



# JUDICIAL COUNCIL OF CALIFORNIA

INFORMATION TECHNOLOGY  
ADVISORY COMMITTEE

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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 RECORDED

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|                                    |   |
|------------------------------------|---|
| <b>Date:</b>                       | May 25, 2022  |
| <b>Time:</b>                       | 10:00 a.m. to 12:20 p.m.  |
| <b>Connection<br/>Information:</b> | <a href="https://jcc.granicus.com/player/event/1771">https://jcc.granicus.com/player/event/1771</a> |

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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.

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 10:00 a.m. – 10:05 a.m.**

**Approval of Minutes (Action Required)**

Approve minutes of the following Information Technology Advisory Committee meetings:

- February 25, 2022

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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 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](mailto:itac@jud.ca.gov). Only written comments received by **10 a.m. on May 24** will be provided to advisory body members prior to the start of the meeting.

**III. REPORTS AND ACTION ITEMS (ITEMS 1–8)**

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**Item 1            10:05 a.m. – 10:15 a.m.**

**Chair’s Report**

Presenter:    Hon. Sheila F. Hanson, Chair

**Item 2            10:15 a.m. – 10:25 a.m.**

**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            10:25 a.m. – 10:40 a.m.**

**Liaison Updates**

Updates from appointed liaisons on activities and news coming from other advisory bodies.

Hon. Louis R. Mauro

*Appellate Advisory Committee*

*Advisory Committee on Providing Access and Fairness*

Hon. Michael S. Groch

*Center for Judicial Education and Research Advisory Committee (CJER)*

*Traffic Advisory Committee*

Hon. Samantha P. Jessner

*Civil & Small Claims Advisory Committee*

Hon. Kimberly Menninger

*Criminal Law Advisory Committee*

David Yamasaki

*Court Executives Advisory Committee*

**Item 4            10:40 a.m. – 11:00 a.m.**

**Strategic Plan Workstream Update**

Update on the workstream’s activities and schedule.

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

Hon. Tara M. Desautels

**Item 5            11:00 a.m. – 11:30 a.m.**

**Court Technology Modernization Funding Update**

Update on activities on the FY 2021-22 and FY 2022-23 Court Technology Modernization Funding cycles.

Presenters:    Hon. Kyle S. Brodie, Chair, Technology Committee  
                  Heather Pettit, Chief Information Officer

**Item 6            11:30 a.m. – 11:50 a.m.**

**Budget Update**

Update on the FY 2022-23 state budget.

Presenters:    Zlatko Theodorovic, Deputy Director, Budget Services  
                  Heather Pettit, Chief Information Officer

**Item 7            11:50 a.m. – 12:00 p.m.**

**Annual Agenda Update: Recommendations from the Ad Hoc Workgroup on Post-Pandemic Initiatives (Action Required)**

Review and amend ITAC's annual agenda to include the workgroup's recommendations.

Presenter:    Hon. Sheila F. Hanson, Chair

**Item 8            12:00 p.m. – 12:20 p.m.**

**Advancing the Hybrid Courtroom Workstream and Remote Proceedings**

Update on the Advancing the Hybrid Courtroom Workstream and other remote proceedings activities.

Presenter:    Hon. Samantha Jessner, Executive Co-Sponsor  
                  Adam Creiglow, Executive Co-Sponsor  
                  Heather Pettit, Chief Information Officer

**A D J O U R N M E N T**

**Adjourn**



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## INFORMATION TECHNOLOGY ADVISORY COMMITTEE

### MINUTES OF OPEN MEETING

February 25, 2022

12:00 PM to 1:30 PM

Videoconferencing

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**Advisory Body Members Present:** Hon. Sheila F. Hanson, Chair; Hon. Louis R. Mauro, Vice Chair; Mr. Mike Balie; Mr. Brian Cotta; Mr. Adam Creiglow; Hon. Julie R. Culver; Hon. Tara Desautels; Hon. Michael S. Groch; Hon. Kimberly Menninger; Hon. James Mize; Mr. Snorri Ogata; Hon. Bruce Smith; Mr. Anh Tran; Ms. Jeannette Vannoy; Mr. Don Willenburg; Mr. David H. Yamasaki; and Hon. Theodore Zayner

**Advisory Body Members Absent:** Assembly Member Marc Berman; Mr. Jake Chatters; Hon. Truc T. Do; Ms. Alexandra Grimwade; Senator Robert Hertzberg; Hon. Samantha P. Jessner; Mr. Darrel Parker; and Hon. Donald Segerstrom

**Others Present:** Mr. Jason Galkin; Ms. Heather Pettit; Ms. Jamel Jones; Ms. Camilla Kieliger; Ms. Andrea Jaramillo; Ms. Jamie Schechter, and other JCC staff present

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### OPEN MEETING

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#### Call to Order and Roll Call

The chair called the meeting to order at 12:00 PM and took roll call.

#### Approval of Minutes

The advisory body reviewed and approved the minutes of the January 26, 2022, Information Technology Advisory Committee meeting.

There were no public comments submitted for this meeting.

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### DISCUSSION AND ACTION ITEMS (ITEMS 1-7)

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#### Item 1

##### Chair's Report

Presenter: Hon. Sheila F. Hanson, Chair

**Update:** Judge Hanson welcomed members and reminded liaisons to let the ITAC chairs know if their assigned committee discusses items of interest to ITAC. Future ITAC meetings will have a liaison update item on the agenda, during which the liaisons are asked to report out on relevant activities.

## Item 2

### **Joint Security Governance Subcommittee: Amend 2022 Annual Agenda (Action Required)**

Consider an amendment of ITAC's Annual Agenda to initiate a Joint Security Governance Subcommittee with the Court Executive Advisory Committee.

Presenter: Heather Pettit, Chief Information Officer

**Action:** ITAC members approved the revised Annual Agenda for the Joint Security Governance Subcommittee with the following amendments:

Change the name of the subcommittee to "Joint Information Security Governance Subcommittee"

Add "Branchwide Information Security Workstream" as an origin for the subcommittee.

## Item 3

### **Rules & Policy Subcommittee: Remove Requirement to Submit E-Filing Program Reports**

Consider an amendment of California Rules of Court, rule 2.253, to remove a requirement that a trial court with mandatory electronic filing submit reports about its electronic filing program to the Judicial Council.

Presenter: Hon. Julie R. Culver, Chair

**Action:** ITAC members approved the proposed amendment for circulation for public comment and recommended it to the Technology Committee for approval.

## Item 4

### **Rules & Policy Subcommittee: Remote Access to Electronic Records**

Consider a proposed new rule and amendments to the California Rules of Court to authorize trial courts to provide remote access to electronic records by administrators contracted to run appellate appointed counsel programs, the Courts of Appeal, and the Habeas Corpus Resource Center.

Presenter: Hon. Julie R. Culver, Chair

**Action:** ITAC members approved the proposed amendment for circulation for public comment, and recommended it to the Technology Committee for approval.

## Item 5

### **Rules & Policy Subcommittee: Remote Access to Electronic Records by Private Criminal Defense Attorneys**

Consider proposed amendments to the California Rules of Court to authorize trial courts to provide private criminal defense attorneys remote access to criminal electronic records.

Presenter: Hon. Julie R. Culver, Chair

**Action:** ITAC members approved the proposed amendment for circulation for public comment and recommended it to the Technology Committee for approval with the following amendment:  
Rule 2.519(d)(1):  
An attorney may remotely access the electronic records only for the purpose of assisting a party with ~~the~~ that party's court matter.

#### Item 6

##### **Traffic Advisory Committee: Amend California Rules of Court, Rule 4.336 to Support *MyCitations***

Provide feedback on a proposed rule to address online options for ability-to-pay determinations and confidentiality of financial information.

Presenter: Jamie Schechter, Attorney, Criminal Justice Services

**Action:** The Traffic Advisory Committee asked ITAC members for their feedback on proposed amendments to rule 4.336 which would grant the online form the same confidentiality as the current paper form.  
For clarity, members suggested reducing or reorganizing wording; potentially combine subdivisions; and to simply refer to "data" whether captured electronically or in paper form. Another suggestion was to omit using the current tool name *MyCitations*, so the rule would not have to be amended should the name or the tool change.

#### Item 7

##### **Traffic Advisory Committee: Remote Proceedings for Infractions**

Provide feedback on a proposal to amend California Rules of Court, rule 4.220, to standardize remote proceedings for infractions.

Presenter: Jamie Schechter, Attorney, Criminal Justice Services

**Action:** ITAC members discussed the proposed rule changes and would like to review them further. They suggested that this item be moved to another rules cycle allowing the committee time to review and help with drafting changes before public comment.

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#### **A D J O U R N M E N T**

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There being no further business, the meeting was adjourned at 1:15 PM.

Approved by the advisory body on enter date.

# **Strategic Plan for Technology 2023-26 Update Preview & Input**

May 2022



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# Overview

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- Technology governance
- Workstream membership
- Workstream analysis completed
- Timeline and Previews
- Discussion and feedback

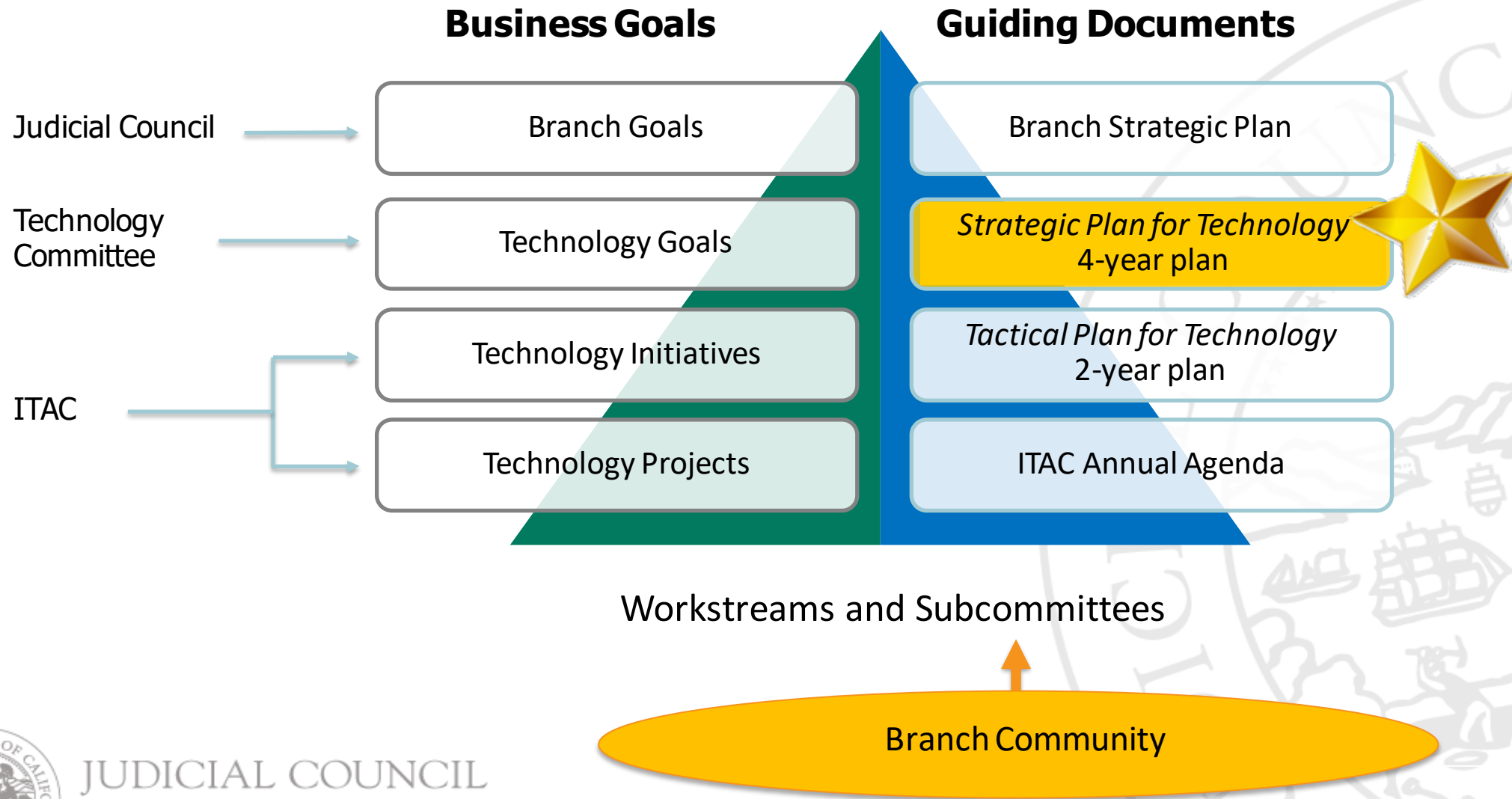


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# Technology Governance



# Workstream Members

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**Hon. Kyle S. Brodie**

Executive Sponsor and Chair Technology Committee

**Hon. Carlos M. Cabrera**

(Judge, San Bernardino)

**Hon. Tara Desautels**

(Judge, Alameda)

**Hon. Audra Ibarra**

(Judge, Santa Clara)

**Ms. Andrea Wallin-Rohmann**

(CEO, 3DCA)

**Mr. Bob Fleshman**

(CEO, Napa)

**Mr. Jason Galkin**

(CEO, Nevada)

**Mr. Brian Taylor**

(CEO, Solano)

**Mr. Pat Patterson**

(Deputy CEO, Ventura)

**Ms. Michelle Duarte**

(CIO, Santa Cruz)

**Mr. Micah May**

(CIO, San Bernardino)

**Mr. Tyrone Tasker**

(Research Attorney, Los Angeles)

**Advisory Member**

**Hon. Sheila F. Hanson**

(Chair, Information Technology Advisory Committee)

**Committee Staff**

Ms. Heather L. Pettit

Mr. Mark Dusman

Mr. Andrae Randolph

Ms. Jamel Jones

Ms. Jessica Craven



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# Workstream Analysis Completed

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- Considered new tools
  - California Courts Connected Framework
  - Court Technology Inventory
- Reviewed branch business drivers
  - Performed SWOT analysis (strengths, weaknesses, opportunities, and threats)
- Presentation by Gartner on Court Strategic Planning
- Research by members
- Subteams analyzing goals for updates and additions



# Current Strategic Plan Goals

## 1. Promote the Digital Court

Increase access to the courts, administer justice in a timely and efficient manner, and optimize case processing by supporting a foundation for the digital court and by implementing comprehensive digital services for the public and for justice partners.

## 2. Innovate Through IT Community

Maximize the ability to innovate by strengthening and broadening the IT Community through collaboration, education, and employment strategies to leverage innovative solutions and drive technological change.

## 3. Advance IT Security and Infrastructure

Invest in a secure, scalable, and reliable technology infrastructure as a foundation for providing digital services and public access, while maintaining a focus on privacy protections and security.

## 4. Promote Rule and Legislative Changes

Promote the modernization of statutes, rules, and procedures to facilitate the use of technology in court operations and the delivery of court services.



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OF

# California Courts Connected Framework



## California Courts Connected

Courts Connected initiatives leverage technology to create core systems that enable digital solutions to meet the evolving court services needs of Californians and our justice system partners.

**NEW**



### Core Systems

- Case Management System
- Electronic Records Management
- Jury Management
- Courthouse
- Financials
- Human Resources
- Collaboration & Office Tools











### Digital Ecosystem

- Branch & Court Development
- State & Local Integrations



### Public & Partner Services

self-service

-  Websites / Self Help Portal
-  Payments
-  Text Notifications
-  Remote Records Access & Search
-  Virtual Cust. Service Center
-  Electronic Filing
-  Remote Proceedings
-  Online Dispute Resolution
- ... Branch Solutions

live-interaction



 Security & Infrastructure



# Court Technology Inventory

- Aligned inventory to framework and focused on three concepts:

## 1. Core Systems

## 2. Public/Partner Services

## 3. Enterprise

- Courts provided status of progress, needs
- Aggregated data courts to show branchwide view

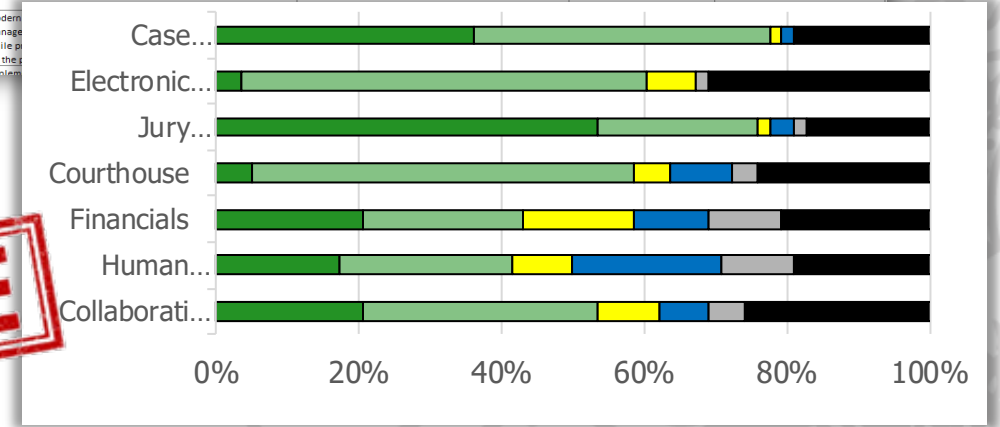
**NEW**

**California Courts Connected**

Courts Connected initiatives leverage technology to create core systems that enable digital solutions to meet the evolving court services needs of Californians and our justice system partners.

**Public & Partner Services**  
self-service  
Web Sites / Self-Help Portal

|  | Definitions   | Implementation Progress   | Solutions  | Areas of Need  |
|--|---|---|--|--|
| <b>Court Technology Inventory</b>          | Description of the technology system, service, or application.  | Identify your court's level of implementation and provide additional comments, if necessary.<br>A) Fully implemented<br>B) Partially implemented/in progress<br>C) Not started<br>D) No plans to implement<br>E) I don't know | If applicable, please provide name of solutions being used | From a technology perspective, what is your biggest need in this area? |
| <b>Core Systems</b>                        |   |   |  |  |
| <b>Case Management Systems (CMS)</b>       | Deploy, enhance, and/or modernize CMS systems in support of effective, and efficient case processing and other essential court operational functions, such as automated work processes, tools used by judicial officers, clerks, and case participants, in and outside the courtroom.           |   |  |  |
| <b>Electronic Records Management (ERM)</b> | Transition from paper-based case files to electronic case files and records, allowing courts to receive the full benefit and efficiencies of electronic filing and a digital court record. Manage electronic court records and processes using various digital automation strategies and tools. |   |  |  |
|  | Intelligent Forms   |   |  |  |
|  | Digitizing of Documents   |   |  |  |
|  | Digital Evidence  |   |  |  |
|  | Transcript Assembly Program   |   |  |  |
| <b>Jury Management Systems (JMS)</b>       | Modernize jury management while providing for the safety of jurors and court employees.   |   |  |  |



**SAMPLE**



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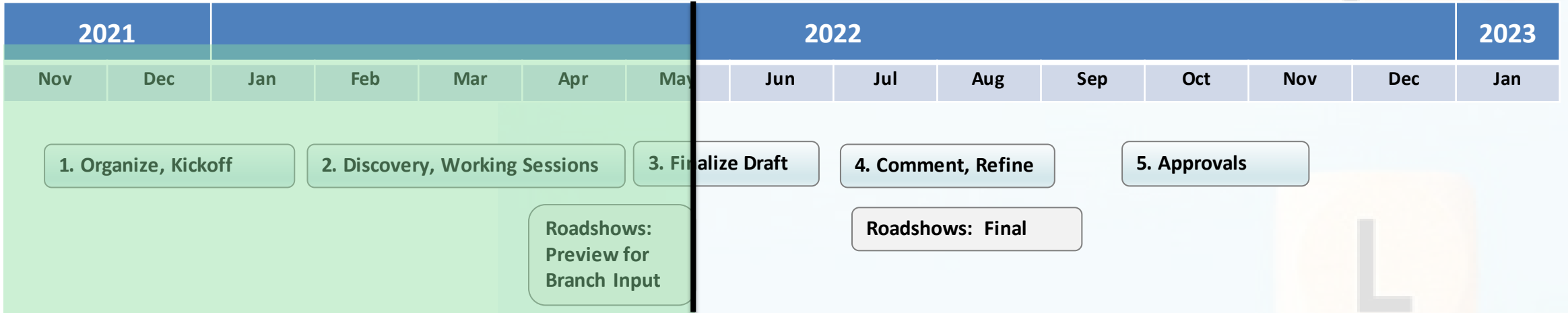
# Key Learnings

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- **Measures of Success:**
  - How do we go about measuring success?
  - What do we mean by this?
- **Review of Goals**
  - **Goal 1: Promote the Digital Court:** Considering reframing Goal 1: Advance the Digital Court and breaking out part for new Goal 5: Ensure Equal Access to the Digital Court
  - **Goal 2: Innovate through IT Community:** Refining; Retaining concepts of innovation and community are key
  - **Goal 3: Advance IT Security and Infrastructure:** Forward thinking to ensure alignment with Judicial Council approved security recommendations
  - **Goal 4: Promote Rule and Legislative Changes:** Refining; reinforced need to be proactive.



# Timeline



## Next Steps:

- Finalize Draft Document
  - Branch and Public Comment (4 weeks)
  - Refine document
  - Approval by Technology Committee
  - Approval by Judicial Council
- *Complete late June*
  - *Begin in July*
  - *August*
  - *October*
  - *November 17-18*



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# Previews for Input

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- **April 20** – California Appellate Court Clerk's Association
- **April 21** – CIO Community / Court Information Technology Management Forum Meeting
- **April 26** – Administrative Presiding Justices Advisory Committee
- **April 27** – Trial Court Presiding Judges and Court Executives Advisory Committee's' Executive Committee Meeting
- **May 25** – Information Technology Advisory Committee Meeting



# Discussion and Feedback

*Thank you!*



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# **Court Technology Modernization Funding FY 2022-23**

Information Technology Advisory Committee  
May 25, 2022



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# Guiding Principles- Proposed Updates

- Allocate funding based on the California Courts Connected framework
- Promote courts' ability to be innovative and forward-looking
- Take an adaptive approach to distribution methodology
- Align with Strategic and Tactical Plans, and Chief's Access 3D
- Collaborate, collaborate, collaborate!
- Keep it simple – support a streamlined and efficient process
- Be responsive to court priorities



# Project Requirements-Proposed Updates

- Benefit the public
- Comply with branchwide policies and standards
- Be vetted and approved by the Technology Committee
- Fall within at least one of the approved program categories
- Commence project initiation activities immediately after project proposals are approved (September 2022)
- Show demonstrable progress by the following January (January 2023)
- Expend or encumber funds by end of the fiscal year (June 30, 2023)
- Project completion by end of the third fiscal year (June 30, 2025)
- Report quarterly on measurable successful outcomes





# California Courts Connected

Courts Connected initiatives leverage technology to create core systems that enable digital solutions to meet the evolving court services needs of Californians and our justice system partners.



## Core Systems

- Case Management System
- Electronic Records Management
- Jury Management
- Courthouse
- Financials
- Human Resources
- Collaboration & Office Tools












## Digital Ecosystem

- Branch & Court Development
- State & Local Integrations



## Public & Partner Services

self-service

-  Websites / Self Help Portal
-  Payments
-  Text Notifications
-  Remote Records Access & Search
-  Virtual Cust. Service Center
-  Electronic Filing
-  Remote Proceedings
-  Online Dispute Resolution
-  ... Branch Solutions

live-interaction

← Data →

 Security & Infrastructure

# Inventory Results

- Responses from 49 Trial Courts
- Responses from 5 Appellate Courts



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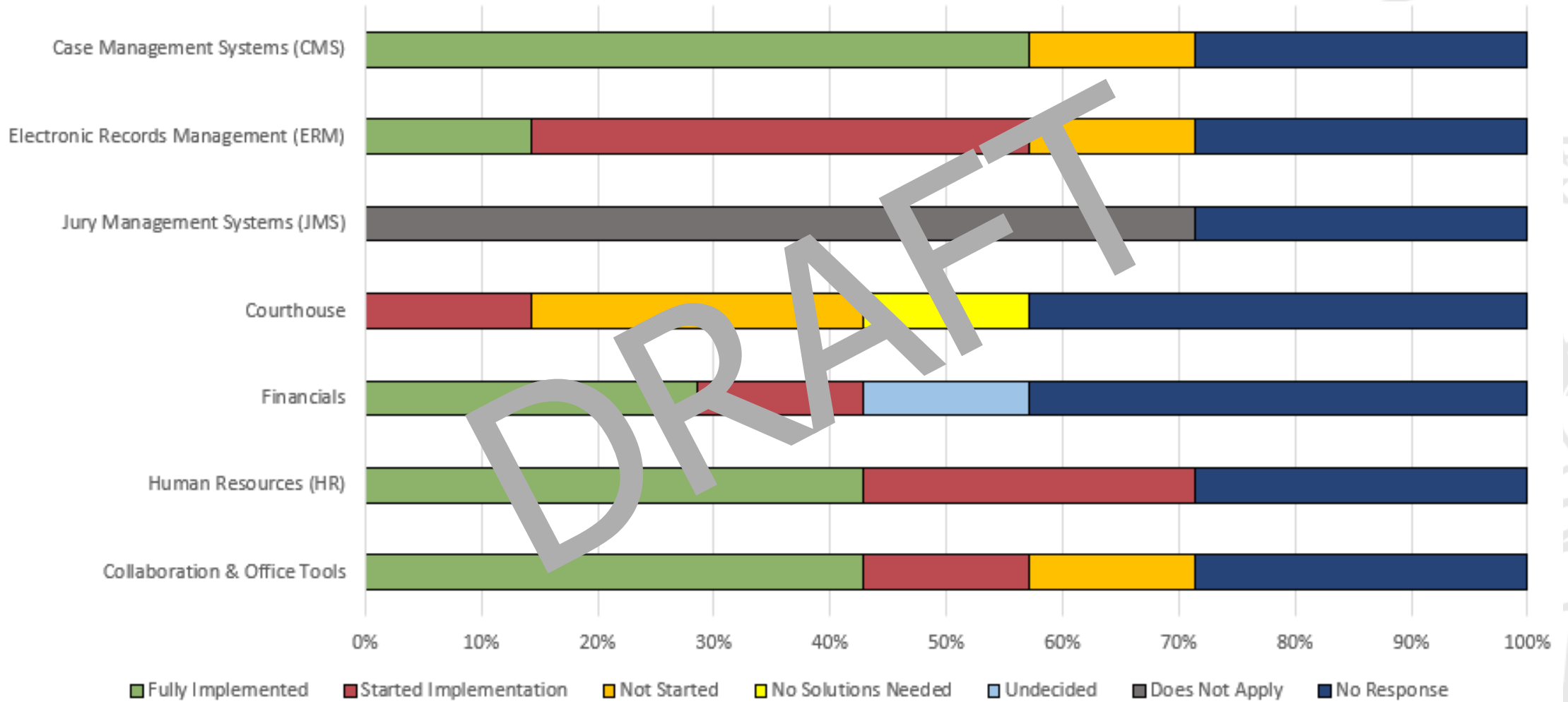
# Response Options

- A. We have **fully implemented** the solution(s) across all areas of need.
- B. We have **started implementation** in this category, but have not completed implementation across all the areas of need.
- C. We have needs for a solution in this category, but have **not started**.
- D. We have considered our needs for this and have **decided to not implement solutions** related to this category.
- E. We have not considered our needs for this category and **have not made a decision**.
- F. Does not apply (Appellate Courts only).
- G. No Response Provided/No Submission Received.



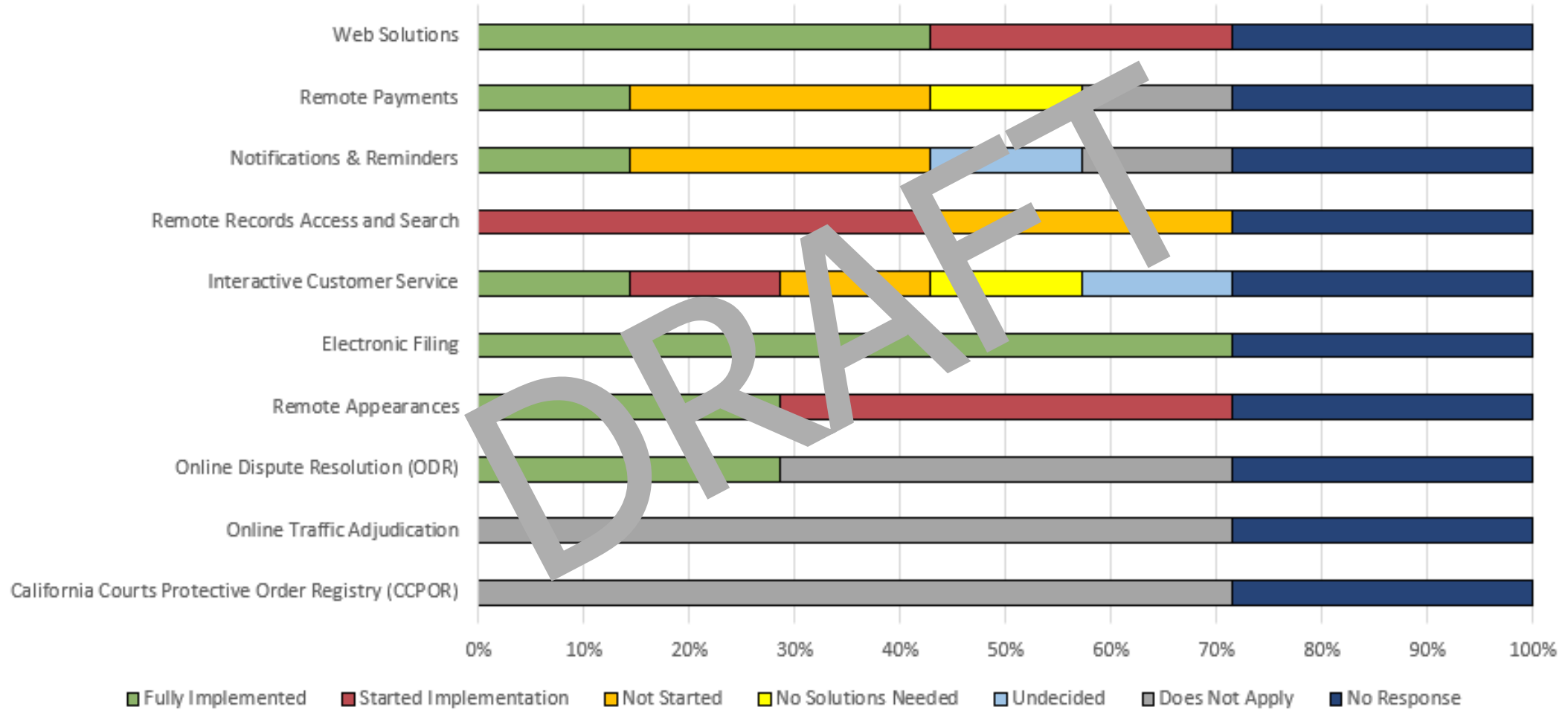


# Appellate Courts- Core Systems



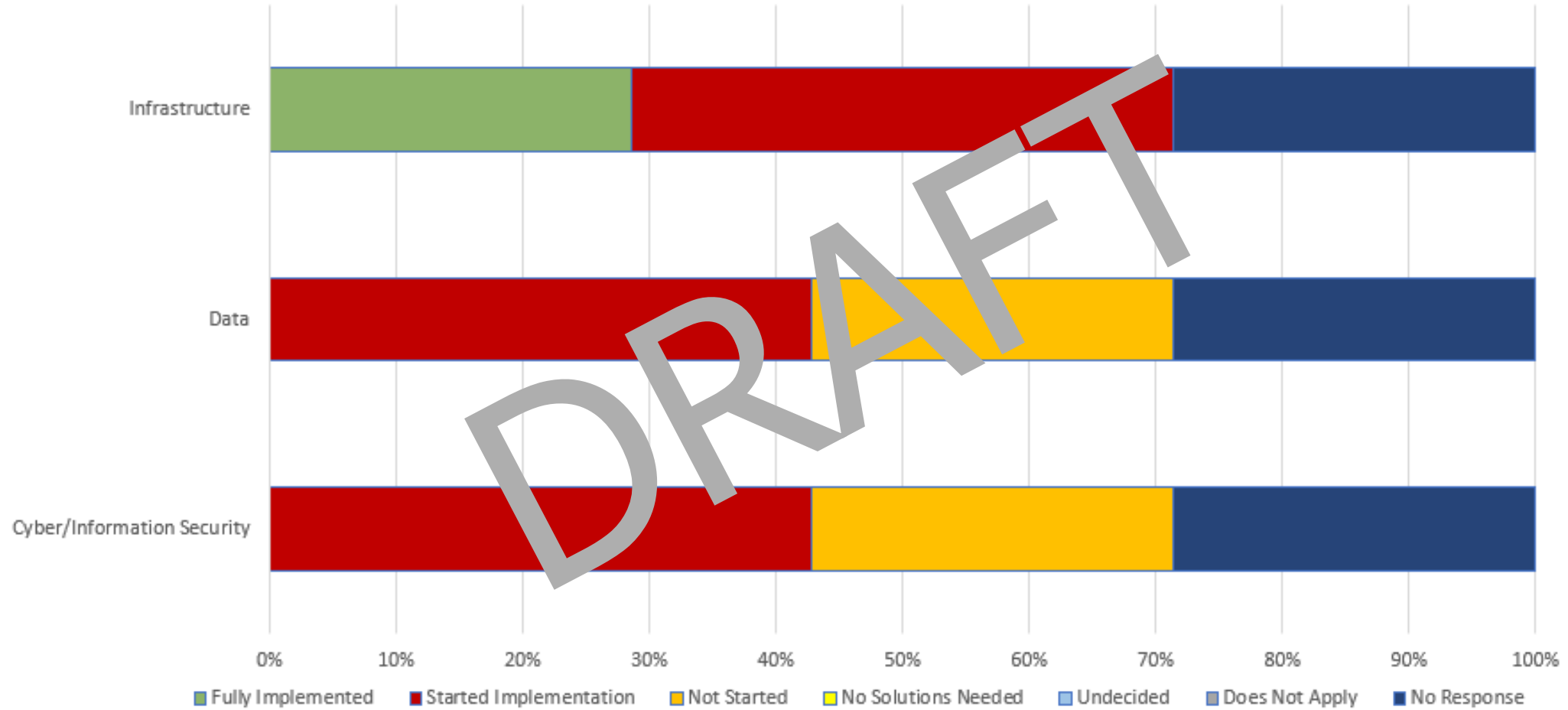
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# Appellate Courts- Public & Partner Services



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# Appellate Courts- Enterprise



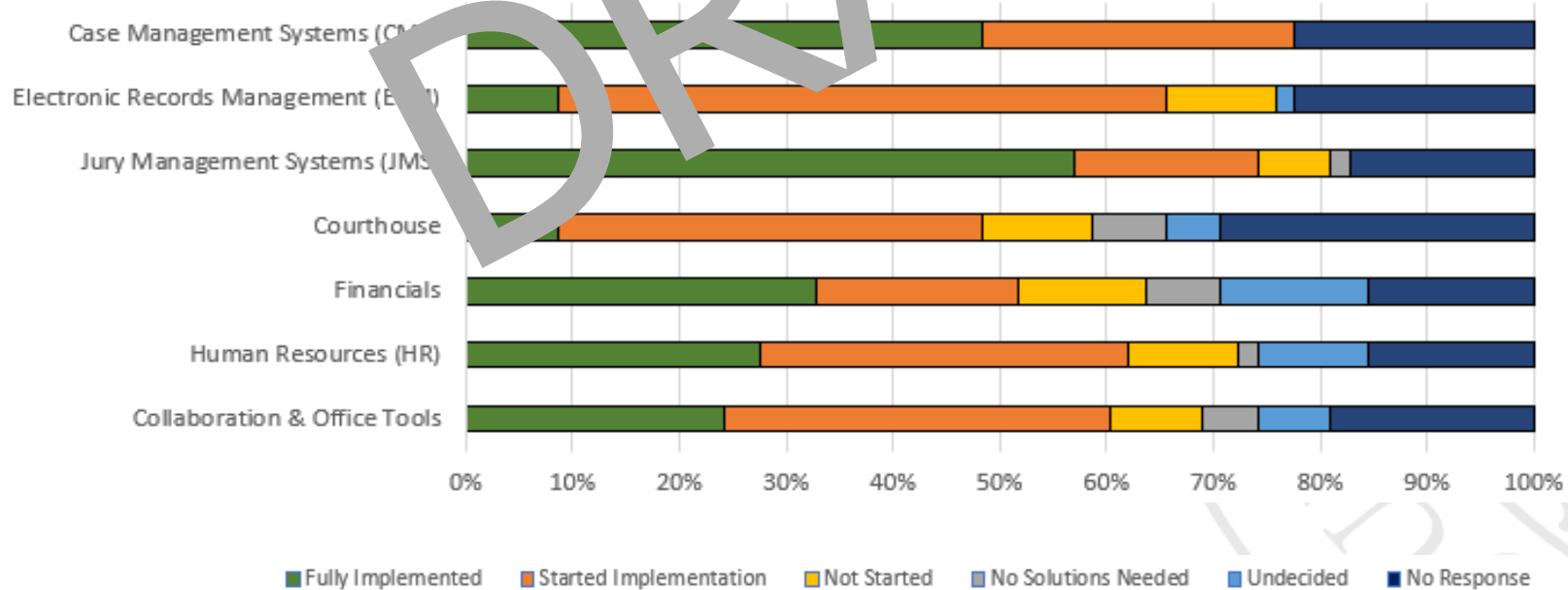
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# Trial Courts- Core Systems

2021

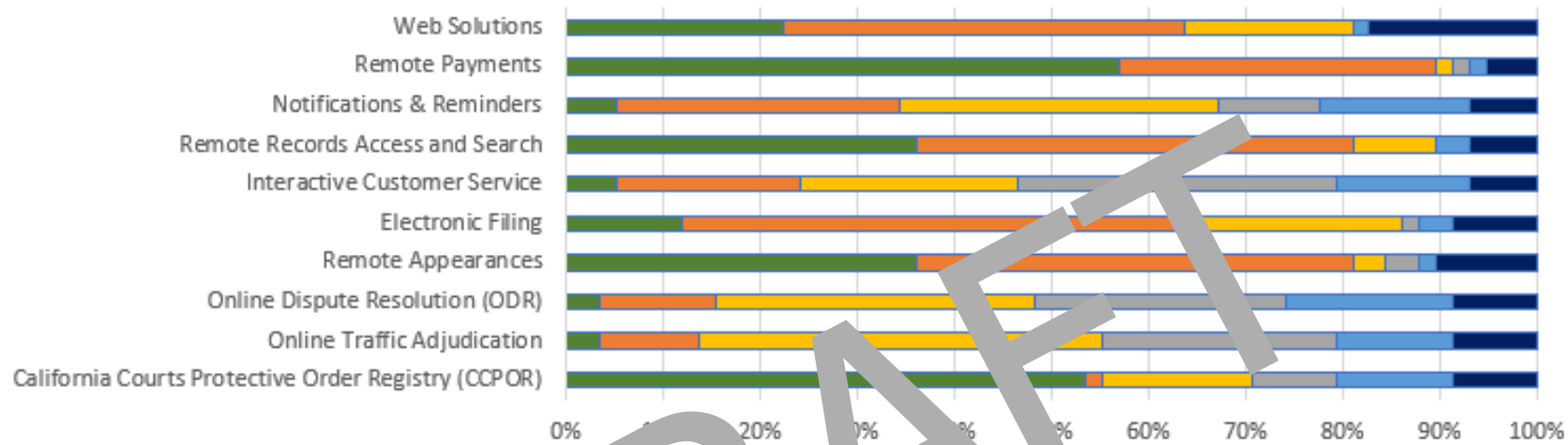


2022

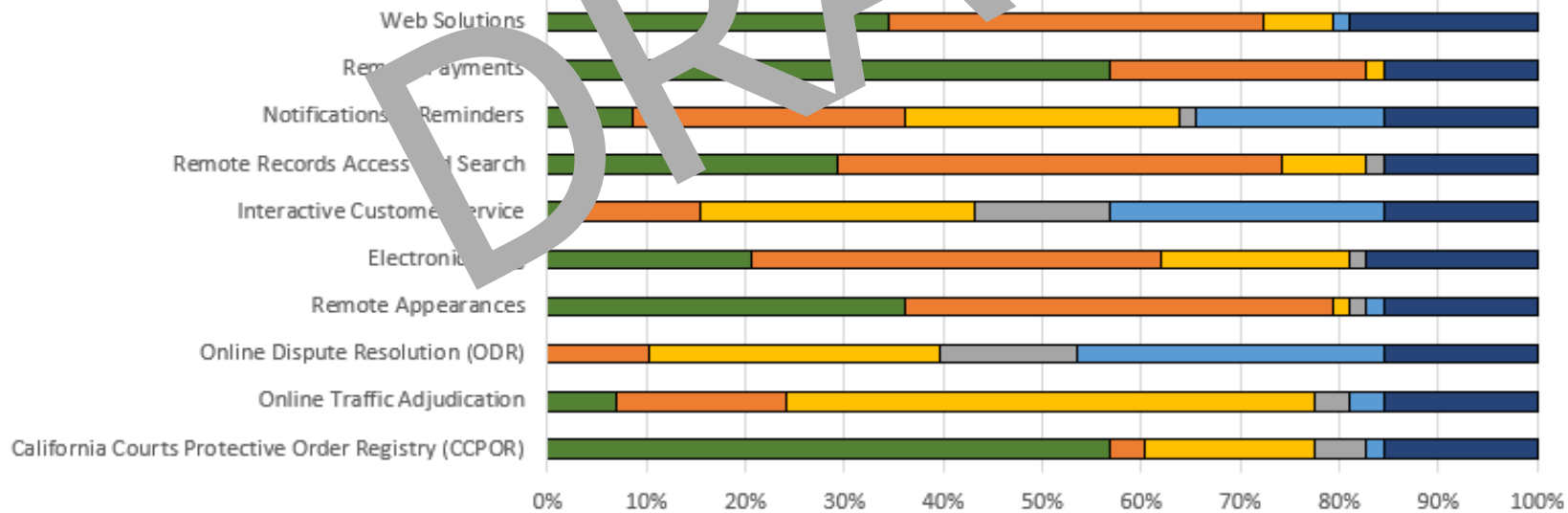


# Trial Courts- Public & Partner Services

2021



2022

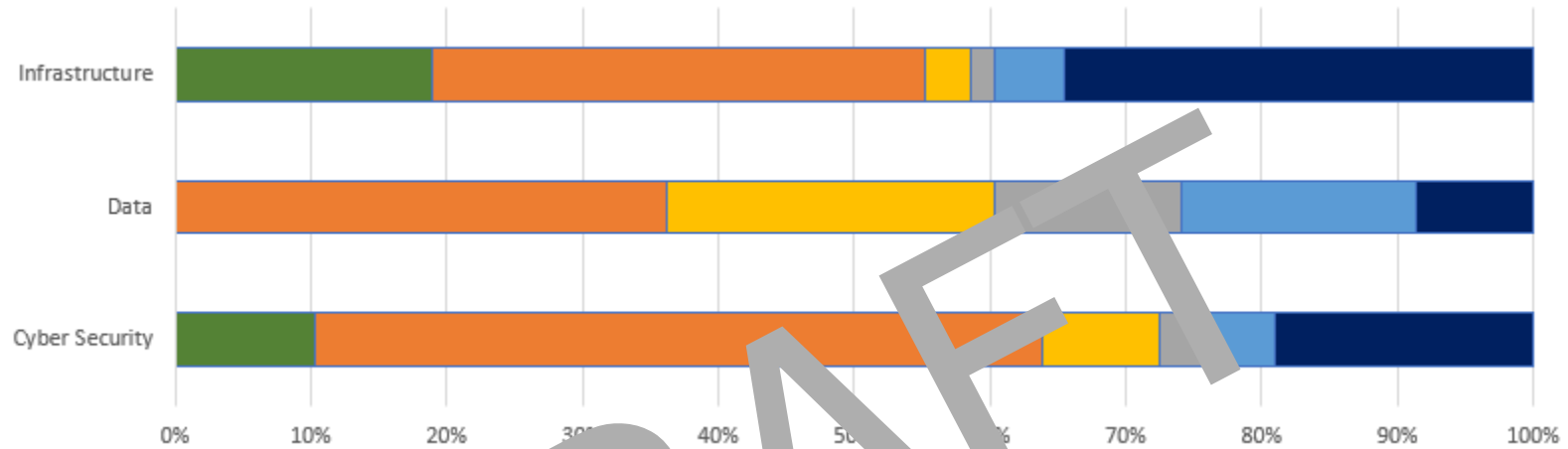


■ Fully Implemented 
 ■ Started Implementation 
 ■ Not Started 
 ■ No Solutions Needed 
 ■ Undecided 
 ■ No Response

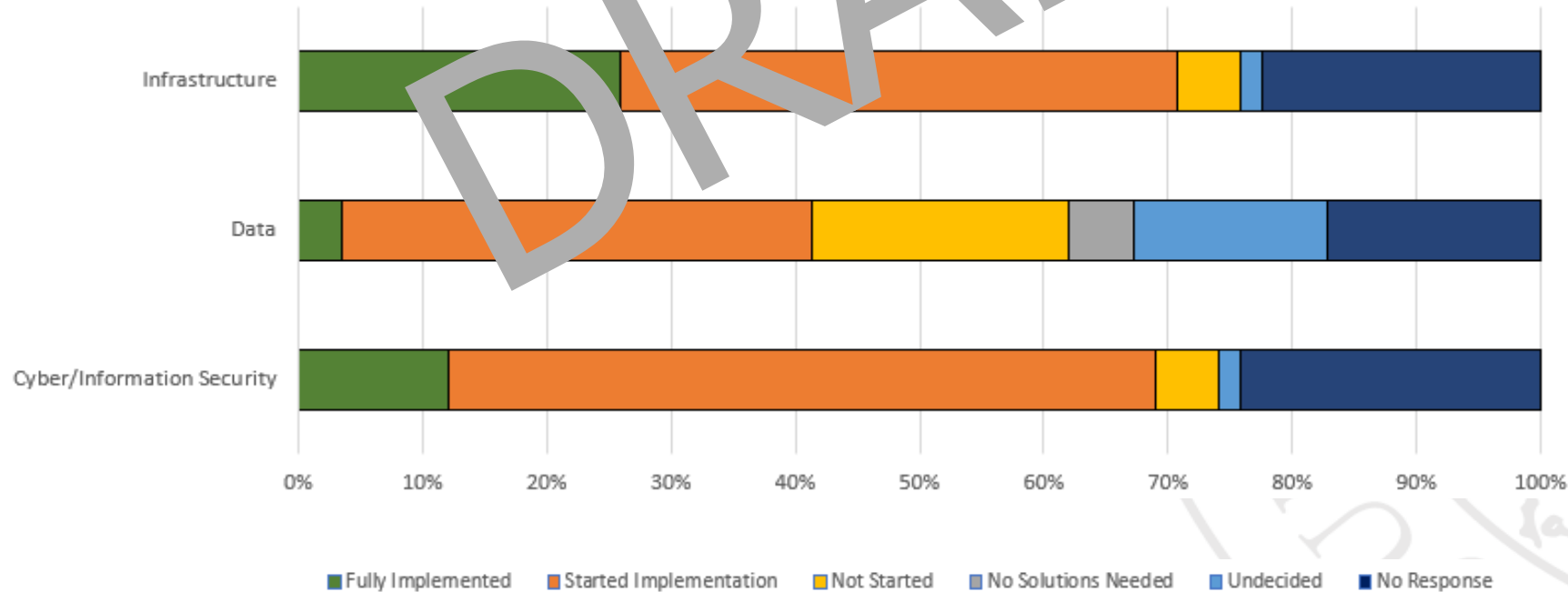


# Trial Courts- Enterprise

2021



2022



# Trial Court Priorities

|                               | Priority 1 | Priority 2 | Priority 3 | Priority 4 | Priority 5 | Total |
|-------------------------------|------------|------------|------------|------------|------------|-------|
| Cyber Security                | 5          | 6          | 6          | 5          | 5          | 27    |
| Case Management Systems       | 16         | 4          | 3          | 0          | 2          | 25    |
| Courthouse                    | 5          | 5          | 3          | 5          | 4          | 22    |
| Electronic Records Management | 8          | 7          | 4          | 2          | 0          | 21    |
| Web Solutions                 | 2          | 2          | 5          | 6          | 4          | 19    |

# Appellate Court Priorities

|                                  | Priority 1 | Priority 2 | Priority 3 | Priority 4 | Priority 5 | Total |
|----------------------------------|------------|------------|------------|------------|------------|-------|
| Data                             | 0          | 0          | 1          | 0          | 2          | 3     |
| Electronic Records Management    | 1          | 1          | 0          | 1          | 0          | 3     |
| Infrastructure                   | 0          | 1          | 1          | 1          | 0          | 3     |
| Case Management Systems          | 1          | 1          | 0          | 0          | 0          | 2     |
| Remote Records Access and Search | 0          | 1          | 1          | 0          | 0          | 2     |



# Priorities Combined

|                               | Priority 1 | Priority 2 | Priority 3 | Priority 4 | Priority 5 | Total |
|-------------------------------|------------|------------|------------|------------|------------|-------|
| Cyber Security                | 6          | 6          | 6          | 6          | 5          | 29    |
| Case Management Systems       | 17         | 5          | 3          | 0          | 2          | 27    |
| Electronic Records Management | 9          | 8          | 4          | 3          | 0          | 24    |
| Courthouse                    | 5          | 5          | 3          | 5          | 4          | 22    |
| Infrastructure                | 2          | 4          | 4          | 6          | 5          | 21    |



# Proposed Priorities

- Case Management Systems
- Electronic Records Management
- Remote Access
  - Remote Appearances
  - Remote Access to Proceedings
  - Remote Records Access and Search
- Infrastructure
  - Ensuring that all components are in place to support and connect systems and services



# Next Steps

- June 1- Technology Committee meeting requesting approvals
- Mid June- Request for Funding Application period opens



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**New One-Time Project**

**7. Projects Assigned by the Ad-Hoc Workgroup on Post-Pandemic Initiatives (P3)**

*Priority 1*

*Scope category(ies):*  
**Policy**

**Project Summary:** The Ad Hoc Workgroup on Post-Pandemic Initiatives (P3) referred two recommendations to ITAC for development and/or implementation: *Expand Options for E-Filing and E-Signatures and Maintain or Improve Online Self-Help Services and Live Chat on Court Websites.*

**Key Objectives:**

***Expand Options for E-Filing and E-Signatures***

- (a) Review, identify and make recommendations for any relevant amendments of California Rules of Court and legislation that may hinder the filing of documents at different courthouses (e.g., through the use of e-filing), as well as what may constrain the ability of filers to use e-signatures.

***Maintain or Improve Online Self-Help Services and Live Chat on Court Websites***

- (b) ITAC will monitor the Judicial Council's existing and ongoing effort to optimize the California Courts Self-Help Center and assist courts in migrating to the web hosting platform offered by the council.
- (c) ITAC will monitor the council's current and ongoing program to create viable chatbots and live chat options for use by courts.
- (d) Judicial Council Information Technology will report progress on these programs to ITAC.

**Origin of Project:** Ad Hoc Workgroup on Post-Pandemic Initiatives

**Status/Timeline:** December 2023

**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:* Rules & Policy Subcommittee
- *Judicial Council Staffing:* Information Technology, Legal Services, Leadership Services; P3 Workgroup staff
- *Collaborations:* P3 Workgroup liaisons; Court Executives Advisory Committee and other advisory bodies as needed



## JUDICIAL COUNCIL OF CALIFORNIA

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TANI G. CANTIL-SAKAUYE  
*Chief Justice of California*  
*Chair of the Judicial Council*

MARTIN HOSHINO  
*Administrative Director*

March 15, 2022

Hon. Sheila F. Hanson  
Judge of the Superior Court of California,  
County of Orange  
700 West Civic Center Drive  
Santa Ana, California 92701

Dear Judge Hanson:

As chair of the Ad Hoc Workgroup on Post-Pandemic Initiatives (P3), I want to express our appreciation for your willingness to consider and provide feedback on the various draft concepts the workgroup generated after hearing from a wide variety of stakeholders. Your feedback was particularly useful in helping us analyze the strength of various concepts and the appropriate timing for when to move forward with these. At this time, we are asking advisory committees to take the lead in developing these concepts into concrete proposals, whether rules, possible legislation, pilot projects, or guidance on good practices.

We now request that the Information Technology Advisory Committee take the lead in developing the following concepts:

- ***Expand Options for E-Filing and E-Signatures***  
P3 encourages expanded options for E-Filing and E-Signatures. Upon completion of its study of expanding statewide e-filing, we ask that the Information Technology Advisory Committee (ITAC) work with appropriate advisory bodies to identify and address any California Rules of Court and legislation that may hinder the filing of documents at different courthouses, as well as what may constrain the ability of filers to use e-signatures.

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March 15, 2022

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- ***Maintain or Improve Online Self-Help Services and Live Chat on Court Websites***  
The Judicial Council should continue the existing and ongoing effort to optimize the California Courts Self-Help Center and assist courts in migrating to the hosting platform offered by the council. Likewise, the council should continue the current and ongoing program to create viable chatbots and live chat options for use by courts.

In September 2021, we requested that you include placeholder language on your annual agenda to account for additional work that may flow to your advisory committee out of the workgroup's efforts. Now that this work has solidified, I request that you work with advisory committee staff to revise this placeholder on your annual agenda and forward to Jessica Goldstein, staff to the Technology Committee, who will coordinate submission to the oversight committee for approval. We have also asked the Court Executives Advisory Committee to provide input and assist you as you work to develop these concepts. Please reach out to them at the appropriate time to include them in your process.

P3 Workgroup members will serve as liaisons to the advisory committees working on these concepts. Your P3 liaisons are Hon. Kyle S. Brodie, Hon. Ann C. Moorman, Mr. Kevin Harrigan, Ms. Rebecca Fleming, and Ms. Gretchen Nelson. These members, along with workgroup staff, will be available to assist you throughout this process. If you have any questions, please feel free to reach out to our P3 Workgroup staff contact, Deirdre Benedict at [deirdre.benedict@jud.ca.gov](mailto:deirdre.benedict@jud.ca.gov). Our workgroup members and staff look forward to working with you.

Sincerely,



Marsha G. Slough  
Associate Justice of the Court of Appeal  
Fourth Appellate District, Division Two

MGS/db

cc: Hon. Louis R. Mauro, Vice-Chair, Associate Justice of the Court of Appeal, Third Appellate District  
Hon. Kyle S. Brodie, Judge of the Superior Court of San Bernardino County  
Hon. Ann C. Moorman, Presiding Judge of the Superior Court of Mendocino County  
Kevin Harrigan, Court Executive Officer, Superior Court of Tehama County  
Rebecca Fleming, Court Executive Officer, Superior Court of Santa Clara County

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Gretchen Nelson, Attorney at Law

Millicent Tidwell, Chief Deputy Director, Judicial Council

Shelley Curran, Chief Policy & Research Officer, Judicial Council

Heather L. Pettit, Chief Information Officer, Information Technology, Judicial Council

Deirdre Benedict, Supervising Analyst, Criminal Justice Services, Judicial Council

Camilla Kieliger, Analyst, Legal Services, Judicial Council

Jamel Jones, Information Systems Supervisor, Information Technology, Judicial Council

Jessica Goldstein, Senior Business Systems Analyst, Information Technology, Judicial  
Council

# Advancing the Hybrid Courtroom

May 25, 2022

Hon. Samantha P. Jessner, APJ, Superior Court of Los Angeles County

Adam Creiglow, CIO, Superior Court of Marin County

Heather Pettit, CIO, Judicial Council



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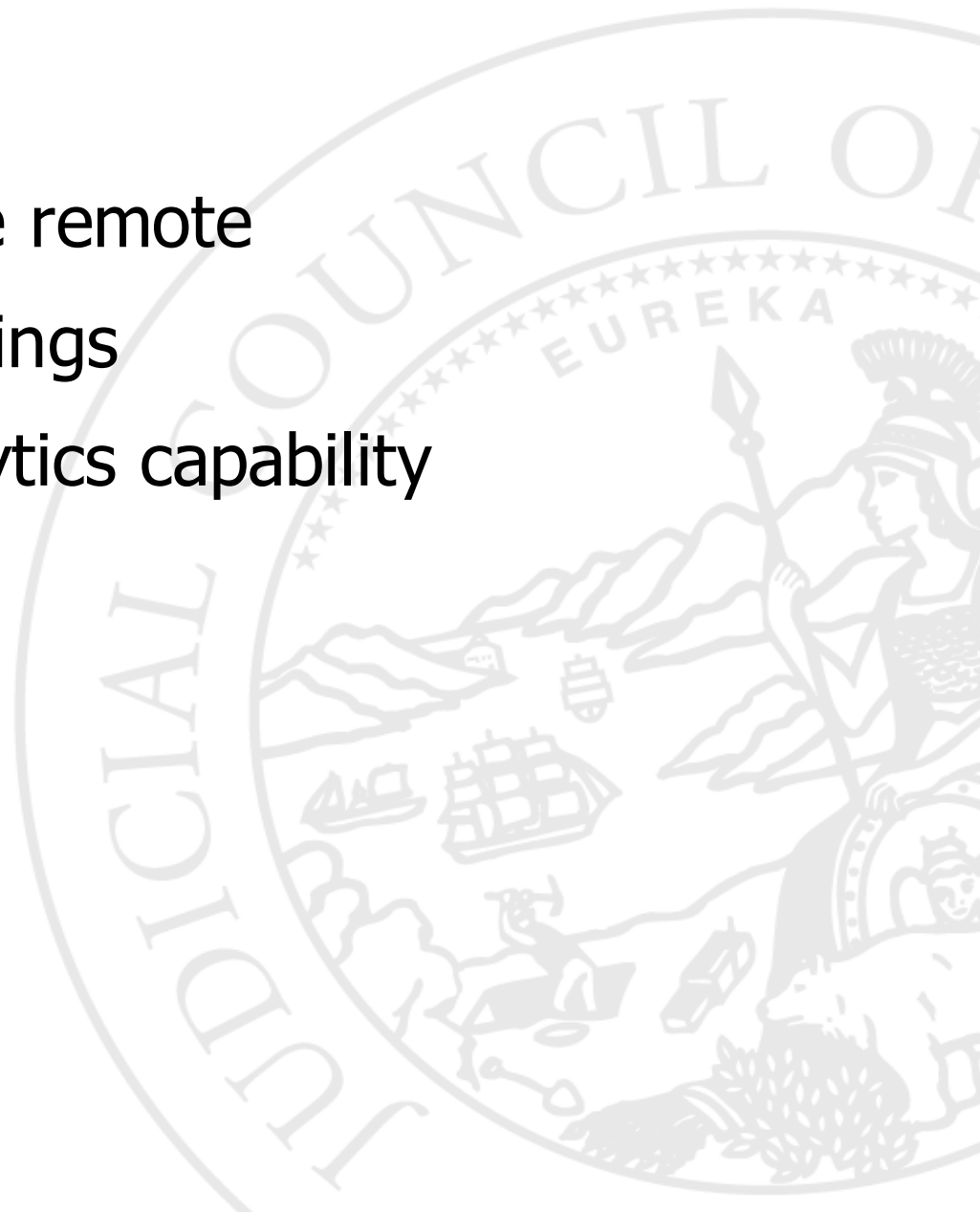


# Base Assumptions

- Any participant in the proceeding can be remote
- The public must have access to proceedings
- Remote technology has embedded analytics capability



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# Workstream charge and approach

**What:** Assess the current implementation of hybrid courtrooms; recommend metrics and data collection to facilitate court compliance with AB 177 and SB 241; develop standards for hybrid courtrooms; assist in developing a Request for Proposal (RFP)

**How:**

- Weekly Team Meetings
- Identify roles in hybrid proceedings
- Conduct interviews



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# Workstream charge and approach

Weekly Team Meetings Conversational Interviews:

- Judicial Officers
- Operations & Automation Brainstorming
- Clerks & Judicial Assistants
- Court Interpreters
- Court Reporters
- Attorneys



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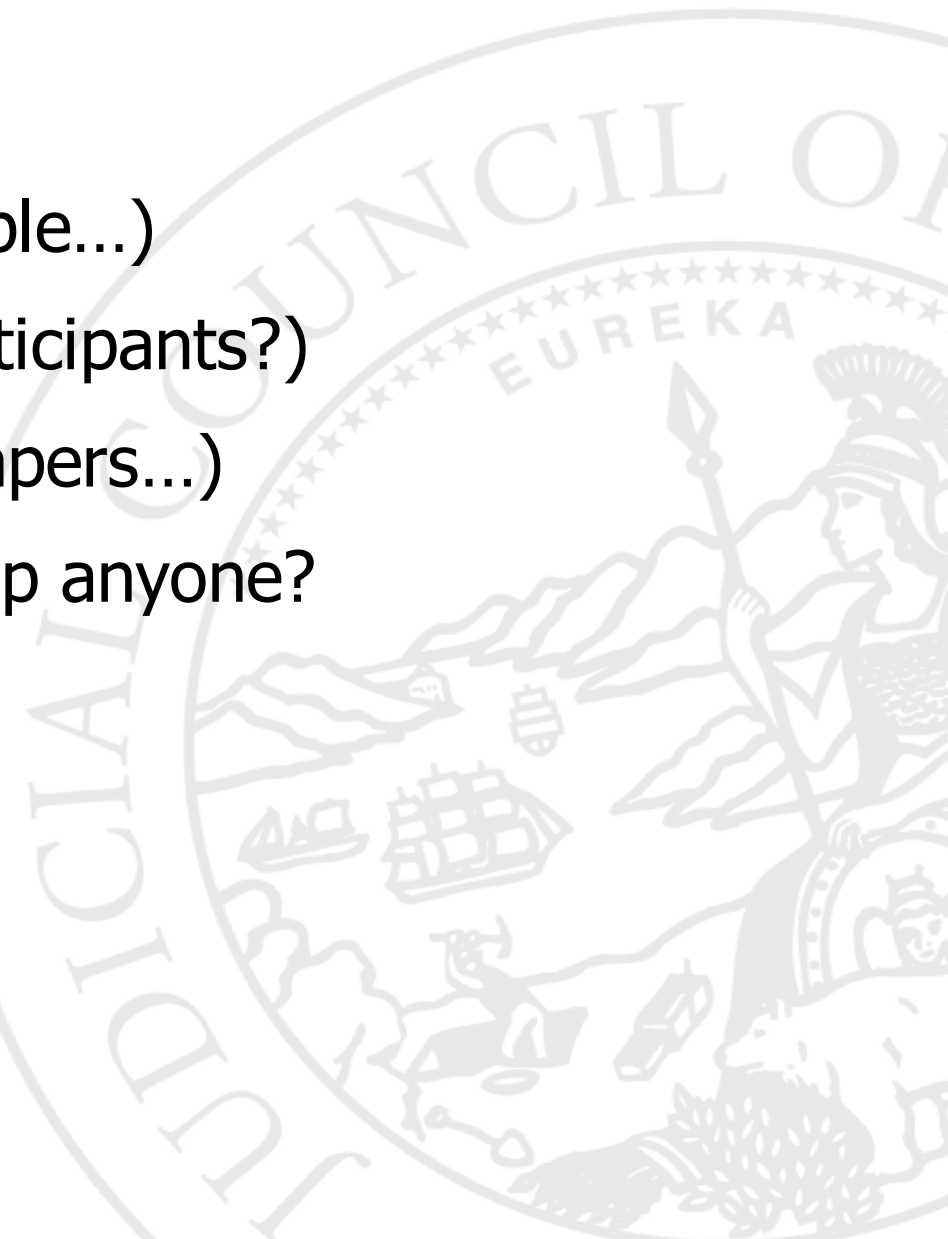


# Interview Questions

1. What do you need to see? (Equipment, people...)
2. What do you need to hear? (Any and all participants?)
3. What do you need to touch? (Equipment, papers...)
4. Who is asking you to do things? (Do you help anyone? Before/during/after proceedings?)
5. Who do you need to communicate with?



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# Sample Findings

Ability to manage participants in proceeding:

- Silencing disruptive behavior
- Challenges with participants talking over each other
- Operational need to signal the bench officer to stop, or at least slow down, participant discussions
- Complications with a mix of in-court and virtual setting device microphones, courtroom audio (speakers and microphones), and use of conference phones



# Next steps

Wrap up interviews

Breakout Sessions

- Operations/Report
- Technical/Facilities
- Legislative



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# Data Gathering – User Feedback

Collected 4/1 – 5/19 (35 business days)

ZoomGov:

- Courts: 49
- Active users: 1,343
- Meeting minutes: 26,962

Responses (5,525 collected):

- **Good** (Thumbs up): **5,430** – 98.28%
- **Bad** (Thumbs down): **95** – 1.72%



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# Data Gathering – User Feedback (continued)

Unique logged issues – **138** explanations: Users can log more than one issue after selecting a “**thumbs down**”

1. Poor Audio Quality – 56
2. Other – 32
3. We Could Not See Them - 29
4. They Could Not Hear Us – 21





# CMS Data Collection Status on Civil Remote Proceedings (as of 5/18/22)

- 29 Courts have provided at least some CMS data regarding remote proceedings as of 5/19/2022
- 21 courts have provided all required data for both April and May 2022
- March 2022 civil remote proceedings from 22 courts: **101,362**
- April 2022 civil remote proceedings from 21 courts: **88,784**

