court notices received by the council under this statutory requirement. Since the previous report, one superior court-the Superior Court of Del Norte County-has issued a new notice.

[22-011](#)**Trial Courts | Quarterly Investment Report for Third Quarter of 2021****Summary:**

This *Trial Courts: Quarterly Investment Report for Third Quarter of 2021* covers the period of July 1, 2021, through September 30, 2021, and provides the financial results for the funds invested by the Judicial Council on behalf of the trial courts as part of the judicial branch treasury program. The report is submitted under agenda item 10, Resolutions Regarding Investment Activities for the Trial Courts, approved by the Judicial Council on February 27, 2004.

**Circulating Orders**

**Appointment Orders**

**Adjournment**

DRAFT

**Trial Court Presiding Judges Advisory Committee**  
**Annual Agenda<sup>1</sup>—2022**

**Approved by the Executive and Planning Committee: [Date]**

**I. COMMITTEE INFORMATION**

<b>Chair:</b>	Hon. Theodore C. Zayner, Presiding Judge, Superior Court of Santa Clara County
<b>Lead Staff:</b>	Mr. Corey Rada, Senior Analyst, Trial Court Leadership
<b>Committee's Charge/Membership:</b> <p>[<a href="#">Rule 10.46(a)</a>] of the California Rules of Court states the charge of the Trial Court Presiding Judges Advisory Committee (TCPJAC), which is to contribute to the statewide administration of justice by monitoring areas of significance to the justice system and making recommendations to the Judicial Council on policy issues affecting the trial courts. In addition to this charge, <a href="#">rule 10.46(b)</a> sets forth the additional duties of the committee.</p> <p>Per rule 10.46(c), the TCPJAC is comprised of the presiding judges of all 58 superior courts. Additionally, rule 10.46 (d) establishes an Executive Committee consisting of the committee chair, vice-chair, and members in the following categories:</p> <ul style="list-style-type: none"><li>(a) All presiding judges from superior courts with 48 or more judges;</li><li>(b) Two presiding judges from superior courts with 2 to 5 judges, who are elected by the members in this court category;</li><li>(c) Three presiding judges from superior courts with 6 to 15 judges, who are elected by the members in this court category; and</li><li>(d) Four presiding judges from superior courts with 16 to 47 judges, who are elected by the members in this court category.</li></ul> <p>The current committee <a href="#">roster</a> is available on the committee's web page.</p>	

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<sup>1</sup> 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.

**Subcommittees/Working Groups<sup>2</sup>:**

1. TCPJAC/CEAC Joint Legislation Subcommittee
2. TCPJAC/CEAC Joint Rules Subcommittee.

**Meetings Planned for 2022<sup>3</sup> (Advisory body and all subcommittees and working groups)**

Date/Time/Location or Teleconference:

Joint TCPJAC/CEAC and TCPJAC Statewide Meetings:

- February 17–18, 2022 (in person, Sacramento)
- August 18–19, 2022 (in-person, location TBD)

Joint TCPJAC/CEAC and TCPJAC Executive Committee Meetings:

- April 27, 2022 (in-person, Sacramento)
- October 26, 2022 (in-person, Sacramento)

Specific subcommittee/working group meeting dates are to be determined at this time. Meeting occurrences are estimates for 2022 and may be subject to change.

TCPJAC/CEAC Joint Legislation Subcommittee – 15 teleconferences

TCPJAC/CEAC Joint Rules Subcommittee – 5 teleconferences

Check here if exception to policy is granted by Executive Office or rule of court.

Assistant presiding judges are permitted to attend and be reimbursed for travel expenditures to statewide meetings in addition to members of the Trial Court Presiding Judges Advisory Committee.

<sup>2</sup> 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.

<sup>3</sup> Refer to [Operating Standards for Judicial Council Advisory Bodies](#) for governance on in-person meetings.

## II. COMMITTEE PROJECTS

#	New or One-Time Projects <sup>4</sup>	
1.	<b>Project Title:</b> Placeholder for Projects assigned by the Ad-Hoc Workgroup on Post-Pandemic Initiatives (P3) (One-Time)	<b>Priority<sup>5</sup></b> TBD
		<b>Strategic Plan Goal<sup>6</sup></b> TBD
<p><b>Project Summary<sup>7</sup>:</b> 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><b>Status/Timeline:</b> TBD</p> <p><b>Fiscal Impact/Resources:</b></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><b>Internal/External Stakeholders:</b> TBD</p> <p><b>AC Collaboration:</b> TBD</p>		

<sup>4</sup> All proposed projects for the year must be included on the Annual Agenda. If a project implements policy or is a program, identify it as *implementation* or a *program* in the project description and attach the Judicial Council authorization/assignment or prior approved Annual Agenda to this Annual Agenda.

<sup>5</sup> For non-rules and forms projects, select priority level 1 (must be done) or 2 (should be done). For rules and forms proposals, select one of the following priority levels: 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.

<sup>6</sup> Indicate which goal number of The Strategic Plan for California’s Judicial Branch the project most closely aligns.

<sup>7</sup> A key objective is a strategic aim, purpose, or “end of action” to be achieved for the coming year.



<b>Ongoing Projects and Activities<sup>4</sup></b>	
1.	<b>Project Title: TCPJAC/CEAC Joint Legislation Subcommittee</b>
	<b>Priority<sup>5</sup> 1</b> <b>Strategic Plan Goal<sup>6</sup> II, III</b>
<p><b>Project Summary<sup>7</sup>:</b> The TCPJAC/CEAC Joint Legislation Subcommittee (JLS) is charged with developing, reviewing, commenting, and making recommendations on proposed legislation to establish new or amend existing laws. The subcommittee monitors proposed and existing legislation that has a significant operational or administrative impact on the trial courts. The subcommittee also reviews proposals to create, amend, or repeal statutes to achieve cost savings or greater efficiencies for the trial courts and recommends proposals for future consideration by the Legislation Committee.</p> <p><b>Status/Timeline:</b> Ongoing.</p> <p><b>Fiscal Impact/Resources:</b> Governmental Affairs and Trial Court Leadership staff.</p> <p><input type="checkbox"/> <i>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.</i></p> <p><b>Internal/External Stakeholders:</b> None.</p> <p><b>AC Collaboration:</b> TCPJAC and the Legislation Committee.</p>	
2.	<b>Project Title: TCPJAC/CEAC Joint Rules Subcommittee</b>
	<b>Priority<sup>5</sup> 1</b> <b>Strategic Plan Goal<sup>6</sup> II, III, VI</b>
<p><b>Project Summary<sup>7</sup>:</b> The TCPJAC/CEAC Joint Rules Subcommittee (JRS) is charged with developing, reviewing, and providing input on proposals to establish, amend, or repeal the California Rules of Court, Standards of Judicial Administration, and Judicial Council forms to improve the efficiency or effectiveness of the trial courts. The subcommittee focuses on those proposals that may lead to a significant fiscal or operational impact on the trial courts and makes recommendations to the Rules Committee concerning the overall rule making process. Additionally, JRS is charged with reviewing non-rule related invitations to comment that may have an impact on the trial courts.</p> <p><b>Status/Timeline:</b> Ongoing.</p> <p><b>Fiscal Impact/Resources:</b> Legal Services and Trial Court Leadership staff.</p> <p><input type="checkbox"/> <i>The project includes allocations or distributions of funds to the courts, which have been reviewed and approved by Budget Service.</i></p> <p><b>Internal/External Stakeholders:</b> None.</p> <p><b>AC Collaboration:</b> TCPJAC, the Rules Committee, and various advisory bodies.</p>	

<b>Ongoing Projects and Activities<sup>4</sup></b>					
3.	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 70%;"><b>Project Title: Legislative Advocacy of Adequate Funding for the Trial Court Trust Fund</b></td> <td style="width: 30%; text-align: center;"><b>Priority<sup>5</sup> 1</b></td> </tr> <tr> <td colspan="2" style="text-align: right;"><b>Strategic Plan Goal<sup>6</sup> II, VII</b></td> </tr> </table> <p><b>Project Summary<sup>7</sup>:</b> Develop strategies on how presiding judges can strengthen their role and be better prepared to both advocate for and assist the Judicial Council, including Governmental Affairs, in advocating for adequate funding to the Trial Court Trust Fund. Through collaboration with advisory committees and the use of liaisons, TCPJAC will also advocate for providing relative equal levels of funding and judgeships for all trial courts.</p> <p><b>Status/Timeline:</b> Ongoing.</p> <p><b>Fiscal Impact/Resources:</b> Governmental Affairs, Budget Services, and Trial Court Leadership staff.</p> <p><input type="checkbox"/> <i>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.</i></p> <p><b>Internal/External Stakeholders:</b> Superior courts.</p> <p><b>AC Collaboration:</b> CEAC, the Judicial Branch Budget Committee, the Trial Court Budget Advisory Committee, and the Workload Assessment Advisory Committee.</p>	<b>Project Title: Legislative Advocacy of Adequate Funding for the Trial Court Trust Fund</b>	<b>Priority<sup>5</sup> 1</b>	<b>Strategic Plan Goal<sup>6</sup> II, VII</b>	
<b>Project Title: Legislative Advocacy of Adequate Funding for the Trial Court Trust Fund</b>	<b>Priority<sup>5</sup> 1</b>				
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4.	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 70%;"><b>Project Title: Serve as a Resource</b></td> <td style="width: 30%; text-align: center;"><b>Priority<sup>5</sup> 2</b></td> </tr> </table> <p><b>Project Summary<sup>7</sup>:</b> Serve as a subject matter resource for Judicial Council divisions and other council advisory groups to avoid duplication of efforts and contribute to the development of recommendations for council action. TCPJAC will also consider providing oversight responsibility over the Privacy Resource Guide.</p> <p><b>Status/Timeline:</b> Ongoing.</p> <p><b>Fiscal Impact/Resources:</b> Judicial Council and Trial Court Leadership.</p> <p><input type="checkbox"/> <i>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.</i></p> <p><b>Internal/External Stakeholders:</b> Superior courts.</p> <p><b>AC Collaboration:</b> CEAC, the Judicial Branch Budget Committee, and the Information Technology Advisory Committee.</p>	<b>Project Title: Serve as a Resource</b>	<b>Priority<sup>5</sup> 2</b>		
<b>Project Title: Serve as a Resource</b>	<b>Priority<sup>5</sup> 2</b>				

### III. LIST OF 2021 PROJECT ACCOMPLISHMENTS

#	Project Highlights and Achievements
1.	<b>Educational Opportunities.</b> TCPJAC and CEAC leadership collaborated with Judicial Council staff to conduct four business meetings in 2021. These meetings covered topics including budget priorities, legislative updates, information technology updates, emergency preparedness and response, court operations, and COVID-19 pandemic response and management. Participants included presiding judges, assistant presiding judges, court executive officers, and assistant court executive officers.
2.	<b>TCPJAC/CEAC Joint Legislation Subcommittee.</b> Remained active throughout 2021, holding 14 conference calls to, on behalf of the TCPJAC and CEAC, provide review and make recommendations to the Legislation Committee on 61 different bills identified by Governmental Affairs as having significant operational or administrative impact on the trial courts. In December 2021, the subcommittee meeting schedule will be set according to the Legislation Committee's 2022 meeting schedule. The subcommittee will continue to meet to review proposals to create, amend, or repeal statutes to achieve cost savings or greater efficiencies for the trial courts, and recommend proposals for future consideration.
3.	<b>TCPJAC/CEAC Joint Rules Subcommittee.</b> Remained active throughout 2021, on behalf of the TCPJAC and CEAC, and reviewed 26 rule proposals throughout the course of the year. The subcommittee provided comment on 18 rule proposals that may have a significant fiscal or operational impact on the trial courts. This subcommittee will continue to be active in 2022 and meet as needed.

**Court Executives Advisory Committee  
Annual Agenda<sup>1</sup>—2022  
Approved by the Executive and Planning Committee: DATE**

**I. COMMITTEE INFORMATION**

<b>Chair:</b>	Mr. Kevin Harrigan, Court Executive Officer, Superior Court of Tehama County
<b>Lead Staff:</b>	Ms. Donna Ignacio, Senior Analyst, Trial Court Leadership
<p><b>Committee’s Charge/Membership:</b> Under <a href="#">rule 10.48(a)</a> of the California Rules of Court, the Court Executives Advisory Committee (CEAC) is charged with making recommendations to the council on policy issues affecting the trial courts. In addition to this charge, <a href="#">rule 10.48(b)</a> sets forth the additional duties of the committee.</p> <p><a href="#">Per rule 10.48(c)</a>, CEAC consists of the court executive officers from the 58 California superior courts. <a href="#">Rule 10.48(d)</a> establishes the Executive Committee of CEAC. The Executive Committee consists of 18 members.</p> <p>The current committee <a href="#">roster</a> is available on the committee’s web page.</p>	
<p><b>Subcommittees/Working Groups<sup>2</sup>:</b></p> <ol style="list-style-type: none"> <li>1. TCPJAC/CEAC Joint Legislation Subcommittee</li> <li>2. TCPJAC/CEAC Joint Rules Subcommittee</li> <li>3. CEAC Child Support Services Subcommittee</li> <li>4. CEAC Interpreter Payment Policy Subcommittee (<i>NEW/formerly ad hoc group</i>)</li> <li>5. CEAC Judicial Branch Statistical Information System Subcommittee</li> <li>6. CEAC Jury Administration and Management Subcommittee (<i>NEW</i>)</li> <li>7. CEAC Nominations Subcommittee</li> <li>8. CEAC Records Management Subcommittee</li> <li>9. CEAC Trial Court Financial Policies Subcommittee</li> </ol>	

<sup>1</sup> 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.

<sup>2</sup> 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.

**Meetings Planned for 2022<sup>3</sup> (Advisory body and all subcommittees and working groups)**

Joint TCPJAC/CEAC and CEAC Statewide Meetings:

- February 17–18, 2022 (in-person, Sacramento)
- August 18–19, 2022 (in-person, location TBD)

Joint TCPJAC/CEAC and CEAC Executive Committee Meetings:

- April 27, 2022 (in-person, Sacramento)
- October 26, 2022 (in-person, Sacramento)

Specific subcommittee/working group meeting dates are to be determined at this time. Meeting occurrences are estimates for 2022 and may be subject to change.

TCPJAC/CEAC Joint Legislation Subcommittee – 15 teleconferences

TCPJAC/CEAC Joint Rules Subcommittee – 5 teleconferences

CEAC Child Support Services Subcommittee – 5 teleconferences

CEAC Interpreter Payment Policy Subcommittee – 4 teleconferences

CEAC Judicial Branch Statistical Information System Subcommittee – 5 teleconferences

CEAC Jury Administration and Management Subcommittee – 4 teleconferences

CEAC Nominations Subcommittee – 6 teleconferences

CEAC Records Management Subcommittee – 3 teleconferences

CEAC Trial Court Financial Policies Subcommittee – 2 teleconferences

Check here if exception to policy is granted by Executive Office or rule of court.

Assistant court executive officers are permitted to attend and be reimbursed for travel expenditures to statewide meetings in addition to members of the Court Executive Advisory Committee.

<sup>3</sup> Refer to [Operating Standards for Judicial Council Advisory Bodies](#) for governance on in-person meetings.

## II. COMMITTEE PROJECTS

#	New or One-Time Projects <sup>4</sup>	
1.	<b>Project Title:</b> CEAC Interpreter Payment Policy Subcommittee (New)	<b>Priority<sup>5</sup></b> 2
<p data-bbox="176 396 1873 467"><b>Project Summary<sup>7</sup>:</b> CEAC, through the Interpreter Payment Policy Subcommittee, will review the <i>Payment Policies on Independent Contractor Interpreters</i> policy and develop recommendations related to independent contractor interpreter reimbursement claims.</p> <p data-bbox="176 500 525 539"><b>Status/Timeline:</b> Ongoing.</p> <p data-bbox="176 571 1957 643"><b>Fiscal Impact/Resources:</b> Audit Services, Budget Services, Center for Families, Children &amp; the Courts Language Access Services, Human Resources, Legal Services, and Trial Court Leadership staff.</p> <p data-bbox="176 656 1902 727"><input type="checkbox"/> <i>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.</i></p> <p data-bbox="176 766 810 805"><b>Internal/External Stakeholders:</b> Superior courts.</p> <p data-bbox="176 837 508 876"><b>AC Collaboration:</b> None.</p>		

<sup>4</sup> All proposed projects for the year must be included on the Annual Agenda. If a project implements policy or is a program, identify it as *implementation* or a *program* in the project description and attach the Judicial Council authorization/assignment or prior approved Annual Agenda to this Annual Agenda.

<sup>5</sup> For non-rules and forms projects, select priority level 1 (must be done) or 2 (should be done). For rules and forms proposals, select one of the following priority levels: 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.

<sup>6</sup> Indicate which goal number of The Strategic Plan for California’s Judicial Branch the project most closely aligns.

<sup>7</sup> A key objective is a strategic aim, purpose, or “end of action” to be achieved for the coming year.

#	<b>New or One-Time Projects<sup>4</sup></b>	
2.	<b>Project Title: CEAC Jury Administration and Management Subcommittee (New)</b>	<b>Priority<sup>5</sup> 2</b> <b>Strategic Plan Goal<sup>6</sup> IV</b>
<p><b>Project Summary<sup>7</sup>:</b> Through the Jury Administration and Management Subcommittee, CEAC will review jury operations. The subcommittee will make recommendations and identify best practices in jury operations, reform, and other post-pandemic issues.</p> <p><b>Status/Timeline:</b> Ongoing.</p> <p><b>Fiscal Impact/Resources:</b> Office of Court Research and Trial Court Leadership staff.</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><b>Internal/External Stakeholders:</b> None.</p> <p><b>AC Collaboration:</b> Ad-Hoc Workgroup on Post-Pandemic Initiatives</p>		
3.	<b>Project Title: Placeholder for Projects assigned by the Ad-Hoc Workgroup on Post-Pandemic Initiatives (P3) (One-Time)</b>	<b>Priority<sup>5</sup> TBD</b> <b>Strategic Plan Goal<sup>6</sup> TBD</b>
<p><b>Project Summary<sup>7</sup>:</b> 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><b>Status/Timeline:</b> TBD.</p> <p><b>Fiscal Impact/Resources:</b> Trial Court Leadership staff.</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><b>Internal/External Stakeholders:</b> TBD.</p> <p><b>AC Collaboration:</b> TBD.</p>		

# Ongoing Projects and Activities <sup>4</sup>					
1.	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;"><b>Project Title:</b> TCPJAC/CEAC Joint Legislation Subcommittee</td> <td style="width: 20%; text-align: center;"><b>Priority<sup>5</sup> 1</b></td> </tr> <tr> <td></td> <td style="text-align: center;"><b>Strategic Plan Goal<sup>6</sup> II, III</b></td> </tr> </table> <p><b>Project Summary<sup>7</sup>:</b> The TCPJAC/CEAC Joint Legislation Subcommittee (JLS) is charged with developing, reviewing, commenting, and making recommendations on proposed legislation to establish new or amend existing laws. The subcommittee monitors proposed and existing legislation that has a significant operational or administrative impact on the trial courts. The subcommittee also reviews proposals to create, amend, or repeal statutes to achieve cost savings or greater efficiencies for the trial courts and recommends proposals for future consideration by the Legislation Committee.</p> <p><b>Status/Timeline:</b> Ongoing.</p> <p><b>Fiscal Impact/Resources:</b> Governmental Affairs and Trial Court Leadership staff.</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><b>Internal/External Stakeholders:</b> None.</p> <p><b>AC Collaboration:</b> TCPJAC and Legislation Committee.</p>	<b>Project Title:</b> TCPJAC/CEAC Joint Legislation Subcommittee	<b>Priority<sup>5</sup> 1</b>		<b>Strategic Plan Goal<sup>6</sup> II, III</b>
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<b>Project Title:</b> TCPJAC/CEAC Joint Rules Subcommittee	<b>Priority<sup>5</sup> 1</b>				
	<b>Strategic Plan Goal<sup>6</sup> II, III, IV</b>				



#	<b>Ongoing Projects and Activities<sup>4</sup></b>	
	<p><b>Internal/External Stakeholders:</b> None.</p> <p><b>AC Collaboration:</b> TCPJAC, Rules Committee, and various advisory bodies.</p>	
3.	<b>Project Title: CEAC Child Support Services Subcommittee</b>	<b>Priority<sup>5</sup> 2</b>
	<p><b>Strategic Plan Goal<sup>6</sup> VII</b></p> <p><b>Project Summary<sup>7</sup>:</b> Through the Child Support Services Subcommittee, CEAC will work in consultation with the Judicial Council Center for Families, Children &amp; the Courts (CFCC) to provide information about significant fiscal and/or operational impacts on trial courts regarding proposed policy or operational changes by the program or the Department of Child Support Services (DCSS). In addition, the subcommittee will develop comments and/or recommendations (for CEAC’s approval) concerning recommendations proposed by the Workload Assessment Advisory Committee regarding the development of Assembly Bill (AB) 1058 data for the Judicial Branch Statistical Information System (JBSIS). The subcommittee will also convene to address any other critical issues related to the Plan of Cooperation (POC) and AB 1058 court contract that might arise in the interim.</p> <p>In response to issues that arose with the 2015 DCSS model POC, CEAC formed an ad hoc working group to meet with State DCSS representatives and CFCC staff to discuss and resolve concerns prior to the POC’s distribution to the trial courts and local child support agencies. CEAC requested that this former ad hoc working group be converted to a subcommittee to review future model POC. The subcommittee will meet annually in spring on an ongoing basis.</p> <p><b>Status/Timeline:</b> Ongoing.</p> <p><b>Fiscal Impact/Resources:</b> CFCC, Trial Court Leadership, and Research and Evaluation staff.</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><b>Internal/External Stakeholders:</b> DCSS.</p> <p><b>AC Collaboration:</b> Family and Juvenile Law Advisory Committee, Trial Court Budget Advisory Committee, and Workload Assessment Advisory Committee.</p>	

#	Ongoing Projects and Activities <sup>4</sup>	
4.	<b>Project Title: CEAC Judicial Branch Statistical Information System Subcommittee</b>	<b>Priority<sup>5</sup> 2</b>
	<b>Strategic Plan Goal<sup>6</sup> III</b>	
<p><b>Project Summary<sup>7</sup>:</b> CEAC will continue to provide oversight responsibility over Judicial Branch Statistical Information System (JBSIS) through the JBSIS Subcommittee. JBSIS is authorized through California Rules of Court, rule 10.400, and CEAC has oversight responsibility of JBSIS as defined in rule 10.48, which governs CEAC.</p> <p>The subcommittee identified the following projects:</p> <p><b>Ongoing Review and Revisions of JBSIS Reporting Standards</b>  CEAC will continue to review and seek input from courts on the recent revisions to the filing definitions and recommend additional revisions as needed. CEAC will also identify additional areas in JBSIS for review that will be important for branchwide budget advocacy efforts, monitoring court operations, and workload analysis. For 2022, this work is anticipated to be extensive. The subcommittee will present and solicit feedback on its proposal for all JBSIS non-filings data with other committees in an effort to standardize data collection with the ability for courts and the branch to ensure a level of data integrity and quality. The subcommittee anticipates developing recommendations to better reflect the current trends in data analytics, with a focus on producing highly reliable data in a consistent and uniform fashion statewide. The subcommittee will conduct this work in collaboration with the Information Technology Advisory Committee (ITAC) Data Analytics Workstream.</p> <p><b>Strengthening Data Governance Principles for JBSIS Reporting</b>  The <i>JBSIS Implementation Manual</i> currently contains the data standards, definitions, reporting rules, and technical specifications for JBSIS reporting. The subcommittee will work on adding new components to the JBSIS manual that will document some of these new data governance principles for JBSIS to provide greater transparency and confidence in JBSIS data. The subcommittee will also provide input to the Judicial Council’s Statistics and Information Unit as they develop additional procedures and guidance for courts as part of their regular JBSIS reporting.</p> <p>The following are areas of ongoing work or planned for the upcoming year:</p> <ul style="list-style-type: none"> <li>• Present and complete the review of all JBSIS non-filings data in an effort to better match the quality of data collection with the ability for courts and the branch to ensure a level of data integrity and quality, and produce recommendations for Judicial Council review;</li> <li>• Create a public database with ongoing JBSIS Q&amp;A and technical assistance provided by the Judicial Council’s Office of Court Research for greater transparency and consistency in the guidance provided to courts (deferred to a future annual agenda); and</li> <li>• Provide ongoing input to Judicial Council’s Audit Services on JBSIS filing audit.</li> </ul>		

#	<b>Ongoing Projects and Activities<sup>4</sup></b>	
	<p><b>Status/Timeline:</b> Ongoing.</p> <p><b>Fiscal Impact/Resources:</b> Audit Services, Information Technology, Trial Court Leadership, and Office of Court Research staff.</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><b>Internal/External Stakeholders:</b> Superior courts and case management system vendors.</p> <p><b>AC Collaboration:</b> None.</p>	
5.	<b>Project Title: CEAC Nominations Subcommittee</b>	<b>Priority5 1</b>
	<p><b>Project Summary<sup>7</sup>:</b> Pursuant to California Rules of Court, rule 10.48(e)(2), the Executive Committee of CEAC must review and recommend to the council’s Executive and Planning Committee candidates for the following:</p> <ul style="list-style-type: none"> <li>• Members of CEAC’s Executive Committee;</li> <li>• Nonvoting court administrator members of the council; and</li> <li>• Members of other advisory committees who are court executives or judicial administrators.</li> </ul> <p><b>Status/Timeline:</b> Ongoing.</p> <p><b>Fiscal Impact/Resources:</b> Trial Court Leadership staff.</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><b>Internal/External Stakeholders:</b> None.</p> <p><b>AC Collaboration:</b> Executive and Planning Committee and various advisory bodies receiving nominations.</p>	

#	Ongoing Projects and Activities <sup>4</sup>	
6.	<b>Project Title: CEAC Records Management Subcommittee</b>	<b>Priority</b> 5 2 <b>Strategic Plan Goal</b> 6 III
<p><b>Project Summary</b><sup>7</sup>: Through the Records Management Subcommittee, CEAC will continue to develop and publish updates to the <i>Trial Court Records Manual</i> (TCRM), with a focus on ensuring that content reflects current law and promoting best practices. The subcommittee will monitor the progress of proposed 2022 Judicial Council-sponsored legislations, other legislation affecting court records management, and relevant amendments to the California Rules of Courts and Judicial Council of California forms.</p> <p><b>Status/Timeline</b>: TCRM Updates – Ongoing. Government Code sections 68152(a)(6) and 68153 – 2022.</p> <p><b>Fiscal Impact/Resources</b>: CFCC, Criminal Justice Services, Governmental Affairs, Information Technology, Legal Services, and Trial Court Leadership staff.</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><b>Internal/External Stakeholders</b>: None.</p> <p><b>AC Collaboration</b>: Possible consultation with Family and Juvenile Law Advisory Committee, Criminal Law Advisory Committee, ITAC, and Probate Mental Health Advisory Committee.</p>		
7.	<b>Project Title: CEAC Trial Court Financial Policies Subcommittee</b>	<b>Priority</b> 5 2 <b>Strategic Plan Goal</b> 6 II, III
<p><b>Project Summary</b><sup>7</sup>: Through the Trial Court Financial Policies Subcommittee, CEAC will work with Judicial Council’s Branch Accounting and Procurement (BAP) to review and identify needed revisions to the <i>Trial Court Financial Policies and Procedures Manual (TCFPPM)</i>.</p> <p>Pursuant to the California Rules of Court, rule 10.804, the Judicial Council of California is required to adopt financial policies and procedures for the superior courts. The TCFPPM was established in 2001 which set out a system of fundamental internal controls that enable the superior courts to monitor their use of public funds, provide consistent and comparable financial statements, and demonstrate accountability. Annually, the manual is reviewed, and any suggested updates are submitted to the Judicial Council for approval. Throughout the year, BAP works with representatives from various courts to compile and draft recommendations for the next version of the manual. Prior to presentation to the Judicial Council, the rule 10.804(1)(b) requires that the amendments to the manual be made available to the superior courts, the Department of Finance, and the State Controller’s Office for comment.</p>		

#	<b>Ongoing Projects and Activities<sup>4</sup></b>	
	<p>The subcommittee will review and comment on proposed recommendations. Subcommittee input will guide which compiled recommendations will be further vetted, and the final verbiage to be circulated for comment before going to the Judicial Council.</p> <p><b>Status/Timeline:</b> Ongoing.</p> <p><b>Fiscal Impact/Resources:</b> Trial Court Leadership and BAP staff.</p> <p><input type="checkbox"/> <i>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.</i></p> <p><b>Internal/External Stakeholders:</b> None.</p> <p><b>AC Collaboration:</b> None.</p>	
8.	<p><b>Project Title: Strengthen the Role of Court Executive Officers in Outreach to the Legislative and Executive Branches</b></p>	<p><b>Priority5 2</b></p> <p><b>Strategic Plan Goal6 II</b></p>
	<p><b>Project Summary<sup>7</sup>:</b> In consultation with the Judicial Council’s Administrative Director, Governmental Affairs, and Budget Services, CEAC will support Judicial Council outreach with the legislature with a focus on legislative staff in both the local districts and in the Capitol. This effort will entail the development of materials for court executive officers and perhaps educational sessions with legislative staff to educate them on the judicial branch budget and the fiscal/operational needs of the trial courts. CEAC will also assist in strengthening communication with the executive branch and with the Department of Finance in particular.</p> <p><b>Status/Timeline:</b> Ongoing.</p> <p><b>Fiscal Impact/Resources:</b> Judicial Council’s Administrative Director; Trial Court Leadership, Budget Services, and Governmental Affairs staff.</p> <p><input type="checkbox"/> <i>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.</i></p> <p><b>Internal/External Stakeholders:</b> None.</p> <p><b>AC Collaboration:</b> None.</p>	

#	Ongoing Projects and Activities <sup>4</sup>	
9.	<b>Project Title:</b> Serve as a Resource	<b>Priority</b> 5 2
<p><b>Project Summary</b><sup>7</sup>: Serve as a subject matter resource for Judicial Council divisions and other council advisory groups to avoid duplication of efforts and contribute to the development of recommendations for council action.</p> <p><b>Status/Timeline:</b> Ongoing.</p> <p><b>Fiscal Impact/Resources:</b> Respective Judicial Council divisions.</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><b>Internal/External Stakeholders:</b> None.</p> <p><b>AC Collaboration:</b> Respective advisory bodies.</p>		

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### III. LIST OF 2021 PROJECT ACCOMPLISHMENTS

#	Project Highlights and Achievements
1.	<b>Educational Opportunities.</b> TCPJAC and CEAC leadership collaborated with Judicial Council staff to hold four business meetings in 2021. These meetings covered topics including budget priorities, legislative updates, information technology updates, emergency preparedness and response, court operations, and COVID-19 pandemic response and management. Participants included presiding judges, assistant presiding judges, court executive officers, and assistant court executive officers.
2.	<b>TCPJAC/CEAC Joint Legislation Subcommittee.</b> Remained active throughout 2021, holding 14 conference calls to, on behalf of the TCPJAC and CEAC, provide review and make recommendations to the Legislation Committee on 61 different bills identified by Governmental Affairs as having significant operational or administrative impact on the trial courts. In December 2021, the subcommittee meeting schedule will be set according to the Legislation Committee’s 2022 meeting schedule. The subcommittee will continue to meet to review proposals to create, amend, or repeal statutes to achieve cost savings or greater efficiencies for the trial courts, and recommend proposals for future consideration.
3.	<b>TCPJAC/CEAC Joint Rules Subcommittee.</b> Remained active throughout 2021, on behalf of the TCPJAC and CEAC, and reviewed 26 rule proposals throughout the course of the year. The subcommittee provided comment on 18 rule proposals that may have a significant fiscal or operational impact on the trial courts. This subcommittee will continue to be active in 2022 and meet as needed.
4.	<b>Child Support Services Subcommittee.</b> The subcommittee reviewed the AB 1058 court contracts for FY 2021–22 and provided feedback to the program on changes to the contract terms. The subcommittee also met with the Department of Child Support Services to negotiate changes to the Plan of Cooperation which affect the timelines for case process and increase communication with the local child support agencies when operational issues arise.
5.	<b>JBSIS Subcommittee.</b> The subcommittee has made considerable progress on its 2021 objectives of completing the initial review of all JBSIS reports, and the data elements to be considered for reporting under each reporting category. The subcommittee recommended, and the Judicial Council adopted, a proposal to add a new data collection category to improve felony disposition reporting, which has been implemented for all courts starting July 2021.
6.	<b>Nominations Subcommittee.</b> During the 2021 nominations cycle, the subcommittee identified, assessed, and recommended court executive/judicial administrator candidates for membership on the CEAC Executive Committee and other advisory bodies.
7.	<b>Records Management Subcommittee.</b> The subcommittee is working on updates on the TCRM to include legislatively mandated updates and best practices for court records.
8.	<b>Trial Court Financial Policies Subcommittee.</b> The subcommittee enhanced the TCFPPM preliminary review process to include the Court Fiscal Officer Roundtable Networking Group participants. A new revision process timeline was developed. Potential revisions to the TCFPPM were identified, reviewed, and approved. Subject matter experts developed revisions drafts. Feedback on initial draft revisions was obtained from key stakeholders including the trial courts, the Department of Finance, and the State Controller’s Office.
9.	<b>CEAC Ad Hoc Working Group on Interpreter Payment Policy.</b> The revised <i>Payment Policies for Independent Contractor Interpreters</i> was approved by the Judicial Council in March 2021.



## JUDICIAL COUNCIL OF CALIFORNIA

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### MEMORANDUM

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**Date**

December 2, 2021

**Action Requested**

Review and Approve

**To**

Members of the Executive and Planning  
Committee

**Deadline**

February 8, 2022

**From**

Judge Kimberly A. Gaab, Chair  
Center for Judicial Education and Research  
Advisory Committee

**Contact**

Karene Alvarado  
415-865-7761  
karene.alvarado@jud.ca.gov

**Subject**

Transfer of Responsibility for All Supreme  
and Appellate Court Education Curriculum to  
Appellate Practice Curriculum Committee

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**Executive Summary**

The Center for Judicial Education and Research (CJER) Advisory Committee recommends that responsibility for all Supreme Court and appellate court education curriculum be transferred to the Appellate Practice Curriculum Committee.

This action will consolidate oversight of appellate education in one curriculum committee whose members are all from the Supreme and appellate courts, ensuring that the education interests of the members of those courts are prioritized and focused for that audience.



## **Recommendation**

The CJER Advisory Committee recommends that, effective immediately, the Executive and Planning Committee approve the following actions:

1. Assign responsibility for the education of all Supreme Court and appellate court audiences (justices, clerk/executive officers, judicial attorneys, managers, supervisors, and staff) exclusively to the Appellate Practice Curriculum Committee.
2. Reassign all Supreme Court and appellate court positions, and the members who occupy those positions, on both the Judicial Branch Leadership Development Curriculum Committee and the Appellate and Trial Court Operations Curriculum Committee, to the Appellate Practice Curriculum Committee.
3. Add an Administrative Presiding Justice Advisory Committee liaison position to the Appellate Practice Curriculum Committee.
4. Change the name of the Appellate and Trial Court Operations Curriculum Committee to the Trial Court Operations Curriculum Committee.

Current rosters of all three committees are included as Attachment A.

## **Relevant Previous Council Action**

In 2009, at the direction of the Judicial Council's Executive and Planning Committee, the CJER Advisory Committee streamlined its committee structure to include nine curriculum committees with specific subject matter and audience expertise (e.g., the Criminal Law Curriculum Committee, the Family Law Curriculum Committee, etc.). The committees submit recommendations to the CJER Advisory Committee for a two-year education plan in their areas. The CJER Advisory Committee oversees the curriculum committees and the execution of all the education it approves for the judicial branch; it also makes modifications in the plan as circumstances warrant (e.g., reduction in funding or staffing, emerging issues requiring new training). This model provides accountability to the Judicial Council for judicial branch education as well as the costs associated with that education.

Prior to 2021, the CJER Advisory Committee, pursuant to its authority under California Rules of Court, rule 10.50, solicited nominations and appointed members to each of its curriculum committees. That rule was amended this year to shift responsibility for making appointments from the CJER Advisory Committee to the Chief Justice under the procedures in rule 10.32.

## **Analysis/Rationale**

When the nine curriculum committees were established in 2009, each committee was assigned responsibility for the education curriculum for a specific subject matter and audience. For example:

- The Appellate Practice Curriculum Committee was assigned responsibility for the curriculum for justices on the Supreme Court and the appellate courts, as well as for judicial attorneys in those courts.
- The Judicial Branch Leadership Development Curriculum Committee was assigned responsibility for the curriculum for leaders in the appellate and trial courts, including trial court presiding judges, appellate and trial court executive officers, and appellate and trial court managers and supervisors.
- The Appellate and Trial Court Operations Curriculum Committee was assigned responsibility for the curriculum for staff in the appellate and trial courts.

In November 2021, the administrative presiding justices of the six district courts of appeal proposed that responsibility for the curriculum for all Supreme Court and appellate court audiences, including justices, clerk/executive officers, judicial attorneys, managers, supervisors, and staff, be assigned to the Appellate Practice Curriculum Committee. The administrative presiding justices suggested that because all members of the Appellate Practice Curriculum Committee work at the Supreme Court and the appellate courts, that committee is best positioned to make decisions about the educational needs of those audiences.

Although the administrative presiding justices recognized that the Judicial Branch Leadership Development Curriculum Committee and the Trial Court Operations Curriculum Committee were focused on the educational needs of court leaders and court staff, respectively, they expressed concern that because both those committees included a mix of appellate and trial court members, the educational needs of the Courts of Appeal might receive less emphasis than those of the trial courts. They further recognized that to be able to effectively address the educational needs of court leadership and staff, Appellate Practice Curriculum Committee membership would need to be augmented with leadership and staff positions. They proposed that the existing Supreme Court and appellate court positions on the other two curriculum committees be moved to the Appellate Practice Curriculum Committee.

Specifically, the following members, and the positions they occupy, should be reassigned from the Appellate and Trial Court Operations Curriculum Committee to the Appellate Practice Curriculum Committee: Ms. Janet Gamboa, Mr. Brandon L. Henson, Ms. Victoria Pons, and Ms. Jenny K. Rogers. The following members, and the positions they occupy, should be reassigned from the Judicial Branch Leadership Development Curriculum Committee to the

December 2, 2021

Page 4

Appellate Practice Curriculum Committee: Ms. Janet Gamboa, Mr. Brandon L. Henson, and Ms. Eva McClintock.

At its meeting on December 2, 2021, the CJER Advisory Committee considered the administrative presiding justices' proposals and voted to recommend them.

**Policy implications**

None.

**Comments**

None.

**Fiscal and Operational Impacts**

There are no fiscal or operational impacts resulting from this proposal.

**Attachments and Links**

1. Attachment A: Rosters of the Appellate Practice Curriculum Committee, Judicial Branch Leadership Development Curriculum Committee, and Appellate and Trial Court Operations Curriculum Committee

# **ATTACHMENT A**

## Rosters

# Appellate Practice Curriculum Committee

As of October 13, 2021

**Hon. Judith D. McConnell, Chair**

Administrative Presiding Justice of the Court of Appeal  
Fourth Appellate District

**Mr. David DeFrank**

Appellate Court Attorney  
Court of Appeal  
Fifth Appellate District

**Hon. Helen Bendix**

Associate Justice of the Court of Appeal  
Second Appellate District, Division One

**Ms. Melinda Gordon Oross**

Senior Appellate Court Attorney  
Court of Appeal  
Fourth Appellate District

**Hon. Allison M. Danner**

Associate Justice of the Court of Appeal  
Sixth Appellate District

**Ms. Oona Mallett**

Appellate Court Attorney  
Court of Appeal  
Third Appellate District

**Hon. Joan K. Irion**

Associate Justice of the Court of Appeal  
Fourth Appellate District, Division One

**Hon. Tony L. Richardson**

Judge of the Superior Court of California,  
County of Los Angeles

**Hon. M. Bruce Smith**

Associate Justice of the Court of Appeal  
Fifth Appellate District

**Hon. Nathan R. Scott**

Judge of the Superior Court of California,  
County of Orange

**Hon. Therese M. Stewart**

Associate Justice of the Court of Appeal  
First Appellate District, Division Two

**JUDICIAL COUNCIL STAFF LIAISON**

**Ms. Jessica Butterick**

Lead Appellate Court Attorney  
Court of Appeal  
Second Appellate District

**Ms. Deborah Collier-Tucker**

Manager  
Appellate Court Services  
Judicial Council of California

**CJER ADVISORY COMMITTEE LIAISON**

# **Appellate Practice Curriculum Committee**

As of October 13, 2021

## **CJER ADVISORY COMMITTEE LIAISON**

### **Hon. Richard D. Huffman**

Associate Justice of the Court of Appeal  
Fourth Appellate District, Division One

## **CJER LEAD STAFF**

### **Ms. Adetunji Olude**

Attorney  
Center for Judicial Education and Research  
Judicial Council of California

# **Judicial Branch Leadership Development Curriculum Committee**

**As of October 13, 2021**

**Mr. Bob Fleshman, Chair**  
Court Executive Officer  
Superior Court of California,  
County of Napa

**Ms. Aliyah Hadt**  
Court Operations Manager  
Superior Court of California,  
County of Los Angeles

**Ms. Janet Gamboa**  
Assistant Clerk/Executive Officer  
Court of Appeal  
Fourth Appellate District

**Dr. Krystal N. Lyons**  
General Counsel & Director of Legal Services  
Superior Court of California,  
County of San Bernardino

**Mr. Brandon L. Henson**  
Assistant Clerk/Administrator  
Court of Appeal  
Fourth Appellate District

**Janay Marks**  
Courtroom Operations Supervisor  
Superior Court of California,  
County of Orange

**Ms. Eva McClintock**  
Assistant Clerk/Executive Officer  
Court of Appeal  
Second Appellate District

**Ms. Katie Lee Mayeda**  
Collaborative Court Manager  
Superior Court of California,  
County of Santa Cruz

**Ms. Amber Bravo**  
Court Operations Manager  
Superior Court of California,  
County of Butte

**Ms. Carla J. Ortega**  
Managing Attorney  
Superior Court of California,  
County of Kern

**Mr. Darren Dang**  
Chief Financial and Administrative Officer  
Superior Court of California,  
County of Orange

**Mr. Darrel E. Parker**  
Court Executive Officer  
Superior Court of California,  
County of Santa Barbara

**Ms. Teresa Estrada**  
Court Operations Manager  
Superior Court of California,  
County of San Diego

**Ms. Jacqueline Royston**  
Court Operations Manager  
Superior Court of California,  
County of Los Angeles

# **Judicial Branch Leadership Development Curriculum Committee**

As of October 13, 2021

**Ms. Kimberlie Turner**

Deputy Court Executive Officer  
Superior Court of California,  
County of San Bernardino

**CJER ADVISORY COMMITTEE LIAISON**

**Mr. Joseph Ford**

Assistant Court Executive Officer  
Superior Court of California,  
County of Placer

**CJER LEAD STAFF**

**Ms. Kristine Van Dorsten**

Senior Education Developer  
Center for Judicial Education and Research  
Judicial Council of California



# Appellate and Trial Court Operations Curriculum Committee

As of October 13, 2021

**Ms. Ginny Spevak-Scheitt, Chair**  
Staff Development Specialist  
Superior Court of California,  
County of San Diego

**Ms. Faye Hadley**  
Administrator II - Operations Training and Support  
Superior Court of California,  
County of Los Angeles

**Ms. Janet Gamboa**  
Assistant Clerk/Executive Officer  
Court of Appeal  
Fourth Appellate District

**Ms. Jodi L. Leveque**  
Chief Operations Officer  
Superior Court of California,  
County of Marin

**Mr. Brandon L. Henson**  
Assistant Clerk/Administrator  
Court of Appeal  
Fourth Appellate District

**Ms. Florence Patten**  
Courtroom Clerk II  
Superior Court of California,  
County of Santa Cruz

**Ms. Victoria Pons**  
Deputy Clerk  
Court of Appeal  
First Appellate District

**Ms. Carrie Robinson**  
District Manager II  
Superior Court of California,  
County of San Bernardino

**Ms. Maribel Betancourt**  
District Manager I  
Superior Court of California,  
County of San Bernardino

**Ms. Priscilla Roque**  
Criminal Court Operations Supervisor  
Superior Court of California,  
County of San Diego

**Ms. Elissa Chambers**  
Court Operations Manager  
Superior Court of California,  
County of Contra Costa

**Ms. Scharonica Smith**  
Court Supervisor  
Superior Court of California,  
County of Alameda

**Ms. Sarah Davis**  
Operations Manager, Juvenile Dependency  
Superior Court of California,  
County of Sacramento

**Mr. Caleb Valdez**  
Probate Court Operations Supervisor  
Superior Court of California,  
County of San Diego

# **Appellate and Trial Court Operations Curriculum Committee**

As of October 13, 2021

**Ms. Kristen Kincaid**

Senior Human Resources Business Partner  
Superior Court of California,  
County of San Bernardino

**Mr. Rob Marshall**

Senior Education Developer  
Center for Judicial Education and Research  
Judicial Council of California

**Ms. Robin Randall**

Staff Development Specialist  
Superior Court of California,  
County of Orange

**Ms. Jenny K. Rogers**

Human Resources Liaison  
Court of Appeal  
Fourth Appellate District

**Ms. Bryna Q. Smith**

Human Resources Director  
Superior Court of California,  
County of Placer

**Ms. Susanna Tram-Quon**

Deputy Director of Human Resources  
Superior Court of California,  
County of Los Angeles

**CJER ADVISORY COMMITTEE LIAISON**

**Mr. Kevin J. Lane**

Clerk/Executive Officer  
Court of Appeal  
Fourth Appellate District

**CJER LEAD STAFF**