



# JUDICIAL COUNCIL OF CALIFORNIA

TECHNOLOGY COMMITTEE

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## JUDICIAL COUNCIL TECHNOLOGY COMMITTEE

### MINUTES OF OPEN MEETING

March 3, 2023  
12:00 PM to 1:30 PM  
Videoconference

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**Advisory Body Members Present:** Hon. Kyle S. Brodie, Chair; Hon. C. Todd Bottke, Vice-Chair; Hon. Kevin C. Brazile; Hon. Ms. Rebecca Fleming; Mr. David Fu; and Hon. Glenn Mondo

**Advisory Body Members Absent:** Jonathan B. Conklin; and Hon. Carol Corrigan

**Others Present:** Hon. Sheila F. Hanson; Ms. Heather Pettit; Mr. John Yee; and Judicial Council Staff

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#### OPEN MEETING

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##### Call to Order and Roll Call

The chair called the meeting to order and took roll call.

There were no public comments received for this meeting.

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#### DISCUSSION AND ACTION ITEMS (ITEM 1)

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##### Item 1

##### IT Modernization Fund Fiscal Year 2023-24

**Update:** Ms. Jamel Jones, Manager in the Judicial Council Information Technology office, provided an overview on the IT Modernization Fund program for Fiscal Year 2023-24, including process timeline, guiding principles, project requirements, and priorities. In order to provide funding to the courts earlier, this fiscal year's process must begin sooner. The committee discussed the updated timeline, guiding principles, project requirements, and priorities. The committee will discuss and consider the branch priorities at its next open meeting.

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#### ADJOURNMENT

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There being no further business, the meeting was adjourned.



# JUDICIAL COUNCIL OF CALIFORNIA

TECHNOLOGY COMMITTEE

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## JUDICIAL COUNCIL TECHNOLOGY COMMITTEE

### MINUTES OF OPEN MEETING

March 13, 2023

12:00 PM to 1:00 PM

Videoconference

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**Advisory Body Members Present:** Hon. Kyle S. Brodie, Chair; Hon. C. Todd Bottke, Vice-Chair; Hon. Kevin C. Brazile; Hon. Jonathan B. Conklin; Ms. Rebecca Fleming; and Mr. David Fu

**Advisory Body Members Absent:** Hon. Glenn Mondo; and Hon. Carol Corrigan

**Others Present:** Hon. Sheila F. Hanson; Ms. Heather Pettit; Ms. Jamel Jones; and Judicial Council Staff

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#### OPEN MEETING

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

The chair called the meeting to order and took roll call.

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

The advisory body reviewed and approved the minutes of the February 6, 2023, Judicial Council Technology Committee meeting. Mr. David Fu, abstained, he was unable to attend the meeting.

There were no public comments received for this meeting.

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#### DISCUSSION AND ACTION ITEMS (ITEM 1-5)

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##### **Item 1**

##### **Chair Report**

**Update:** Hon. Kyle S. Brodie attended the Information Technology Advisory Committee (ITAC) meeting on March 8 and provided an update of the Technology Committee's activities. Work has begun on next year's IT Modernization Funding. The application period will begin in March and close in April as there is a goal of getting funding requests to the Judicial Council in July and money to courts earlier in the fiscal year. The IT Modernization Workstream has transitioned to ITAC, and a branchwide webinar on the next fiscal year's IT Modernization Funding will be held on Thursday, March 23, 12 noon – 1 pm.

**Item 2**

**E-Filing Program Review and Evaluation Workstream**

**Update:** Mr. Snorri Ogata, CIO, Los Angeles Superior Court, and Workstream Sponsor presented the final findings and recommendations from the ITAC E-Filing workstream.

**Action:** The Technology Committee members voted to accept and approve the report. With their approval, the workstream has formally been sunset.

**Item 3**

**Technology Budget Change Proposals (BCPs) for Fiscal Year 2024-25**

**Update:** Ms. Heather Pettit, CIO / Director, Judicial Council Information Technology presented the Budget Change Proposal (BCP) concepts with technology components for FY 2024–25. The concepts include Phoenix Payroll and Innovation Support; Data Governance and Analytics; Proposition 66 Costs in Court of Appeal; and Additional Funding for Remote Access to Court Proceedings.

**Action:** The Technology Committee members voted to approve and submit to the Judicial Branch Budget Committee.

**Item 4**

**Jury Management System Grant Program for the Fiscal Year 2022-23 (Action Requested)**

**Update:** Ms. Heather Pettit, CIO / Director, Judicial Council Information Technology an update on the program. With remaining grant funds, a second application period opened October 31, 2022 – December 30, 2022. There were two trial courts requesting funding and their applications were reviewed to ensure compliance with SB 592. The recommendation is to allocate \$37,650 in funding those two courts for two projects.

**Action:** The Technology Committee members voted to approve the allocation of \$37,650 to Alameda and San Mateo Superior Courts for their jury management system upgrades.

**Item 5**

**IT Modernization Fund Fiscal Year 2023-24**

**Update:** Ms. Jamel Jones, PMO Manager, Judicial Council Information Technology office shared the recommended and proposed branch priorities based on branch and local court technology priorities. These branchwide priorities will be shared with the courts before the start of the next IT Modernization Funding application process..

**Action:** As the meeting had run over time, the Technology Committee will circulate an Action by Email to consider approval of the priority recommendations.

There being no further business, the meeting was adjourned.

JUDICIAL COUNCIL TECHNOLOGY COMMITTEE

MINUTES OF ACTION BY EMAIL BETWEEN MEETINGS  
MARCH 16, 2023

**Email Proposal**

The Judicial Council Technology Committee was asked to consider approving the proposed branch technology priorities for fiscal year 2023–24.

Due to the limited availability of Technology Committee members and the body’s other priorities, the Technology Committee did not have time to consider this request at a meeting in a timely manner. Accordingly, the Chair concluded that prompt action by email was necessary.

**Notice**

On March 16, 2023, a notice was posted advising that the Technology Committee was proposing to act by email between meetings under California Rules of Court, rule 10.75(o)(1)(B).

**Public Comment**

Because the email recommendation concerned a subject that otherwise must be discussed in an open meeting, the Technology Committee invited public comment on the proposed branch technology priorities under rule 10.75(o)(2). The public comment period began at 9:00 a.m. March 16, 2023, and ended at 9:00 a.m. March 17, 2023. No public comments were received.

**Action Taken**

After the public comment period ended, Technology Committee members were asked to submit their votes on the recommended grant allocations by 12 noon on March 20, 2023. All eight members voted to approve. The email recommendation was approved.



# Judicial Council of California

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## REPORT TO THE JUDICIAL COUNCIL

Item No.: 23-0XX

For business meeting on: July 21, 2023

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**Title**

Judicial Branch Administration: *Tactical Plan for Technology 2023–2024*

**Rules, Forms, Standards, or Statutes Affected**

None

**Recommended by**

Judicial Council Technology Committee  
Hon. Kyle S. Brodie, Chair  
Information Technology Advisory Committee  
Hon. Sheila F. Hanson, Chair

**Agenda Item Type**

Action Required

**Effective Date**

July 24, 2023

**Date of Report**

May 31, 2023

**Contact**

Heather Pettit, Chief Information Officer  
916-263-2708  
[heather.pettit@jud.ca.gov](mailto:heather.pettit@jud.ca.gov)

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### Executive Summary

The Tactical Plan Update Workstream and the Information Technology Advisory Committee recommend adopting the updated *Tactical Plan for Technology 2023–2024*. The updated plan was developed by reviewing the *Strategic Plan for Technology* to ensure alignment with branchwide goals, evaluating the status of existing initiatives, and considering new initiatives. Building on the technology strategic plan, the tactical plan describes the focused efforts on technology solutions that further the administration of justice and meet the needs of the people of California.

### Recommendation

The Technology Committee and the Information Technology Advisory Committee recommend that the Judicial Council, effective July 24, 2023, adopt the *Tactical Plan for Technology 2023–2024* to supersede the 2021–2022 plan. This is the fourth update of the judicial branch tactical plan for technology since it was established within the *Technology Governance and Funding Model*, effective October 2014. The revised tactical plan is attached as Attachment A.

## Relevant Previous Council Action

The Judicial Council adopted the initial *Court Technology Governance and Strategic Plan*—which included the *Technology Governance and Funding Model*, the *Strategic Plan for Technology*, and the *Tactical Plan for Technology*—effective August 2014. The council then adopted the updated *Court Technology Governance and Strategic Plan* effective October 2014. The first update to the technology tactical plan (for calendar years 2017–2018) was adopted by the council in March 2017, the second in May 2019, and the third in March 2021. The first update to the technology strategic plan (for calendar years 2019–2022) was adopted by the council in November 2018. The most recent update to the technology strategic plan (for calendar years 2023–2026) was adopted by the council in January 2023.

## Analysis/Rationale

The *Technology Governance and Funding Model*<sup>1</sup> (Oct. 2, 2014) directs the Judicial Council to adopt, every two years, a *Tactical Plan for Technology* that will guide branch technology decisions. It assigns to the Information Technology Advisory Committee (ITAC) the responsibility of developing, seeking input on, and producing the technology tactical plan. This proposed plan represents the third update to the technology tactical plan since the governance model was adopted. ITAC tasked the Tactical Plan Update Workstream with the responsibility of updating the plan. The workstream included representatives from the appellate and trial courts, the Judicial Council Technology Committee, ITAC, and Judicial Council staff.

As a starting point to drafting this updated plan, the workstream members reviewed the technology goals, vision, and principles in the current *Strategic Plan for Technology 2023–2026*.<sup>2</sup> The technology strategic plan explains *why* we need certain technology initiatives, and the technology tactical plan explains *what* those initiatives should be. Advisory committee annual agendas can then create projects and workstreams to explain *how* those initiatives can be considered and implemented. The workstream discussed and defined the scope and purpose of the tactical plan. The guidelines that the workstream established included ensuring that initiatives have branchwide impact, expand online services, focus on supporting access to justice, and maintain the momentum of innovation in the branch.

The workstream reviewed the existing tactical plan, assessed the progress made on each initiative, and decided which should be extended into the new plan and, if so, how so. Additionally, the workstream considered possible new initiatives based on emerging technologies and input from stakeholders and leadership.

The workstream remained sensitive to the significant business drivers and technological shifts resulting from the pandemic, and mindful that ongoing court modernization funding makes

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<sup>1</sup> Available at [www.courts.ca.gov/documents/jctc-Court-Technology-Governance-Funding-Model.pdf](http://www.courts.ca.gov/documents/jctc-Court-Technology-Governance-Funding-Model.pdf).

<sup>2</sup> Available at [www.courts.ca.gov/documents/jctc-Court-Technology-Strategic-Plan.pdf](http://www.courts.ca.gov/documents/jctc-Court-Technology-Strategic-Plan.pdf).

continued advancement possible. Any reduction in funding would require revisiting the tactical plan, and could potentially postpone or eliminate certain initiatives.

### **Summary of key updates**

As with the recently updated four-year *Strategic Plan for Technology*, the updated two-year tactical plan is future-focused, more succinct, and accessible to a broader audience. In its review of the existing plan and assessment of activities that had taken place since the last plan, the workstream found that most of the initiatives remained relevant and updated the plan to reflect the next stage of progress needed for each initiative. Additionally, the workstream recognized the importance of branch collaboration as a central theme throughout the plan, deciding to incorporate this concept in the overall tone and within the introduction rather than as a standalone initiative. Similarly, the standalone electronic filing initiative was subsumed into the Enhanced Self-Help Services initiative, signaling its synergy with that overall program focusing on service enhancements that (1) simplify instructions and information, (2) assist with document preparation, and (3) streamline electronic filing to the courts.

Perhaps most notably in the proposed update, the workstream included two more substantive improvements to the plan: (1) alignment with the California Courts Connected framework,<sup>3</sup> representing the branch model of the foundational technology systems needed to operate courts and how those systems can be extended to provide digital services for the public and justice system partners; and (2) inclusion of proposed metrics for each initiative to help in measuring branch progress in the future.

Through these revisions and additions, the committee believes the new plan is successful in establishing the actions needed by the branch to achieve its strategic goals.

### **Policy implications**

Enhancing electronic access to our courts and court services and promoting more efficient business practices through information technology align with the core values of our judicial branch, with the branch's technology vision, and with enhancing access to our courts. Tactical initiatives expanding the "digital court" not only allow us to operate more efficiently but also significantly broaden meaningful access to the courts for litigants, lawyers, justice partners, and the public. The technology tactical plan also facilitates efforts related to information security, infrastructure, and data analytics.

### **Comments**

The draft plan was presented at meetings of appellate presiding justices, trial court presiding judges, and court executives. The draft was also circulated to the branch and public for written comment beginning April 13, 2023, to April 27, 2023. During the formal comment period, five comments were received: One suggested recognizing the additional resource costs of maintaining certain initiatives, which the committee agreed with and incorporated. Other comments either posed questions that did not specify revisions or offered detailed suggestions in

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<sup>3</sup> Available at [www.courts.ca.gov/documents/California-Courts-Connected-Framework.pdf](http://www.courts.ca.gov/documents/California-Courts-Connected-Framework.pdf).

cases where the committee concluded the current language sufficed for the purpose and target audience of the plan. A chart summarizing the comments received and the workstream members' responses is attached at pages 5–8.

### **Alternatives considered**

The Information Technology Advisory Committee is charged with developing the biannual *Technology Plan for Technology* as described in the *Technology Governance and Funding Model* adopted by the Judicial Council.

Given the many advancements and lessons learned from the COVID-19 pandemic to court and branch business and the approval of permanent modernization funding, ITAC felt a strong incentive to update the plan with a future focus rather than postpone the update, which would result in an outdated view of the significant achievements accomplished by the branch over the past two years and of its aspirations for the next plan period.

### **Fiscal and Operational Impacts**

Projected implementation requirements and costs vary from initiative to initiative within the tactical plan and are noted in the Potential Funding Requirements section describing each initiative. Where impacts to operations may be likely for the courts, the Judicial Council, or justice partners, or where funding may be needed, a comprehensive business analysis will be performed at the project or workstream level to ensure that return on investment can be maximized.

### **Attachments and Links**

1. Chart of comments, at pages 5–8
2. Attachment A: *Tactical Plan for Technology, 2023–2024*



**SP23-02**

**Tactical Plan for Technology 2023-2024**

All comments are verbatim unless indicated by an asterisk (\*).

	<b>Commenter</b>	<b>Position</b>	<b>Comment</b>	<b>Committee Response</b>
1.	John Fisher, Retired Judge	N	<ol style="list-style-type: none"> <li>1. CMS. Historically, the implementation of this concept has been problematic. What is its current status? Is the public, or court employees able to access case information, civil or criminal, (information within files legally accessible to public)? Within a County, or county to county? Currently how many Counties have this capability? For ex. if I have the name of a deft in a crim case, can I go on a county website and get the status of the case?</li> <li>2. Reliability of data. What is the level of accuracy of the data rec'd by the Statistics Div of Jud. Council from Counties for their yearly report? Is there uniformity re definitions of the various categories.? For ex, what is definition of a jury trial for stat purposes? A verdict? Impaneling a jury, then a dispo?</li> <li>3. Security. How secure is court's IT? Among the counties, does it vary? Is a single product for security used, or does each independently choose?</li> </ol>	<p>The committee appreciates the questions from the commenter and notes that access to case information, reliable data, and protecting information are all supported by the plan; and thus, concludes that no specific revisions to the plan are required.</p> <p>Additionally, as further information in response to the commenter's questions:</p> <ol style="list-style-type: none"> <li>1. The availability of case information may be found on each court's website.</li> <li>2. Statistics reported to the Judicial Council are based on statewide definitions.</li> <li>3. Information security is an important issue for courts and the branch; please refer to the plan for specifics related to this subject.</li> </ol>
2.	Diana Baca, Court Executive Officer/Jury Commissioner, Glenn County Superior Court	A	These goals align well with our plans for Glenn Court, namely, case management system improvement and expansion and electronic records management. We are watching CourtStack with a close eye for future expansion.	No revisions required.
3.	Micah May, Deputy CEO – Technology (CIO), San Bernardino County Superior Court	AM	<ol style="list-style-type: none"> <li>1. Expanded Use of Electronic Records, on page 13 with one-time and ongoing costs. I am sure this was discussed, but there are costs involved with moving resources to Q/A the digital files and I would also add costs for training. Both of these would likely fall under on-going costs.</li> <li>2. Shared Integrations, on page 17, I would add training to the on-going costs. While the idea is to make it easy to share app's most courts are different enough that some development is necessary. That requires training the resources and internal and external partners on how to use the application in question.</li> </ol>	<p>The committee appreciates the commenter's recognition of additional costs and metrics and has generally incorporated language into the plan to reflect changes that it agrees are appropriate in the context of this document.</p> <p>Re: 4, 6. The committee considered these comments but chose not to set an expectation of mandated collection of</p>

**SP23-02**

**Tactical Plan for Technology 2023-2024**

All comments are verbatim unless indicated by an asterisk (\*).

	Commenter	Position	Comment	Committee Response
			<p>3. Enhanced Self-Help Services on page 19 there may be ongoing staffing costs as well. The in-person self-help will still have to be maintained and courts may need additional staff to address some of the Self-Help enhancements in a timely manner e.g., Live Chat.</p> <p>4. Remote Appearances on Page 20, one of the metrics should be to engage with the public and staff after the remote court proceedings to determine if they found the remote proceedings helpful or a hinderance. That information will be incredibly helpful in determining if Remote Appearance is successful.</p> <p>5. Electronic Evidence Management Page 22, <b>Pursue opportunities to streamline procurement activities (e.g., master service agreements)</b>. This seems out of place, but I think it has to do with identifying Vendors who deal in Electronic Evidence Management and getting them on a Master Service Agreement. Perhaps adding some specificity to this line may alleviate confusion.</p> <p>6. Electronic Evidence Management Page 22, Under Metrics, I again think we need to proactively reach out to the public and internal staff to identify how their experience with Digital Evidence Management went.</p> <p>7. Network Infrastructure Page 27, Under one-time costs it may be worthwhile to specifically call out potential Cabling requirements. In some cases when upgrading network equipment, the underlying cabling may be older and not able to perform to the modern standards of 10Gb. CAT 5, Cat 5e and CAT 6 cables would likely need to be replaced as they are rated for 100MB and 1GB connections. There may be other costs as well associated with having to change the patch panels as well.</p> <p>8. Disaster Recovery and Business Continuity Page 31, it may help to expand the Ongoing costs line for maintaining DR solutions. It may be a good idea to add a parenthesis</p>	<p>branchwide data in these areas at this time; however, courts may and are encouraged to seek feedback on their local programs.</p> <p>Re: 7, 8. No revisions made. The committee felt that the language as written is suffice for the plan at this level and keeps it understandable to a broader audience.</p>

## SP23-02

### Tactical Plan for Technology 2023-2024

All comments are verbatim unless indicated by an asterisk (\*).

	Commenter	Position	Comment	Committee Response
			with some examples of what a DR solution consists of with some examples (Cold storage, Egress/Ingress costs).	
4.	Shelby Wineinger, Court Executive Officer, El Dorado County Superior Court	A	The plan looks great.	No revisions required.
5.	On behalf of Superior Court of San Diego County, Chris Reinker, Senior Applications Developer   Court Systems Analyst III	AM	<p>I was invited by Jake Pison, our CIO, to review the 2023-2024 Tactical Plan for Technology and offer the following comments on behalf of San Diego Superior Court:</p> <p>Under the Shared Solutions / Shared Integrations section:</p> <ul style="list-style-type: none"> <li>• <b>Code-sharing:</b> We'd like to see the JCC use its influence to promote a shared platform for code-sharing between courts. By this, we mean a private GitHub/Gitlab/Azure DevOps space where we can upload our application code so it can be shared statewide, without having to make it fully open-source and available to the public.</li> </ul> <p>Under "Modern Hosting Solutions":</p> <ul style="list-style-type: none"> <li>• <b>Centralized vs. decentralized hosting:</b> We are excited about shared solutions such as CourtNotify, however we are concerned about any service that requires centralized hosting administered by a single court and/or the JCC. Whenever possible, we'd like to see the JCC prioritize making it possible for courts to host these solutions ourselves, whether that's on premise or in the cloud. We think it's important for our own IT Operations staff to have visibility into the services we rely on.</li> </ul> <p>Under "Modernize Rules and Legislation":</p>	The committee appreciates the comments; however, the committee does not have any specific revisions as they do not directly state edits to the plan. The feedback to the council has been shared with staff.

**SP23-02**

**Tactical Plan for Technology 2023-2024**

All comments are verbatim unless indicated by an asterisk (\*).

	Commenter	Position	Comment	Committee Response
			<ul style="list-style-type: none"><li>• <b>Guidance on California Rules of Court:</b> It'd be helpful if the JCC could provide more guidance on how the rules of court should be translated into technical requirements. Currently, we have our own attorneys spend a non-trivial amount of time interpreting the rules to determine which pieces of data can be provided to the public on our website, as opposed to by mail or in person. And sometimes they reach conclusions that contradict what other courts are doing. It'd be nice if we could consult the JCC for guidance here, so we could apply that guidance consistently statewide.</li></ul> <p>Please feel free to reach out if you'd like clarification on any of these comments.</p>	

DRAFT



# Tactical Plan for Technology

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2023-2024

**\*\* FINAL DESIGN PENDING \*\***



JUDICIAL COUNCIL  
OF CALIFORNIA

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INFORMATION TECHNOLOGY  
ADVISORY COMMITTEE

## Tactical Plan Update Workstream Members

**Hon. Sheila F. Hanson, Executive Sponsor**  
Judge of the Superior Court of California,  
County of Orange

**Hon. Kyle S. Brodie**  
Judge of the Superior Court of California,  
County of San Bernardino

**Hon. Amy Guerra**  
Judge of the Superior Court of California,  
County of Fresno

**Hon. Kimberly Menninger**  
Judge of the Superior Court of California,  
County of Orange

**Hon. Amy Yerkey**  
Judge of the Superior Court of California,  
County of Los Angeles

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

**Mr. Hector Gomez**  
Court Technology Manager of the Court of  
Appeal, Third Appellate District

**Mr. Brett Howard**  
Chief Information Officer of the Superior  
Court of California, County of Orange

**Ms. Heather Pettit**  
Chief Information Officer of the Judicial  
Council of California

**Mr. Jake Pison**  
Chief Information Officer of the Superior  
Court of California, County of San Diego

**Ms. Anabel Romero**  
Court Executive Officer of the Superior  
Court of California, County of San  
Bernardino

**Ms. Nocona Soboleski**  
Court Executive Officer of the Superior  
Court of California, County of Kings

**Ms. Kristine Swensson**  
Chief Financial Officer of the Superior  
Court of California, County of San  
Bernardino

**Ms. Jeannette Vannoy**  
Chief Information Officer of the Superior  
Court of California, County of Napa

### WORKSTREAM STAFF

**Ms. Deborah Silcox**  
Principal Manager, Judicial Council  
Information Technology

**Mr. Mark Dusman**  
Principal Manager, Judicial Council  
Information Technology

**Ms. Jamel Jones**  
Manager, Judicial Council Information  
Technology

**Ms. Camilla Kieliger**  
Senior Business Systems Analyst, Judicial  
Council Information Technology

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## Introduction

The 2021–2022 *Tactical Plan for Technology* was issued as the world wrestled with the COVID-19 pandemic. We recognized that the pandemic had led Californians to expect more from technology, and we committed ourselves to meeting those expectations.

Since then, the judicial branch has continued to work together to expand access to our courts and improve the services we offer. Despite unprecedented challenges, we have benefitted from years of thoughtful planning as well as the innovative use of technology to better conduct branch business.

The *Tactical Plan for Technology 2023–2024* sets forth the portfolio of technology projects currently undertaken by the judicial branch and furthers the goals driving our implementation of court technology as outlined in the *Strategic Plan for Technology 2023–2026*. As set forth in that plan, we are committed to improving every Californian’s access to justice and ensuring that access is equally available to all residents, regardless of location, socioeconomic status, language, physical ability, or technological access or experience. The initiatives set forth in the tactical plan show how we are achieving that goal with intentional planning, innovation, and collaboration.

Our greatest successes come from our branch as a community. As we use technology to improve the ability to access our courts remotely and in person, we work collaboratively to develop, adopt, and share technology solutions. This collaboration is exemplified through quarterly meetings of technology leaders sharing common challenges and solutions and, more recently, as all branch leaders—including judicial officers, court executives, and technologists—convened for a Judicial Branch Technology Summit to (1) discuss key technology issues impacting courts, (2) showcase available solutions, and (3) preview developing standards and policies. Together, we have made our courts more efficient, advanced our use of data analytics to allow data-informed decisions, and implemented a branchwide information security program.

Our successes illustrate the principle that innovation and expertise can come from anywhere. Our strategy of collaboration to innovate is working, and we will remain committed to sharing best practices and leveraging the experiences of others to support our continuing and collective digital transformation.

As we continue to meet the challenges of a postpandemic environment, we will build upon the lessons learned, and we will continue to adapt and remain agile. Our successes will rightly lead the people of California to expect more successes, and we will continue to meet those expectations. We invite you to join us on our journey as we improve every Californian’s access to justice.



# Summary of the Strategic Plan for Technology 2023–2026

## Vision

Through collaboration, innovation, and initiative at a branchwide and local level, the judicial branch adopts and uses technology to improve access to justice and provide a broader range and higher quality of services to litigants, attorneys, justice partners, and the public.

## Principles

### ACCESS

Provides accessible and easy-to-use systems for all persons seeking services from the courts.

### RELIABILITY

Maintain a well-architected, secure, and reliable technical infrastructure.

### INNOVATION

Foster a culture of innovation through planning, collaboration, and education to enhance court services and operations.

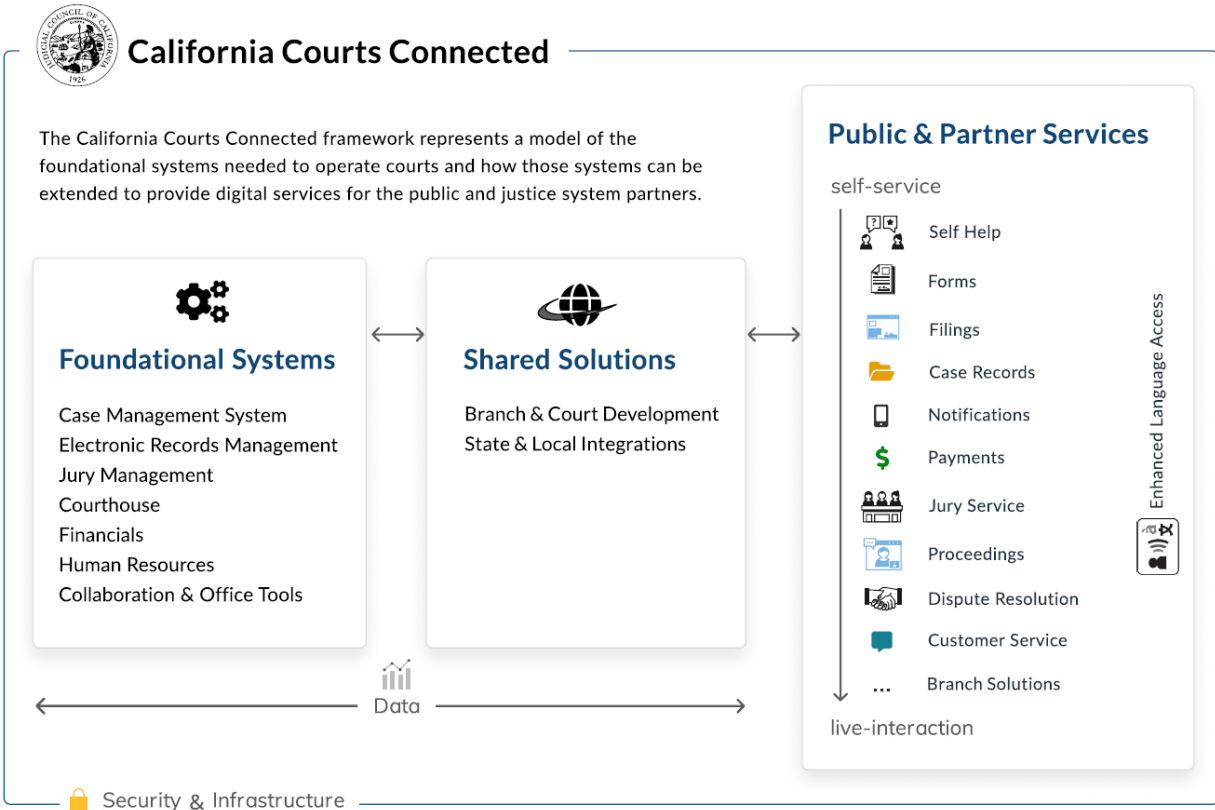
## Goals



- 1 Advance the Digital Court**  
Gain operational efficiencies and provide consistent and reliable digital services to all.
- 2 Promote Equal Access to Digital Services**  
Promote digital services that are accessible to all, regardless of location, socioeconomic status, language, physical ability, or technological access or experience.
- 3 Innovate Through Community**  
Maximize the ability to innovate through collaboration, education, and investment in the skills and talents needed to propel technological advancement.
- 4 Advance IT Security and Infrastructure**  
Invest in a high-performing technology infrastructure that secures and protects data, privacy, and confidentiality.
- 5 Advocate for Rule and Legislative Changes**  
Identify, promote, and support legislation, rules, and procedures that improve court operations and the delivery of services using technology.

# California Courts Connected Framework

The California Courts Connected framework represents the full scope of solutions needed for courts to effectively operate and provide digital services to the public and justice partners. The framework allows courts to identify focus areas and their alignment to strategic and tactical priorities.



# Tactical Plan for Technology: Summary of Initiatives Aligned to the California Courts Connected Framework

## Foundational Systems

Courts require foundational systems that enable judicial officers, court operations, and administrative units to effectively perform their work.

- [Case Management System Modernization and Improvement \(1\)](#)<sup>1</sup>
- [Expanded Use of Electronic Records \(1, 2\)](#)
- [Enterprise Resource Management \(1\)](#)

## Shared Solutions

Reusable integration frameworks allow courts to create efficiencies between state and local partners and share common digital services across courts.

- [Shared Integrations \(1, 2, 3\)](#)

## Public and Partner Services

Courts strive to meet the needs of the public and partners in the justice system using enhanced digital solutions that accommodate language access needs.

- [Enhanced Self-Help Services \(1, 2\)](#)
- [Remote Appearances \(1, 2, 5\)](#)
- [Electronic Evidence Management \(1, 2\)](#)
- [Language Access Technology \(1, 2\)](#)

## Security & Infrastructure

A modern, secure, and highly available technical infrastructure is needed for courts to provide access to internally and externally facing applications.

- [Network Infrastructure \(4\)](#)
- [Modern Hosting Solutions \(4\)](#)
- [Disaster Recovery and Business Continuity \(4\)](#)
- [Identity Management \(4\)](#)
- [Branchwide Information Security \(4\)](#)

## Data & Governance

Continual evaluation of rules and laws, along with the use of data analytics, helps identify opportunities to improve service delivery and remove barriers to access.

- [Modernize Rules and Legislation \(5\)](#)
- [Data Analytics: Governance and Sharing \(1, 3\)](#)

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<sup>1</sup> (#) indicates Strategic Plan Goal alignment.

## Foundational Systems

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### Case Management System Modernization and Improvement

#### Description

Case management systems are foundational to preserving the integrity of court records, achieving operational efficiencies, and enabling expanded access and services to the public. Many trial courts have replaced their legacy systems and are working to complete their transition to these new more efficient systems. It is imperative that all remaining legacy systems be replaced, and that courts commit to continuously improving their case management systems by leveraging new functionality and staying current on available releases.

Collaboration within the branch is key. Courts are encouraged to leverage the collective knowledge and experience of the judicial branch community in order to accelerate case management system improvement and modernization.

#### Benefits

- Allows courts to optimize resources by automating manual tasks.
- Establishes the foundation needed to expand digital access and services.
- Allows courts to easily access records with greater flexibility and efficiency.
- Improves ability to respond to legislative proposals and requirements.
- Allows courts to collaborate on development and enhancements.
- Provides opportunities to capture accurate and comprehensive data for better reporting and analysis.
- Supports data exchanges with state and local justice partners.

#### Goals and Objectives

- Continue implementation and improvement of CMS systems.
- Develop streamlined methodologies for CMS testing and upgrades.
- Share best practices and lessons learned through user groups and other collaborative means.
- Increase collaboration and develop strategies for implementing legislative changes.

#### Metrics

- Number of court systems that are:
  - In need of replacement;
  - On a supported release of a modern case management system; and
  - Using automated testing to support their maintenance release upgrades.
- Number of forums or user group meetings conducted for courts to collaborate on CMS activities.

## **Considerations**

- Readiness of case management system releases.
- Availability of vendor resources to support implementations and upgrades.
- Availability of court resources to adopt best practices.
- Readiness of justice partners to support data integrations.

## **Potential Funding Requirements**

### ***One-time costs***

- Deployment of new case management systems.

### ***Ongoing costs***

- Licensing, hardware, and professional services related to upgrades and automated testing.
- Application development to enhance case management systems.
- Judicial Council staff and other resources needed to support CMS-related needs, including managing branchwide master service agreements.

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## Foundational Systems

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### Expanded Use of Electronic Records

#### Description

California courts have made significant strides in their digital transformation efforts to move from paper-dependent work processes to using electronic records. Electronic records allow courts to gain operational efficiencies, reduce physical storage requirements, and increase access to the courts. Having electronic records also allows staff and judicial officers to perform the work of the court without being tied to a physical location.

The most significant aspect of a court's transition to using electronic records is digitizing paper case files and making them accessible from within a case management system. Due to changes in technology, many courts must also digitize records that are now in an outdated format (e.g., microfiche or microfilm). In addition to case records, many courts are looking to use electronic records to modernize their administrative business processes, such as accounting, procurement, and human resources.

The transition to electronic records introduces new considerations for how records are accessed and preserved.

#### Benefits

- Eliminates the risk of damage or loss of physical court records.
- Allows multiple resources to access court records simultaneously.
- Allows the work of the court to be conducted independent of a physical location.
- Improves a court's ability to maintain services and/or recover in the event of an emergency.
- Provides opportunities to develop uniform procedures and automated workflows.
- Provides opportunities to adopt modern strategies and methods for managing records.
- Increases options to expand self-service access to court records.
- Improves access control to ensure that records can only be accessed by those authorized.
- Reduces resources required to store and retrieve physical documents.
- Allows courts to repurpose space previously used for records storage.
- Reduces reliance on outdated microfilm/fiche viewing equipment.

#### Goals and Objectives

- Support courts' ongoing efforts to digitize documents.
- Leverage master service agreements for software and professional services in support of digitization efforts.
- Establish clear standards and guidelines to effectively manage and destroy electronic records, in accordance with legislative requirements.

- Provide forums and opportunities for courts to share best practices and create standards to capture, store, and preserve court records.
- Expand outreach efforts to include operational, technical, and records management staff in available forums to develop comprehensive electronic records management strategies.

## **Metrics**

### *Number of courts*

- Exclusively using electronic case files in all litigation types (e.g., Civil, Criminal, Family, etc.).
- Using electronic case files by litigation type (if not all).
- Using electronic records to support financial recordkeeping and workflows.
- Using electronic records to support human resources recordkeeping and workflows.

## **Considerations**

- Funding and resource allocation for digitization programs and services.
- Reengineering case management and administrative business processes of the court.
- Changing technological norms related to expectations for the use of electronic records.
- Ongoing capacity planning for the technology systems needed to preserve court records.

## **Potential Funding Requirements**

### *One-time costs*

- Hardware, software, and professional services for digitizing records.
- Hardware, software, and professional services for implementing expanded automated solutions.

### *Ongoing costs*

- Annual maintenance and periodic software and hardware upgrades.
- Resources for ongoing management of electronic records.

## Foundational Systems

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# Enterprise Resource Management

## Description

The courts are committed to using modern enterprise resource management software to support the day-to-day administrative business functions of the judicial branch. Enterprise resource management systems are designed to manage and interconnect all aspects of administration, including finance and accounting, contracts and procurement, human resources, education management, project management, and real estate and facilities. The enterprise resource management system hosted by the Judicial Council provides support to administrative functions at both the branchwide level as well as individual trial courts.

Some examples of the system components include:

- *Phoenix*: Statewide financial system for all trial courts and payroll for a growing number of courts.
- *Human Resources and Education Management System*: Human resource management and education tracking system for the Judicial Council, the Supreme Court and appellate courts, the Habeas Corpus Resource Center, and the Commission on Judicial Performance.
- *Computer-Aided Facilities Management (CAFM)*: All aspects of real estate and facility management for court facilities throughout the state.

## Benefits

- Promotes consistent and streamlined business practices to maximize resources.
- Provides enhanced functionality using new technology.
- Improves consistency of data for statewide reporting and analysis.
- Effectively communicates short- and long-term needs related to essential business functions.
- Provides solutions to address changing business needs, while improving management of vital services.
- Enhances visibility into administrative tasks for improved accountability and service delivery.
- Reduces the need for additional training when employees move to a new court.

## Goals and Objectives

- Continue to provide robust administrative solutions managed by the Judicial Council in support of the courts.
- Identify new functionality that can be incorporated into the enterprise management system (e.g., budget module, electronic forms, and workflow tools).



- Determine ongoing resources required to support changing technology needs and evolving business processes.
- Continue to realize economies of scale by incorporating and sharing local court functionality, as appropriate.
- Migrate systems to next-generation hosting solutions.
- Ongoing improvement of data access.

### **Metrics**

- Number of solutions available for use by the courts.
- Number of solutions added within the Tactical Plan time frame.
- Number of courts using each of the available solutions.
- Number of courts interested in deploying available solutions.
- Number of potential new solutions identified where the enterprise resource management system may be beneficial.

### **Considerations**

- Business processes will need to be examined and may need to change to fully leverage an enterprise resource management system.
- The move toward more standardized business processes requires strong change management and cultural readiness.
- Ability to hire and retain necessary resources.
- General readiness to support systems and leverage data and shared resources, including creating gateways to provide improved access to data.
- Judicial Council support and available funding.

### **Potential Funding Requirements**

#### *One-time costs*

- Project implementation activities.
- Purchase or development of required systems, applications, software, and hardware.

#### *Ongoing costs*

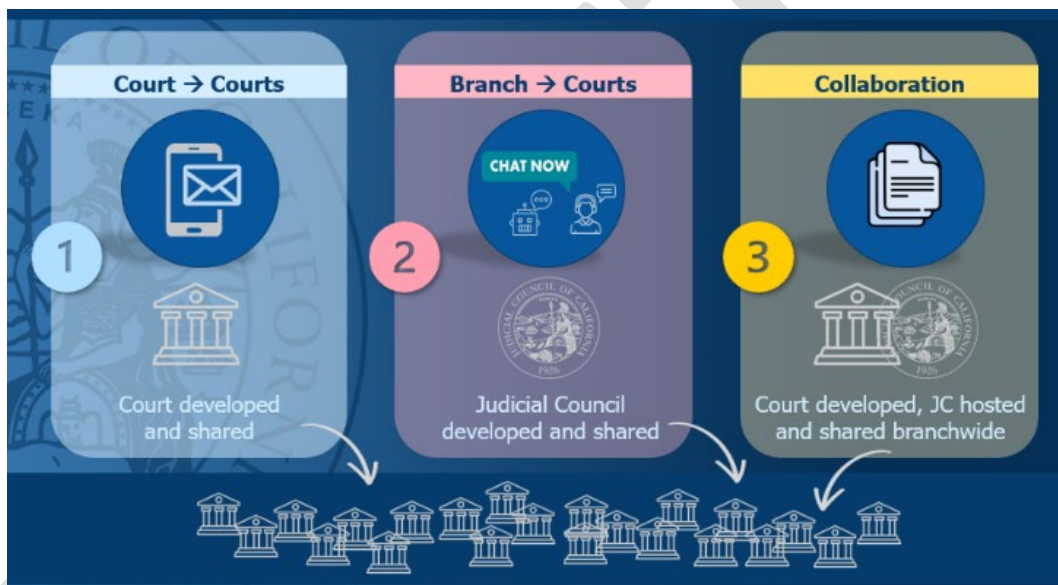
- Ongoing support services to design, develop, deploy, host, and maintain functionality.
- Maintenance for software products, equipment, and associated interfaces.
- Training and development.

## Shared Solutions

### Shared Integrations

#### Description

Courts continue to strive to provide consistent digital services to the public and recognize the value in pursuing common products and solutions to do so. Courts can further these efforts by using integration frameworks to help streamline the adoption of common products and solutions. For example, a court or vendor could create a single tool that could be utilized by multiple courts or court systems if it was built to leverage the integration framework. Through this commitment to collaborate and use common integration frameworks, courts are better positioned to share solutions developed by other courts, vendors, or through collaborative efforts.



There are a number of integration strategies in development throughout the judicial branch, and courts have been able to adopt common solutions (e.g., MyCitations, hearing notice reminders, way-finding solutions, etc.) using these standardized frameworks. Although some progress has been made, a continued commitment to further develop and support these standard integration frameworks is needed for courts to be able to adopt more consistent digital services statewide.

#### Benefits

- Enables courts to adopt consistent digital services developed by courts or vendors.
- Supports efficient adoption of branchwide programs, including those that are legislatively mandated.
- Promotes consistent integration methods for local court integrations and solutions.
- Increases collaboration and sharing amongst the court development community by using established integration frameworks (e.g., CourtStack, Talend, Microsoft, Google, or standard APIs).

## Goals and Objectives

- Expand development integration components (e.g., CourtStack VCMS).
- Determine a support model for ongoing development and maintenance.
- Continue communication of the branch priorities and vision for leveraging common solutions.
- Promote information sharing among developers throughout the branch.

## Metrics

- Number of courts using shared developed applications.
- Number of shared applications implemented.

## Considerations

- Level of commitment by courts to build, integrate, and deploy new products.
- Long-term branch commitment to support and maintenance of the digital ecosystem.
- Courts without developers need support.

## Potential Funding Requirements

### *One-time costs*

- Development of the technical foundation and expanded interfaces.
- Deployment of shared products.

### *Ongoing costs*

- Hosted platforms and subscriptions.
- Maintenance, support, and training.

## Public and Partner Services

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### Enhanced Self-Help Services

#### Description

The California courts are committed to enhancing the digital services and information provided for self-represented litigants who are seeking to resolve their legal issues without an attorney. The primary areas of focus for service enhancements are simplifying instructions and information, assisting with document preparation, and streamlining electronic filing to the courts.

The courts continue to seek opportunities to meet the broadest needs in the most consistent manner, while also seamlessly connecting those in need of assistance to local court solutions and resources.

#### Benefits

- Expands access to digital services for self-represented litigants.
- Prepares litigants for visiting court self-help centers and participating in court hearings.
- Reduces errors on legal forms and documents filed with the court.
- Achieves economies of scale through statewide materials and resources.
- Streamlines service delivery through easy-to-use digital services that include online chat support.
- Provides access to mobile-friendly self-help resources.
- Improves satisfaction with the court experience overall.

#### Goals and Objectives

- Complete transition to redesigned, statewide self-help site with new content.
- Increase collaboration efforts between state and local content owners and technical teams to provide consistent and expanded digital self-help services.
- Continue to improve guidance and options for completing and submitting forms online.
- Identify opportunities to streamline interactions from branchwide self-help resources to local court information and services.
- Align digital self-help services with language access technology and other virtual court services.
- Continue to develop content and increase local capabilities to expand chat services.

#### Metrics

- User satisfaction statistics (reported through the “Was this helpful?” survey).

- Number of services improved based on long-range satisfaction surveys.
- Number of tasks completed/not completed on the site.

### **Considerations**

- Coordination with related initiatives (e-filing, intelligent chat, intelligent forms, and language access).
- Collaboration with self-help and technical resources at the branch and local court levels.

### **Potential Funding Requirements**

#### ***One-time costs***

- Initial design, testing, development, deployment, and integration of expanded services based on a phased rollout.

#### ***Ongoing costs***

- Maintenance of new e-services, and updating of forms, information, resources, and instructional materials.

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## Public and Partner Services

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### Remote Appearances

Courts throughout California currently conduct proceedings in person, remotely, or in a hybrid fashion. The user experience can be significantly improved by successfully expanding technology. California courts are committed to increasing remote access and upgrading technology to improve the court experience.

Courts will need to adopt business practices that support remote appearances (e.g., electronic signatures, evidence, etc.), including by collaborating interdepartmentally to produce effective solutions and then sharing statewide.

#### Benefits

- Enhances in-person and remote courtroom experiences by providing high-quality audio, video, operational, and technology solutions.
- Increases options for court appearances.
- Provides more convenient access for those with challenges related to competing life demands, physical location, or other circumstances, such as childcare, work, school, illnesses, disabilities, transportation, custodial status, out of state or county locations, juvenile cases, state hospitals, etc.
- Reduces transportation costs for inmates.
- Provides inmates the ability to maintain their housing and/or treatment.

#### Goals and Objectives

- Identify and expand remote appearance solutions.
- Share technical solutions and operational best practices locally and statewide.
- Identify necessary legislative changes or revisions to rules of court to eliminate barriers for increased remote appearances.
- Maintain and expand easy-to-use solutions for self-represented litigants (e.g., mobile devices, public computers, court kiosks).
- Streamline remote appearances and gain court efficiencies through electronic workflows and solutions (e.g., electronic signatures, electronic evidence).

#### Metrics

- Number of courtrooms with remote access capabilities, by county.
- Number of courtrooms not equipped to provide remote access, by county.
- Number of courtrooms needing upgrades, by county.
- Number of courtrooms upgraded, by county.
- Number of hearings held with remote participants per case type, by county.
- Number of counties with online instructions for the use of remote appearances.

- Number of litigants participating remotely per case type, by county (if available).

### **Considerations**

- Court user’s access and ability to use remote technologies.
- Impact of remote appearances on court staff duties.
- Willingness of the court and parties to participate in remote appearances.
- Collaboration and cooperation with stakeholders (e.g., facilities, interpreters, court reporters, bar associations, justice partners, advisory bodies).
- Changes to legislation.
- Court’s ability to uphold courtroom decorum.

### **Potential Funding Requirements**

#### *One-time costs*

- Courtroom audio and video systems.
- Bandwidth/network upgrades.
- Facility upgrades.
- Assistance for those without access to technology.

#### *Ongoing costs*

- Annual maintenance and licensing for hardware and software.
- Staffing needs.

## Public and Partner Services

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### Electronic Evidence Management

#### Description

Most courts throughout the state require that electronic evidence be submitted using physical storage media (e.g., flash drive). However, in today’s electronic world, the demand for electronic alternatives is increasing; therefore, the physical storage requirement is quickly becoming impractical and inconvenient for both the litigants and the court.

With the adoption of remote and hybrid court appearances, courts must continue to evaluate related laws, rules, and business processes to increase access for litigants, without creating an undue burden for the court. A key area for evaluation is for the submission, management, presentation, and storage of electronic evidence.

Although some courts have created local solutions to meet some of the immediate electronic evidence demands, very few courts have had the opportunity to participate in pilot programs to explore more comprehensive approaches to managing electronic evidence. Expanded pilot programs and collaboration opportunities are needed to make further progress in this area.

#### Benefits

- Provides the ability to securely receive and view electronic evidence.
- Allows for use of electronic evidence in remote and hybrid court appearances.
- Establishes effective practices for accepting, presenting, and storing electronic evidence.
- Reduces the need for and cost of physical evidence storage.
- Simplifies access across courts by providing consistent solutions for all court users.

#### Goals and Objectives

- Launch electronic evidence pilot projects statewide.
- Pursue opportunities to streamline procurement activities (e.g., master service agreements).
- Propose changes to related rules and statutes impacting the use of electronic evidence.
- Establish a forum or user group for courts to share technology solutions, recommended standards, best practices, and retention strategies.

#### Metrics

- Number of pilots/projects completed.
- Number of solutions identified (could include master service agreements as applicable).
- Number of courts accepting electronic evidence (per litigation type).
- Number of exhibits admitted electronically (per litigation type).
- Number of exhibits received by the court from self-represented litigants.



## Considerations

- Solutions should consider all external stakeholders (e.g., law enforcement and justice partners) and all levels of courts.
- Roles and responsibilities for ownership and storage of electronic evidence should be clearly delineated.
- Clear rules are needed to identify the point in time when the clerk of the court is responsible for maintaining electronic evidence (i.e., upload, mark, admit).
- Necessary equipment and/or support to display evidence should reside with the proper entity/party, and rules can vary by court.
- Evidence management systems must have proper security measures in place.

## Potential Funding Requirements

### *One-time costs*

- Appropriate interoperability between case management and electronic evidence systems for basic case information.
- Acquisition of technology solutions to support pilot projects.

### *Ongoing costs*

- Expanded cloud capacity for electronic evidence.
- Maintenance of technology solutions.
- Implementation of new policies and business practices by court staff.
- Staff support for user groups and forums to promote collaboration.

## Public and Partner Services

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### Language Access Technology

#### Description

In 2015, the Judicial Council adopted the *Strategic Plan for Language Access in the California Courts*,<sup>2</sup> which focused on equal access to justice for people of all languages. In California more than 200 languages are spoken, and the state has 6.4 million limited-English-proficient (LEP) residents and potential court users. Implementation of this plan recommends the appropriate use of technology throughout the branch to enhance language access. California Courts Connected is an initiative that leverages technology to develop core digital systems to meet the court service needs for all court users. Efforts to enhance language access for all LEP court users through technology include video remote interpreting (VRI), California Court Translator application (voice-to-text) language services, multilingual websites, and self-help services and other technological solutions to aid supporting language access, are critical components of this vision.

Courts will continue to leverage technology to expand access to services to all court users in their own languages.

#### Benefits

- Provides increased, accurate, and timely access to court services.
- Enhances the court's ability to communicate with LEP users.
- Promotes fairness to LEP users.
- May reduce the costs and constraints associated with human translation.
- Increases public trust and confidence in California courts.

#### Goals and Objectives

- Expand the availability of language services for courtroom proceedings and services outside the courtroom.
- Increase normalization of technical translation alternatives to in-person translation services while ensuring factual and legal accuracy.
- Continue to modernize courtrooms in support of language services.
- Continue to enhance all online services to support language access.
- Improve the quality of language services through user testing and evaluation of service effectiveness.

#### Metrics

- Number of proceedings involving VRI.
- Number of courts using voice-to-text technology.

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<sup>2</sup> Judicial Council of Cal., *Strategic Plan for Language Access in the California Courts* (2015), [www.courts.ca.gov/documents/CLASP\\_report\\_060514.pdf](http://www.courts.ca.gov/documents/CLASP_report_060514.pdf).

- Efficiencies from the court user perspective tied to VRI or voice-to-text technology.
- Number of interactions with multilingual online services, by language (if available).

## **Considerations**

- Remote proceedings with many iterations, such as remote participation by multiple participants and/or interpreters, through VRI, telephonic appearances, or hybrid (some in person, some remote), requiring solutions that consider multiple variables.
- Relay interpreting and nonspoken communication systems such as sign language, which require unique or additional solutions and can be integrated into projects at early stages.
- Ability to accurately and consistently collect statewide remote access data and satisfaction surveys that integrate language access.
- Availability of funding to support ongoing use of technological improvements.
- Collaboration between the groups working on remote video and language access programs to share best practices and lessons learned.
- Adequate internet bandwidth and fidelity to provide quality language service solutions.

## **Potential Funding Requirements**

### *One-time costs*

- Hardware, software, telecommunications infrastructure, and implementation services, if not currently available.

### *Ongoing costs*

- Annual maintenance, lease, licensing, or expenses for hardware and software, including upgrades and enhancements to improve audio, video, and other technology solutions providing language access.
- Translation of court forms, documents, signage, and online services required to support language access.
- Training, education, and promotion of language services to the public.
- Training and education of court staff and judicial officers.

## Security and Infrastructure

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### Network Infrastructure

#### Description

The judicial branch recognizes that courts need modern software to operate efficiently and provide access and services to the public. There is an underlying foundation of interconnected devices, referred to as the “network infrastructure,” that enables this access. The network infrastructure is made up of all of the hardware, software, and connectivity and management systems needed for court staff and various stakeholders to securely access court applications and services.

As interconnected systems have evolved, the focus has shifted from local area network (LAN) and wide area network (WAN) solutions that have traditionally provided connectivity within buildings to also include internet-based (cloud) systems. The branch recognizes that this complex, interdependent network infrastructure must be high performing, well-managed, and protected in this new reality.

#### Benefits

- Provides a secure, robust, and scalable network foundation to operate efficiently and provide access to digital services.
- Increases wireless access for all users.
- Provides equipment standards and network redundancy to increase resiliency in the event of an outage.
- Provides a stronger defense against cybersecurity threats.
- Enables use of cloud-based services.

#### Goals and Objectives

- Evaluate and design new technology solutions that increase network performance through upgraded connectivity and equipment.
- Achieve cost savings through the procurement of standard equipment and installation services for all courts.
- Provide wireless coverage throughout court facilities.
- Maintain fast, reliable, and redundant internet access throughout the branch.
- Provide enhanced solutions and implement best practices to secure the network infrastructure.
- Provide technical network infrastructure management training.

#### Metrics

- Number of courts that have:
  - Deployed replacement equipment through the branch technology refresh program;
  - and

- Redundant internet connectivity.
- Number of Judicial Council–offered network training classes and the number of courts participating.

### **Considerations**

- Aligning funding requirements with equipment life cycle replacement needs.
- Rural court locations may have limited connectivity options.
- Network infrastructure requires collaboration between facilities services and information technology.

### **Potential Funding Requirements**

#### *One-time costs*

- Replacement of hardware and installation services.

#### *Ongoing costs*

- Hardware and software maintenance.
- Training.
- Managed security services.

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## Security and Infrastructure

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### Modern Hosting Solutions

#### Description

The past decade has seen a substantial shift from organizations having their core computer systems hosted in local data centers on their physical premises (on-prem) to adopting modern hosting solutions that use the internet and subscription-based services (cloud) to manage these systems. As hosting models have evolved, a variety of cost-effective options have emerged to support the courts' transition from traditional data centers to modern hosting solutions. The branch will continue to pursue proven strategies such as consolidation, virtualization, and secure private and public cloud networks that support modern data center management and streamline application delivery.

#### Benefits

- Ensures that resources are used effectively.
- Addresses courts' current and future needs.
- Provides branchwide strategic alignment.
- Provides a strategy for business continuity and disaster recovery.
- Reduces ongoing dependency, maintenance, and support of local infrastructure hardware and facility requirements (e.g., electrical, cooling, and space).
- Reduces dependence on outdated technologies.
- Provides a versatile environment that enables new services to be more rapidly deployed to better meet the needs of the public and consumers of judicial branch services.
- Offers the ability to rapidly obtain needed infrastructure capacity in emergency and nonemergency situations.

#### Goals and Objectives

- Determine opportunities for deploying or building new applications using secure cloud-optimized and cloud-native design principles.
- Utilize the [structured hosting matrix](#) to identify potential use cases for cloud computing.
- Align modern hosting strategies with [California Courts Connected framework](#) for consistency.
- Ensure that the modern hosting strategy is consistent and complies with the branch IT security road map.

#### Metrics

- Number of statewide applications transitioned to hosted platforms.
- Number of courts that have transitioned services to a modern hosting solution.

## Considerations

- Availability of Judicial Council and court staff resources to plan, develop, and transition to modern hosting solutions for judicial branch entities.
- Availability of expertise to assist judicial branch entities in their transition to next-generation hosting.

## Potential Funding Requirements

### *Ongoing costs*

- Hosting services that are shared across the branch.
- Direct billing to the courts for court-specific services.

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## Security and Infrastructure

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### Disaster Recovery and Business Continuity

#### Description

From wildfires, earthquakes, pandemics, and ransomware attacks, there is no shortage of disasters that can disrupt an organization. The courts are no exception; therefore, it is vital that the branch continue to promote an effective disaster recovery strategy for court technology systems to be restored in a timely manner in the event of a disaster. Having a disaster recovery strategy addresses the court's ability to recover the technology systems needed for courts to operate and provide access and services to the public. A court's disaster recovery strategy should be aligned with the broader organizational Continuity of Operations Plan (COOP) to ensure that in addition to technology, courts have comprehensive plans to resume services to the public when needed.

The degree of disaster recovery preparedness varies amongst courts. The branch will continue to pursue modern technologies to effectively deploy and maintain scalable disaster recovery solutions.

#### Benefits

- Reduces disruption of essential court functions and services to the public.
- Ensures essential court records and systems are secure and can be recovered in a timely manner.
- Extends recovery capabilities and shortens recovery time by using modern, scalable solutions.
- Promotes adoption of common solutions through collaboration and information sharing.

#### Goals and Objectives

- Simplify the approach to implementing disaster recovery solutions.
- Validate critical court services and applications, their hosting location, and acceptable data loss and recovery time.
- Implement solutions that meet desired requirements.
- Strengthen incident response plans that identify the technical recovery steps and communications required in the event of a disaster.
- Conduct education sessions for courts interested in design, implementation, and ongoing testing strategies.

#### Metrics

- Number of courts that have a disaster recovery plan for critical services and applications.
- Number of courts that have an incident response plan.
- Number of education sessions conducted.



## Considerations

- Reference work products and solutions from the [Disaster Recovery to Cloud Roadmap report](#).
- Lessons learned from Judicial Council and courts' implementation of disaster recovery solutions.
- Communication and buy-in from stakeholders.

## Potential Funding Requirements

### *One-time costs*

- Design and implementation of disaster recovery solutions.

### *Ongoing costs*

- Maintaining disaster recovery solutions.
- Annual testing of disaster recovery and business continuity for defined systems and applications.

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## Security and Infrastructure

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### Identity Management

#### Description

Branchwide identity management provides a secure central location to manage and protect digital identities. The solution allows the public and internal court users to use a single username and password to access digital services throughout the courts.

#### Benefits

- Improves the experience by using a single account, instead of multiple usernames and passwords to access court services.
- Enables self-service account management.
- Protects access to court resources and personal information.
- Reduces development efforts by using a standardized identity solution.
- Streamlines justice partner access to court services.

#### Goals and Objectives

- Develop identity management governance for the judicial branch.
- Provide implementation guidelines for courts and vendors.
- Ensure that service providers adhere to judicial branch requirements.
- Enable identity management for branch-developed digital services.
- Establish an ongoing maintenance and operational team.

#### Metrics

- Number of digital services using the identity solution.
- Number of registered accounts.
- Number of times used to sign in.

#### Considerations

- Microsoft Azure Identity Services are required for adoption.

#### Potential Funding Requirements

##### *One-time costs*

- Staff to implement and integrate identity management solution.
- Professional services to implement and integrate identity management solution.

##### *Ongoing costs*

- Monthly active user subscriptions.
- Platform hosting and operational costs.
- Staff for ongoing maintenance and support.

## Security and Infrastructure

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### Branchwide Information Security

#### Description

With increased use of technology and remote access solutions comes increased security risks to courts throughout California. One of the judicial branch’s strategic objectives is to establish a sustainable information security program to support the reliable delivery of services to judicial branch entities and their customers. The judicial branch continues to invest in a secure, scalable, and robust technology infrastructure as a foundation to providing digital services. This program will accomplish its mission through the use of information security governance, policies, standards, guidelines, and services that protect the judicial branch’s information assets and the security interests of the users of branch services.

The Information Technology Advisory Committee’s security workstream, now in progress, will develop further recommendations to achieve these goals and ensure alignment with ongoing development of judicial branch security standards.

#### Benefits

- Enhances security and data reliability.
- Improves collaboration, data sharing, and decisionmaking.
- Provides more effective risk management.
- Provides clear security guidelines for all judicial branch entities.
- Creates baseline policies as a foundation to measure effectiveness.
- Ensures consistent application of security controls across the branch.
- Provides a central point of contact for judicial branch entities to address IT security needs.

#### Goals and Objectives

- Update implementation road map for addressing evolving security strategies and tools.
- Create an overarching strategy for educating courts on information security best practices, risk management, and incident response.
- Continue to provide ongoing branchwide information security assessments, to assess court security environments and prioritize activities within the security road map.
- Propose additional proactive risk management tools and tactics, including end point management and incident response.
- Seek alignment with industry information security best practices and recommended strategies, including the Cal-CSIC, Cal-Secure Plan.

#### Metrics

- Number of courts participating in the security awareness program.
- Number of courts participating in the branch endpoint management program.

- Number of hours of security-related education taken by branch employees.
- Number of annual security assessments.

### **Considerations**

- Ability of courts to keep up with constantly evolving security protocols.
- Aligned policies, procedures, and standards that can be leveraged by individual courts.
- Availability of and funding for security awareness training for employees, executives, and judicial leaders.
- An understanding that information security is an ongoing program requiring maintenance and support and not a one-time, discrete project.
- Difficulty for some courts to fund additional and ongoing expenses for information security (including business continuity and disaster recovery programs) out of their existing budgets.

### **Potential Funding Requirements**

#### *Ongoing costs*

- Maintenance of an effective information security program.

## Data and Governance

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### Modernize Rules and Legislation

#### Description

The courts must ensure that laws support the adoption of new and existing technologies to modernize delivery of services. Proposals for changes may originate with judicial branch advisory committees or workgroups, courts, judges, attorneys, government entities, or the public.

#### Benefits

- Improves and increases public access to the courts.
- Offers greater convenience in conducting court business and obtaining services.
- Ensures continued security of branch information and assets.
- Provides potential savings in time, resources, and expenses.
- Aligns with branch efforts to expand self-help and language services.
- Improves communication and information sharing between courts and justice partners.
- Improves overall courtroom experience.

#### Goals and Objectives

- Create and update rules, standards, and guidelines in areas in which new technologies affect court operations and access to the courts.
- Modernize statutes, rules, and procedures to permit and enhance the use of technology.
- Translate laws and requirements to procedures modernized by technology.
- Address legislative proposals with data analytics.

#### Considerations

- Proposals for rules, legislation, and branchwide policies follow established schedules.
- Legislative proposals are subject to approval by the Legislature and the Governor.
- Seek and address public comment on proposals.
- Judicial Council staff support is required throughout applicable review and approval processes.
- Effective communication and implementation of changes and initiatives.

#### Potential Funding Requirements

##### *One-time costs*

- None.

##### *Ongoing costs*

- Staff support and committee member time for the development, review, and approval process of specific proposals.
- Implementation of policy, rule, and legislative changes by individual courts.

## Data and Governance

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### Data Analytics: Governance and Sharing

#### Description

Data analytics can help inform, enhance, and transform the way the judicial branch operates to increase access to justice, provide fair and timely case resolution, and improve court operations. Technical advancements in data analysis tools have made data analytics easier and more accessible than ever before, creating an opportunity for the judicial branch to make data-informed decisions that enhance business practices and operations. The key to data analytics is determining what is relevant to represent the work of the judicial branch, as well as enhancing and expanding programs and services that serve the people of California.

The Data Analytics Advisory Committee is working on areas of policy and governance, as well as performance measures, studies, and methodologies to measure and report on court administration, practices, and procedures, including workload assessments.

#### Benefits

- Helps courts respond to requests for statewide data with one voice.
- Increases agility in responding to requests for data.
- Provides a mechanism to perform “what-if” analysis on potential changes in legislation, alternative business practices, and model policies.
- Identifies caseload trends that may impact court operations resource allocation.
- Facilitates court scheduling to promote the efficient use of court resources in alignment with the needs of the public.
- Helps courts more accurately analyze juror summons response and usage rates, potentially saving state residents substantial time and transportation costs.
- Helps courts analyze hiring trends, attrition, and associated management and budgetary impacts.

#### Goals and Objectives

- Monitor progress of data analytics pilot and expand associated training and implementation resources to additional courts.
- Explore options for leveraging technology solutions to execute the branch’s data analytics projects and programs.
- Explore options for leveraging shared solutions developed by the branch and vendors to supply standardized data.
- Generate data to support short- and long-term planning.

#### Metrics

- Number of courts deploying data analytics pilot solution.

## Considerations

- Accuracy and reliability of the data.
- Leveraging common business processes and solutions will contribute to more effective data analytics efforts.
- Courts will need to continue to invest in the resources needed to engage in meaningful data analytics efforts.
- Outcomes from the Data Analytics Advisory Committee.

## Potential Funding Requirements

### *One-time costs*

- Software, hardware, and services for data analytics tools.
- Staff training to implement appropriate data collection and analytics practices.

### *Ongoing costs*

- Software and hardware maintenance.
- Software programming and integration services for effective implementation of data analytics tools.
- Staffing to support data collection and analytics.

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June 13, 2023

Hon. Kyle S. Brodie, Chair  
Technology Committee

Dear Judge Brodie,

The purpose of this letter is to provide an update on the work of the Information Technology Advisory Committee's IT Modernization workstream; and submit to the Technology Committee for consideration, the advisory body's recommended list of court project proposals for approval within the program.

In February, the Technology Committee directed ITAC to oversee this workstream activity for the first time, per our 2023 Annual Agenda. The workstream was then formed in March, we held an orientation and training session in April, and the workstream evaluated proposals in May.

## **Program Requirements and Evaluation**

The attached recommendations reflect the list of projects ITAC believes met the project requirements for the program, including that each proposal must:

- 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
- Be able to initiate project activities immediately after approval (July 2023)
- Show demonstrable progress by the following quarter (October 2023)
- Expend or encumber funds by end of the fiscal year (June 30, 2024)
- Be completed by end of the third fiscal year (June 30, 2026)
- Report quarterly on measurable, successful outcomes

Additionally, as in years past, the workstream checked for alignment with the principles of the program, including that projects should involve modernization or innovation, and assume one-time (and not ongoing) funding. As a result, the workstream did not recommend projects to fund full-time staff positions, hardware replacements that should be considered part of regular maintenance, or fees for reoccurring subscriptions or

HON. PATRICIA GUERRERO  
*Chief Justice of California  
Chair of the Judicial Council*

MS. MILLICENT TIDWELL  
*Acting Administrative Director  
Judicial Council*

## **INFORMATION TECHNOLOGY ADVISORY COMMITTEE**

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COMMITTEE STAFF  
*Ms. Heather Pettit  
Tel. 916-263-2708*



licenses. The workstream recognized that court IT budgets and the cluster allocation funding that the trial courts receive separately is more intended for those purposes.

### **Review Process**

To arrive at our decisions, the workstream took the following steps:

- Reviewed all proposals without any budget information (as financials is intentionally not a consideration in this part of the process).
- Sought more information from courts when detail was lacking.
- Flagged projects that did not meet the program and project requirements (previously cited), including any conflicts with branch standards or initiatives.
- Identified projects that could potentially be funded through alternate grant programs. (Staff then shared these referrals in order to maximize the court's ability to receive funding from one or more sources).
- Reviewed final recommendations for consistency.
- Finalized and received approval from ITAC on the list of proposed project approval recommendations (Attachment A) for consideration by the Technology Committee.

### **Membership**

The workstream consisted of 23 members including judicial officers, court executives, court technology and operations leaders from appellate and trial courts, as well as mix of small, medium, and large courts.

### **FY 2023-24 IT Modernization Fund Project Recommendations**

Please review the attached list of project recommendations to consider for approval.

Please let me know if I may provide additional information.

Kind regards,

Hon. Sheila F. Hanson  
Chair, Information Technology Advisory Committee

Attachment

cc: Hon. Louis R. Mauro, Vice-chair  
Ms. Heather L. Pettit, Chief Information Officer/Director  
Mr. John Yee, Deputy Chief Information Officer  
Ms. Jamel Jones, IT Manager

Information Technology Advisory Committee  
FY 2023-24 IT Modernization Fund Project Recommendations

Court	Project Name	Workstream Recommendation	Notes
1 DCA	Digitization of Court Records	Yes	
Alameda	Digital Evidence Management System	Yes	
Butte	Audio Visual Upgrades	Yes	Project is also being considered by an alternative funding source
Butte	Disaster Recovery	Yes	
CATUG	CATUG - Phase III Enhancements	Yes	
Colusa	Technology Modernization	Yes	
Contra Costa	Electronic Records Management	Yes	
Contra Costa	Case Management Public Web Portals	Yes	
Contra Costa	Storage Area Network (SAN) Modernization	No	
Contra Costa	Court Records Access Kiosks	Yes	
Contra Costa	Virtual Customer Service Center (Chatbot) Modernization	No	
Contra Costa	Network Assessment & Modernization	No	
Del Norte	HR Management System	No	
Del Norte	Queue System for Public Counter	Yes	Project is also being considered by an alternative funding source
Del Norte	Jury System Upgrade	Yes	Project is also being considered by an alternative funding source
Del Norte	Disaster Planning/Preparedness	No	
Del Norte	Microsoft 365 Migration	No	
El Dorado	El Dorado Electronic Records management	Yes	
Fresno	upgrade sound at JJC	Yes	
Fresno	Data storage expansion	No	
Fresno	Docket screens for MCH	Yes	Project is also being considered by an alternative funding source
Fresno	Continuation of paper case scanning	Yes	
Glenn	Digitization	Yes	
Glenn	Client Solutions Consultant	Yes	
Glenn	Court and E-File Analytics	Yes	
Glenn	Shasta Collections Report Template Creation	No	
Inyo	Self-Help Computer Replacement	No	Project is also being considered by an alternative funding source
Inyo	Bishop Courthouse Cable Replacement	Yes	
Inyo	Independence Courthouse Cable Replacement	Yes	
Kern	ERM - Digitizing Documents – CMS	Yes	
Kern	Hybrid Trial Courtroom Integrated A/V Enhancement- Remote Appearances	Yes	
Kern	Case Management Systems (CMS) - Interfaces	Yes	
Kern	Jury Management Services – Check-in Kiosks	Yes	Project is also being considered by an alternative funding source
Kings	Juror Educational Orientation Video	No	Project is also being considered by an alternative funding source
Kings	Juror Express Check In Kiosk	Yes	Project is also being considered by an alternative funding source
Los Angeles	Los Angeles Court Connect (LACC) Advanced Remote Hearing Platform	Yes	Project is also being considered by an alternative funding source
Los Angeles	CourtPortal	Yes	
Los Angeles	Business Intelligence and Analytics Dashboard Infrastructure	Yes	
Los Angeles	Digitization of Paper Documents	Yes	
Madera	CMS Enhancement - Integration with CHP & DCSS	Yes	
Madera	Traffic Department Kiosk Check In	Yes	Project is also being considered by an alternative funding source
Marin	AI Robotic Process Automation Project	Yes	

Information Technology Advisory Committee  
FY 2023-24 IT Modernization Fund Project Recommendations

Court	Project Name	Workstream Recommendation	Notes
Mariposa	Telecommunication Improvement	Yes	
Mariposa	Lower Courtroom Remote Appearance	Yes	Project is also being considered by an alternative funding source
Merced	Teleconference appliance upgrades	Yes	
Merced	Data Storage Appliance Upgrade	No	
Monterey	ACV (AT&T Cloud Voice for MS Teams) - HYBRID	Yes	
Monterey	Security and Compliance Technologies	No	
Monterey	Case File Digitization Phase IV	Yes	
Nevada	Courtroom AV Technology Refresh	Yes	
Nevada	Records Digitization	Yes	
Nevada	Zendesk Pilot Project	Yes	
Orange	Hybrid court equipment	Yes	
Orange	Jail Management System Data Exchange (Grand Central)	Yes	
Orange	Oracle Cloud	Yes	
Orange	Document AI	Yes	
Orange	Online Probate Case Record Access	Yes	
Orange	Expansion of CAP Probate Conservator Accounting Portal	Yes	
Orange	CUP expansion to include e-Check payments	Yes	
Orange	IVR - chatbot and conversational AI	Yes	
Orange	Vision NG	No	
Orange	Digital Court Platform (Microsoft/Tech Unicorn)	Yes	
Orange	Predicting Future Filings and Jury Trials (using CAVE data)	Yes	
Orange	Mobile App modernization	Yes	
Riverside	Tableau Cloud Data Fusion Project	Yes	
Sacramento	Sacramento - Project A - Courtrooms Audio and Video (Highest Priority 1)	Yes	
Sacramento	Sacramento - Project B - Courthouse Completion	Yes	
Sacramento	Sacramento - Project C - Thick Client Configuration	No	
Sacramento	Sacramento - Project D - Server Patching	No	
Sacramento	Sacramento - Project E - Cisco ISE Umbrella Security	Yes	
San Benito	Public Computers for Self Help Center	No	Project is also being considered by an alternative funding source
San Benito	Television for Self Help Center & Instruction Videos	No	Project is also being considered by an alternative funding source
San Benito	IT Migration of data to Cloud	Yes	
San Benito	IT Phone System Modernization Telephony	Yes	
San Benito	Tablets for Defendants table with signature pads	Yes	
San Benito	Public Viewing Room Computers	No	
San Benito	Microsoft 365 Add-on's	Yes	
San Benito	InFax Board for JCA	Yes	Project is also being considered by an alternative funding source
San Diego	ODY Criminal and Juvenile Peripherals Installation	No	
San Diego	Data Analytics and Business Intelligence System for HR/Finance, Criminal and Juvenile Case Types	Yes	
San Diego	Automated Forms Workflow	Yes	
San Diego	Software Development Professional Services	Yes	
San Diego	Extra Hop NDR Support and Licensing	No	

Information Technology Advisory Committee  
FY 2023-24 IT Modernization Fund Project Recommendations

Court	Project Name	Workstream Recommendation	Notes
San Diego	Zscaler Cloud Security Gateway Service	No	
San Diego	Odyssey Automated Testing Project	Yes	
San Diego	Backup Infrastructure Replacement Project	No	
San Diego	Microfilm/Microfiche Conversion	Yes	
San Diego	Court User Directional Kiosks	Yes	Project is also being considered by an alternative funding source
San Francisco	ELECTRONIC RECORDS MANAGEMENT – DOCUMENT DIGITIZATION	Yes	
San Francisco	Lock Refresh at Courthouse	No	
San Francisco	Televic Conferencing System for Courtrooms	No	
San Joaquin	Migration to Journal Technologies Case Management System	Yes	
San Luis Obispo	Digitizing Court Records - Continued	Yes	
San Luis Obispo	Courtroom A/V upgrade	Yes	
San Mateo	First Floor HOJ Modernization	Yes	
San Mateo	Book Digitization	Yes	
Santa Barbara	CSI: Document Intelligence Platform Implementation	Yes	
Santa Clara	Courtroom Modernization	Yes	
Santa Clara	Digitization of Paper Documents	Yes	
Santa Clara	Process Automation and Integration	No	
Santa Cruz	Sharepoint	Yes	
Santa Cruz	Electronic Display Addition	Yes	Project is also being considered by an alternative funding source
Santa Cruz	Data Analytics	Yes	
Santa Cruz	Digitizing of Court Documents	Yes	
Santa Cruz	Improving Remote Document Review Process and Staff Efficiency	Yes	Project is also being considered by an alternative funding source
Shasta	Project A	Yes	
Shasta	Project B	No	
Shasta	Project C	No	
Sierra	CISCO Upgrade Cloud Solution	No	
Sierra	CMS Server Replacement	No	
Siskiyou	Rubrik Data Protection	Yes	
Siskiyou	Rudundant Internet Service	No	
Siskiyou	Azure Site Recovery	No	
Siskiyou	Microsoft 365	No	
Solano	JTI eCourt Interfaces	Yes	
Solano	Digitization of Case Files	Yes	
Solano	Courtroom AV Upgrades	Yes	
Solano	Qmatic Expansion for Criminal-Traffic & Self-Help	Yes	Project is also being considered by an alternative funding source
Sonoma	Storage Area Network - Disaster Recovery	Yes	
Stanislaus	Eforms expansion	Yes	
Stanislaus	Robot Process Automation (RPA) expansion	Yes	
Stanislaus	Court and County integrations	Yes	
Sutter	Sutter Courts Rubrik DRaaS	Yes	
Sutter	Jury Phone and Text Reminders	Yes	Project is also being considered by an alternative funding source
Sutter	Courtroom AV Upgrades Phase 4 - Matrix Switchers	Yes	

Information Technology Advisory Committee  
 FY 2023-24 IT Modernization Fund Project Recommendations

Court	Project Name	Workstream Recommendation	Notes
Tehama	Courthouse Self-Service & Electronic Signatures Kiosks	Yes	Project is also being considered by an alternative funding source
Tulare	Infax Docket and Courthouse Signage Refresh	Yes	Project is also being considered by an alternative funding source
Tuolumne	DR SCOT (Disaster Recovery Superior Court Operations Trailer)	Yes	
Tuolumne	DR Cloud	Yes	
Tuolumne	RFID File Tracking	No	
Tuolumne	Bluetooth Beaconing	No	
Ventura	Courtroom Video Upgrades for Remote Proceedings	Yes	Project is also being considered by an alternative funding source
Ventura	Self-Help Center on-Demand Video	No	Project is also being considered by an alternative funding source
Yolo	Courtroom AV upgrade (for remote appearances)	Yes	Project is also being considered by an alternative funding source
Yuba	SMS Text Reminders	Yes	
Yuba	Document Imaging	Yes	
Yuba	Virtual Machine Manager	No	
Yuba	Microsoft 365 G3 to G5 w/Teams Telephony Migration	Yes	

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