Overall data

Category	Top Funding Needs	Top Local Technology Priorities	Last Year's Branch Priorities
Infrastructure	16	25	Y
Proceedings	16	19	Y
Electronic Records Management	14	26	Y
CMS and Extensions	11	37	N
Cyber/Information Security	9	19	N

Discussion & Action Requested

Proposed Priorities for FY 2023-24

- Proceedings – focused on AB716 Compliance and BCP

- Electronic Records Management

- Infrastructure

- CMS and Extensions

- Cyber/Information Security

Next steps

- Branchwide webinar

- Applications open later this month

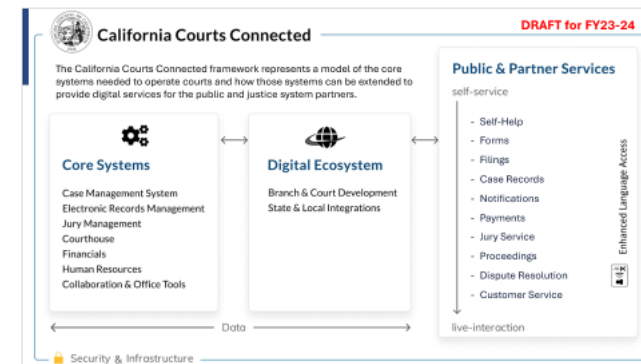# Appendix

Materials from last meeting, for reference.

IT Mod Fund: Local Court Projects

$12.5 million budgeted and potentially allocated annually

Appellate and trial courts submit project proposals

Aligns to judicial branch:

- Strategic and Tactical Plans for Technology

- California Courts Connected (CCC) framework

Guiding Principles for the program

- Allocate funding based on the CCC framework

- Promote courts' ability to be innovative and forward-looking

- Take an adaptive approach to distribution methodology

- Align with Strategic and Tactical Plans; and Access 3D

- Collaborate, collaborate, collaborate!

- Keep it simple – support a streamlined and efficient process

- Be responsive to court priorities

Project Requirements for courts

- 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

- Initiate project activities immediately after approved (July 2023)

- Show demonstrable progress by the following quarter (October 2023)

- Expend or encumber funds by end of the fiscal year (June 30, 2024)

- Project completion by end of the third fiscal year (June 30, 2026)

- Report quarterly on measurable, successful outcomes

Timeline

WE ARE HERE

February
Preparations

- Court Technology Assessment Tool

March
Kickoff New Program Cycle

- Tech Comm finalize branch priorities (March 13)
- Outreach to branch for ITAC Workstream participation
- Branchwide webinar
- Application opens (est. March 27)

April
Applications

- ITAC Workstream Kickoff and information on evaluation process
- Application closes (est. April 21)
- Tech Comm education on types of allocation methodologies (April or May)

May
Review

- ITAC Workstream reviews project proposals

June
Review & Recommendations

- ITAC approves project recommendations
- Tech Comm approves project recommendations and allocations

July
Approvals

- Judicial Council reviews and approves allocations

August-September
Disbursements

- Intra-Branch Agreements (IBAs) executed and funds distributed

Remainder of FY
Progress Reports

Workstream meets to review progress reports in:
- November 2023
- February 2024
- May 2024

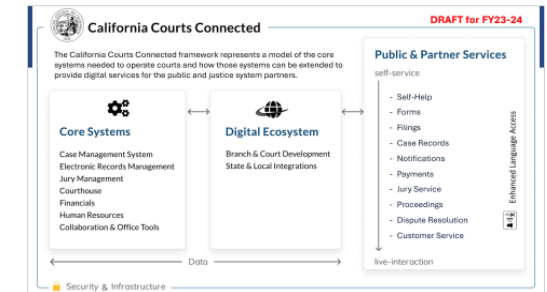- **Next Step –** March 13 public meeting to set branch priorities

Boxes indicate Technology Committee activities.

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Branch Data and Considerations

1. Court Technology Assessment Tool

- Formerly "court technology inventory"
- Courts self-assess local technology posture, local priorities, funding needs
- Aligns to the CCC framework categories
- Response rate

    Appellate Courts- 100% - all Courts of Appeal and Supreme Court

    Trial Courts- 94% (55 of 58 courts; missing Marin, Santa Clara, Plumas)

Results: Technology Priorities

Categories listed most frequently as court priorities

Appellate and Trial Courts	
CMS and Extensions	37
Electronic Records Management	26
Infrastructure	25
Cyber/Information Security	19
Proceedings	19

Appellate Courts	
CMS and Extensions	4
Electronic Records Management	4
Infrastructure	4
Cyber/Information Security	3
Collaboration & Office Tools	2
Data	2

Trial Courts	
CMS and Extensions	33
Cyber/Information Security	16
Electronic Records Management	22
Infrastructure	21
Proceedings	19

CMS = Case Management Systems

Results: Funding Needs

Categories where funding for FY 23-24 was most requested

Appellate and Trial Courts

	Yes	Maybe	No
Infrastructure	16	4	1
Proceedings	16	2	
Electronic Records Management	14	3	2
CMS and Extensions	11	4	14
Cyber/Information Security	9		2

Appellate Courts

	Yes	Maybe	No
Electronic Records Management	1	1	1
Infrastructure	1	1	
CMS and Extensions		1	
Filings		1	
Websites		1	
Data			1

Trial Courts

	Yes	Maybe	No
Proceedings	16	2	
Infrastructure	15	3	1
Electronic Records Management	13	2	1
CMS and Extensions	11	3	14
Cyber/Information Security	9		2

CMS = Case Management Systems

2. Other Funding Considerations

- AB 716 – funding for audio upgrades

- IT Modernization Fund – for branchwide Information Security Office

- Language Access & Signage Technology Grant

- Jury Management Systems Grant

- Model Self-Help Grant

Priorities set last year and result

Branch priorities last cycle

- Electronic Records Management (includes digitization of court records)
- Remote Access

    Remote Appearances

    Remote Access to Proceedings (for the public)

    Remote Records Access and Search

- Infrastructure (ensuring components in place to support and connect systems and services)
- Innovative Branch Solutions

Distribution methodology:

Funded $5m for digitization of records, small court priority #1s without digitization; and remainder as pro rata