Judicial Council *of* California

INFORMATION TECHNOLOGY ADVISORY COMMITTEE
DRAFT MINUTES OF OPEN MEETING

September 16, 2026

12:00 p.m.

Videoconference

Members Present: Hon. Sheila F. Hanson, Chair; Hon. Samantha P. Jessner, Vice-Chair; Mr. Michael Baliel; Hon. Kathy Ciuffini; Mr. Brian Cotta; Hon. Sean Dabel; Hon. Tara Desautels; Mr. Jason Galkin; Mr. AJ Guzman; Mr. Brett Howard; Hon. Kimberly Menninger; Hon. Richard Miadich; Hon. Ioana Petrou; Ms. Jessica Thomson; Hon. Jason Webster

Members Absent: Mr. Timothy Fox, Ms. Katy Grant, Hon. Michael Groch, Mr. Kevin Harrigan, Ms. Carrie Holmes, Hon. Michael Mau, Hon. Eloise Gómez-Reyes; Ms. Jeannette Vannoy

Others Present: Hon. Maria Hernandez

OPEN MEETING

Call to Order and Roll Call
The chair called the meeting to order at 12:00 p.m. and took roll call.

Approval of Minutes
The advisory body reviewed and approved the minutes of the July 15, 2026, Information Technology Advisory Committee meeting.

DISCUSSION AND ACTION ITEMS (ITEMS 1–3)

Item 1
Chair Report (No Action—Information Only)
The committee received an update on activities and news from the Information Technology Advisory Committee chair, Hon. Sheila F. Hanson.

Item 2
Judicial Council Technology Committee Chair Report (No Action—Information Only)
The committee received an update on activities and news from the Judicial Council Technology Committee chair, Hon. Maria D. Hernandez.

Item 3
2027 Annual Agenda – Planning (No Action—Information Only)
Judge Hanson reviewed the 2026 Annual Agenda priorities and accomplishments. She then introduced the development of the 2027 Annual Agenda. The committee provided feedback on

projects and initiatives and will continue planning of the 2027 Annual Agenda at its next meeting.

ADJOURNMENT

There being no further business, the meeting was adjourned.

Approved by the advisory body on enter date.

DRAFT

Judicial Council *of* California

INFORMATION TECHNOLOGY ADVISORY COMMITTEE
DRAFT MINUTES OF OPEN MEETING

October 21, 2026

12:00 p.m.

Videoconference

Members Present: Hon. Sheila F. Hanson, Chair; Hon. Samantha P. Jessner, Vice-Chair; Hon. Kathy Ciuffini; Hon. Sean Dabel; Mr. Jason Galkin; Ms. Katy Grant; Mr. Kevin Harrigan; Ms. Carrie Holmes; Hon. Kimberly Menninger; Hon. Richard Miadich; Hon. Ioana Petrou; Ms. Jessica Thomson; Ms. Jeannette Vannoy; Hon. Jason Webster

Members Absent: Mr. Mike Baliel; Mr. Brian Cotta; Hon. Tara Desautels; Mr. Timothy Fox; Hon. Michael Groch; Mr. AJ Guzman; Mr. Brett Howard; Hon. Michael Mau; Hon. Eloise Gómez-Reyes

Others Present: Judicial Council staff

OPEN MEETING

Call to Order and Roll Call

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

DISCUSSION ITEMS (ITEMS 1–2)

Item 1

Chair Report (No Action—Information Only)

The committee received an update on activities and news from the Information Technology Advisory Committee chair, Hon. Sheila F. Hanson.

Item 2

2027 Annual Agenda – Planning (No Action Required)

Judge Hanson reviewed proposals for ITAC's 2027 Annual Agenda, including items that are already in progress. The committee provided feedback on existing and new agenda items for refinement, including prioritization of two pending workstreams: Electronic Evidence Phase 3 and Develop Strategies to Improve the Digital Experience on Court Websites. The committee identified Electronic Evidence Phase 3 as the higher priority workstream for 2027. Staff will address comments shared on the call and present an updated draft for the committee to finalize at their next meeting.

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ADJOURNMENT

There being no further business, the meeting was adjourned.

Approved by the advisory body on enter date.

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Information Technology Advisory Committee
DRAFT—Annual Agenda—2027
Approved by Technology Committee: Enter a date

I. COMMITTEE INFORMATION

Chair: Hon. Sheila F. Hanson, Presiding Judge, Superior Court of California, County of Orange
Lead Staff: Christopher Sandino, Senior Business Systems Analyst, Judicial Council Information Technology

Advisory Body's Charge/Membership:

Rule 10.53 of the California Rules of Court states the charge of the Information Technology Advisory Committee (ITAC), which is to make recommendations to the council for improving the administration of justice through the use of technology and for fostering cooperative endeavors to resolve common technological issues with other stakeholders in the justice system. Rule 10.53(b) sets forth additional duties of the advisory body.

Rule 10.53(d) sets forth the membership position of the advisory body. ITAC currently has 23 members. The current advisory body roster is available on the advisory body's webpage.

Subgroups of the Advisory Body:

Subcommittees

- Rules & Policy Subcommittee
- Information Security (InfoSec) Subcommittee (oversight to Information Security Workstream)

Workstreams

1. Information Security (InfoSec) Workstream (reports to Information Security Subcommittee)
2. IT Modernization Program FY 2027–28
3. Frameworks for Effective Technology Adoption
4. Supporting the Exploration of Artificial Intelligence (AI) for Use in Courts
5. Electronic Evidence Phase 3: Pilot, Evaluation, and Request for Proposals (RFP) (pending resources)
6. Develop Strategies to Improve the Digital Experience on Court Websites (pending resources)

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Advisory Body and Subgroup Meetings Planned for 2027:

- **Information Technology Advisory Committee:**
  - Third Wednesday of every month, 12–1 p.m. / remote
  - In-person meeting, TBD

- **Rules & Policy Subcommittee:**
  - First Thursday of every month, 12–1 p.m. / remote
  - Exceptions: February 11, 12–1 p.m. / remote
    May 13, 12–1 p.m. / remote
    June 11, 12–1 p.m. / remote
    July 8, 12–1 p.m. / remote
    August 12, 12–1 p.m. / remote
    September 17, 12–1 p.m. / remote

- **Information Security Governance Subcommittee:**
  - Third Thursday every 2 months, 12:15–1:30 p.m. / remote

☐ Check here if more than one in-person meeting is approved by the internal committee oversight chair.

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II. COMMITTEE PROJECTS

Priority Levels and Branch Goals Key

Priority Levels for Non-Rules/Forms
1 – Must be done
2 – Should be done

Priority Levels for Rules/Forms Proposals
1a (Legal Compliance) – Proposal urgently needed to conform to or accurately reflect the law.

1b (Council Directive) – Council has directed the committee to consider new or amended rules and forms.

1c (Urgent Remedial Action) – Change is urgently needed to remedy a problem that is causing significant cost or inconvenience to the courts or the public.

1d (Financial/ Legal Risk Mitigation) – Proposal is otherwise urgent and necessary, such as a proposal that would mitigate exposure to immediate or severe financial or legal risk.

2a (Useful Changes in Law) – Useful, but not necessary, to implement changes in law.

2b (Responsive to Concerns) – Responsive to identified concerns or problems.

2c (Helpful Advancing Branch Goals) – Helpful in otherwise advancing Judicial Council goals and objectives

Judicial Branch Strategic Plan–Branch Goals

I. Access, Fairness, Diversity, and Inclusion
II. Independence and Accountability
III. Modernization of Management and Administration
IV. Quality of Justice and Service to the Public
V. Education for Branchwide Professional Excellence
VI. Branchwide Infrastructure for Service Excellence
VII. Adequate, Stable, and Predictable Funding for a Fully Functioning Branch

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Ongoing Projects and Activities

1. ***Project Title*: Rules and Policy Subcommittee (RPS)**

Priority: 1

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☒	☐	☐	☐	☐	☐	☐

Project Summary: Review and advance rules, policies, and legislation related to judicial branch technology.

Key Objectives:
a) Review Rule 2.954 (Specifications for electronic recording equipment) and consider updates, if needed.
b) Review all California Rules of Court to determine whether other technology-related rules require modernization; discuss and prioritize identified updates.
c) Develop rules and policies related to judicial branch technology and make recommendations for action, as needed.
d) Review pending legislation related to court technology upon request and provide input on potential impacts to the courts.

Status/Timeline: Ongoing.

Fiscal Impact/Staff Resources: Judicial Council Information Technology, Legal Services, and Governmental Affairs staff.

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Internal: appellate and trial courts. External: justice partners, court users, and the public.

AC Collaboration: Judicial Council Rules Committee, Judicial Council Legislation Committee, Joint Rules Subcommittee of the Trial Court Presiding Judges Advisory Committee, Court Executives Advisory Committee, and other Judicial Council advisory bodies as needed.

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2. ***Project Title*: Information Security Governance (InfoSec) Subcommittee and Workstream**

Priority: 1

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☐	☐	☐	☐	☐	☒	☐

Subcommittee Summary: The subcommittee identifies and prioritizes information security deliverables needed to improve the branch's overall security posture. This work is carried out in coordination with the Judicial Council's Information Security Services group and includes reviewing recommendations from that group and other relevant entities. The subcommittee assigns deliverables to its workstream, reviews and evaluates workstream outputs, prepares items for ITAC consideration, and provides direction on next steps.

Workstream Summary: The workstream carries out the information security deliverables assigned by the subcommittee. It produces draft proposals, templates, and policy recommendations for review and approval by the InfoSec Subcommittee.

Key Objectives (for 2027):

a) Complete the Cybersecurity Baseline Model (continuing work that initiated in 2026).
b) Develop a baseline Incident Response Plan (template) for courts to adopt or adapt, including:
   i. A version for courts implementing autonomously, and
   ii. A version for courts requiring Judicial Council support.
c) Identify core information security policies needed for courts and propose a prioritized roadmap for their development and sequencing.

Status/Timeline: Subcommittee is ongoing. Workstream estimated 12-month timeline to complete key objectives.

Fiscal Impact/Staff Resources: Judicial Council Information Technology and Legal Services staff.

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Internal: appellate and trial courts. External: justice partners, court users, and the public.

AC Collaboration: ITAC Rules & Policy Subcommittee, ITAC Frameworks for Effective Technology Adoption Workstream, Court Executives Advisory Committee, and other advisory bodies as needed.

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New or One-Time Projects

1. ***Project Title*: IT Modernization Program FY 2027–28**

Priority: 1

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☐	☐	☒	☒	☐	☒	☐

Project Summary: Evaluate court applications, review approved project implementation plans, and provide relevant program support functions.

Key Objectives:
a) Review and evaluate project proposals and provide analysis to the Technology Committee.
b) Seek ITAC approval of the evaluation process and recommendation to the Technology Committee.
c) Review implementation plans for funded projects to support project success and adherence to expenditure deadlines.
d) Upon the completion of these objectives, formally sunset the workstream.

Status/Timeline: Approximately 12 months. Solicit members in late 2026; kickoff meeting in early 2027; complete project evaluations for the Technology Committee by May 2027; review project implementation plans through December 2027.

Fiscal Impact/Staff Resources: Judicial Council Information Technology staff.

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Internal: appellate and trial courts. External: justice partners, court users, and the public.

AC Collaboration: Judicial Council Technology Committee.

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2. ***Project Title*: Frameworks for Effective Technology Adoption (Tech Frameworks Workstream)**

Priority: 2

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☐	☐	☐	☒	☐	☐	☐

Project Summary: Develop new tools and resources that support the use of a unified framework for court-related technology solutions to measure technology progress, identify opportunities for collaboration, and inform priorities. (This is a continuation from 2026.)

Key Objectives:

a) Review and inform updates to the California Courts Connected framework to ensure its continued applicability to be included it in the future Tactical Plan for Technology update.
b) Review and inform updates to the current Court Technology Assessment process to identify new or improved opportunities to measure technology adoption, identify common needs, and inform branch and local strategic priorities.
c) Define recommended baseline technologies to establish a consistent minimum level of technology across all courts.
d) Develop a technology solutions inventory across courts as a tool for information exchange, including a regular cadence to keep it current (i.e., aligned with IT Modernization funding activities).
e) Conduct an information campaign to ensure that court leaders are informed of related technology frameworks and solutions.
f) At the completion of these objectives, formally sunset the workstream.

Status/Timeline: Solicitation of membership began in July 2026; updates to frameworks completed by May 2027; branchwide communications outreach completed by July 2027.

Fiscal Impact/Staff Resources: Judicial Council Information Technology staff.

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Judicial Council Information Technology staff.

AC Collaboration: Other Judicial Council advisory bodies as needed.

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3. ***Project Title*: Supporting the Exploration of Artificial Intelligence (AI) for Use in Courts (AI Workstream)**

Priority: 2

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☐	☐	☒	☒	☐	☐	☐

Project Summary: Participate in and provide a technology perspective on branchwide efforts related to AI, identify potential court-related use cases, and assess the benefits and risks to the branch.

Key Objectives:

a) Contribute to and support assignments carried out by the Chief Justice's Artificial Intelligence Task Force, including providing input on policies, potential rules of court, and other projects.
b) Identify potential uses of AI by the courts and within the branch. For those uses:
   i. Explicitly distinguish between AI and Generative AI uses, and
   ii. Complete an assessment of:
      a. Potential benefits such as increasing accuracy and efficiency; increasing access to justice; and enhancing data-informed decision making; and
      b. Potential risks such as confidentiality, reliability, bias, information security, and transparency.
c) Present findings to ITAC, the Artificial Intelligence Task Force, the Technology Committee, and the Judicial Council (if applicable).
d) At the completion of these objectives, formally sunset the workstream.

Status/Timeline: Membership solicitation completed in 2026. Kickoff expected in December 2026 /January 2027. Estimated 12-month timeline to complete key objectives.

Fiscal Impact/Staff Resources: Judicial Council Information Technology, Executive Office, Legal Services, Leadership Support Services, Policy and Research, and Governmental Affairs staff.

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Internal: appellate and trial courts. External: justice partners, court users, and the public.

AC Collaboration: Artificial Intelligence Task Force, Court Executives Advisory Committee Artificial Intelligence Working Group, and other Judicial Council advisory bodies as needed.

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4. ***Project Title*: Electronic Evidence Phase 3: Pilot, Evaluation, and Request for Proposals (RFP) (Electronic Evidence Workstream)**

Priority: 2

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☐	☐	☒	☒	☐	☐	☐

Project Summary: Following adequate information gathering, evaluate the need for a branchwide master agreement for electronic evidence solutions and, if warranted, develop and present recommendations for an enterprise request for proposal (RFP).

Key Objectives:
Drawing on findings from Phase 2 of the Electronic Evidence Workstream, additional research, and relevant work by the Technology Frameworks Workstream:

a) Confirm whether courts would benefit from a master agreement for electronic evidence solution(s).
b) If a master agreement is warranted, develop requirements for commercially available technology solutions and contribute to an enterprise RFP for a master agreement that addresses the needs of courts of varying sizes.
c) Present recommendations for consideration and approval by ITAC, the Technology Committee, and, if applicable, the Judicial Council.
d) Upon completion of these objectives, formally conclude (sunset) the workstream.

Status/Timeline: Initiation of workstream is pending information gathering results and resources. Once confirmed, estimated 8-month timeline to complete key objectives.

Fiscal Impact/Staff Resources: Judicial Council Information Technology staff.

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Internal: trial courts. External: justice partners, court users, and the public.

AC Collaboration: Court Executives Advisory Committee, Trial Court Presiding Judges Advisory Committee, ITAC's Rules & Policy Subcommittee, and other Judicial Council advisory bodies as needed.

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5. *Project Title*: Develop Strategies to Improve the Digital Experience on Court Websites

Priority: 2

Supported Strategic Plan Branch Goals:

I. Access	II. Independence	III. Modernization	IV. Quality	V. Education	VI. Infrastructure	VII. Funding
☒	☒	☐	☒	☐	☒	☐

Project Summary: The purpose of this initiative is to identify opportunities to provide an improved user experience on court websites and portals across the judicial branch through user-centered design principles, content management strategies, and modern technology solutions.

Key Objectives:

a) Research user-centered design principles to inform improvement strategies to modernize court websites.
b) Inventory existing sites to identify areas of focus for improved content management strategies.
c) Evaluate opportunities to modernize common digital public-facing services.
d) Develop a report outlining key considerations and recommendations.
e) At the completion of these objectives, formally sunset the workstream.

Status/Timeline: Initiation of this workstream is pending resources. Once confirmed, estimated 12-month timeline to complete key objectives.

Fiscal Impact/Staff Resources: Judicial Council Information Technology staff.

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Internal: appellate and trial courts. External: justice partners, court users, and the public.

AC Collaboration: Other Judicial Council advisory bodies as needed.

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III. LIST OF 2026 PROJECT ACCOMPLISHMENTS

Project Highlights and Achievements

1. **IT Modernization Program FY 2026–27** — In 2026, this workstream evaluated 149 total project proposals enabling the Technology Committee to rank for funding consideration. The Judicial Council ultimately awarded the $12.5 million allocation to 49 projects.
2. **Advancing the Hybrid Courtroom** — In July 2026, this workstream presented its final draft of its *Remote Proceedings Technology Recommendations* to ITAC and in August 2026, to the Technology Committee. These recommendations will go to the Judicial Council for approval in December 2026 and are intended to be a playbook for courts to enable remote proceeding technology, the playbook
3. **Joint Information Security Governance** — In 2026 the subcommittee published the *Information Security Service Catalog*, giving courts a comprehensive list of information security services available and guidance on how to request support from Judicial Council Information Technology.

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Information Technology Advisory Committee

Advisory Committee/Task Force/Working Group Liaison Report

Meeting Date:
December 1, 2026

I. Reporting Member's Name, Title, and Court

Hon. Ioana Petrou, Associate Justice, Court of Appeal, First Appellate District, Division Three

II. Name of Advisory Committee/Task Force/Working Group

Appellate Advisory Committee (AAC)

III. Highlights of Key Discussions and/or Action Items Relevant to Information Technology (i.e. topic, discussion, and next steps)

- **Increasing the File-size Limit for E-filing in the Court of Appeal:** Effective July 1, 2026, rule 8.74 was amended to increase the file-size limit from 25 megabytes to 100 megabytes for e-filing in the Court of Appeal. The vendor (i3Verticals) concurrently increased the file size limit to 100 megabytes.
- **Electronic Exhibits in the Court of Appeal:** Following the finalization of the electronic exhibit platform in the Court of Appeal, AAC will consider what action is necessary to clarify requirements for use of an electronic exhibits platform and increase the efficiency of the transmission of exhibits in the Court of Appeal.

IV. Other Information of Potential Interest

- **Appellate Caseflow Workgroup Recommendations Regarding Record Preparation:** Effective January 1, 2027, rules and forms will be changed to implement recommendations made by the Appellate Caseflow Workgroup. These include: (1) streamlining or reducing the number of tasks required by superior court clerks in preparing the record on appeal; and (2) simplifying the record designation process to make it clearer and more efficient.

ITAC

Traffic Advisory Committee
Liaison Report

I. Reporting Member's Name, Title, and Court

Katy Grant

II. Name of Advisory Committee/Task Force/Working Group

Traffic Advisory Committee

III. Highlights of Key Discussions and/or Action Items Relevant to Presiding Judges and Court Executives (i.e. topic, discussion, and next steps)

Recent work has been heavily focused on the Uniform Bail Schedule updates based on new legislation and public comment.

Information Technology Advisory Committee

Advisory Committee/Task Force/Working Group Liaison Report

Meeting Date:
December 1, 2026

I. Reporting Member's Name, Title, and Court

Mr. Jason Galkin, Court Executive Officer, Superior Court of California, County of Riverside

II. Name of Advisory Committee/Task Force/Working Group

Center for Judicial Education and Research Advisory Committee (CJERAC)

III. Highlights of Key Discussions and/or Action Items Relevant to Information Technology (i.e. topic, discussion, and next steps)

Recent actions

- Approved the Council report closing out the 2024-2026 Education Plan, going to the Judicial Council Dec 10-11, 2026 (information item), with wording that highlights resource limits on education plan scope.
- Approved the draft 2027 Annual Agenda.

2027 Annual Agenda (pending)

- Goes to the Judicial Council's Executive and Planning Committee, which reviews advisory body agendas in November.
- Projects: implement the 2026-2028 Education Plan (through June 30, 2028), design the 2028-2030 Education Plan (Council submission Jan 2028), and a caseflow management curriculum (through Dec 31, 2027) developed with CEAC, the Data Analytics Advisory Committee and TCPJAC.
- 2027 meetings: 3 video conferences and 1 in-person in San Francisco, dates TBD.

Technology-related items

- CJER Online is moving to the new court website platform, with filters by subject and type.
- Relevant AI context and content are being built into curriculum where feasible, including courses on ethical AI use and AI-assisted legal research.
- CEB ended free OnLaw access for the branch. CEOs are negotiating access individually and coordinating on rates.
- Education is mostly remote. Self-guided courses use Articulate 360 with captions, transcripts and contrast requirements.

Upcoming: CJERAC meets Nov 12, 2026 and Feb 9, 2027.