



Judicial Council of California

Judicial Branch Budget Committee

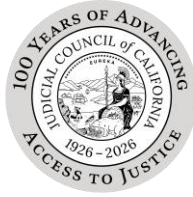
JUDICIAL BRANCH BUDGET COMMITTEE

MATERIALS SEPTEMBER 22, 2026 VIRTUAL MEETING

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Judicial Council of California

**JUDICIAL BRANCH BUDGET COMMITTEE
NOTICE AND AGENDA OF OPEN ELECTRONIC MEETING**

Tuesday, September 22, 2026

10:30 a.m. – 11:30 a.m.

Public Access: <https://jcc.granicus.com/player/event/5854>

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

Meeting materials for open portions of the meeting will be posted on the [Judicial Branch Budget Committee](#) webpage on the California Courts website at least three business days before the meeting.

Request for ADA accommodations should be made at least three business days before the meeting and directed to: JCCAccessCoordinator@jud.ca.gov.

Members of the public seeking to make an audio recording of the open meeting portion of the meeting must submit a written request at least two business days before the meeting. Requests can be emailed to JBBC@jud.ca.gov.

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

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

Call to Order and Roll Call

Approval of Minutes

Approve minutes of the May 20, 2026, Judicial Branch Budget Committee meeting, and the June 10, 2026, and August 6, 2026, actions by e-mail between meetings.

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

This meeting will be conducted by electronic means. As such, the public may make comments in writing or remotely.

Written Comment

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 emailed to JBBC@jud.ca.gov. Only written comments received by 10:30 a.m. September 21, 2026, will be provided to advisory body members prior to the start of the meeting.

Remote Public Comment

Members of the public requesting to speak during the public comment portion of the meeting must provide the speaker's name, the name of the organization that the speaker represents if any, and the agenda item that the public comment will address. Requests to make a remote public comment must be received by 10:30 a.m. September 21, 2026, via email to JBBC@jud.ca.gov. The chair will establish speaking limits at the beginning of the public comment session. While the advisory body welcomes and encourages public comment, time may not permit all individuals requesting to speak to be heard at this meeting.

III. DISCUSSION AND POSSIBLE ACTION ITEMS (ITEMS 1–3)

Item 1

**Involuntary Medication Orders (Senate Bill 820) Allocations for Fiscal Year 2026–27
(Action Required)**

Consideration of allocations to implement the new hearing process for involuntary medication orders established by Senate Bill 820 for fiscal year 2026–27.

Presenters: Hon. Judith K. Dulcich, Chair, Trial Court Budget Advisory Committee
Ms. Jenny Clark, Supervising Analyst, Judicial Council Criminal Justice Services

Item 2

Workload Formula Adjustment Request Process Update (Action Required)

Consideration of updates to Judicial Council instructions for submitting annual Workload Formula policy adjustment requests.

Presenters: Hon. Judith K. Dulcich, Chair, Trial Court Budget Advisory Committee
Ms. Oksana Tuk, Senior Fiscal Analyst, Judicial Council Budget Services

Item 3

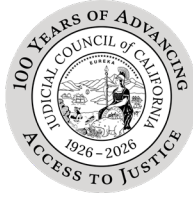
Workload Formula Policy Base Funding Floor Adjustment Process (Action Required)

Consideration of potential changes to the Workload Formula base funding floor policy.

Presenters: Hon. Judith K. Dulcich, Chair, Trial Court Budget Advisory Committee
Ms. Oksana Tuk, Senior Fiscal Analyst, Judicial Council Budget Services

IV. ADJOURNMENT

Adjourn



Judicial Council of California

**JUDICIAL BRANCH BUDGET COMMITTEE
DRAFT MINUTES OF OPEN MEETING**

May 20, 2026

1:00 p.m. - 4:00 p.m.

Videoconference

Members Present: Hon. Ann C. Moorman, Chair, Hon. Maria D. Hernandez, Vice Chair, Hon. Brad R. Hill, Hon. Maria Lucy Armendariz, Hon. Michael Rhoads, and Mr. Charles Johnson

Members Absent: Ms. Rachel Hill and Ms. Kate Bieker

Others Present: Hon. Jonathan B. Conklin, Ms. Angela Cowan, Ms. Aman Singh, Ms. Oksana Tuk, Ms. Megan Ellis, Mr. John Yee, Ms. Francine Byrne, Mr. Erick Schnurpfeil, Ms. Kristin Greenway, Mr. John Larson, Ms. Sarah Davis, Ms. Amber Barnett, Ms. Deborah Collier-Tucker, Ms. Marcela Eggleton, and Mr. Jagan Singh

OPEN MEETING

Call to Order and Roll Call

The chair called the meeting to order at 1:01 p.m. and took roll call.

Approval of Minutes

The advisory body reviewed and approved the minutes of the April 23, 2026, Judicial Branch Budget Committee (Budget Committee) meeting.

DISCUSSION AND ACTION ITEMS (ITEMS 1-3)

Item 1

Allocation from the State Trial Court Improvement and Modernization Fund for Fiscal Year 2026-27 (Action Required)

Consideration of allocations from the State Trial Court Improvement and Modernization Fund in support of the trial courts for fiscal year 2026-27.

Action: *The Budget Committee unanimously voted to approve the proposed fiscal year 2026-27 State Trial Court Improvement and Modernization Fund allocations, totaling \$47.8 million, detailed in Attachment 1A. This recommendation will be considered by the Judicial Council at its business meeting on July 17, 2026.*

Item 2**Allocations for Trial Court Operations for Fiscal Year 2026–27 (Action Required)**

Consideration of fiscal year 2026–27 allocations from the Trial Court Trust Fund and General Fund in support trial court operations.

Action: *The Budget Committee unanimously voted to approve the following Trial Court Budget Advisory Committee recommendations for consideration by the Judicial Council at its business meeting on July 17, 2026.*

1. *Approve base, discretionary, and nondiscretionary program allocations from the Trial Court Trust Fund and General Fund in the amount of \$3.2 billion (Attachment 2B, column W), including any needed technical adjustments and contingent on funding included in the enacted budget for fiscal 2026–27:*
 - *This includes a General Fund allocation of \$68.8 million for employee benefits (Attachment 2B, column P).*
 - *Approve Workload Formula policy calculation of \$2.7 billion for fiscal year 2026–27 based on methodologies approved by the Judicial Council (Attachment 2C, column V).*

Item 3**Judicial Branch Budget Change Concepts for Fiscal Year 2027–28 (Action Required)**

Review of fiscal year 2026–27 budget change concepts for the judicial branch.

Action: *The Budget Committee unanimously voted to recommend to the Judicial Council at its business meeting on July 17, 2026, the following budget change proposal concepts to be developed into budget change proposals for submission to the State Department of Finance for consideration in the fiscal year 2027–28 Governor’s budget:*

1. *27-01 – Inflationary Adjustment for Trial Courts (Consumer Price Index)*
2. *27-02 – Trial Courts Technology Ongoing Support*
3. *27-03 – Language Access in the California Courts – **approved and submit in spring 2027***
4. *27-04 – Improving Branchwide Cybersecurity*
5. *27-05 – Appellate Court Technology Modernization and Ongoing Cost Adjustment*
6. *27-06 – Addressing the Impact of the Disproportionate Increase in Competency Evaluations*
7. *27-07 – Litigation Management Program*
8. *27-08 – Branch Data Analytics Modernization*
9. *27-29 – Funding for 26 New Judgeships*
10. *27-09 – HCRC Case Team Staffing*
11. *27-28 – Workload Assessment for Court-Appointed Dependency Counsel*
12. *27-10 – Appellate Court Unarmed Security Guard – Expanded Coverage*
13. *27-11 – Proposition 66 in Courts of Appeal*
14. *27-12 – Racial Justice Act Retroactivity (AB 256) for the Appellate Courts and Trial Courts*
15. *27-13 – Appellate Court Facilities Staff*
16. *27-14 – Increase Appellate Court Staffing*

17. 27-15 – Courts of Appeal Court Appointed Counsel Program - adjust overall amount acknowledge \$25 per hour increase and combine with 27-16
18. 27-16 – Supreme Court Capital Court-Appointed Counsel Program - adjust overall amount acknowledge \$25 per hour increase and combine with 27-15
19. 27-17 – Seven California Highway Patrol – Judicial Protection Section (CHP-JPS) Officers
20. 27-18 – Trial Court Facility Modifications
21. 27-19 – Trial Courts Facilities Maintenance and Utilities – approved to be combined with concept 27-24 into one budget change proposal
22. 27-20 – Trial Court Physical Security Assessment and Evaluation
23. 27-21 – Orange Central Justice Center - Facility Modification
24. 27-22 – Trial Court Deferred Maintenance - approved to be combined with 27-25 into one budget change proposal
25. 27-23 – Courts of Appeal Facility Modification
26. 27-24 – Courts of Appeal Facilities Maintenance and Utilities - approved to be combined with 27-19 into one budget change proposal
27. 27-25 – Courts of Appeal Deferred Maintenance - approved to be combined with 27-22 into one budget change proposal
28. 27-26 – Superior Court Public Lactation Rooms (AB 1576)
29. 27-27 – Los Angeles Spring Street Courthouse - Courtrooms Relocation
30. 27-51 – Capital Outlay Project Reassessment and Program Support
31. 27-52 – Capital Outlay Funding: Fiscal Year 2027–28 through 2031–32
32. 27-53 – Los Angeles Spring Street Courthouse - Chatsworth Buildout – approved only 2nd year of funding
33. 27-54 – Statewide: Budget Packages and Advanced Planning

INFORMATION ONLY ITEMS (NO ACTION REQUIRED)

Info 1

Governor's Budget Update for Fiscal year 2026–27

Update on the fiscal year 2026–27 May Revision to the Governor's Budget.

Action: None taken.

Info 2

Funds Held on Behalf of the Trial Courts Annual Report for Fiscal Year 2024–25

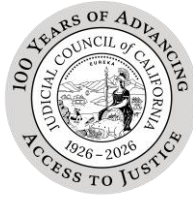
Annual report for the Funds Held on Behalf of the Trial Courts program regarding open projects and projects completed in fiscal year 2024–25.

Action: None taken.

ADJOURNMENT

There being no further business, the meeting was adjourned at 1:58 p.m.

Approved by the advisory body on enter date.



Judicial Council of California

JUDICIAL BRANCH BUDGET COMMITTEE DRAFT MINUTES OF ACTION BY EMAIL

June 10, 2026

11:00 a.m.

Members Present: Hon. Ann C. Moorman (Chair), Hon. Maria D Hernandez (Vice Chair), Hon. Brad R. Hill, Hon. Maria Lucy Armendariz, Hon. Michael Rhoads, Mr. Charles Johnson, Ms. Rachel W. Hill, and Ms. Kate Bieker

Others Present: Ms. Angela Cowan

ACTION BY EMAIL

As provided in the California Rules of Court, rule 10.75 (o)(1)(B), the chair concluded that prompt action was needed. This action by email concerned matters that would otherwise be discussed in an open meeting; therefore, in accordance with rule 10.75(o)(2), public notice and the proposal were posted on June 8, 2026 at 11:52 a.m., to allow at least one complete business day for public comment before the committee took action.

ACTION ITEMS (ITEMS 1–2)

Item 1

Court-Appointed Juvenile Dependency Counsel Allocations for Fiscal Year 2026–27

Consideration of court-appointed juvenile dependency counsel allocations for fiscal year 2026–27.

Action: *The Judicial Branch Budget Committee unanimously voted to approve the Trial Court Budget Advisory Committee recommendation for the fiscal year 2026–27 court-appointed juvenile dependency counsel allocations as outlined in Attachment 1A, including any technical adjustments and contingent on funding included in the enacted budget for fiscal year 2026–27. This recommendation will be considered by the Judicial Council at its business meeting on July 17, 2026.*

Item 2

Court Interpreter Allocations for Fiscal Year 2026–27

Consideration of court interpreter allocations for fiscal year 2026–27 to include the \$20 million augmentation included in the May Revision.

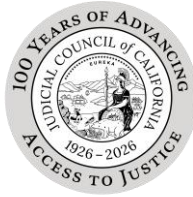
Action: *The Judicial Branch Budget Committee unanimously voted to approve the Trial Court Budget Advisory Committee recommendation for the fiscal year 2026–27 allocation of the \$20 million augmentation as outlined in Attachment 2A, including any technical adjustments and contingent on*

funding included in the enacted budget for fiscal year 2026–27. This recommendation will be considered by the Judicial Council at its business meeting on July 17, 2026.

CLOSURE OF ACTION

Voting closed at 5:00 p.m. on June 10, 2026.

Approved by the advisory body on enter date.



Judicial Council of California

**JUDICIAL BRANCH BUDGET COMMITTEE
DRAFT MINUTES OF ACTION BY EMAIL**

August 6, 2026

11:00 a.m.

Members Present: Hon. Ann C. Moorman (Chair), Hon. Maria D. Hernandez (Vice Chair), Hon. Maria Lucy Armendariz, Hon. Michael Rhoads, Mr. Charles Johnson, Ms. Rachel W. Hill, and Ms. Kate Bieker

Members Absent: Hon. Brad R. Hill

Others Present: Ms. Angela Cowan

ACTION BY EMAIL

As provided in the California Rules of Court, rule 10.75 (o)(1)(B), the chair concluded that prompt action was needed. This action by email concerned matters that would otherwise be discussed in an open meeting; therefore, in accordance with rule 10.75(o)(2), public notice and the proposal were posted on August 3, 2026 at 3:47 p.m., to allow at least one complete business day for public comment before the committee took action.

ACTION ITEM

Item 1

Pretrial Release Program Supplemental Allocations for Fiscal Year 2026–27

Consideration of the supplemental one-time \$20 million General Fund allocations for the Pretrial Release Program for fiscal year 2026–27.

Action: *The Judicial Branch Budget Committee unanimously voted to approve the fiscal year 2026–27 supplemental allocations of \$20 million for the Pretrial Release Program as outlined in Attachment B. This recommendation will be considered by the Judicial Council through Circulation Order.*

CLOSURE OF ACTION

Voting closed at 5:00 p.m. on August 6, 2026.

Approved by the advisory body on enter date.

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Judicial Branch Budget Committee
(Action Item)

Title: Involuntary Medication Orders (Senate Bill 820) Allocations for Fiscal Year 2026–27

Date: 9/11/2026

Contact: Jenny Clarke, Supervising Analyst, Criminal Justice Services | 415-865-7958 | jenny.clarke@jud.ca.gov

Issue

The Budget Act of 2026 included \$4.3 million General Fund annually for four years, starting in fiscal year (FY) 2026–27 and continuing through FY 2029–30, for the trial courts to implement the new responsibilities and workload required by Senate Bill (SB) 820. The Trial Court Budget Advisory Committee recommends an allocation methodology to distribute this funding among the 58 trial courts for FY 2026–27.

Background

SB 820 (Stats. 2025, ch. 330) creates an alternative process to allow involuntary medication of individuals who are confined in the county jail and have been found incompetent to stand trial (IST) after being charged with a misdemeanor.¹ The bill provides for the ability to involuntarily medicate in an emergency situation, as defined, or where a court has found a defendant to be gravely disabled and without capacity to refuse treatment with psychiatric medication.

While Penal Code (PC) section 2603 allows involuntary medication orders (IMO) in county jails under certain conditions, SB 820 allows for IMOs through a hearing process for IST trial misdemeanor cases. Additionally, this bill will require the court to review the medication order at least every 60 days.

This bill creates additional court workload by requiring new evidentiary hearings, increased medical evaluations, and additional efforts to manage defendant rights.

Both psychiatrists and licensed psychologists are authorized to recommend antipsychotic medication and its manner of administration. However, psychiatrists remain the only licensure type that can prescribe medication. Larger counties benefit from having teaching hospitals, which help retain psychiatric professionals. In contrast, smaller and rural counties, lacking such infrastructure, are disproportionately impacted by these shortages.

¹ Chapter 330, Statutes of 2025 (Senate Bill 820), https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=202520260SB820.

Analysis and Rationale

The funding structure included in the approved budget change proposal (BCP) was developed to address the new hearing requirements, increased court-ordered psychiatric evaluations, and the need to uphold defendants' procedural rights, such as the right to cross-examine expert witnesses.² Since psychiatrists are in short supply and typically charge higher fees than psychologists, they are employed specifically to provide opinions regarding the medication portion of competency assessments. In most instances, this focused aspect of the evaluation can be conducted remotely.

Using these factors and the Judicial Council's most recent workload cost estimates, the projected costs for each IMO are as follows: court workload (\$22), remote psychiatric evaluation for medication administration (\$300), evaluator testimony (\$250), and additional court workload for the 60-day review hearing (\$22). This results in a total estimated cost of \$594 per filing.

To establish a funding methodology, Judicial Council staff identified two consistently reported data metrics in the Judicial Branch Statistical Information System: PC 1368 IST filings, which directly relate to SB 820, and total non-traffic misdemeanor filings to capture relevant trends in misdemeanor cases. Although PC 1368 IST filings are not broken down by charge type and represent total filings for each county, analyzing both metrics allowed staff to examine yearly trends and assess their impact on future funding allocations.

A funding floor is also considered to ensure that any court receiving less than the estimated cost for a full IMO process would still receive sufficient funding to maintain operational readiness in the event of a case.

Data Trends and Alternatives Considered

To establish a funding baseline, staff analyzed filings using historical averages, looking at the past 3, 5, and 10 years. Over the past 10 years, PC 1368 IST filings have shown a consistent upward trend, with the most recent FY 2024–25 data showing a notable spike that exceeds pre-pandemic levels. In contrast, misdemeanor filing data reveal a large decline from pre-pandemic years, followed by a rebound starting in FY 2023–24 and continuing through FY 2024–25. Although misdemeanor filings are increasing, they have not reached pre-pandemic numbers.

Utilizing both IST and nontraffic misdemeanor filings provides balance, and a funding floor of \$1,200 is incorporated based on an estimated cost formula for a full IMO process. The funding floor ensures that any court receiving less than the estimated cost for a full IMO process will still receive sufficient funding to maintain operational readiness in the event of a case that requires the IMO process established by SB 820.

² Incompetent to Stand Trial Procedures (SB 820) budget change proposal for FY 2026–27, 0250-084-BCP-2026-GB, https://bcp.dof.ca.gov/2627/FY2627_ORG0250_BCP8621.pdf.

At its meeting on August 27, 2026, TCBAC approved an allocation methodology based on 60 percent IST filings and 40 percent nontraffic misdemeanor filings, which represents existing caseloads, and a \$1,200 funding floor for FY 2026–27 and FY 2027–28.³

Expenditure and Reporting Requirements

The approved methodology will be used for the first two of the four fiscal years in which funding is available to implement SB 820 (FY 2026–27 and FY 2027–28). For the remaining two fiscal years (FY 2028–29 and FY 2029–30), data collected from trial courts will be used to reevaluate the allocation methodology, if necessary.

Trial courts will receive their FY 2026–27 allocations as a lump sum in a single monthly distribution, following Judicial Council approval. The FY 2026–27 allocation is available for expenditure or encumbrance until June 30, 2027, and courts have an additional two years to liquidate any funding for valid encumbrances until June 30, 2029. Courts are required to code all allocation related activities using the Work Breakdown Structure element (WBSE) designated within the Phoenix financial system for this funding.

Trial courts should use their approved allocations on eligible costs necessary to implement SB 820. No additional operational agreement will be issued to provide further expenditure or reporting guidance. Qualifying expenditures must be recorded in the Phoenix financial system under the appropriate WBSE by the fifth business day after each month end to ensure current expenditure information is available as needed. Final year-end expenditures must be recorded in the Phoenix financial system by July 31 of each reportable year to ensure sufficient time to reconcile and report annual expenditures.

Recommendation

Approve the FY 2026–27 allocations to implement SB 820, as outlined in Attachment 1A, based on 60 percent IST filings and 40 percent nontraffic misdemeanor filings and a \$1,200 funding floor.

This recommendation will be considered by the Judicial Council at its business meeting on October 16, 2026.

Attachments

1. Attachment 1A: Recommended FY 2026–27 Involuntary Medication Order Funding Allocations

³ Trial Court Budget Advisory Committee meeting materials (Aug. 27, 2026), [Item 1 - Involuntary Medication Orders \(Senate Bill 820\) Allocations for Fiscal Year 2026-27](#).

Attachment 1A: Recommended FY 2026–27 Involuntary Medication Order Funding Allocations

County	60% IST and 40% Misdemeanor + Funding Floor*
Alameda	\$79,303
Alpine	1,200
Amador	7,211
Butte	27,259
Calaveras	4,681
Colusa	3,475
Contra Costa	32,727
Del Norte	2,562
El Dorado	12,679
Fresno	141,602
Glenn	2,186
Humboldt	29,770
Imperial	13,543
Inyo	3,392
Kern	224,462
Kings	30,208
Lake	20,905
Lassen	2,378
Los Angeles	1,116,253
Madera	17,523
Marin	22,827
Mariposa	2,470
Mendocino	14,996
Merced	16,526
Modoc	1,757
Mono	1,327
Monterey	82,693
Napa	15,587
Nevada	6,140

County	60% IST and 40% Misdemeanor + Funding Floor*
Orange	283,339
Placer	49,266
Plumas	1,529
Riverside	181,695
Sacramento	181,400
San Benito	6,093
San Bernardino	247,069
San Diego	158,672
San Francisco	36,145
San Joaquin	144,155
San Luis Obispo	67,172
San Mateo	62,000
Santa Barbara	79,801
Santa Clara	171,837
Santa Cruz	29,244
Shasta	42,626
Sierra	1,200
Siskiyou	7,197
Solano	52,726
Sonoma	97,302
Stanislaus	117,495
Sutter	20,292
Tehama	21,146
Trinity	1,378
Tulare	82,101
Tuolumne	14,223
Ventura	103,050
Yolo	33,549
Yuba	18,656
Total	\$4,250,000

* Funding floor amount is \$1,200.

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Judicial Branch Budget Committee
(Action Item)

Title: Workload Formula Adjustment Request Process Update

Date: 8/31/2026

Contact: Oksana Tuk, Senior Fiscal Analyst, Judicial Council Budget Services | 916-643-8027 | oksana.tuk@jud.ca.gov

Issue

Consideration of updates to the current process for submitting annual requests from the trial courts to propose changes to the Workload Formula to improve clarity and streamline the process.

Background

The Judicial Council–approved Workload Formula is used to allocate certain funding to the trial courts guided by the principles of equity, stability, and predictability. The Workload Formula methodology includes an adjustment request process that allows the trial courts to submit annual requests for consideration when workload-related factors arise that are not currently accounted for in the model but are essential to court operations.

On April 26, 2013, the Judicial Council approved the Workload-based Allocation and Funding Methodology (WAFM) for use in allocating trial court funding.¹ At that time, the Trial Court Budget Working Group indicated that specific elements of the model would require further refinement based on input from trial courts and stakeholders, subject to final Judicial Council approval.

On August 22, 2013, the Judicial Council approved the WAFM adjustment request process.² Since then, a series of updates have been made:

- **July 28, 2017:** Minor updates to align terminology, including replacing references to the “Administrative Office of the Courts” with “Judicial Council,” and adjusting process timelines.³
- **May 17, 2019:** Broader revisions, including updating the name from “Workload-based Allocation and Funding Methodology” to “Workload Formula”, removing references to

¹ Judicial Council of Cal., Advisory Com. Rep., [Trial Court Budget Working Group: Recommendation of New Budget Development and Allocation Methodology](#) (April 24, 2013).

² Judicial Council of Cal., Advisory Com. Rep., [Trial Court Workload-based Allocation and Funding Methodology: Adjustment Request Process](#) (August 19, 2013).

³ Judicial Council of Cal., Advisory Com. Rep., [Trial Court Allocations: Revisions to the Workload-Based Allocation and Funding Methodology \(WAFM\) Adjustment Request Procedures](#) (July 14, 2017).

workload need, and clarifying and streamlining the instructions. The updates also allowed the Trial Court Budget Advisory Committee chair to more quickly refer adjustment requests to other advisory committees as appropriate.⁴

Based on recent feedback from the trial courts, additional changes are recommended to further improve clarity and streamline the process. The proposed updates include:

- Require all new adjustment requests to be submitted directly to the Director of Judicial Council Budget Services rather than to the Administrative Director of the Judicial Council.
- Adjust process timelines to align with current practice and improve workflow efficiency.
- Update the title of the adjustment request instructions from “Procedures” to “Process Instructions” to better align with the document’s purpose.
- Include a brief summary of the Workload Formula at the beginning of the instructions to provide context for courts submitting requests.
- Provide courts an opportunity to present their requests directly to the advisory committee responsible for evaluating them, enhancing transparency and ensuring accurate understanding.
- Make non-substantive narrative improvements throughout to strengthen organization, wording, and the use of plain language.
- Delegate changes to the submission instructions to the Director of Judicial Council Budget Services, given the changes do not change the policy.

On August 27, 2026, the Trial Court Budget Advisory Committee approved the proposed changes to the Workload Formula Adjustment Request Process Instructions, which are included in Attachment 2A.⁵ For reference, the current Workload Formula Adjustment Request Procedures are included in Attachment 2B.

Recommendation

Approve the proposed updates to the Workload Formula Adjustment Request Process Instructions as shown in Attachment 2A. This recommendation will be considered by the Judicial Council at its business meeting on October 16, 2026.

Attachments

Attachment 2A: Judicial Council Workload Formula Adjustment Request Process Instructions – Proposed

Attachment 2B: Current Workload Formula Adjustment Request Procedures

⁴ Judicial Council of Cal., Advisory Com. Rep., [Judicial Branch Budget: Workload Formula Adjustment Request Process Policy Update](#) (April 26, 2019).

⁵ Trial Court Budget Advisory Committee Meeting Materials (August 27, 2026), [Item 2 - Workload Formula Adjustment Request Process Update](#).

Judicial Council Workload Formula Adjustment Request ~~Procedures~~ Process Instructions – Proposed

The Judicial Council–approved Workload Formula is used to allocate certain funding to the trial courts guided by the principles of equity, stability, and predictability. This includes an adjustment request process that allows the trial courts to submit annual requests to consider potential modifications when workload-related factors arise that are not currently accounted for in the model but are essential to court operations.

Submission, review, and approval

The submission, review, and approval process is under the direction of the Judicial Council and is as follows:

1. Annual Workload Formula adjustment requests must be submitted to the ~~Administrative Director of Judicial Council Budget Services~~ by the trial court’s presiding judge or executive officer by January 15 of each year.
2. ~~The Administrative Director shall forward the request to the Director of Judicial Council Budget Services.~~ The Director of Judicial Council Budget Services, in consultation with the Chair of the Trial Court Budget Advisory Committee (TCBAC), will review each request and refer the request to the Funding Methodology Subcommittee (FMS) or other advisory committee, as appropriate, by April 30. The chair will notify TCBAC no later than May 15 of requests that have been received and referred to either FMS or other advisory bodies.
3. FMS or the appropriate advisory committee will review the referral from TCBAC.¹ Courts are encouraged to present their requests directly to the advisory committee responsible for evaluating the requests to support transparency and ensure accurate understanding.
4. FMS may recommend that the request be included in the subcommittee’s proposed annual work plan for the upcoming fiscal year, with or without prioritization, to be ~~submitted back to TCBAC no later than July~~ approved by TCBAC. In some circumstances, TCBAC may direct FMS to conduct an expedited review of a request.
5. The review of Workload Formula adjustment requests is a three-step process:
 1. Initial review to determine whether the factor identified in a court’s request should form the basis of potential modifications to the Workload Formula;
 2. Evaluation of whether and how the modification should occur; and
 3. Evaluation of whether—for those circumstances where it is determined that the factor should ultimately be included in the underlying Resource Assessment Study (RAS)

¹ California Rules of Court, Rule 10.34 subdivision (a), https://courts.ca.gov/cms/rules/index/ten/rule10_34_.

model—an interim adjustment should be made to a trial court’s Workload Formula calculation pending a more formal adjustment to the RAS model.

6. To the extent possible, FMS or the responsible advisory committee will review the requests and present their recommendation to TCBAC no later than January prior to the year proposed for implementation.
7. TCBAC will make final recommendations to the Judicial Council for consideration no later than April prior to the year proposed for implementation. Requested adjustments that are approved by the Judicial Council will be included in the allocation based on the timing included in the recommendation.

Upon approval by the Judicial Council of an adjustment to the Workload Formula, the Director of Judicial Council Budget Services, in consultation with TCBAC, will notify trial courts of the change. The Director of Judicial Council Budget Services may also adjust the submission instructions, given the changes do not change the policy.

Trial court adjustment requests

Trial courts requesting an adjustment to the Workload Formula must submit a letter to the Director of Judicial Council Budget Services by January 15 of each year that includes the following information:

1. A description of how the workload-based factor is not currently accounted for in the Workload Formula;
2. Identification and description of the basis for which the adjustment is requested;
3. A detailed analysis of why the adjustment is necessary;
4. A description of whether the unaccounted-for factor is unique to the applicant court(s) or has broader applications;
5. A detailed description of staffing needs and/or costs required to support the factor that is unaccounted for by the Workload Formula;
6. A description of the consequence to the public and access to justice without the funding;
7. A description of the consequences to the requesting court(s) of not receiving the funding; and
8. Any additional information requested by Judicial Council Budget Services, FMS or other advisory committee, and TCBAC that is necessary to fully evaluate the request.

Current Workload Formula Adjustment Request Procedures

Submission, review, and approval

The submission, review, and approval process is under the direction of the Judicial Council and is as follows:

1. Initial requests shall be submitted to the Administrative Director either by the trial court's Presiding Judge or Executive Officer no later than January 15 of each year.
2. The Administrative Director shall forward the request to the Director of Judicial Council Budget Services. The Director, in consultation with the Chair of the Trial Court Budget Advisory Committee (TCBAC) shall review each request and refer the request to the Funding Methodology Subcommittee (FMS) no later than April. If the request is more appropriately referred to another advisory committee, the Chair may do so immediately. The Chair will notify TCBAC no later than April of requests that have been referred to other advisory bodies.
3. FMS shall review the referral from TCBAC and prioritize the request into the proposed annual work plan to be submitted back to TCBAC no later than July.
4. Once prioritized, requests will be evaluated by FMS. The review of Workload Formula Adjustment Requests is a three-step process:
 - a. Initial review to determine whether the factor identified in a court's request should form the basis of a potential modification to the Workload Formula;
 - b. Evaluation of whether and how the modification should occur; and
 - c. Evaluation of whether—for those circumstances where it is determined that the factor should ultimately be included in the underlying Resource Assessment Study model (RAS)—an interim adjustment should be made to a trial court's Workload Formula pending a more formal adjustment to the RAS model.
5. FMS shall review any requests and present its recommendation(s) to TCBAC no later than January prior to the year proposed for implementation.
6. TCBAC shall make final recommendations to the Judicial Council for consideration no later than April. Requested adjustments that are approved by the Judicial Council shall be included in the allocation based on the timing included in the recommendation. TCBAC will make no further recommendations for changes to the Workload Formula impacting the next fiscal year.
7. Upon approval by the Judicial Council of an adjustment to the Workload Formula, the Director, in consultation with TCBAC, shall notify all trial courts. In some circumstances, the nature of the adjustment will automatically apply to all courts.
8. This policy does not preclude FMS from taking expedited action per the direction of TCBAC.

Trial court adjustment requests

Trial courts requesting an adjustment in accordance with the Workload Formula Adjustment Request Procedures shall be required to submit detailed information documenting the need for such adjustment as follows:

1. A description of how the factor is not currently accounted for in the Workload Formula;
2. Identification and description of the basis for which the adjustment is requested;
3. A detailed analysis of why the adjustment is necessary;
4. A description of whether the unaccounted-for factor is unique to the applicant court(s) or has broader applications;
5. A detailed description of staffing need(s) and/or costs required to support the factor that is unaccounted for by the Workload Formula;
6. A description of the consequence to the public and access to justice without the funding;
7. A description of the consequences to the requesting court(s) of not receiving the funding; and
8. Any additional information requested by Judicial Council Budget Services, FMS, and/or TCBAC deemed necessary to fully evaluate the request.

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Judicial Branch Budget Committee
(Action Item)

Title: Workload Formula Policy Base Funding Floor Adjustment Process

Date: 8/31/2026

Contact: Oksana Tuk, Senior Fiscal Analyst, Judicial Council Budget Services | 916-643-8027 | oksana.tuk@jud.ca.gov

Issue

Consideration of a recommendation from the Trial Court Budget Advisory Committee (TCBAC) to update the Workload Formula policy's annual base funding floor adjustment process to ensure the two funding floor courts have sufficient resources to meet essential operational needs and maintain minimum staffing levels.

Background

To ensure that the two smallest trial courts—the Superior Courts of Alpine and Sierra Counties—have sufficient funding to support minimum staffing levels and operational needs, the Judicial Council established a base funding floor policy. When the Workload-Based Allocation and Funding Methodology was implemented in fiscal year (FY) 2013–14, it was determined that the standard workload metrics did not accurately represent the funding needs of these very small courts. As a result, the Judicial Council approved an initial base funding floor of \$750,000, effective FY 2014–15, for Alpine and Sierra courts.¹

The current process includes an annual review of the base funding floor amount. Each year, the two funding floor courts may submit requests for augmentations if additional resources are needed to maintain their core operations and staffing.

During the review of allocations for FY 2025–26, the court executive officers from Alpine and Sierra courts requested clarification on how the base funding floor policy is applied in determining their annual allocations. They also expressed interest in revisiting the methodology to improve transparency and ensure the policy continues to meet their operational needs.

Base Funding Floor Adjustments

After the base funding floor was first established in FY 2014–15, no adjustments were made for approximately five years. In March 2019, the Judicial Council approved a \$50,000 inflationary

¹ Judicial Council Judicial Council of Cal., Advisory Com. Rep., [Trial Court Allocations: Revisions to the Workload-Based Allocation and Funding Methodology](#) (Feb. 10, 2014).

adjustment, increasing the funding floor from \$750,000 to \$800,000, effective FY 2019–20.² This increase responded to rising personnel and operating expenditures, equipment costs, and other pressures that the courts attempted to absorb through cost-cutting measures and limited fund balance resources. These efforts were insufficient and were adversely impacting core business operations and essential services.

In March 2022, the Judicial Council approved another \$150,000 inflationary adjustment, raising the base funding floor to \$950,000, effective FY 2022–23.³ This increase reflected growing costs in information technology, case management systems, modernization projects, employee benefits and staffing, as well as recruitment and retention needs to sustain operations.

Workload Formula Policy Update for Inflationary Funding

In March 2023, the Judicial Council updated the Workload Formula policy to ensure that the two base funding floor courts receive inflation-based increases that are consistent with the percentage increase included in the statewide trial court budget for operational cost growth.⁴ Under this update, Alpine and Sierra courts receive an adjustment equal to the same percentage applied to the other courts' Workload Formula allocations. Recent adjustments to the base funding floor include the following:

In FY 2023–24, the budget included \$74.1 million for the trial courts, representing a 3 percent ongoing inflationary increase. The funding was allocated to all 58 courts as a 3 percent increase over each court's FY 2022–23 Workload Formula allocation⁵. This resulted in a 3 percent increase to the base funding floor amount, raising it from \$950,000 to \$978,500.

In FY 2025–26, the budget included \$40 million to address ongoing trial court operational cost increases. The funding was allocated to all 58 courts as a 1.6 percent increase over each court's FY 2024–25 Workload Formula allocation⁶. This resulted in a 1.6 percent increase to the base funding floor amount, increasing it from \$978,500 to \$994,000.

In FY 2026–27, the budget included \$70 million for trial court operational costs increases. The funding was allocated to all 58 courts as a 2.7 percent increase over each court's FY 2025–26 Workload Formula allocation⁷. This resulted in a 2.7 percent increase for the base funding floor amount, increasing it from \$994,000 to \$1,021,000.

² Judicial Council Judicial Council of Cal., Advisory Com. Rep., [Trial Court Budget: Base Funding Floor Allocation](#) (Feb. 13, 2019).

³ Judicial Council Judicial Council of Cal., Advisory Com. Rep., [Trial Court Budget: Base Funding Floor Allocation](#) (Feb. 18, 2022).

⁴ Judicial Council Judicial Council of Cal., Advisory Com. Rep., [Trial Court Budget: Base Funding Floor Inflationary Increases](#) (Mar. 3, 2023).

⁵ Judicial Council Judicial Council of Cal., Advisory Com. Rep., [Trial Court Budget: Allocations from the Trial Court Trust Fund and Trial Court Allocations for 2023–24](#) (June 23, 2023).

⁶ Judicial Council Judicial Council of Cal., Advisory Com. Rep., [Trial Court Budget: Allocations from the Trial Court Trust Fund and Trial Court Allocations for Fiscal Year 2025–26](#) (June 24, 2025).

⁷ Judicial Council Judicial Council of Cal., Advisory Com. Rep., [Trial Court Budget: Allocations for Trial Court Operations for Fiscal Year 2026–27](#) (June 18, 2026).

Workload Formula Policy Funding Floor Adjustments

As part of the multi-step Workload Formula methodology used to calculate annual trial court allocations, the final step is the funding floor adjustment. This step ensures that the two smallest courts receive at least their established base funding floor amount. Under the existing application of the policy:

- If the Workload Formula allocation amount for a base funding floor court *is lower* than the established base funding floor amount, then the other 56 courts contribute funding on a proportional basis to bring the funding floor amount to the required level.
- If the Workload Formula allocation amount for a base funding floor court *is higher* than the current floor amount, then the funding floor courts are reduced to the floor with the other 56 courts sharing the overage amount as a proportional increase.

Every August, the two funding floor courts are provided an opportunity to request an increase to their base funding floor amount for the next fiscal year. The requests are reviewed by the Funding Methodology Subcommittee and TCBAC. If an increase is approved by the Judicial Council, it will take effect in the next fiscal year. For the August 2026 submission cycle, there were no requests from the funding floor courts to increase the floor amount.

Methodology Options for Consideration

To improve clarity and transparency in how the Workload Formula policy's base funding floor adjustments are applied, and to ensure the two floor courts have adequate resources to meet their operational needs, TCBAC considered the following options during its meeting on August 27, 2026.⁸ TCBAC approved Option 2, which will provide stable funding for the floor courts and align with the Workload Formula policy's intent to ensure they receive adequate funding.

Option 1 – Treat the base funding floor amount as a ceiling, which means the court's allocations cannot exceed this amount. This option reflects current practice in the Workload Formula methodology.

Option 2 – Treat the base funding floor amount as a minimum floor, which will allow the floor court to retain its full Workload Formula allocation if it is higher than the established base funding floor amount without any downward adjustment.

Option 3 – Establish a ceiling cap (e.g., 5 percent or 10 percent) for the base funding floor court's Workload Formula allocation. If the calculated allocation exceeds the base floor amount but remains below the established ceiling, the court will receive the full allocation. If the allocation exceeds the ceiling cap, it will be reduced to the ceiling level.

Option 4 – Evaluate the established process for funding floor adjustments on a recurring schedule (e.g., every two or three years) to determine whether modifications are needed.

⁸ Trial Court Budget Advisory Committee Meeting Materials (August 27, 2026), [Item 3 - Workload Formula Policy Base Funding Floor Adjustment Process](#).

Recommendation

Approve an update to the Workload Formula policy's base funding floor adjustment so that, when calculating annual allocations for the two funding floor courts, the base funding floor amount is treated as a minimum floor. Under this methodology, when a floor court's Workload Formula allocation exceeds the floor, the court will retain its full calculated allocation rather than be reduced to the floor. This change provides greater funding stability and ensures the floor courts have sufficient resources to meet essential operational needs and maintain minimum staffing levels.

This recommendation will be considered by the Judicial Council at its business meeting on October 16, 2026.