

Appellate Advisory Committee
Annual Agenda¹—2025–2026
Approved by Rules Committee: [Date]

I. COMMITTEE INFORMATION

Chair:	Hon. Allison M. Danner, Associate Justice of the Court of Appeal, Sixth District
Lead Staff:	Jeremy T. Varon, Attorney, Legal Services
Advisory Body’s Charge/Membership: Rule 10.40 of the California Rules of Court states the charge of the Appellate Advisory Committee (AAC), which is to make recommendations to the Judicial Council for improving the administration of justice in appellate proceedings and to make proposals on training for justices and appellate support staff to the Center for Judicial Education and Research Advisory Committee. Rule 10.40(c) sets forth the membership positions of the committee. The AAC currently has 22 members. The current committee roster is available on the committee’s webpage.	
Subgroups of the Advisory Body²: 1. Appellate Division Subcommittee 2. Legislation Subcommittee 3. Rules Subcommittee 4. Appellate Efficiency Ad Hoc Subcommittee	

¹ The Annual Agenda outlines the work an advisory body will focus on in the coming year or cycle and identifies areas of collaboration with other advisory bodies and Judicial Council staff resources.

² For the definition of “subcommittee” see Cal. Rules of Court, rule 10.30(c); for “working group,” see rule 10.70; for “workstream,” see rule 10.53(c); and for “education curriculum committee,” see rule 10.50(c)(6).

Advisory Body and Subgroup Meetings Planned for 2025–2026³

Full committee meetings:

- October 2025 (videoconference to review winter cycle proposals)
- February/March 2026 (videoconference to make final recommendations on winter cycle proposals and to review spring cycle proposals)
- July 2026 (videoconference to make final recommendations on spring cycle proposals)
- September 2026 (videoconference to make recommendations on annual agenda)

Subcommittee meetings: one or more teleconference or videoconference meetings of the Rules and Appellate Division subcommittees before each full committee meeting. Legislation Subcommittee to meet as needed to review relevant legislation. Appellate Efficiency Ad Hoc Subcommittee to meet as needed to work on rules and forms proposals.

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

³ Refer to section IV. 2 (Meeting frequency) of the [Operating Standards for Judicial Council Advisory Bodies](#) for governance on in-person meetings.

Note: Because of the current budget and staffing constraints, advisory body chairs and staff must first consider meeting remotely. The chair of the Executive and Planning Committee is extending the suspension of advisory body in-person meetings for the 2025–2026 annual agenda cycle. If an in-person meeting is needed, the responsible Judicial Council office head must seek approval from their advisory body's internal oversight committee chair. Please see the prioritization memo dated June 23, 2025, for additional details.

II. COMMITTEE PROJECTS

Priority Levels and Branch Goals Key:

Refer to the following key for populating your project priority levels and branch goals. For each Priority Level 1 proposal, the advisory body **must** provide a specific reason why it should be done this year and how it fits within the identified category. If an advisory committee is interested in pursuing any Priority Level 2 proposals, please include justification as to why the proposal should be approved at this time.

Priority Levels for Non-Rules/Forms	
1	Must be done
2	Should be done
Priority Levels for Rules/Forms Proposals	
1a (Legal Compliance)	Proposal urgently needed to conform to or accurately reflect the law.
1b (Council Directive)	Council has directed the committee to consider new or amended rules and forms.
1c (Urgent Remedial Action)	Change is urgently needed to remedy a problem that is causing significant cost or inconvenience to the courts or the public.
1d (Financial/ Legal Risk Mitigation)	Proposal is otherwise urgent and necessary, such as a proposal that would mitigate exposure to immediate or severe financial or legal risk.
2a (Useful Changes in Law)	Useful, but not necessary, to implement changes in law.
2b (Responsive to Concerns)	Responsive to identified concerns or problems.
2c (Helpful Advancing Branch Goals)	Helpful in otherwise advancing Judicial Council goals and objectives.

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

#	New or One-Time Projects													
1.	Racial Justice Act: Revise Rules and Forms (new project)						Priority: 1a							
Supported Strategic Plan Branch Goals:														
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Project Summary: This is a joint project with the Criminal Law Advisory Committee. Develop rules recommendations as appropriate. AB 1071* (Stats. 2025, ch. x) requires amendment to rule 8.385 to allow courts to request an informal response from the state and implement new “plausible allegation” and “prima facie showing” standards. Develop rules recommendations as appropriate. The committee will also consider forms recommendations as appropriate to clarify that habeas petitioners making claims related to the Racial Justice Act must explain those claims in the petition. This change was suggested by staff of appellate courts. Status/Timeline: Invitation to comment planned for Winter Cycle, with anticipated effective date of July 1, 2026 Fiscal Impact/Staff Resources: Committee staff, Criminal Justice Services ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Appellate courts, appellate litigants; all draft proposals will circulate for public comment. AC Collaboration: Criminal Law Advisory Committee														
2.	CEQA Actions: Implementation of Streamlining Legislation (new project)						Priority: 1a							
Supported Strategic Plan Branch Goals:														
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* This legislation is pending and has not been signed by the Governor. If the legislation is not enacted the project will be modified.

#	New or One-Time Projects								
	Project Summary: This is a joint project with the Civil and Small Claims Advisory Committee. SB 676 (Stats. 2025, ch. 550) changes procedures for CEQA actions relating to projects to repair, demolish, or replace property or facilities damaged or destroyed by wildfire. The bill requires the Judicial Council to adopt rules to implement a statutory requirement for courts to resolve these actions, including appeals, within a specific timeframe. Develop rule recommendations as appropriate. Status/Timeline: Invitation to comment planned for Spring Cycle, with anticipated effective date of January 1, 2027 Fiscal Impact/Staff Resources: Committee staff, Legal Services ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial and appellate courts, trial and appellate litigants; all draft proposals will circulate for public comment. AC Collaboration: Civil and Small Claims Advisory Committee								
3.	Appellate Caseflow Workgroup Recommendations Regarding Record Preparation	Priority: 1b							
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	Project Summary: Consider changes to rules and forms relating to preparation of the record on appeal. The project proposals were recommended by the Appellate Caseflow Workgroup and referred to the committee by the Executive and Planning Committee. - Consider amending the applicable rules to streamline or reduce the number of tasks required by superior court clerks in preparing the record on appeal and revising related forms as necessary. The Appellate Caseflow Workgroup noted that the burden of compiling the clerk’s transcript can cause delays in the early stages of appeals. It thus encouraged the council to consider ways to reduce the tasks superior court clerks are required to perform in the record preparation process. - Consider revising the record designation forms and, if necessary, amending the applicable rules to make the record designation process simpler, clearer, and more efficient. There are currently 10 forms (including one information sheet) that litigants use to designate/create the record in civil and criminal cases, with the precise forms to be used depending on the circumstances of the case.								

#	New or One-Time Projects													
	Consider amending rules to allow and encourage parties to elect to proceed by appendix on appeal. The Appellate Caseflow Workgroup determined that the parties' use of appendixes can expedite the record preparation process. Status/Timeline: This proposal was previously included as project 2 on the committee's approved annual agenda for 2024–2025 with a proposed completion date of January 1, 2027. Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial and appellate courts, appellate litigants; all draft proposals will circulate for public comment. AC Collaboration: Court Executives Advisory Committee; Information Technology Advisory Committee													
4.	Submission of Excerpts of Record on Appeal with Briefs						Priority: 1b							
Supported Strategic Plan Branch Goals:														
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Project Summary: Consider amending applicable rules to encourage or require appellants to submit, along with their briefs, excerpts of the record containing those parts of the record that are relevant and useful to the court in deciding the appeal. The proposal was recommended by the Appellate Caseflow Workgroup and referred to the committee by the Executive and Planning Committee. Submission of excerpts of record alongside a party's brief may aid the judges' or justices' review of the party's arguments on appeal by providing an easily accessible and clearly citable subset of the key parts of the record. Status/Timeline: This proposal was previously included as project 3 on the committee's approved annual agenda for 2024–2025 with a proposed completion date of January 1, 2027. Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i>														

#	New or One-Time Projects													
	Internal/External Stakeholders: Appellate courts, appellate litigants; all draft proposals will circulate for public comment. AC Collaboration: n/a													
5.	Amend Rules on Settled Statements (new project)						Priority: 1c							
Supported Strategic Plan Branch Goals:														
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Project Summary: Consider amending rules on settled statements to clarify/simplify the process. This proposal originated with the Appellate Efficiency Ad Hoc Subcommittee's work on how to simplify/improve the record preparation process prompted by the suggestions of the Appellate Caseflow Workgroup (see project 4 above). Status/Timeline: Invitation to comment planned for Spring Cycle, with anticipated effective date of January 1, 2027 Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial and appellate courts, appellate litigants; all draft proposals will circulate for public comment. AC Collaboration: Court Executives Advisory Committee														
6.	Clarify Rule 8.140						Priority: 2b							
Supported Strategic Plan Branch Goals:														
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#	New or One-Time Projects													
	Project Summary: Consider what action, if any, such as education or rule amendment relating to rule 8.140, is necessary to clarify the circumstances under which a default notice must be sent. This change was suggested by the chair of a County Bar Association Appellate Law Section. Status/Timeline: This item was previously included as item 8 on the committee’s approved annual agenda for 2024–2025. After initial subcommittee analysis, the committee deferred the proposal for additional analysis. Invitation to comment planned for Spring Cycle, with anticipated effective date of January 1, 2027. Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial and appellate courts, appellate litigants; any proposal will circulate for public comment. AC Collaboration: n/a													
7.	Form for Court to Issue an Order on an Extension of Time Application in the Appellate Division (new project)						Priority: 2b							
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	Project Summary: Consider developing a new form for the appellate division to issue an order on an extension of time application. This proposal originated with a comment by a bar association. Status/Timeline: Invitation to comment planned for Spring Cycle, with anticipated effective date of January 1, 2027 Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial and appellate courts, appellate litigants; all draft proposals will circulate for public comment.													

#	New or One-Time Projects						
	<i>AC Collaboration:</i> n/a						
8.	Electronic Exhibits in the Court of Appeal (new project)						Priority: 2b PLACEHOLDER
Supported Strategic Plan Branch Goals:							
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Project Summary: Consider what action, if any, such as education, rule adoption or rule amendment, is necessary to clarify requirements for use of an electronic exhibits platform and increase the efficiency of the transmission of exhibits in the Court of Appeal. This change was suggested by the Executive Officer of one of the Courts of Appeal. Clarification of the rules with respect to electronic exhibits was also suggested during the Appellate Efficiency Ad Hoc Subcommittee's work on how to simplify/improve the record preparation process prompted by the suggestions of the Appellate Caseflow Workgroup (see project 6 above). Status/Timeline: Pending finalization of electronic exhibit platform in the Court of Appeal. This priority 2 project is included on the annual agenda with a recommendation that work be deferred until finalization of electronic exhibit platform in the Court of Appeal. Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Appellate courts, appellate litigants; all draft proposals will circulate for public comment. AC Collaboration: Information Technology Advisory Committee							
9.	Clarify Rule 8.104(a)(1)(A) (new project)						Priority: 2b
Supported Strategic Plan Branch Goals:							
I Access ☒ II Independence ☐ III Modernization ☒ IV Quality ☒ V Education ☒ VI Infrastructure ☐ VII Funding ☐							

#	New or One-Time Projects								
	Project Summary: Consider what action, if any, such as education or rule amendment relating to rule 8.104(a)(1)(A), is necessary to clarify the language “showing the date either was served” to make it more consistent with the terminology of Code of Civil Procedure sections 1010.6 and 1013b, the conclusions in <i>Wing Inflatables, Inc v. Certain Underwriters at Lloyd’s</i> (2025) 112 Cal.App.5th 1108 [order denying motion], and the “single document” rule in <i>Alan v. American Honda Motor Co., Inc.</i> (2007) 40 Cal.4th 894, 904. Status/Timeline: Invitation to comment planned for Spring Cycle, with anticipated effective date of January 1, 2027 Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Appellate courts, appellate litigants; all draft proposals will circulate for public comment. AC Collaboration: n/a								
10.	Respondent’s Designation of Reporters’ Transcripts in Code of Civil Procedure section 1294.4 Appeals (one-time project) Supported Strategic Plan Branch Goals: <table><tr><td>I Access ☒</td><td>II Independence ☐</td><td>III Modernization ☐</td><td>IV Quality ☒</td><td>V Education ☐</td><td>VI Infrastructure ☐</td><td>VII Funding ☐</td></tr></table>	I Access ☒	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐	Priority: 2b
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	Project Summary: Appeals under Code of Civil Procedure section 1294.4 from an order dismissing or denying a petition to compel arbitration must be decided within 100 days. Under rule 8.713, appellants must file a record designation with the notice of appeal and any reporter’s transcript must be filed within 10 days. However, the rule does not provide for respondent to designate any additional reporter’s transcript. This project would consider amending the rule to provide for respondent’s designation and to establish the time for doing so. The project was recommended by a committee member to close a gap in the rule that is reported to have been problematic. Status/Timeline: This priority 2 project was previously included as project 9 on the committee’s approved annual agenda for 2024–2025 with a completion date of January 1, 2027, to allow the committee to consider this project alongside other record-related projects. It is included on this annual agenda because it relates to the record designation process, and including this project with the other record designation proposals in project 6 above would promote efficiency and reduce the burden of separate review and implementation of related proposals. Invitation to comment planned for Spring Cycle, with anticipated effective date of January 1, 2027.								

#	New or One-Time Projects								
	Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Appellate courts, appellate litigants; all draft proposals will circulate for public comment. AC Collaboration: Civil and Small Claims Advisory Committee; Court Executives Advisory Committee; Information Technology Advisory Committee								
11.	Amend the File Size Limit for Electronic Filings in the Court of Appeal (one-time project)	Priority: 2b							
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	Project Summary: Currently, rule 8.74(a)(5) limits the size of an electronic filing in the Court of Appeal to 25 megabytes. This limitation was included when the Courts of Appeal accepted such filings via email. It has been suggested that with full implementation of e-filing in the Courts of Appeal, this limitation is no longer necessary. This change was suggested by the Executive Officer of one of the Courts of Appeal. Status/Timeline: Pending vendor and funding approval for increased e-filing size limit. This item was previously included as item 7 on the committee’s approved annual agenda for 2024–2025, but the subcommittee deferred the proposal because funding for an increase in the file-size limit has not been finalized. Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Appellate courts, appellate litigants; any proposal will circulate for public comment. AC Collaboration: Information Technology Advisory Committee								

#	New or One-Time Projects								
12.	Publication and Posting of Appellate Division Opinions Certified for Publication	Priority: 1 PLACEHOLDER							
	Supported Strategic Plan Branch Goals:								
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Project Summary: Currently, appellate division opinions certified for publication are posted on the California courts website after the time provided for the Court of Appeal to order transfer, and only if transfer is not ordered. The current procedures were developed in part based on provisions in the California Style Manual (CSM). The CSM is now under review. This project would consider possible changes to the rules for transfer and publication based on the subject matter expertise of the Supreme Court and the Reporter of Decisions. This is a priority 1 project because it will improve access to the development of the law in unlawful detainer, debt collection, and fee waiver cases, among others. Status/Timeline: Waiting for CSM revisions to be finalized by the Supreme Court. This item was previously approved by the Rules Committee as a placeholder. It is on hold pending action by the Supreme Court to revise the California Style Manual and consider changes to publication rules and procedures for posting opinions on the website. Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: The Supreme Court, Reporter of Decisions, JC Information Technology; all draft rules proposals will circulate for public comment. AC Collaboration: n/a									
13.	Clarify the Format Requirements that Apply to Both Paper and E-Filed Briefs (one-time project)	Priority: 2b DEFERRED							
	Supported Strategic Plan Branch Goals:								
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#	New or One-Time Projects													
	Project Summary: Consider amending rule 8.204(b) to clarify the formatting requirements that apply to both paper and e-filed briefs. This project was suggested by a member of the committee. Status/Timeline: Deferred based on prioritization of committee resources. This priority 2 project to improve access and quality of justice and service to the public was previously included as project 11 on the committee’s approved annual agenda for 2024–2025 but action on the project was deferred. This project is included on the annual agenda with a recommendation that work be deferred until next year in recognition of budgetary pressure and to reduce burdens on the courts. Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial and appellate courts, appellate litigants; any proposal will circulate for public comment. AC Collaboration: n/a													
14.	Revise Form JV-822 (new project)						Priority: 2b DEFERRED							
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#	New or One-Time Projects								
	Internal/External Stakeholders: Trial and appellate courts, appellate litigants; all draft proposals will circulate for public comment. AC Collaboration: Family and Juvenile Law Advisory Committee								
15.	Amend the Filing Fee Recipient in Rule 8.100 (new project) Supported Strategic Plan Branch Goals: <table><tr><td>I Access ☒</td><td>II Independence ☐</td><td>III Modernization ☒</td><td>IV Quality ☒</td><td>V Education ☐</td><td>VI Infrastructure ☐</td><td>VII Funding ☐</td></tr></table>	I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐	Priority: 2b DEFERRED
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	Project Summary: Consider amending rule 8.100 of the California Rules of Court to require the fee for filing a notice of appeal be paid to the Court of Appeal instead of the Superior Court. This change was suggested by the California Academy of Appellate Lawyers. Status/Timeline: Deferred based on prioritization of committee resources. This priority 2 project is included on the annual agenda with a recommendation that work be deferred until next year in recognition of budgetary pressure, to reduce burdens on the courts. Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Appellate courts, appellate litigants; all draft proposals will circulate for public comment. AC Collaboration: Court Executives Advisory Committee								

#	Ongoing Projects and Activities								
1.	Improve Rules and Forms	Priority: 1							
Supported Strategic Plan Branch Goals:									
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Project Summary: Working through the Rules Subcommittee and the Appellate Division Subcommittee, review case law changes that impact appellate courts and appellate procedure and suggestions from committee members, judicial officers, court staff, the bar, and the public concerning appellate rules and forms and appellate administration. Make recommendations to the Judicial Council for necessary changes to appellate rules, standards, and forms (rule 10.21). Status/Timeline: Ongoing Fiscal Impact/Staff Resources: Committee staff; potentially others depending on the project. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: Depends on the project; all draft proposals circulate for public comment. AC Collaboration: As appropriate, depending on the project.									
2.	Review Pending Legislation	Priority: 1							
Supported Strategic Plan Branch Goals:									
<table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>			I Access ☐	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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Project Summary: Working through the Legislative Subcommittee, review pending legislation affecting appellate procedure and court administration and make recommendations to the Legislation Committee as to whether the Judicial Council should support or oppose the legislation (rule 10.34). Status/Timeline: Ongoing Fiscal Impact/Staff Resources: Committee staff, Governmental Affairs ☐ Check this box if this project may result in an allocation or distribution of funds to the courts.									

#	Ongoing Projects and Activities								
	Internal/External Stakeholders: California Legislature AC Collaboration: TBD, depending on subject matter and scope of legislation. In the past, the committee has collaborated with the Civil and Small Claims Advisory Committee and the Criminal Law Advisory Committee								
3.	Review Enacted Legislation	Priority: 1							
	Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>		I Access ☐	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☐	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
	Project Summary: Review all enacted legislation referred to the committee by the Judicial Council's Governmental Affairs office that may have an impact on appellate procedure and court administration, and, where appropriate, propose to the Judicial Council rules and forms to implement the legislation or to bring rules and forms into conformity with it. Status/Timeline: Ongoing Fiscal Impact/Staff Resources: Committee staff, Governmental Affairs ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: n/a AC Collaboration: As appropriate, depending on the legislation								
4.	Provide Subject-Matter Expertise	Priority: 1							
	Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>		I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			

#	Ongoing Projects and Activities								
	Project Summary: Serve as subject matter resource for the Judicial Council, its internal committees, other advisory bodies, and Judicial Council staff to support legal work, and to avoid duplication of efforts and contribute to the development of recommendations for council action. Such efforts may include providing appellate procedural expertise and review to working groups, advisory committees, and subcommittees as needed. Status/Timeline: Ongoing Fiscal Impact/Staff Resources: Governmental Affairs, Legal Services, Criminal Justice Services, and Center for Families, Children & the Courts ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: N/A AC Collaboration: As appropriate, depending on the project for which advice or consultation was requested								
5.	Rules and Forms: Miscellaneous Technical Changes	Priority: 2a							
	Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>		I Access ☐	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☐	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
	Project Summary: Develop rule and form changes as necessary to correct technical errors meeting the criteria of rule 10.22(d)(2): “a nonsubstantive technical change or correction or a minor substantive change that is unlikely to create controversy” Status/Timeline: Ongoing Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: n/a AC Collaboration: n/a								

III. LIST OF 2024–2025 PROJECT ACCOMPLISHMENTS

#	Project Highlights and Achievements
1.	<i>New Projects and Fees for Expedited CEQA Review.</i> The committee, jointly with the Civil and Small Claims Advisory Committee, recommended amending eight rules of the California Rules of Court governing the expedited resolution of actions and proceedings brought under the California Environmental Quality Act to implement legislation requiring inclusion of “environmental leadership media campus project” for streamlined review and specify the fees that applicants of this project type must pay to cover the costs of the trial and appellate courts in adjudicating challenges to those projects.
2.	<i>Remote Appearances at Oral Argument in the Appellate Division.</i> The committee recommended amending rules 8.885 and 8.929 of the California Rules of Court to reflect modern videoconferencing technology and facilitate remote participation by both parties and appellate division judges.
3.	<i>Extension of Time in Misdemeanor and Infraction Appeals.</i> The committee recommended approving a new form for requesting extensions of time to file a brief in misdemeanor and infraction appeals.
4.	<i>Appellate Caseflow Workgroup Recommendations Regarding Record Preparation.</i> The committee began work to develop recommendations for amending rules and revising forms relating to preparation of the record on appeal.
5.	<i>E-Filing File Size Limit.</i> The committee began work to develop recommendations for amending the rule regarding the file size limit for e-filing in the Court of Appeal to increase the maximum allowable file size.
6.	<i>Record Procurement Default Notice.</i> The committee began work to develop recommendations for amending the rule governing default notices for record procurement to clarify the requirements.

Advisory Committee on Civil Jury Instructions
Annual Agenda¹—2025–2026
Approved by Rules Committee: [DATE]

I. COMMITTEE INFORMATION

Chair:	Hon. Adrienne M. Grover, Associate Justice of the Court of Appeal, Sixth Appellate District
Lead Staff:	Eric Long, Supervising Attorney, Legal Services
Advisory Body’s Charge/Membership: Rule 10.58 of the California Rules of Court states the charge of the Advisory Committee on Civil Jury Instructions, which is to make recommendations to the Judicial Council for updating, amending, and adding topics to the <i>Judicial Council of California Civil Jury Instructions (CACI)</i>. Rule 10.58 sets forth the membership position of the committee. The Advisory Committee on Civil Jury Instructions currently has 24 members (a majority of which must be judges). Under rule 10.58, the Committee must include at least 1 member from each of the following categories: (1) appellate court justice; (2) trial court judge; (3) lawyer whose primary area of practice is civil law; and (4) law professor whose primary area of expertise is civil law. The current committee roster is available on the committee’s web page.	
Subgroups of the Advisory Body²: The advisory committee has three subcommittees (referred to internally as working groups). Each working group is made up exclusively of committee members. Each working group reviews approximately one third of the proposed meeting agenda before the full committee meeting and makes recommendations to the committee regarding each proposal. The three working groups are (and are so numbered because the committee’s original six working groups were consolidated into three): 1. Working Group 12 2. Working Group 34 3. Working Group 56	

¹ The Annual Agenda outlines the work an advisory body will focus on in the coming year or cycle and identifies areas of collaboration with other advisory bodies and Judicial Council staff resources.

² For the definition of “subcommittee” see Cal. Rules of Court, rule 10.30(c); for “working group,” see rule 10.70; for “workstream,” see rule 10.53(c); and for “education curriculum committee,” see rule 10.50(c)(6).

Advisory Body and Subgroup Meetings Planned for 2025–2026³

Three working group meetings: during the first two weeks of December 2025, 10:00 a.m.–2:00 p.m., videoconference

Advisory committee meeting: on or about January 29, 2026, 10:00 a.m.–4:00 p.m., San Francisco with hybrid videoconference option

Three working group meetings: during the first two weeks of June 2026, 10:00 a.m.–2:00 p.m., videoconference

Advisory committee meeting: on or about July 23, 2026, 10:00 a.m.–4:00 p.m., San Francisco with hybrid videoconference option

Due to the nature of the advisory committee’s work and the detailed drafting that is required to write civil jury instructions that are legally accurate and understandable to the average juror, two in-person meetings have been authorized. To fulfill its charge to maintain *CACI*, to add instructions in new areas of the law, and to augment existing subject matter areas, the advisory committee will have two in-person meetings with a hybrid videoconference option for members who are unable to attend in person.

☒ Check here if in-person meeting is approved by the internal committee oversight chair.

³ Refer to section IV. 2 (Meeting frequency) of the [Operating Standards for Judicial Council Advisory Bodies](#) for governance on in-person meetings.

Note: Because of the current budget and staffing constraints, advisory body chairs and staff must first consider meeting remotely. The chair of the Executive and Planning Committee is extending the suspension of advisory body in-person meetings for the 2025–2026 annual agenda cycle. If an in-person meeting is needed, the responsible Judicial Council office head must seek approval from their advisory body’s internal oversight committee chair. Please see the prioritization memo dated June 23, 2025, for additional details.

II. COMMITTEE PROJECTS

Priority Levels and Branch Goals Key:

Refer to the following key for populating your project priority levels and branch goals. For each Priority Level 1 proposal, the advisory body **must** provide a specific reason why it should be done this year and how it fits within the identified category. If an advisory committee is interested in pursuing any Priority Level 2 proposals, please include justification as to why the proposal should be approved at this time.

Priority Levels for Non-Rules/Forms	
1	Must be done
2	Should be done
Priority Levels for Rules/Forms Proposals	
1a (Legal Compliance)	Proposal urgently needed to conform to or accurately reflect the law.
1b (Council Directive)	Council has directed the committee to consider new or amended rules and forms.
1c (Urgent Remedial Action)	Change is urgently needed to remedy a problem that is causing significant cost or inconvenience to the courts or the public.
1d (Financial/ Legal Risk Mitigation)	Proposal is otherwise urgent and necessary, such as a proposal that would mitigate exposure to immediate or severe financial or legal risk.
2a (Useful Changes in Law)	Useful, but not necessary, to implement changes in law.
2b (Responsive to Concerns)	Responsive to identified concerns or problems.
2c (Helpful Advancing Branch Goals)	Helpful in otherwise advancing Judicial Council goals and objectives.

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

#	New or One-Time Projects						
1.	None						Priority: n/a
Supported Strategic Plan Branch Goals:							
I Access ☐ II Independence ☐ III Modernization ☐ IV Quality ☐ V Education ☐ VI Infrastructure ☐ VII Funding ☐							
Project Summary: n/a Status/Timeline: n/a Fiscal Impact/Staff Resources: n/a ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: n/a AC Collaboration: n/a							

#	Ongoing Projects and Activities								
1.	Maintenance—Case Law	Priority 1							
Supported Strategic Plan Branch Goals:									
<table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☐</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>			I Access ☒	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☒	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
Project Summary: Review new case law affecting jury instructions to determine whether changes to any civil jury instructions are required. Draft and present proposed changes for council approval. Status/Timeline: Ongoing, with delivery of any changes requiring Judicial Council approval to the council at its July and December meetings; delivery of any changes requiring only Rules Committee approval to Rules Committee as needed. Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: None. AC Collaboration: Each Working Group reviews, considers, and makes recommendations to the AC regarding each proposal.									
2.	Maintenance—Legislation	Priority 1							
Supported Strategic Plan Branch Goals:									
<table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☐</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>			I Access ☒	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☒	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
Project Summary: Review new legislation affecting jury instructions to determine whether changes to any civil jury instructions are required. Draft and present proposed changes for council approval. Status/Timeline: Ongoing, with delivery of any changes requiring Judicial Council approval to the council at its July and December meetings; delivery of any changes requiring only Rules Committee approval to Rules Committee as needed. Fiscal Impact/Staff Resources: None. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts.									

#	Ongoing Projects and Activities								
	Internal/External Stakeholders: None. AC Collaboration: Each Working Group reviews, considers, and makes recommendations to the AC regarding each proposal								
3.	Maintenance—Comments from Users	Priority 1							
Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☐</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>			I Access ☒	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☒	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
Project Summary: Review suggestions received from jury instruction users, including the bench and bar; draft and propose changes and refinements, as appropriate, based on user suggestions. Status/Timeline: Ongoing, with delivery of any changes requiring Judicial Council approval to the council at its July and December meetings; delivery of any changes requiring only Rules Committee approval to Rules Committee as needed. Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: None. AC Collaboration: Each Working Group reviews, considers, and makes recommendations to the AC regarding each proposal.									
4.	New Instructions and Expansion into New Subject Matter Areas	Priority 1							
Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☐</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>			I Access ☒	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☒	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
Project Summary: Review new legislation, case law, and suggestions received from jury instruction users; draft and propose new civil jury instructions, including new series of instructions in an entirely new subject area, as appropriate.									

#	Ongoing Projects and Activities													
	Status/Timeline: Ongoing, with delivery of any changes requiring Judicial Council approval to the council at its July and December meetings. Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: None. AC Collaboration: Each Working Group reviews, considers, and makes recommendations to the AC regarding each proposal.													
5.	Maintenance—Sources and Authority						Priority 1							
Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☐</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>								I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐								
Project Summary: Update Sources and Authority citations and case quotations as appropriate. Status/Timeline: Ongoing, with delivery to the Judicial Council at its July and December meetings; ongoing, with delivery of any changes that the Judicial Council has given the Rules Committee final authority to approve through a delegation of authority— for example, adding cases and statutes to and removing them from the Sources and Authority and editing the Sources and Authority—as needed. Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: None. AC Collaboration: Each Working Group reviews, considers, and makes recommendations to the AC regarding each proposal.														

#	Ongoing Projects and Activities						
6.	Maintenance—Secondary Sources						Priority 1
Supported Strategic Plan Branch Goals:							
I Access ☐ II Independence ☐ III Modernization ☐ IV Quality ☒ V Education ☐ VI Infrastructure ☐ VII Funding ☐							
Project Summary: Update Secondary Source citations to ensure that the secondary sources included in <i>CACI</i> are up to date. Status/Timeline: Ongoing, with delivery to the Judicial Council at its July and December meetings; ongoing, with delivery of any changes that the Judicial Council has given the Rules Committee final authority to approve through a delegation of authority—for example, adding, removing, and editing Secondary Sources—as needed. Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: None. AC Collaboration: Each Working Group reviews, considers, and makes recommendations to the AC regarding each proposal.							
7.	Technical Corrections						Priority 1
Supported Strategic Plan Branch Goals:							
I Access ☐ II Independence ☐ III Modernization ☐ IV Quality ☒ V Education ☐ VI Infrastructure ☐ VII Funding ☐							
Project Summary: Make any necessary corrections or editing changes to the jury instructions. Status/Timeline: Ongoing, with delivery of any changes requiring Judicial Council approval to the council at its July and December meetings; ongoing, with delivery of any changes that the Judicial Council has given the Rules Committee final authority to approve through a delegation of authority—nonsubstantive grammatical and typographical corrections to the jury instructions, as well as minor substantive changes unlikely to create controversy—as needed. Fiscal Impact/Staff Resources: Committee staff							

#	Ongoing Projects and Activities
	☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Internal/External Stakeholders:</i> None. <i>AC Collaboration:</i> Each Working Group reviews, considers, and makes recommendations to the AC regarding each proposal.

III. LIST OF 2024–2025 PROJECT ACCOMPLISHMENTS

#	Project Highlights and Achievements
1.	Maintenance—Case Law, Legislation, and Comments from Users: Reviewed case law, new legislation affecting jury instructions, and comments from jury instruction users to determine whether changes to the civil jury instructions are required. Releases presented to Judicial Council for approval on July 18, 2025, and to be presented to the Judicial Council on or about December 12, 2025. Release 46 (approved by the council in November 2024) included revisions to 13 instructions and verdict forms to bring them up to date, and release 47 (approved by the council in July 2025) included revisions to 15 instructions to bring them up to date.
2.	New Instructions and Expansion into New Subject Matter Areas: Reviewed new legislation, case law, and suggestions received from jury instruction users and proposed new civil jury instructions as appropriate. Releases presented to Judicial Council for approval in July 2025 and to be presented to the Judicial Council on or about December 12, 2025. Release 46 (approved by the council in November 2024) included one new instruction in the Dangerous Condition of Public Property series concerning a dangerous roadway condition and one verdict form in the Unlawful Detainer series concerning an affirmative defense to eviction, and release 47 (approved by the council in July 2025) included two new instructions and two new verdict forms in the Premises Liability series and in the Fraud or Deceit series.
3.	Maintenance—Sources and Authority: Reviewed case law and new legislation and proposed inclusion of excerpts and citations from new sources and authority. Updates to the Sources and Authority presented to Judicial Council for approval on July 18, 2025, and to be presented to the Judicial Council on or about December 12, 2025, and through a delegation of authority to the council’s Rules Committee in October 2024 and June 2025.
4.	Maintenance—Secondary Sources: Updated citations in <i>CACI</i> ’s Secondary Sources. Releases presented to Judicial Council for approval on July 18, 2025, and to be presented to Judicial Council on or about December 12, 2025, and other secondary sources updated through a delegation of authority to the council’s Rules Committee in October 2024 and June 2025.
5.	Technical Corrections: Made necessary corrections or editing changes to the jury instruction publication. Releases presented to Judicial Council for approval on July 18, 2025, and to be presented to Judicial Council on or about December 12, 2025, and other technical corrections made through a delegation of authority to the council’s Rules Committee in October 2024 and June 2025.

Advisory Committee on Criminal Jury Instructions
Annual Agenda¹—2025–2026
Approved by Rules Committee: DATE

I. COMMITTEE INFORMATION

Chair:	Hon. Jeffrey S. Ross, Superior Court of San Francisco County
Lead Staff:	Kara Portnow, Supervising Attorney, Criminal Justice Services
Advisory Body’s Charge/Membership: Rule 10.59 of the California Rules of Court states the charge of the Advisory Committee on Criminal Jury Instructions (CALCRIM), which is to regularly review case law and statutes affecting jury instructions and to make recommendations to the Judicial Council for updating, amending, and adding topics to the council’s criminal jury instructions. Rule 10.59 also sets forth the membership position of the committee. The Advisory Committee on Criminal Jury Instructions currently has 13 members. The current committee roster is available on the committee’s webpage.	
Subgroups of the Advisory Body:² The committee has one subcommittee, the CALCRIM Workgroup, currently consisting of six members who meet to review and evaluate all materials before they go to the full committee for review.	

¹ The Annual Agenda outlines the work an advisory body will focus on in the coming year or cycle and identifies areas of collaboration with other advisory bodies and Judicial Council staff resources.

² For the definition of “subcommittee” see Cal. Rules of Court, rule 10.30(c); for “working group,” see rule 10.70; for “workstream,” see rule 10.53(c); and for “education curriculum committee,” see rule 10.50(c)(6).

Advisory Body and Subgroup Meetings Planned for 2025–2026³

Two full committee meetings in San Francisco: October 10, 2025, and May 2026 (date TBD). Two workgroup meetings ahead of the full committee meetings: September 19, 2025, and April 2025 (date TBD) by videoconference.

☒ Check here if in-person meeting is approved by the internal committee oversight chair.

³ Refer to section IV. 2 (Meeting frequency) of the [Operating Standards for Judicial Council Advisory Bodies](#) for governance on in-person meetings.

Note: Because of the current budget and staffing constraints, advisory body chairs and staff must first consider meeting remotely. The chair of the Executive and Planning Committee is extending the suspension of advisory body in-person meetings for the 2025–2026 annual agenda cycle. If an in-person meeting is needed, the responsible Judicial Council office head must seek approval from their advisory body's internal oversight committee chair. Please see the prioritization memo dated June 23, 2025, for additional details.

II. COMMITTEE PROJECTS

Priority Levels and Branch Goals Key:

Refer to the following key for populating your project priority levels and branch goals. For each Priority Level 1 proposal, the advisory body **must** provide a specific reason why it should be done this year and how it fits within the identified category. If an advisory committee is interested in pursuing any Priority Level 2 proposals, please include justification as to why the proposal should be approved at this time.

Priority Levels for Non-Rules/Forms	
1	Must be done
2	Should be done
Priority Levels for Rules/Forms Proposals	
1a (Legal Compliance)	Proposal urgently needed to conform to or accurately reflect the law.
1b (Council Directive)	Council has directed the committee to consider new or amended rules and forms.
1c (Urgent Remedial Action)	Change is urgently needed to remedy a problem that is causing significant cost or inconvenience to the courts or the public.
1d (Financial/ Legal Risk Mitigation)	Proposal is otherwise urgent and necessary, such as a proposal that would mitigate exposure to immediate or severe financial or legal risk.
2a (Useful Changes in Law)	Useful, but not necessary, to implement changes in law.
2b (Responsive to Concerns)	Responsive to identified concerns or problems.
2c (Helpful Advancing Branch Goals)	Helpful in otherwise advancing Judicial Council goals and objectives.

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

#	New or One-Time Projects						
	None.						Priority: N/A
	Supported Strategic Plan Branch Goals: Select the branch goal(s) of the Judicial Branch Strategic Plan that the project most closely aligns with.						
	I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☐	V Education ☐	VI Infrastructure ☐	VII Funding ☐
	Project Summary: N/A Status/Timeline: N/A Fiscal Impact/Staff Resources: N/A ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: N/A AC Collaboration: N/A.						

#	Ongoing Projects and Activities								
1.	Maintenance—Case Law and Legislation	Priority: 1							
Supported Strategic Plan Branch Goals:									
<table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☐</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>			I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
Project Summary: Review case law and new legislation affecting jury instructions to determine whether changes to the criminal jury instructions are required. Judicial Council direction: Draft and maintain jury instructions that accurately and understandably state the law. Status/Timeline: Ongoing, with delivery to Judicial Council at February and October meetings. Fiscal Impact/Staff Resources: Committee staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: Not applicable. AC Collaboration: Not applicable.									
2.	Maintenance—Comments from Users	Priority: 1							
Supported Strategic Plan Branch Goals:									
<table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☐</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>			I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
Project Summary: Review comments received from jury instruction users and propose any necessary changes and improvements. Judicial Council Direction: Draft and maintain jury instructions that accurately and understandably state the law. Status/Timeline: Ongoing, with delivery to Judicial Council at February and October meetings. Fiscal Impact/Staff Resources: Committee staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: Not applicable									

#	Ongoing Projects and Activities						
	<i>AC Collaboration:</i> Not applicable.						
3.	New Instructions and Expansion into New Areas.						Priority: 1
Supported Strategic Plan Branch Goals:							
I Access ☐ II Independence ☐ III Modernization ☐ IV Quality ☒ V Education ☐ VI Infrastructure ☐ VII Funding ☐							
Project Summary: Review suggestions received from jury instruction users, new legislation, and case law and propose new criminal jury instructions as appropriate. Judicial Council Direction: Draft and maintain jury instructions that accurately and understandably state the law. Status/Timeline: Ongoing, with delivery to Judicial Council at February and October meetings. Fiscal Impact/Staff Resources: Committee staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: Not applicable. AC Collaboration: Not applicable.							
4.	Technical Corrections						Priority: 2
Supported Strategic Plan Branch Goals:							
I Access ☐ II Independence ☐ III Modernization ☐ IV Quality ☒ V Education ☐ VI Infrastructure ☐ VII Funding ☐							
Project Summary: Make any necessary corrections or editing changes to the jury instructions. Judicial Council Direction: Draft and maintain jury instructions that accurately and understandably state the law. Status/Timeline: Ongoing, with delivery to Judicial Council at February and October meetings. Fiscal Impact/Staff Resources: Committee staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts.							

#	Ongoing Projects and Activities
	<i>Internal/External Stakeholders:</i> Not applicable. <i>AC Collaboration:</i> Not applicable.

DRAFT

III. LIST OF 2024–2025 PROJECT ACCOMPLISHMENTS

#	Project Highlights and Achievements
1.	Maintenance—Case Law and Legislation: Reviewed case law and new legislation affecting jury instructions to determine whether changes to the criminal jury instructions are required. Releases presented to Judicial Council for approval in February 2025 and October 2025. Updated 68 instructions (approved by the Judicial Council in February 2025) and 73 instructions (pending approval by the Judicial Council in October 2025).
2.	Maintenance—Comments From Users: Reviewed comments received from jury instruction users and proposed necessary changes and improvements. Releases presented to Judicial Council for approval in February 2025 and October 2025.
3.	New Instructions and Expansion into New Areas: Reviewed new legislation and case law and suggestions received from jury instruction users and proposed new criminal jury instructions as appropriate. Releases presented to Judicial Council for approval in February 2025 and October 2025. Drafted one new instruction based on case law (approved by the Judicial Council in February 2025), eight new instructions based on new legislation, including Proposition 36 (pending approval by the Judicial Council in October 2025) and two new instructions based on user requests (pending approval by the Judicial Council in October 2025).
4.	Technical Corrections: Made necessary corrections or editing changes to the jury instructions. Releases presented to Judicial Council for approval in February 2025 and October 2025.

Criminal Law Advisory Committee
Annual Agenda¹—2025–2026
Approved by Rules Committee: [Date]

I. COMMITTEE INFORMATION

Chair:	Hon. Lisa Rodriguez, Chair, Judge, Superior Court of San Diego County Hon. Alison Tucher, Vice Chair, Presiding Justice of the Court of Appeal, First Appellate District, Third Division
Lead Staff:	Sarah Fleischer-Ihn, Attorney, Criminal Justice Services
Committee’s Charge/Membership: Rule 10.42(a) of the California Rules of Court states the charge of the Criminal Law Advisory Committee, which is to make recommendations to the Judicial Council for improving the administration of justice in criminal proceedings. Rule 10.42(b) sets forth the membership categories of the committee. The Criminal Law Advisory Committee currently has 19 voting members. The current advisory body roster is available on the advisory body’s webpage.	
Subgroups of the Advisory Body²: 1. Pretrial Policy and Data Subcommittee 2. Protective Orders Working Group (POWG) (with the Civil and Small Claims Advisory Committee and the Family and Juvenile Law Advisory Committee) 3. Joint Mental Health Legislation Subcommittee (with the Collaborative Justice Courts Advisory Committee)	

¹ The Annual Agenda outlines the work an advisory body will focus on in the coming year or cycle and identifies areas of collaboration with other advisory bodies and Judicial Council staff resources.

² For the definition of “subcommittee” see Cal. Rules of Court, rule 10.30(c); for “working group,” see rule 10.70; for “workstream,” see rule 10.53(c); and for “education curriculum committee,” see rule 10.50(c)(6).

Advisory Body and Subgroup Meetings Planned for 2026³

- January 2026 (remote annual meeting to discuss rule and form proposals and pending legislation)
- February, March 2026 (remote meetings to discuss rule and form proposals and pending legislation)
- April, May, June 2026 (remote meetings to discuss pending legislation)
- July 2026 (remote meeting to discuss rule and form proposals and pending legislation)
- August, September, October 2026 (remote meetings to discuss pending legislation)
- November, December 2026 (remote meetings to discuss rule and form proposals)
- Other remote meetings as needed

Subcommittee Meetings:

- Pretrial Policy and Data Subcommittee: remote meetings as needed to work on rule and form proposals and reviewing legislation
- Protective Orders Working Group (POWG): remote meetings as needed to work on rule and form proposals
- Joint Mental Health Legislation Subcommittee: remote meetings as needed from February through September to review proposed legislation

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

³ Refer to section IV. 2 (Meeting frequency) of the [Operating Standards for Judicial Council Advisory Bodies](#) for governance on in-person meetings.

Note: Because of the current budget and staffing constraints, advisory body chairs and staff must first consider meeting remotely. The chair of the Executive and Planning Committee is extending the suspension of advisory body in-person meetings for the 2025–2026 annual agenda cycle. If an in-person meeting is needed, the responsible Judicial Council office head must seek approval from their advisory body's internal oversight committee chair. Please see the prioritization memo dated June 23, 2025, for additional details.

II. COMMITTEE PROJECTS

Priority Levels and Branch Goals Key:

Refer to the following key for populating your project priority levels and branch goals. For each Priority Level 1 proposal, the advisory body **must** provide a specific reason why it should be done this year and how it fits within the identified category. If an advisory committee is interested in pursuing any Priority Level 2 proposals, please include justification as to why the proposal should be approved at this time.

Priority Levels for Non-Rules/Forms	
1	Must be done
2	Should be done
Priority Levels for Rules/Forms Proposals	
1a (Legal Compliance)	Proposal urgently needed to conform to or accurately reflect the law.
1b (Council Directive)	Council has directed the committee to consider new or amended rules and forms.
1c (Urgent Remedial Action)	Change is urgently needed to remedy a problem that is causing significant cost or inconvenience to the courts or the public.
1d (Financial/ Legal Risk Mitigation)	Proposal is otherwise urgent and necessary, such as a proposal that would mitigate exposure to immediate or severe financial or legal risk.
2a (Useful Changes in Law)	Useful, but not necessary, to implement changes in law.
2b (Responsive to Concerns)	Responsive to identified concerns or problems.
2c (Helpful Advancing Branch Goals)	Helpful in otherwise advancing Judicial Council goals and objectives.

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

#	New or One-Time Projects													
1.	Amend sentencing rules of court to conform with recent law (one-time)						Priority: 1a							
Supported Strategic Plan Branch Goals:														
<table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☐</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>								I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐								
Project Summary: Amend sentencing rules of court to conform with recent case law and statutory changes under Senate Bill 567 (Stats. 2021, ch. 731), including <i>Lovelace v. Superior Court</i> (2025) 108 Cal.App.5th 1081 (“residual clause” in rule 4.421(c) violates the separation of powers clause of the California Constitution) and <i>People v. Wiley</i> (2025) 17 Cal.5th 1069 (whether a defendant’s prior convictions are of increasing seriousness and whether defendant has performed unsatisfactorily on probation, are aggravating circumstances that must be proven beyond a reasonable doubt by a jury for a court to rely on them to justify an upper term sentence). The committee will also consider amending the rule on circumstances in aggravation to implement AB 352 (Stats. 2025, ch. 554), which would allow a court to consider, as a factor in aggravation, that a defendant knowingly and willfully threatened to commit a crime that would result in death or great bodily injury of specified government officials. Status/Timeline: Anticipate circulating for comment in winter cycle, for an effective date of July 1, 2026. Fiscal Impact/Staff Resources: Committee staff, in consultation with Legal Services staff, will prepare the amended rules. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial courts, justice system partners AC Collaboration: None														
2.	Revise the felony plea form (one-time)						Priority: 1a							
Supported Strategic Plan Branch Goals:														
<table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☐</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>								I Access ☒	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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#	New or One-Time Projects								
	Project Summary: To implement SB 281 (Stats. 2025, ch. 666), the committee will consider revising the felony plea form to update the immigration advisement to incorporate the verbatim language specified in Penal Code Section 1016.5(a). The committee will also consider additional revisions requested by judicial officers on clarifying the advisement given under <i>In re Tellez</i> (2024) 17 Cal.5th 77 and adding a waiver of appellate rights. Status/Timeline: Anticipate circulating for comment in winter cycle, for an effective date of July 1, 2026. Fiscal Impact/Staff Resources: Committee staff, in consultation with Legal Services staff, will prepare the revised form. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial courts, justice system partners AC Collaboration: None								
3.	Amend rules and revise forms to implement AB 1071 (one-time) Supported Strategic Plan Branch Goals: <table><tr><td>I Access ☒</td><td>II Independence ☐</td><td>III Modernization ☐</td><td>IV Quality ☒</td><td>V Education ☐</td><td>VI Infrastructure ☐</td><td>VII Funding ☐</td></tr></table>	I Access ☒	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐	Priority: 1a, 1c
I Access ☒	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
	Project Summary: Develop rules and forms recommendations as needed to implement AB 1071.[*] AB 1071 would revise and clarify procedures and remedies under Penal Code section 745, which was enacted by the Racial Justice Act. In addition to changes needed to implement legislation, the committee will consider additional substantive rule and form changes based on suggestions made by courts, stakeholders, and the public, or to increase useability of rules and forms for courts and litigants. Status/Timeline: Anticipate circulating for comment in winter cycle, for an effective date of July 1, 2026. Fiscal Impact/Staff Resources: Committee staff, in consultation with Legal Services staff, will prepare the amended rules and revised forms.								

^{*} This legislation is pending and has not been signed by the Governor. If the legislation is not enacted the relevant part of the project will be removed from this Annual Agenda.

#	New or One-Time Projects						
	☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: Trial courts, appellate courts, justice system partners AC Collaboration: Appellate Advisory Committee						
4.	Protective orders related to hate crimes (one-time)						Priority: 1a
Supported Strategic Plan Branch Goals:							
I Access ☒ II Independence ☐ III Modernization ☐ IV Quality ☒ V Education ☐ VI Infrastructure ☐ VII Funding ☐							
Project Summary: There are currently no statewide criminal protective orders for orders issued for hate crimes pursuant to Penal Code sections 422.85, 422.88, and 422.865. The committee will consider developing new protective orders or modifying existing protective orders for use by courts issuing these orders. This was brought to the committee's attention by the California Department of Justice. Status/Timeline: Anticipate circulating for comment in spring cycle, for an effective date of January 1, 2027. Fiscal Impact/Staff Resources: Committee staff, in consultation with Legal Services, will prepare new or revised forms. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial courts, California Department of Justice, justice system partners AC Collaboration: None							
5.	Expiration dates for pretrial criminal protective orders (one-time)						Priority: 1c, 1d, 1
Supported Strategic Plan Branch Goals:							
I Access ☐ II Independence ☐ III Modernization ☐ IV Quality ☒ V Education ☐ VI Infrastructure ☐ VII Funding ☐							

#	New or One-Time Projects								
	Project Summary: The committee will consider developing a rule of court or a recommendation for Judicial Council-sponsored legislation addressing expiration dates for pretrial criminal protective orders. This is in response to enforcement concerns by a law enforcement agency due to the lack of a set expiration date at the time the order issues, as pretrial criminal protective orders expire upon sentencing or dismissal Status/Timeline: For a rule of court, the committee anticipates circulating for comment in spring cycle, for an effective date of January 1, 2027. For a legislative proposal, the committee anticipates circulating for public comment in spring cycle, submitting to the council in fall/winter 2026, and, if approved, leading to introduction of legislation that would, if enacted, take effect no sooner than January 1, 2028. Fiscal Impact/Staff Resources: Committee staff, in consultation with Legal Services and Governmental Affairs ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial courts, justice system partners, including law enforcement AC Collaboration: Legislation Committee (for Judicial Council-sponsored legislation)								
6.	Implement consistent and clear procedures for sealing court records (one-time) Supported Strategic Plan Branch Goals: <table><tr><td>I Access ☐</td><td>II Independence ☐</td><td>III Modernization ☐</td><td>IV Quality ☒</td><td>V Education ☐</td><td>VI Infrastructure ☐</td><td>VII Funding ☐</td></tr></table>	I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐	Priority: 1c and 1
I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
	Project Summary: The committee will consider developing a recommendation for Judicial Council-sponsored legislation, a rule of court, and/or form revisions to promote consistency and clarity in the process for sealing court records when relief is granted under a record cleaning statute. Status/Timeline: For a rule of court or revised forms, the committee anticipates circulating for comment in spring cycle, for an effective date of January 1, 2027. For a legislative proposal, the committee anticipates circulating for public comment in spring cycle, submitting to the council in fall/winter 2026, and, if approved, leading to introduction of legislation that would, if enacted, take effect no sooner than January 1, 2028. Fiscal Impact/Staff Resources: Committee staff, in consultation with Governmental Affairs								

#	New or One-Time Projects													
	☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial courts, justice system partners AC Collaboration: Legislation Committee (for Judicial Council-sponsored legislation)													
7.	Pretrial release implementation through court outreach (new)						Priority: 1							
Supported Strategic Plan Branch Goals:														
<table border="0" style="width: 100%;"> <tr> <td style="text-align: center;">I Access ☐</td> <td style="text-align: center;">II Independence ☐</td> <td style="text-align: center;">III Modernization ☐</td> <td style="text-align: center;">IV Quality ☒</td> <td style="text-align: center;">V Education ☒</td> <td style="text-align: center;">VI Infrastructure ☐</td> <td style="text-align: center;">VII Funding ☐</td> </tr> </table>								I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☒	VI Infrastructure ☐	VII Funding ☐
I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☒	VI Infrastructure ☐	VII Funding ☐								
Project Summary: Consistent with the committee's charge to improve administration of justice in criminal proceedings and related to the committee's ongoing work on pretrial release rules and forms, the committee will provide subject matter expertise for the Judicial Council's Criminal Justice Services Pretrial unit to provide information to trial courts on implementation of <i>In re Humphrey</i> (2021) 11 Cal.5th 135 and related cases for consistent implementation statewide. Status/Timeline: Ongoing Fiscal Impact/Staff Resources: Committee staff, Criminal Justice Services staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial courts AC Collaboration: None														

#	Ongoing Projects and Activities								
1.	Pretrial release implementation through rules and forms	Priority: 1a, 1c							
Supported Strategic Plan Branch Goals:									
<table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☐</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>			I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
Project Summary: The committee will consider developing rule and form proposals on pretrial release implementation, such as the use of actuarial risk assessment tools, pretrial release or detention in light of <i>In re Humphrey</i> (2021) 11 Cal.5th 135 and related cases, the imposition of pretrial release conditions, and a defendant's ability to pay. Status/Timeline: Anticipate circulating for comment in spring cycle, for an effective date of January 1, 2027. Fiscal Impact/Staff Resources: Committee staff, Criminal Justice Services, Legal Services ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: Trial courts, justice system partners AC Collaboration: None									
2.	Review pending legislation	Priority: 1							
Supported Strategic Plan Branch Goals:									
<table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☒</td> <td>III Modernization ☐</td> <td>IV Quality ☐</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>			I Access ☐	II Independence ☒	III Modernization ☐	IV Quality ☐	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☐	II Independence ☒	III Modernization ☐	IV Quality ☐	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
Project Summary: The committee will review pending criminal law legislation and provide recommendations as to whether the Judicial Council should support or oppose the legislation. The committee will provide subject matter expertise on pending criminal law legislation, including efforts to extend the sunset date for criminal remote proceedings beyond January 1, 2027. Status/Timeline: Ongoing Fiscal Impact/Staff Resources: Governmental Affairs, committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts.									

#	Ongoing Projects and Activities								
	Internal/External Stakeholders: None AC Collaboration: Joint Mental Health Legislation Subcommittee (with Collaborative Justice Courts Advisory Committee)								
3.	Review enacted legislation Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☐</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table> Project Summary: Review all enacted legislation referred to the committee by the Judicial Council's Governmental Affairs staff to determine whether it raises issues within the advisory committee's purview and, when appropriate, develop recommendations for amendment to the rules of court or revisions to Judicial Council forms to implement the legislation or to bring rules and forms into conformity with it. Status/Timeline: Ongoing Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: To be determined AC Collaboration: To be determined	I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐	Priority: 1
I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
4.	Provide subject matter expertise for other advisory committees Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☐</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table> Project Summary: The committee will provide subject matter expertise for the Judicial Council and other advisory committees working on proposals involving criminal law and procedure. Status/Timeline: Ongoing	I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐	Priority: 1
I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			

#	Ongoing Projects and Activities								
	Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: None AC Collaboration: Respective advisory committees								
5.	Participate in the Protective Orders Working Group	Priority: 1							
	Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☐</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>		I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
	Project Summary: Continue participation in the Protective Orders Working Group, which assists in ensuring consistency and uniformity in the different protective orders used in family, juvenile, civil, criminal, and probate proceedings, and helps to develop and update protective order forms and rules of court. Status/Timeline: Ongoing Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: California Department of Justice AC Collaboration: Civil and Small Claims Advisory Committee, Family and Juvenile Law Advisory Committee								
6.	Gender neutrality in rules and forms	Priority: 1							
	Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☐</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>		I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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#	Ongoing Projects and Activities								
	Project Summary: As rules are amended and forms are revised for independent reasons, the committee will continue to review and, when possible, replace gendered terms or gender identity questions to conform to legislation providing for gender neutrality and nonbinary gender identity. Status/Timeline: Ongoing Fiscal Impact/Staff Resources: ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: None AC Collaboration: None								
7.	Miscellaneous technical changes to rules and forms	Priority: 1a							
	Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☐</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>		I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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	Project Summary: Develop rule and form changes as necessary to make corrections and adjustments meeting the criteria of rule 10.22(d)(2): “a nonsubstantive technical change or correction or a minor substantive change that is unlikely to create controversy....”. Status/Timeline: Ongoing Fiscal Impact/Staff Resources: Committee staff, Legal Services ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: None AC Collaboration: None								

III. LIST OF 2024–2025 PROJECT ACCOMPLISHMENTS

#	Project Highlights and Achievements
1.	<i>Develop a stay-away order from protected retail establishments under AB 3209.</i> At its April 2025 meeting, the Judicial Council approved new form CR-164, a postconviction retail crime restraining order, to implement AB 3209. The form became effective July 1, 2025.
2.	<i>Revise the felony plea form.</i> At its April 2025 meeting, the Judicial Council approved revisions to CR-101 to include advisements from Prop. 36 and a recent Supreme Court case on sexually violent predators (In re Tellez). The form became effective July 1, 2025.
3.	<i>Amend the rule of court on mental competency proceedings to implement new laws.</i> It is anticipated that at its October 2025 meeting, the Judicial Council will approve amendments to the rules of court to implement SB 1323, SB 1400, and simplify and streamline the rules addressing mental competency proceedings. The amendments would be effective January 1, 2026.
4.	<i>Amend rules and forms related to criminal protective orders to implement new laws.</i> It is anticipated that at its October 2025 meeting, the Judicial Council will approve a proposal to implement SB 2907 and SB 899 through changes to the rules of court and forms. The amendments would be effective January 1, 2026.
5.	<i>Develop procedures for affordable bail determination and pretrial release processes.</i> It is anticipated that at its October 2025 meeting, the Judicial Council will approve a new pretrial release or detention form which would be effective January 1, 2026.
6.	<i>Develop a new form on firearm prohibitions while on mental health diversion.</i> It is anticipated that at its October 2025 meeting, the Judicial Council will approve a new form specifying prohibited items while on diversion which would be effective January 1, 2026.
7.	<i>Review pending legislation.</i> The committee provided subject matter expertise or a recommended position on 30 criminal law bills, including: AB 285 , Criminal procedure: protective order; AB 321 , Misdemeanors; AB 352 , Crimes: criminal threats; AB 394 , Public transportation providers; AB 704 , Criminal records: destruction; AB 1018 , Automated decision systems; AB 1036 , Criminal procedure: postconviction discovery; AB 1071 , Criminal procedure: discrimination; AB 1231 , Criminal procedure: felony diversion; AB 1483 , Supervision: violations; SB 281 , Pleas: immigration advisement; SB 396 , Corrections: supervision; SB 562 , Bail; SB 821 , Probable cause determinations.
8.	<i>Criminal justice and mental health.</i> The committee reviewed pending legislation related to criminal justice and mental health and provided recommendations as to whether the Judicial Council should support or oppose the legislation. Committee members participated in a joint subcommittee on mental health legislation with members of the Collaborative Justice Courts Advisory Committee.

Civil and Small Claims Advisory Committee
Annual Agenda¹—2025–2026
Approved by Rules Committee: [Date]

I. COMMITTEE INFORMATION

Chair:	Hon. Samantha P. Jessner, Superior Court of Los Angeles County
Lead Staff:	Jenny Grantz, Attorney, Legal Services
Advisory Body’s Charge/Membership: Rule 10.41 of the California Rules of Court states the charge of the Civil and Small Claims Advisory Committee (CSCAC), which is to make recommendations to the Judicial Council for improving the administration of justice in civil and small claims proceedings. Rule 10.41 also sets forth the membership categories for the committee, which currently has 26 voting members and 1 advisory member. The current committee roster is available on the committee’s web page.	
Subgroups of the Advisory Committee²: 1. Alternative Dispute Resolution Subcommittee 2. Case Management and Environmental Law Subcommittee 3. Forms Subcommittee 4. Legislative Subcommittee 5. Protective Orders Subcommittee	

¹ The Annual Agenda outlines the work an advisory body will focus on in the coming year or cycle and identifies areas of collaboration with other advisory bodies and Judicial Council staff resources.

² For the definition of “subcommittee” see Cal. Rules of Court, rule 10.30(c); for “working group,” see rule 10.70; for “workstream,” see rule 10.53(c); and for “education curriculum committee,” see rule 10.50(c)(6).

Advisory Body and Subgroup Meetings Planned for 2025–2026³

Full committee meetings:

- October 2025 (videoconference to review the Annual Agenda and Winter cycle proposals)
- February 2026 (videoconferences to review Spring cycle proposals and to make final recommendations on Winter cycle proposals)
- June 2026 (videoconference to make final recommendations on Spring cycle proposals)

Subcommittee meetings:

- Legislative Subcommittee: Videoconference meetings several times a month as needed from February through August 2026 to review proposed legislation.
- Other subcommittees: One or more videoconference meetings of each subcommittee before each of the full committee meetings.
- Other meetings as needed to address proposals implementing new legislation and other urgent matters.

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

³ Refer to section IV. 2 (Meeting frequency) of the [Operating Standards for Judicial Council Advisory Bodies](#) for governance on in-person meetings.

Note: Because of the current budget and staffing constraints, advisory body chairs and staff must first consider meeting remotely. The chair of the Executive and Planning Committee is extending the suspension of advisory body in-person meetings for the 2025–2026 annual agenda cycle. If an in-person meeting is needed, the responsible Judicial Council office head must seek approval from their advisory body's internal oversight committee chair. Please see the prioritization memo dated June 23, 2025, for additional details.

II. COMMITTEE PROJECTS

Priority Levels and Branch Goals Key:

Refer to the following key for populating your project priority levels and branch goals. For each Priority Level 1 proposal, the advisory body **must** provide a specific reason why it should be done this year and how it fits within the identified category. If an advisory committee is interested in pursuing any Priority Level 2 proposals, please include justification as to why the proposal should be approved at this time.

Priority Levels for Non-Rules/Forms	
1	Must be done
2	Should be done
Priority Levels for Rules/Forms Proposals	
1a (Legal Compliance)	Proposal urgently needed to conform to or accurately reflect the law.
1b (Council Directive)	Council has directed the committee to consider new or amended rules and forms.
1c (Urgent Remedial Action)	Change is urgently needed to remedy a problem that is causing significant cost or inconvenience to the courts or the public.
1d (Financial/ Legal Risk Mitigation)	Proposal is otherwise urgent and necessary, such as a proposal that would mitigate exposure to immediate or severe financial or legal risk.
2a (Useful Changes in Law)	Useful, but not necessary, to implement changes in law.
2b (Responsive to Concerns)	Responsive to identified concerns or problems.
2c (Helpful Advancing Branch Goals)	Helpful in otherwise advancing Judicial Council goals and objectives.

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

#	New or One-Time Projects								
1.	Enforcement of Judgment: Implementation of AB 774 (new project)	Priority: 1a							
	Supported Strategic Plan Branch Goals:								
	<table><tr><td>I Access ☒</td><td>II Independence ☐</td><td>III Modernization ☒</td><td>IV Quality ☐</td><td>V Education ☐</td><td>VI Infrastructure ☐</td><td>VII Funding ☐</td></tr></table>		I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☐	V Education ☐	VI Infrastructure ☐	VII Funding ☐
	I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☐	V Education ☐	VI Infrastructure ☐	VII Funding ☐		
Project Summary: Develop form recommendations as appropriate. AB 774* makes several changes to the laws relating to enforcement of judgment, including the calculation of the start of the earnings withholding period and the procedure for verifying the judgment debtor’s address in personal debt cases. AB 774 also creates new procedures for reinstating a judgment lien. AB 774 will likely require form revisions and the creation of a new form. Status/Timeline: Invitation to comment planned for Winter Cycle, with an anticipated effective date of July 1, 2026 Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial courts and court users; all draft proposals will circulate for public comment. AC Collaboration: N/A									
2.	Name and Gender Change Forms: Implementation of AB 1084 and SB 59 (new project)	Priority: 1a							
	Supported Strategic Plan Branch Goals:								
<table><tr><td>I Access ☒</td><td>II Independence ☐</td><td>III Modernization ☒</td><td>IV Quality ☒</td><td>V Education ☐</td><td>VI Infrastructure ☐</td><td>VII Funding ☐</td></tr></table>			I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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* This legislation is pending and has not been signed by the Governor. If the legislation is not enacted the project will be removed from this Annual Agenda. All bills marked with (*) share this status.

#	New or One-Time Projects								
	Project Summary: Develop form recommendations as appropriate. AB 1084* changes the procedures for obtaining a court order changing the petitioner’s name to conform to their gender identity. The bill eliminates the mechanism for objecting if the petition is filed by an adult or if the petitioner is a minor and all living parents have signed the petition. These petitions must be granted by the court within six weeks of the filing of the petition. SB 59* requires courts to limit access to court records in proceedings to change the petitioner’s gender and sex identifier, change the petitioner’s name and recognize their gender and sex identifier, or conform the petitioner’s name to their gender identity. Both bills will likely require revisions to name change forms. The committee will also consider whether to revise name change forms to address recent suggestions from members of the public to make the forms easier to use. Status/Timeline: Invitation to comment planned for Winter Cycle, with an anticipated effective date of July 1, 2026 Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial courts and court users; all draft proposals will circulate for public comment. AC Collaboration: N/A								
3.	CEQA Rules: Implementation of SB 676 (new project)	Priority: 1a							
	Supported Strategic Plan Branch Goals: <table><tr><td>I Access ☒</td><td>II Independence ☐</td><td>III Modernization ☒</td><td>IV Quality ☐</td><td>V Education ☐</td><td>VI Infrastructure ☐</td><td>VII Funding ☐</td></tr></table>		I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☐	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☐	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
	Project Summary: Develop rule recommendations as appropriate. This is a joint project with the Appellate Advisory Committee. SB 676 (Stats. 2025, ch. 550) changes procedures for CEQA actions relating to projects to repair, demolish, or replace property or facilities damaged or destroyed by wildfire. The bill requires the Judicial Council to adopt rules of court to implement a statutory requirement for courts to resolve these actions, including appeals, within 270 calendar days. Status/Timeline: Invitation to comment planned for Spring Cycle, with an anticipated effective date of January 1, 2027 Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i>								

#	New or One-Time Projects													
	Internal/External Stakeholders: Trial and appellate courts and court users; all draft proposals will circulate for public comment. AC Collaboration: Appellate Advisory Committee													
4.	Fee Waiver Forms: Implementation of SB 54 (new project)						Priority: 1a							
Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>								I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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Project Summary: Develop form recommendations as appropriate. This is a joint project with the Probate and Mental Health Advisory Committee. SB 54 (Stats. 2025, ch. 646) excludes veterans' disability service-connected compensation from monthly income for purposes of determining whether the court must grant a fee waiver. SB 54 will likely require revising fee waiver forms to explain this exclusion. The committee will also consider whether forms FW-001 and FW-003 should be revised to address recent suggestions made by courts and members of the public, such as whether form FW-003 should include an option for courts to make an order allowing the applicant to pay their fees over time, to correspond with an existing item on form FW-001. Status/Timeline: Invitation to comment planned for Spring Cycle, with an anticipated effective date of January 1, 2027 Fiscal Impact/Staff Resources: Committee staff, staff from the Center for Families, Children & the Courts ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial courts and court users; all draft proposals will circulate for public comment. AC Collaboration: Probate and Mental Health Advisory Committee														
5.	Mandatory Settlement Conferences: Revise Rule 3.1380 (new project)						Priority: 1a							
Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☐</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>								I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☐	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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#	New or One-Time Projects												
	Project Summary: Develop rule recommendations as appropriate. Rule 3.1380 requires in-person attendance at mandatory settlement conferences. The committee will consider whether to amend the rule to allow remote appearances at settlement conferences consistent with Code of Civil Procedure section 367.75 and rule 3.672. Status/Timeline: Invitation to comment planned for Spring Cycle, with an anticipated effective date of January 1, 2027 Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial courts and court users; all draft proposals will circulate for public comment. AC Collaboration: N/A												
6.	Mediation Rules: Implementation of AB 1523 (new project)					Priority: 1a							
Supported Strategic Plan Branch Goals: <table><tr><td>I Access ☒</td><td>II Independence ☐</td><td>III Modernization ☒</td><td>IV Quality ☐</td><td>V Education ☐</td><td>VI Infrastructure ☐</td><td>VII Funding ☐</td></tr></table>							I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☐	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☐	V Education ☐	VI Infrastructure ☐	VII Funding ☐							
Project Summary: Develop rule recommendations as appropriate. AB 1523 (Stats. 2025, ch. 201) changes the conditions under which a court can order a case into mediation, including by raising the maximum amount in controversy from \$50,000 to \$75,000. AB 1523 will likely require amendments to rule 3.891. The committee will also consider amendments to the rules regarding mediation and judicial arbitration more broadly, such as whether the rules can be expanded to apply to additional cases. Status/Timeline: The committee anticipates this to be a two-year project. An invitation to comment to ensure the rules correctly reflect AB 1523 is planned for Spring Cycle, with an anticipated effective date of January 1, 2027. Other amendments to the rules regarding mediation and judicial arbitration would be proposed during the 2027 Spring Cycle. Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial courts and court users; all draft proposals will circulate for public comment.													

#	New or One-Time Projects													
	<i>AC Collaboration:</i> N/A													
7.	Proofs of Service: Implementation of AB 747 and SB 85 (new project)						Priority: 1a							
Supported Strategic Plan Branch Goals:														
<table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☐</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>								I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☐	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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Project Summary: Develop form recommendations as appropriate. This is a joint project with the Family and Juvenile Law Advisory Committee and the Probate and Mental Health Advisory Committee. AB 747 (Stats. 2025, ch. 563) creates new requirements for proofs of service under Code of Civil Procedure sections 415.10, 415.20, and 415.30. These proofs of service must now include photos of the site of service, a time stamp, and GPS coordinates. Applications to enter default under Code of Civil Procedure section 585 also must include proofs of service containing those elements. AB 747 also adds a definition of “reasonable diligence” for purposes of substitute service under sections 415.10, 415.20, and 415.30. SB 85 (Stats. 2025, ch. 403) amends Code of Civil Procedure section 413.30, which concerns certain forms of service of summons. AB 747 and SB 85 will require form revisions. Status/Timeline: Invitation to comment planned for Spring Cycle, with an anticipated effective date of January 1, 2027 Fiscal Impact/Staff Resources: Committee staff, staff from the Center for Families, Children & the Courts ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial courts and court users; all draft proposals will circulate for public comment. AC Collaboration: Family and Juvenile Law Advisory Committee, Probate and Mental Health Advisory Committee														
8.	Protective Order Forms: Implementation of AB 561 (new project)						Priority: 1a							
Supported Strategic Plan Branch Goals:														
<table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☐</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>								I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☐	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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#	New or One-Time Projects								
	Project Summary: Develop rule and form recommendations as appropriate. AB 561 (Stats. 2025, ch. 267) allows parties, support persons, and witnesses to appear remotely at a hearing on a petition for a civil harassment. AB 561 will likely require rule amendments and revisions to protective order forms. Status/Timeline: Invitation to comment planned for Spring Cycle, with an anticipated effective date of January 1, 2027 Fiscal Impact/Staff Resources: Committee staff, potentially staff from the Center for Families, Children & the Courts ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial courts and court users; all draft proposals will circulate for public comment. AC Collaboration: Potentially the Joint Protective Order Working Group, Family and Juvenile Law Advisory Committee								
9.	Protective Order Forms: Implementation of AB 2917 (new project)	Priority: 1a							
	Supported Strategic Plan Branch Goals: <table><tr><td>I Access ☒</td><td>II Independence ☐</td><td>III Modernization ☒</td><td>IV Quality ☐</td><td>V Education ☐</td><td>VI Infrastructure ☐</td><td>VII Funding ☐</td></tr></table>		I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☐	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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	Project Summary: Develop form recommendations as appropriate. Effective January 1, 2025, AB 2917 (Stats. 2024, ch. 539) created new requirements for gun violence restraining orders, including a requirement that the court consider any recent threats of violence or acts of violence directed toward another group or location, or a past history of those threats or acts, when determining whether the order is warranted. AB 2917 likely requires revisions to gun violence restraining order forms. Status/Timeline: Invitation to comment planned for Spring Cycle, with an anticipated effective date of January 1, 2027 Fiscal Impact/Staff Resources: Committee staff, potentially staff from the Center for Families, Children & the Courts ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial courts and court users; all draft proposals will circulate for public comment. AC Collaboration: Potentially the Joint Protective Order Working Group, Family and Juvenile Law Advisory Committee								

#	New or One-Time Projects								
10.	Statements of Decision: Implementation of AB 515 (new project)	Priority: 1a							
Supported Strategic Plan Branch Goals: <table border="0" style="width: 100%;"> <tr> <td style="text-align: center;">I Access ☒</td> <td style="text-align: center;">II Independence ☐</td> <td style="text-align: center;">III Modernization ☒</td> <td style="text-align: center;">IV Quality ☒</td> <td style="text-align: center;">V Education ☐</td> <td style="text-align: center;">VI Infrastructure ☐</td> <td style="text-align: center;">VII Funding ☐</td> </tr> </table>			I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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Project Summary: Develop rule and form recommendations as appropriate. This is a joint project with the Family and Juvenile Law Advisory Committee. AB 515 (Stats. 2025, ch. 559) changes the procedures for requesting a written statement of decision after the trial of a question of fact by the court. AB 515 requires the Judicial Council to adopt a form and information sheet for requesting a statement of decision. AB 515 may also require rule amendments. The committee will also consider whether to amend or simplify rule 3.1590, which governs the announcement of tentative decisions, statements of decisions, and judgments. Status/Timeline: Invitation to comment planned for Spring Cycle, with an anticipated effective date of January 1, 2027 Fiscal Impact/Staff Resources: Committee staff, staff from the Center for Families, Children & the Courts ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial courts and court users; all draft proposals will circulate for public comment. AC Collaboration: Family and Juvenile Law Advisory Committee									
11.	Unlawful Detainer Forms: Implementation of AB 246 and AB 863 (new project)	Priority: 1a							
Supported Strategic Plan Branch Goals: <table border="0" style="width: 100%;"> <tr> <td style="text-align: center;">I Access ☒</td> <td style="text-align: center;">II Independence ☐</td> <td style="text-align: center;">III Modernization ☒</td> <td style="text-align: center;">IV Quality ☒</td> <td style="text-align: center;">V Education ☐</td> <td style="text-align: center;">VI Infrastructure ☐</td> <td style="text-align: center;">VII Funding ☐</td> </tr> </table>			I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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Project Summary: Develop form recommendations as appropriate. AB 246 (Stats. 2025, ch. 337) creates a defense to unlawful detainer based on interruptions to federal social security benefit payments. AB 863 (Stats. 2025, ch. 344) requires the Judicial Council to create a single form that contains all five existing translations of form SUM-130. The committee will also consider revising the unlawful detainer complaint and answer forms to use plain language, in a continuation of a two-year project approved on the committee's 2024–2025 annual agenda. Status/Timeline: Invitation to comment planned for Spring Cycle, with an anticipated effective date of January 1, 2027									

#	New or One-Time Projects								
	Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial courts and court users; all draft proposals will circulate for public comment. AC Collaboration: N/A								
12.	Military Forms: Implementation of SB 1311 (previously approved one-time project)	Priority: 2a							
	Supported Strategic Plan Branch Goals: <table><tr><td>I Access ☒</td><td>II Independence ☐</td><td>III Modernization ☒</td><td>IV Quality ☒</td><td>V Education ☐</td><td>VI Infrastructure ☐</td><td>VII Funding ☐</td></tr></table> Project Summary: Develop form recommendations as appropriate. Under SB 1311 (Stats. 2022, ch. 620), servicemembers in active duty may not be charged interest on certain financial obligations during their deployment. This project is included as it has been requested repeatedly by the California Department of Justice organizations over the past several years. In preparing the proposal, staff and the committee identified items on forms MIL-010, MIL-015, and MIL-020 that would benefit from revision and circulation for public comment in order to best reflect the law. Status/Timeline: Invitation to comment planned for Spring Cycle, with an anticipated effective date of January 1, 2027 Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial courts and court users; all draft proposals will circulate for public comment. AC Collaboration: N/A		I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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13.	Default Judgments: Create Form Implementing Civil Code Section 1788.185 (new project)	Priority: 2a DEFERRED							
	Supported Strategic Plan Branch Goals:								

#	New or One-Time Projects													
	I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☐	V Education ☐	VI Infrastructure ☐	VII Funding ☐							
	Project Summary: Develop form recommendations as appropriate. A member of the public suggested creating a form for requesting a default judgment in an action collecting debt originating with a general acute care hospital. Code of Civil procedure section 1788.185 was enacted in 2022 and creates requirements for complaints in those actions. A form similar to <i>Request for Entry of Default</i> (form CIV-105), which implements a similar statute, could help ensure that default judgment is not entered in cases that do not meet the requirements of section 1788.185. Status/Timeline: Deferred based on prioritization of committee resources. Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial courts and court users; all draft proposals will circulate for public comment. AC Collaboration: N/A													
14.	Civil Practice and Procedure: Revise Civil Case Cover Sheet (new project)						Priority: 2b							
	Supported Strategic Plan Branch Goals: <table><tr><td>I Access ☒</td><td>II Independence ☐</td><td>III Modernization ☒</td><td>IV Quality ☐</td><td>V Education ☐</td><td>VI Infrastructure ☐</td><td>VII Funding ☐</td></tr></table>							I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☐	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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	Project Summary: Develop form recommendations as appropriate. Judicial officers and CEOs from several courts suggested revising <i>Civil Case Cover Sheet</i> (form CM-010) to add a checkbox for cases filed under the Song-Beverly Act. Over the past year, these courts have seen a significant increase in Song-Beverly cases, which tend to involve substantial motion practice and require more court resources than other case types. Adding a Song-Beverly checkbox to form CM-010 would allow courts and the branch to more effectively develop data regarding these cases and their resource requirements. Status/Timeline: Invitation to comment planned for Winter Cycle, with an anticipated effective date of July 1, 2026 Fiscal Impact/Staff Resources: Committee staff													

#	New or One-Time Projects																			
	☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial courts and court users; all draft proposals will circulate for public comment. AC Collaboration: N/A																			
15.	Civil Practice and Procedure: Revise Rule 2.111(4) (new project)					Priority: 2b														
Supported Strategic Plan Branch Goals:																				
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I Access	II Independence	III Modernization	IV Quality	V Education	VI Infrastructure	VII Funding														
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Project Summary: Develop rule recommendations as appropriate. A member of the committee suggested amending rule 2.111(4) to require parties to list the names of all parties in the caption on “each initial or subsequent complaint” instead of “each initial complaint.” This revision would address situations where new plaintiffs are added in an amended complaint but are not listed in the caption, which makes it difficult for courts to ensure all plaintiffs are correctly listed in the case management system. Rule revisions could reduce burdens on courts and reduce confusion for judicial officers and litigants when plaintiffs are added by an amended complaint. Status/Timeline: Invitation to comment planned for Spring Cycle, with an anticipated effective date of January 1, 2027 Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial courts and court users; all draft proposals will circulate for public comment. AC Collaboration: N/A																				
16.	Civil Practice and Procedure: Revise Civil Summons Form (previously approved one-time project)					Priority: 2b DEFERRED														
Supported Strategic Plan Branch Goals:																				
<table><tr><td>I Access</td><td>II Independence</td><td>III Modernization</td><td>IV Quality</td><td>V Education</td><td>VI Infrastructure</td><td>VII Funding</td></tr></table>							I Access	II Independence	III Modernization	IV Quality	V Education	VI Infrastructure	VII Funding							
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#	New or One-Time Projects
	☒ ☐ ☒ ☒ ☐ ☐ ☐
	Project Summary: Develop form recommendations as appropriate. The civil Summons (form SUM-100) contains numerous checkboxes for the filer to designate the type of organization the summons has been issued on behalf of. These checkboxes may not reflect the most common organization types used. Additionally, minor formatting changes may improve the form’s useability for courts and court users. Status/Timeline: Deferred based on prioritization of committee resources. Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial courts and court users; all draft proposals will circulate for public comment. AC Collaboration: N/A

#	Ongoing Projects and Activities								
1.	Review Suggestions for Rules and Forms	Priority: 1							
Supported Strategic Plan Branch Goals:									
<table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>			I Access ☐	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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Project Summary: As mandated by rule 10.21(c), review suggestions from members of the judicial branch and the public for improving civil practice and procedure, court-connected ADR, and case management and recommend actions by the council or one of its committees. Status/Timeline: Ongoing; will only take further action upon approval of Rules Committee. Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: N/A AC Collaboration: As appropriate based on proposal received.									
2.	Review Enacted Legislation	Priority: 1							
Supported Strategic Plan Branch Goals:									
<table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☒</td> <td>III Modernization ☒</td> <td>IV Quality ☐</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>			I Access ☐	II Independence ☒	III Modernization ☒	IV Quality ☐	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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Project Summary: Review all enacted legislation referred to the committee by the Judicial Council's Governmental Affairs office that may have an impact on issues within the advisory committee's purview and, where appropriate, propose to the council rules and forms to implement the legislation or to bring rules and forms into conformity with it. Status/Timeline: Ongoing; will only take further action upon approval of Rules Committee. Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts.									

#	Ongoing Projects and Activities													
	Internal/External Stakeholders: N/A AC Collaboration: As appropriate based on specific legislation.													
3.	Review Pending Legislation						Priority: 1							
Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>								I Access ☐	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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Project Summary: Working through the Legislative Subcommittee, review pending legislation affecting civil and small claims proceedings and court administration, then make recommendations to the Legislation Committee as to whether the Judicial Council should support or oppose the legislation. Status/Timeline: Ongoing Fiscal Impact/Staff Resources: Committee staff, Governmental Affairs ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: California Legislature AC Collaboration: N/A														
4.	Miscellaneous Technical Changes						Priority: 1							
Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>								I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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Project Summary: Develop rule and form changes as necessary to make corrections and adjustments meeting the criteria of rule 10.22(d)(2): “a nonsubstantive technical change or correction or a minor substantive change that is unlikely to create controversy.” These changes include revisions to forms that contain dollar figures based on statutory criteria that the Judicial Council is mandated to adjust on a regular basis. Status/Timeline: Ongoing														

#	Ongoing Projects and Activities								
	Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: N/A AC Collaboration: N/A								
5.	Protective Orders Working Group	Priority: 1							
	Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☐</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>		I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☐	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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	Project Summary: As a member committee for the Protective Orders Working Group (POWG), work with the Criminal Law Advisory Committee and Family and Juvenile Law Advisory Committee to ensure protective order forms are written in consistent language that is comprehensible to non-attorneys, while maintaining legal accuracy. POWG will work collaboratively on the protective order projects identified in this agenda and the agendas of the other committees that make up the working group. Status/Timeline: Ongoing Fiscal Impact/Staff Resources: Committee staff; Center for Families, Children & the Courts; Criminal Justice Services ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: N/A AC Collaboration: Criminal Law Advisory Committee, Family and Juvenile Law Advisory Committee								
6.	Provide Subject Matter Expertise	Priority: 2							
	Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☐</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>		I Access ☐	II Independence ☐	III Modernization ☒	IV Quality ☐	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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#	Ongoing Projects and Activities								
	Project Summary: Serve as a subject matter resource for other advisory bodies to avoid duplication of efforts and contribute to the development of recommendations for council action. Such efforts may include providing civil and small claims procedural expertise and review to working groups, advisory committees, and subcommittees as requested on projects that have been approved on their annual agendas. Status/Timeline: Ongoing Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: N/A AC Collaboration: As appropriate based on the advice or consultation requested.								
7.	Deskbook on the Management of Complex Civil Litigation	Priority: 2 DEFERRED							
	Supported Strategic Plan Branch Goals: <table><tr><td>I Access ☐</td><td>II Independence ☐</td><td>III Modernization ☒</td><td>IV Quality ☐</td><td>V Education ☐</td><td>VI Infrastructure ☐</td><td>VII Funding ☐</td></tr></table>		I Access ☐	II Independence ☐	III Modernization ☒	IV Quality ☐	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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	Project Summary: Implementation project that the Civil and Small Claims Advisory Committee will work on as time permits; the charge for this work was made for CSCAC by the council at the October 22, 1999, meeting, in which the council received the report of the Complex Civil Litigation Task Force and voted to adopt the Task Force’s recommendations. Status/Timeline: Deferred based on prioritization of committee resources. Fiscal Impact/Staff Resources: Center for Judicial Education and Resources ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: N/A AC Collaboration: N/A								

#	Ongoing Projects and Activities								
8.	Revision of Judicial Council Forms with a Gender Identity Question or Term	Priority: 2b							
Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>			I Access ☐	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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Project Summary: The forms within this committee's purview that include a gendered term or gender identity question are being revised to eliminate or revise those terms where possible. Status/Timeline: The vast majority of forms have been updated to eliminate such terms. Any time a form is revised for legislatively mandated reasons or other reasons approved by the Rules Committee, gendered terms are reviewed and revised as appropriate. Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: Trial courts and court users; all draft proposals will circulate for public comment. AC Collaboration: As appropriate based on the affected forms.									

III. LIST OF 2024–2025 PROJECT ACCOMPLISHMENTS

#	Project Highlights and Achievements
1.	<i>Protective Order Forms:</i> The committee recommended creating and revising dozens of protective order forms to implement four new laws. The recommendations included: (1) new and revised forms to implement new statutory requirements that courts must comply with when receiving information that a restrained person has firearms; (2) amended rules and new forms to implement a law creating retail theft restraining orders; (3) revised forms to implement changes in the laws regarding postsecondary school violence restraining orders; and (4) revised forms to implement changes in law regarding the venue of civil harassment restraining orders. These projects were completed during the 2025 Winter and Spring rule cycles.
2.	<i>Unlawful Detainer and Small Claims Forms:</i> The committee recommended revoking and revising numerous unlawful detainer and small claims forms to reflect the repeal of certain laws implemented to address the COVID-19 pandemic. The committee also recommended revising the unlawful detainer complaint (form UD-100) to add an item regarding the federal CARES Act. This project was completed during the 2025 Spring rules cycle.
3.	<i>CEQA Rules:</i> The committee recommended rule amendments to implement two new laws requiring expedited CEQA review for certain projects. This project was completed during the 2025 Winter rules cycle.
4.	<i>Confidential Information Forms:</i> The committee recommended form revisions to implement a new law allowing plaintiffs to use a pseudonym in actions regarding doxing (the publication of private information about an individual on the internet). This project was completed during the 2025 Spring rules cycle.
5.	<i>Enforcement of Judgment Forms:</i> The committee recommended numerous form revisions to implement AB 2837, which made changes to the laws regarding enforcement of judgment, including a new requirement to verify the judgment debtor’s address before the sheriff can serve papers related to enforcement of a judgment for personal debt, changes to the start of the earnings withholding period, and new requirements for orders on claims of exemption from enforcement of judgment. This project was completed during the 2025 Spring rules cycle.
6.	<i>Small Claims Forms:</i> The committee recommended revisions to <i>Authorization to Appear</i> (form SC-109) to ensure the form correctly reflects the law. Form SC-109 implements Code of Civil Procedure section 116.540, which allows an individual to appear in small claims court on behalf of the plaintiff or defendant in certain circumstances. This project was completed during the 2025 Spring rules cycle.
7.	<i>Class Certification:</i> The committee recommended amendments to California Rules of Court, rule 3.764, to lengthen the deadlines for filings related to class certification motions. These revisions ensure courts have sufficient time to review filings before hearing a motion. This project was completed during the 2025 Spring rules cycle.
8.	<i>Complex Coordinated Actions:</i> The committee recommended adopting one rule and amending one rule to adjust court procedures for coordinated actions and coordination proceedings. The recommendations addressed concerns that the existing rules on these matters were overly burdensome for courts and did not contain a process to terminate coordination proceedings. This project was completed during the 2025 Winter rules cycle.

#	Project Highlights and Achievements
9.	<i>Collections Cases:</i> The committee recommended amending California Rules of Court, rule 3.740, which governs collections cases, to increase the rule’s monetary limit to \$35,000. With this increase, the monetary limit in rule 3.740 matches the current jurisdictional limit for limited civil cases. This project was completed during the 2025 Spring rules cycle.
10.	<i>Groundwater Adjudication:</i> The committee recommended adopting one rule and amending one rule to improve the adjudication of cases filed for comprehensive groundwater adjudication under Code of Civil Procedure section 838. In a separate proposal, the committee recommended revisions to Civil Case Cover Sheet (form CM-010) to add new case types, including comprehensive groundwater adjudications. These projects were completed during the 2025 Spring rules cycle.
11.	<i>Review of Pending Legislation:</i> The committee reviewed and made recommendations regarding council position on numerous bills with potential impacts on civil and small claims proceedings.

Family and Juvenile Law Advisory Committee
Annual Agenda¹—2025–2026
Approved by Rules Committee: [Date]

I. COMMITTEE INFORMATION

Cochairs:	Hon. Tari L. Cody, Associate Justice of the Court of Appeal, Second Appellate District, Division Six Hon. Stephanie E. Hulsey, Judge of the Superior Court of California, County of Monterey
Lead Staff:	Ms. Sarah Jacobvitz, Co-lead Staff, Attorney, Center for Families, Children & the Courts Ms. Stephanie Lacambra, Co-lead Staff, Attorney, Center for Families, Children & the Courts
Advisory Body’s Charge/Membership: Rule 10.43(a) of the California Rules of Court states the area of focus for the Family and Juvenile Law Advisory Committee, which is to make recommendations to the Judicial Council for improving the administration of justice in all cases involving marriage, family, or children. Rule 10.43(b) sets forth the membership positions of the committee, which currently has 35 voting members and 2 advisory members. The current advisory body roster is available on the advisory body’s webpage.	
Subgroups of the Advisory Body²: 1. Protective Order Working Group (POWG) 2. Violence Against Women Education Program (VAWEP)	

¹ The Annual Agenda outlines the work an advisory body will focus on in the coming year or cycle and identifies areas of collaboration with other advisory bodies and Judicial Council staff resources.

² For the definition of “subcommittee” see Cal. Rules of Court, rule 10.30(c); for “working group,” see rule 10.70; for “workstream,” see rule 10.53(c); and for “education curriculum committee,” see rule 10.50(c)(6).

Advisory Body and Subgroup Meetings Planned for 2026³

- The committee meets weekly by teleconference or videoconference on Mondays from 4:30 to 5:30 p.m., unless a meeting is not required.
- VAWEF meets in-person or by videoconference at least once a year. The next meeting is projected for late Summer 2026. Should the meeting be held in-person, staff will seek the necessary approvals.
- POWG meets as needed by teleconference or videoconference to work on rules and forms proposals.

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

³ Refer to section IV. 2 (Meeting frequency) of the [Operating Standards for Judicial Council Advisory Bodies](#) for governance on in-person meetings. Note: Because of the current budget and staffing constraints, advisory body chairs and staff must first consider meeting remotely. The chair of the Executive and Planning Committee is extending the suspension of advisory body in-person meetings for the 2025–2026 annual agenda cycle. If an in-person meeting is needed, the responsible Judicial Council office head must seek approval from their advisory body's internal oversight committee chair. Please see the prioritization memo dated June 23, 2025, for additional details.

II. COMMITTEE PROJECTS

Priority Levels and Branch Goals Key:

Refer to the following key for populating your project priority levels and branch goals. For each Priority Level 1 proposal, the advisory body **must** provide a specific reason why it should be done this year and how it fits within the identified category. If an advisory committee is interested in pursuing any Priority Level 2 proposals, please include justification as to why the proposal should be approved at this time.

Priority Levels for Non-Rules/Forms	
1	Must be done
2	Should be done
Priority Levels for Rules/Forms Proposals	
1a (Legal Compliance)	Proposal urgently needed to conform to or accurately reflect the law.
1b (Council Directive)	Council has directed the committee to consider new or amended rules and forms.
1c (Urgent Remedial Action)	Change is urgently needed to remedy a problem that is causing significant cost or inconvenience to the courts or the public.
1d (Financial/ Legal Risk Mitigation)	Proposal is otherwise urgent and necessary, such as a proposal that would mitigate exposure to immediate or severe financial or legal risk.
2a (Useful Changes in Law)	Useful, but not necessary, to implement changes in law.
2b (Responsive to Concerns)	Responsive to identified concerns or problems.
2c (Helpful Advancing Branch Goals)	Helpful in otherwise advancing Judicial Council goals and objectives.

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

#	New or One-Time Projects								
1.	Legislative changes from the 2025 Legislative Session (New Project)	Priority: 1a							
Supported Strategic Plan Branch Goals:									
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I Access ☒	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
Project Summary: Develop rules and forms recommendations as needed to implement the legislation listed below. In addition to changes needed to implement legislation, the committee may propose additional substantive rule and form changes based on suggestions made by courts, stakeholders, and the public, or to increase useability of rules and forms for courts and litigants. Domestic Violence: a. Assembly Bill 1363 (Stefani), Protective orders: Wyland’s Law (Stats. 2025, ch. 574) This bill authorizes, subject to an appropriation by the Legislature, the Department of Justice to establish, or contract with a vendor to establish, an automated protected person information and notification system to provide a petitioner or a protected person in a protective order case with automated access to information about their case, as specified. Provides that a record demonstrating whether the superior court has fulfilled its transmission obligations or a record demonstrating receipt of information about a protective order that the department is required to maintain to be open to public inspection and copying. b. Assembly Bill 561 (Quirk-Silva), Restraining orders (Stats. 2025, ch. 267) This bill conforms provisions relating to filing fees, remote appearances, and alternative service in civil harassment protective order proceedings and protective order proceedings under the Domestic Violence Prevention Act (DVPA) and the Elder and Dependent Adult Civil Protection Act (EADACPA) and prohibits the charging of fees for filing or remote appearances in those proceedings. Family Law: c. Assembly Bill 343 (Pacheco), California Public Records Act: elected or appointed officials (Stats. 2025, ch. 142) This bill expands the definition of “elected or appointed official” under the California Public Records Act (CPRA) to include additional judicial-related roles (e.g., retired judges, court commissioners, federal judges, federal defenders, or judges of a federally recognized Indian tribe, active or retired State Bar Court judges, and appointees of a court to serve as children’s counsel in a family or dependency proceeding), and limits public disclosure of their personal information.									

#	New or One-Time Projects
	d. Assembly Bill 515 (Pacheco), Trial: statement of decision (Stats. 2025, ch. 559) This bill requires a request for a statement of decision in all trials by court to be made in writing, or orally if there is an official record of the proceeding being transcribed, before the matter is submitted for decision. This bill authorizes the court, if a statement of decision is not timely requested, to announce its ruling on all relief sought without a statement of decision or to issue a written statement of decision without a request from a party. The bill authorizes the court to order a party or parties to prepare a draft statement of decision and permits a party to make objections to a statement of decision, as specified. Timeframes for each stage of the process are set forth and can be extended by the court in all cases. For cases under the Family Code, the court may shorten the time frame with a written order and statement of good cause. This bill requires the Judicial Council to adopt or amend all rules of court necessary to implement these provisions, and to prepare a form that a party may use to request a statement of decision and an accompanying information sheet. e. Assembly Bill 747 (Kalra), Service of Process Accountability, Reform and Equity (SPARE) Act. (Stats. 2025, ch. 563) This bill increases accountability in service of process by requiring county clerks to make the register of process servers publicly available and by removing provisions that previously validated service by unregistered servers. It defines “reasonable diligence” as at least three good-faith attempts on different days and times, including one at the person’s residence, and requires proofs of service to include a photograph of the site with a timestamp and GPS coordinates of each attempted or effectuated service. The bill also allows parties to move to vacate default judgments at any time for improper service, shifts the burden to plaintiffs to prove that the court has jurisdiction over the defendant and that service of the summons and complaint was effected, and requires courts to take evidence on contested service. f. Assembly Bill 1134, (Bains) Coerced marriage. (Stats. 2025, ch. 633) Beginning January 1, 2027, the bill will allow a court to grant permission for annulment petitions filed beyond the current statutory limit if the party's consent was obtained by force and the court finds good cause to grant the nullity. The bill also amends the existing coerced marriage statute to make it gender neutral and specifies that it applies regardless of the age of the victim of a forced marriage. g. Assembly Bill 1297, (Stefani) Automatic temporary restraining orders (Stats. 2025, ch. 48) Starting January 1, 2027, this bill adds to the temporary restraining order entered in a proceeding for nullification or dissolution of a marriage, or legal separation, a prohibition on allowing insurance coverage to lapse for nonpayment of premiums or failure to renew, when the policy is for the benefit of parties to the marriage or minor children for whom support may be ordered. h. Assembly Bill 1375 (Hoover) Consideration when determining child custody: human trafficking (Stats. 2025, ch. 452) This bill requires the court, when determining the best interests of a child in a child custody matter, to consider any relevant, admissible evidence that a parent has caused human trafficking of the child or other parent.

- i. [Senate Bill 85](#) (Umberg) Civil actions: service of summons. (Stats. 2025, ch. 403)
Authorizes a court, upon motion, to direct service of the summons by electronic means, if such service is reasonably calculated to give actual notice. The bill would require a plaintiff seeking to establish reasonable diligence under this section to set forth facts that detail, as specified, the attempts to effect service pursuant to the methods prescribed by statute. Provides that these provisions do not apply to actions against public entities or agents or employees of public entities sued in their official capacity.
- j. [Senate Bill 450](#) (Menjivar). Adoption: state court jurisdiction (Stats. 2025, ch.)*
This bill clarifies that California state courts have jurisdiction over a proceeding for the adoption of a minor if the minor was born in this state and either of the following apply: a proceeding to free the minor from the custody and control of one or both parents is not required to make the minor available for adoption; or the proceeding to free the minor from the custody and control of one or both parents to make the minor available for adoption is being brought in this state. This bill also requires an adoption order to include the names of the adoptive parent or parents and that any existing parent who will maintain their parental rights after the finalization of the adoption. This bill clarifies that a failure to include an existing parent or parents on the adoption order in compliance with this provision shall not be construed to terminate the parental rights and responsibilities otherwise maintained under existing law by an existing parent or parents. This bill requires a petitioner for an independent adoption to be responsible for providing any additional documentation or information necessary to complete an adoption investigation if the out-of-state home study report is not substantially commensurate with California standards or is otherwise missing required information.

Juvenile Dependency:

- k. [Assembly Bill 118](#) (Committee on Budget) Human Services (Stats. 2025, ch. 7)
Human services trailer bill which has numerous provisions, including a requirement that beginning July 1, 2025, county welfare agencies convene child and family team meetings for all children and youth receiving family maintenance services.
- l. [Assembly Bill 243](#) (Ahrens), Postsecondary education: student financial aid dependency status: juvenile case file inspection (Stats. 2025, ch. 610)
This bill allows agencies (child welfare, probation, etc.) to submit sworn statements to aid determination of students' financial aid dependency status and authorizes sharing of juvenile court-related information with educational institutions. The information shared must remain confidential and be used only for specified purposes, with intentional breaches subject to misdemeanor penalties and fines of up to \$500.
- m. [Assembly Bill 373](#) (Rubio, Blanca), Dependency proceedings: counsel (Stats. 2025, ch. 146)
This bill amends Welfare and Institutions Code section 317(e) to clarify that the standard of representation for counsel appointed to represent a nonminor dependent in a dependency proceeding is to represent the wishes of the NMD, without exception.
- n. [Assembly Bill 383](#) (Davies), Firearms: prohibition: minors (Stats. 2025, ch. 362)
This bill expands exemptions to the prohibition against the purchase and possession of firearms by minors for specified activities related to hunting education, applies existing post-conviction firearm relinquishment procedures to minors adjudicated to have

#	New or One-Time Projects
	committed a crime and individuals subject to specified restraining orders, and authorizes the issuance of a search warrant for minors unlawfully in possession of a firearm. o. Assembly Bill 562 (Solache) Foster care: placement: family finding. (Stats. 2025, ch. 436) The Justice through Placing Foster Children with Families Act requires counties to compare their foster child placement rates with the statewide average. Starting January 1, 2027, each county must review data showing how often children are placed with relatives, including comparing their own rates with the statewide average from the previous year. For Native American children, counties must also compare their rates to the federal placement preferences outlined in the Indian Child Welfare Act of 1978. If a county's placement rate is lower than the statewide average, the county welfare director (or their designee) must work with the Center for Excellence in Family Finding, Engagement, and Support to identify ways to improve their placement rates. p. Assembly Bill 651 (Bryan) Juveniles: dependency: incarcerated parent (Stats. 2025, ch. 274) This bill amends Welfare and Institutions Code section 349 to extend minors' rights to notice, participation, and continuances for lack of notice to nonminor dependents. The bill also amends Penal Code section 2625 to require notice and an opportunity for an incarcerated parent to be physically present at specified dependency hearings related to their child, or the opportunity to participate in those proceedings by videoconference or teleconference when their physical presence is waived. q. Assembly Bill 741 (Ransom), Department of Justice: child abuse reporting (Stats. 2025, ch. 619) This bill requires the Department of Justice (DOJ) to monitor the Child Abuse Central Index and notify designated Court Appointed Special Advocate (CASA) programs if a record of a child abuse investigation involving a CASA employee or volunteer is added to the index. CASA programs must request subsequent arrest notifications for all employment and volunteer candidates and notify the DOJ when an individual is no longer employed or volunteering with the program. The DOJ may increase its fee for processing these notifications to cover associated costs. r. Assembly Bill 779 (Lackey), Child welfare services: domestic violence consultant pilot program (Stats. 2025, ch. 381) This bill authorizes a county child welfare agency to establish a 3-year pilot program in which the county partners with a domestic violence consultant from a domestic violence victim service organization to offer support and guidance to county social workers in addressing the complex dynamics of families who are potentially experiencing both domestic violence and child maltreatment in order to enhance the social worker's knowledge of domestic violence and their ability to apply that knowledge to their work with parent survivors and their children through tailored engagement and intervention strategies. This bill requires a county that implements the pilot program to conduct a comprehensive evaluation of the pilot program and report its findings to the Legislature on or before October 31, 2031.

* This legislation is pending and has not been signed by the Governor. If the legislation is not enacted the project will be removed from this Annual Agenda. An asterisk following any legislation herein denotes the same.

#	New or One-Time Projects
	s. Assembly Bill 890 (Lee), Nonminor dependents: county of residence (Stats. 2025, ch. 281) This bill amends Welfare and Institutions Code section 375 to allow a nonminor dependent to request a transfer of jurisdiction to a new county if the court determines it is in their best interest. The court will consider factors like access to services, input from the social worker or probation officer, residency status, connections to the new county, and any involvement in another dependency case as a parent. The court must make a decision within 30 days of the request, and the new county must accept jurisdiction within 10 days of the court’s transfer order. t. Assembly Bill 896 (Elhawary), Foster care: placement transition planning (Stats. 2025, ch. 564) This bill requires county child welfare agencies to adopt a policy for supporting foster children during placement transitions, including transitions to reunification. The policy must allow children to give input on their transitions and provide guidance to social workers on how to collect input and share information. If a placement cannot be maintained, the social worker must ensure proper transition planning. The State Department of Social Services will issue guidance on best practices for these transitions, and counties must submit their policies to the department within a year after receiving the guidance and funding. u. Assembly Bill 1261 (Bonta), Immigration: unaccompanied undocumented minors: right to legal counsel (Stats. 2025, ch. 665) This bill requires the state to provide legal counsel to each unaccompanied undocumented minor in the physical custody of the federal Office of Refugee Resettlement and present in California or residing with a family member or other sponsor in California. The right to counsel applies in state court proceedings for purposes of obtaining any order necessary for or relevant to immigration remedies, federal immigration proceedings, any related appearances or matters before the United States Department of Homeland Security, and any appeals arising from those proceedings. This bill defines an unaccompanied undocumented minor as a person who has not attained the age of 18, has no legal immigration status, and has no parent or legal guardian in the United States, or no parent or legal guardian in the United States is available to provide care and physical custody. v. Assembly Bill 1521 (Committee on Judiciary), Committee on Judiciary: judiciary omnibus (Stats. 2025, ch. 200) Among other provisions, this bill requires representatives of a decedent’s estate to notify the Director of the Department of Child Support Services if the general personal representative or estate attorney knows or has reason to believe the decedent had a child support obligation under an order issued by a court of competent jurisdiction. The local child support agency providing services may assert a claim no later than four months after receiving notice. This provision only applies to estates for which letters are issued on and after January 1, 2026. w. Senate Bill 119 (Committee on Budget and Fiscal Review), Public social services trailer bill (Stats. 2025, ch. 79) This bill requires the California Department of Social Services, through the State Office of Child Abuse Prevention, to, by no later than July 1, 2027, develop, with participation from specified individuals, including, among others, county child welfare agencies, a

#	New or One-Time Projects
	standardized curriculum for mandated reporters, and to make that training available on an internet website. Requires the standardized curriculum for mandated reporters to include various components, including but not limited to: the history of mandated reporting laws; California’s Child Abuse and Neglect Reporting Act, the federal Indian Child Welfare Act, best practice for defining “reasonable suspicion” and “substantial risk”; differences between “severe neglect” and “general neglect,” as defined; California child abuse, neglect, and disproportionality data; definitions of bias and trauma; the impact on families of making a child abuse or neglect report to child protective services; considerations for specified populations; decision-making processes and tools for mandated reporters; and education and information on community resources. Requires the California Child Welfare Council to establish a Mandated Reporting Advisory Committee, which includes representatives of county agencies, labor organizations, community-based organizations, and parents and youth directly impacted by the child welfare system. x. Senate Bill 413 (Allen), Juveniles: case file inspection (Stats. 2025, ch. 221) This bill amends Welfare and Institutions Code section 827 to allow an attorney representing a party in a civil proceeding (defined to mean either a civil action or a government claim filed pursuant to the Government Claims Act) to inspect and use information and records in a juvenile case file when the civil claim is filed by, or on behalf of the person who is the subject of the juvenile case file. Procedural protections. This bill allows information and copies of records from a juvenile case file to be provided to persons assisting the attorneys for the parties in the civil proceeding for their use in that proceeding without the prior approval of the court, but requires them to return all copies of records from a juvenile case file provided by an attorney pursuant to this subparagraph at the conclusion of the civil proceeding. The attorney must also take appropriate steps to ensure that all copies of records from a juvenile case file obtained pursuant to this subparagraph are destroyed upon the conclusion of the civil proceeding consistent with other applicable laws. Juvenile Justice: y. Assembly Bill 1071 (Kalra), Criminal procedure: discrimination (Stats. 2025, ch.)[*] This bill amends Penal Code sections 745, 1473, and 1473.7 and adds Penal Code section 1473.2 to provide procedures for a defendant to seek relief if they believe their conviction or sentence was influenced by racial, ethnic, or national origin discrimination. It establishes a process for filing a motion for relief, including the submission of statistical evidence, and specifies the burden of proof required. The bill would also change the remedies for a violation of this prohibition in accordance with the procedure the defendant used to pursue relief. z. Assembly Bill 1376 (Bonta), Wards: probation (Stats. 2025, ch. 575) This bill amends Welfare and Institutions Code sections 730, 730.6, and 731 to create a rebuttable presumption that probation should not extend beyond 12 months, and allows the presumption to be overcome by a preponderance of evidence that that it is in the ward’s and the public’s best interest. Requires the court to state the reasons for the findings orally on the record in cases in which the court finds by a preponderance of the evidence a basis for extending probation. This bill requires the court to set forth the reasons in an order

#	New or One-Time Projects												
	entered upon the minutes if requested by either party or when the proceedings are not being recorded electronically or reported by a court reporter. Requires the court to hold noticed hearings for the ward not less frequently than every 6 months for the remainder of the wardship period if the court extends probation. These requirements do not apply to wards in a juvenile home, ranch, camp, or forestry camp. Status/Timeline: Proposals required by the foregoing legislative mandates are anticipated to circulate in the Spring cycle with an expected effective date of January 1, 2027. Fiscal Impact/Staff Resources: Center for Families, Children & the Courts (CFCC) staff, in consultation with staff from Legal Services, will prepare revised rules and forms as needed. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: All draft proposals will circulate for public comment to a list of family and juvenile law related stakeholders as well as all court executives and presiding judges. AC Collaboration: For proposals that impact family and civil courts, the committee will collaborate with the Civil and Small Claims Advisory Committee (CSCAC). For proposals that impact guardianship and adult mental health, the committee will collaborate with the Probate and Mental Health Advisory Committee (PMHAC). For proposals that impact tribal courts, the committee will collaborate with the Tribal Court–State Court Forum. For proposals that impact the Courts of Appeal, the committee will collaborate with the Appellate Advisory Committee (AAC). For proposals that impact protective orders other than domestic violence and juvenile orders, the committee will convene POWG and collaborate with CSCAC and the Criminal Law Advisory Committee (CLAC), as needed.												
2.	Juvenile Law: Consider new and revised forms for sealing juvenile records under Welfare and Institutions Code section 788 (One-Time Project)					Priority: 1a							
Supported Strategic Plan Branch Goals:													
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Project Summary: Create a court form to seal juvenile records in accordance with Welfare and Institutions Code section 788, to implement Assembly Bill 1877 (Jackson) Juveniles: sealing records (Stats. 2024, ch. 811), which requires county probation officers to petition the court to seal juvenile records once a person who was the subject of a petition or cited to appear before a probation officer has reached 18 years of													

#	New or One-Time Projects								
	age, has not been convicted of a felony or of any misdemeanor involving moral turpitude, and who has attained rehabilitation to the satisfaction of the court. This project would also revise form JV-590, the order sealing the records, to incorporate orders made pursuant to Welfare and Institutions Code section 788. Status/Timeline: Anticipate circulating for comment in the Spring cycle with an effective date of January 1, 2027. Fiscal Impact/Staff Resources: CFCC staff, in consultation with staff from Legal Services, will prepare the new and revised forms. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: The draft proposal will circulate for public comment to a list of juvenile law related stakeholders as well as all court executives and presiding judges. AC Collaboration: None.								
3.	Juvenile Law: Amend rules and revise forms to comply with Senate Bill 823 (Stats. 2020, ch. 337) and <i>Gabriel M. v. Superior Court</i> (2024) 107 Cal.App.5th 446, 456 (One-Time Project)	Priority: 1a							
	Supported Strategic Plan Branch Goals: <table><tr><td>I Access ☐</td><td>II Independence ☐</td><td>III Modernization ☐</td><td>IV Quality ☒</td><td>V Education ☐</td><td>VI Infrastructure ☐</td><td>VII Funding ☐</td></tr></table>		I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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	Project Summary: The committee will consider amendments to rules and revisions to forms, including but not limited to rule 5.770 and <i>Order to Transfer Juvenile to Criminal Court Jurisdiction</i> (form JV-710), based on Senate Bill 823 and a recent Court of Appeal opinion in <i>Gabriel M. v. Superior Court</i> (2024) 107 Cal.App.5th 446, 456, which stated that Welfare and Institutions Code section 707.1 as revised by Senate Bill 823 says nothing about transferring minors from juvenile facilities to adult facilities. Accordingly, rule 5.770(d)(2) must be updated to conform to statute because the current rule’s provision concerning transfers of minors to adult facilities refers to a statute that no longer applies to such transfers. Similarly, Judicial Council form JV-710 (the optional form used for granting a motion to transfer a minor from juvenile court to adult criminal court) must also be updated to conform to statute because it still refers to Welfare and Institutions Code section 207.1, which no longer applies to transferring minors from juvenile facilities to adult facilities. Status/Timeline: Any necessary rules and forms revisions are anticipated to circulate for comment in the Spring cycle, to take effect on January 1, 2027.								

#	New or One-Time Projects								
	Fiscal Impact/Staff Resources: CFCC staff, in consultation with staff from Legal Services, will prepare the amended rules and revised forms. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: The draft proposal will circulate for public comment to a list of juvenile law related stakeholders as well as all court executives and presiding judges. AC Collaboration: CLAC.								
4.	Family Law: Amend rules and create and revise forms regarding income (New Project)	Priority: 1a							
	Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☐</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>		I Access ☒	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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	Project Summary: The committee will consider revisions to <i>Income and Expense Declaration</i> (form FL-150), <i>Financial Statement (Simplified)</i> (form FL-155), <i>Request for Income and Benefit Information from Employer</i> (form FL-397), and any other relevant rules and forms to implement changes required by recent federal legislation (One Big Beautiful Bill Act (H.R. 1, 119th Cong., 1st Sess. (2025))) and to improve useability. The recommendation may include the adoption of new attachment forms. Status/Timeline: The proposal is anticipated to circulate for comment in the Spring cycle, to take effect on January 1, 2027. Fiscal Impact/Staff Resources: CFCC staff, in consultation with staff from Legal Services, will prepare the amended rules and new and revised forms. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: California Department of Child Support Services. The draft proposal will circulate for public comment to a list of relevant stakeholders as well as all court executives and presiding judges. AC Collaboration: None.								

#	New or One-Time Projects								
5.	Family Law: Amend rule 5.230 to comply with Assembly Bill 1974 (Stats. 2024, ch. 303) (One-Time Project)	Priority: 1a							
Supported Strategic Plan Branch Goals:									
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Project Summary: The committee will consider amendments to rule 5.230 (domestic violence training standards for court-appointed child custody investigators and evaluators) to add a new training topic to the 12 hours of advanced training for child custody investigators and evaluators. Status/Timeline: The proposal is anticipated to circulate for comment in the Spring cycle, to take effect on January 1, 2027. Fiscal Impact/Staff Resources: CFCC staff, in consultation with staff from Legal Services, will prepare the amended rule. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: The draft proposal will circulate for public comment to a list of family law and domestic violence prevention related stakeholders as well as all court executives and presiding judges. AC Collaboration: None.									
6.	Juvenile Law: Implement reauthorization of title IV-B funding for Court Improvement Programs (New Project)	Priority: 1							
Supported Strategic Plan Branch Goals:									
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Project Summary: The committee will consider necessary actions to support implementation of the Supporting America's Children and Families Act (H.R. 9076, 118th Cong., 2d Sess. (2025)) which reauthorizes Title IV-B funding for Court Improvement Programs effective October 1, 2025. Necessary actions may include collaborating with the California Department of Social Services to develop and implement federal compliance strategies on topics such as ensuring children, parents, and guardians are informed about the availability of independent									

#	New or One-Time Projects								
	legal representation, preventing family separation based on poverty, improving Indian Child Welfare Act compliance, providing title IV-B services up to the age of 26, and providing technical assistance and education to courts to support implementation and increase compliance. Status/Timeline: Ongoing. Federal guidance continues to be published on the reauthorization and how states are required to implement the changed provisions. Fiscal Impact/Staff Resources: CFCC staff, Legal Services, and Governmental Affairs. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: California Department of Social Services, Chief Probation Officers of California, Child Welfare Directors Association. AC Collaboration: None.								
7.	Family Law: Quadrennial review of statewide uniform child support guideline (One-Time Project)	Priority: 1							
Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☐</td> <td>IV Quality ☐</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>			I Access ☒	II Independence ☐	III Modernization ☐	IV Quality ☐	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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Project Summary: Family Code section 4054(a) requires that, at least every four years, the Judicial Council review the statewide uniform child support guideline to recommend appropriate revisions to the Legislature. Additionally, federal requirements require that the state review its guideline on a quadrennial basis. Status/Timeline: It is anticipated the study will be completed in 2026 and submitted to the Legislature in May 2026. Fiscal Impact/Staff Resources: CFCC staff will work with Governmental Affairs staff to transmit the study to the Legislature. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: California Department of Child Support Services. Additionally, the draft study will circulate for public comment to a list of family and juvenile law related stakeholders as well as all court executives and presiding judges.									

#	New or One-Time Projects								
	AC Collaboration: The study must also be reviewed by the Governmental Affairs Office and approved by the Legislation Committee.								
8.	Allocations and Reimbursements to Trial Courts: Improve compliance with court-ordered firearm prohibitions (One-Time Project)	Priority: 1							
Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☐</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>			I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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Project Summary: The Budget Act of 2022 (Assem. Bill 178 (Ting) Stats. 2022, ch. 45)) allocates \$40 million to the judicial branch to improve compliance with court-ordered firearm prohibitions. Of this amount, \$36 million is for grants to the courts, and \$4 million is for oversight, data collection, and a required evaluation. In 2022, the Rules Committee approved this item on the committee's annual agenda, authorizing its work to implement this program. The committee will continue to develop recommendations to the Judicial Council to distribute the remaining funds, as needed. In addition, the Gun Violence Prevention and School Safety Act (Assem. Bill 28 (Gabriel) (Stats. 2023, ch. 231)) may provide up to \$15 million per year, on an ongoing basis, to support court-based firearm relinquishment programs. It is anticipated that the committee develop recommendations to the Judicial Council for implementation and coordinating with the state Department of Justice. Status/Timeline: Funds must be spent by December 31, 2026. Fiscal Impact/Staff Resources: CFCC and Criminal Justice Services staff will work with Budget Services regarding agreements with the courts for allocation of funds over the remaining two years. ☒ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Law enforcement agencies; University of California Firearm Violence Research Center at the University of California, Davis. AC Collaboration: CSCAC, CLAC, and Trial Court Budget Advisory Committee (TCBAC).									

#	New or One-Time Projects								
9.	Juvenile Law: Revise rule 5.570 and forms JV-180 and JV-183 (One-Time Project)	Priority: 2a							
Supported Strategic Plan Branch Goals:									
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Project Summary: The committee will develop a recommendation to revise <i>Request to Change Court Order</i> (form JV-180) and <i>Court Order on Form JV-180</i>, Request for Court Order (form JV-183) to apply to Welfare and Institutions Code section 388 petitions improperly filed before disposition. Additionally, this proposal will review rule 5.570 to conform with concerns raised in <i>In re L.M.</i> (2025) A171105 (pending publication) regarding the courts' obligation to give special consideration to the views of a presumed fit parent. Status/Timeline: Anticipate circulating for comment in the Spring cycle with an effective date of January 1, 2027. Fiscal Impact/Staff Resources: CFCC staff, in consultation with staff from Legal Services, will prepare the revised forms. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: The draft proposal will circulate for public comment to a list of juvenile law related stakeholders as well as all court executives and presiding judges. AC Collaboration: None.									
10.	Juvenile Law: Amend Appendix F guidelines for the Juvenile Dependency Counsel Collections Program (One-Time Project)	Priority: 2b							
Supported Strategic Plan Branch Goals:									
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Project Summary: If time and resources permit, the committee will consider developing a recommendation to amend Appendix F, Guidelines for the Juvenile Dependency Counsel Collections Program (JDCCP) (Cal. Rules of Court, appen. F). As required by Welfare and Institutions Code section 903.47, the JDCCP collects reimbursement for the cost of providing legal services in juvenile dependency proceedings from responsible persons who are determined able to pay that cost. The program then reallocates the collected funds to the court-appointed counsel									

#	New or One-Time Projects								
	budgets of participating courts whose base allocation does not meet their needs under the current funding methodology. To reduce confusion, the recommended amendments will update the guidelines to remove an outdated method of calculating a court’s costs of providing dependency-related legal services. The committee will consider whether to replace this method with a new method of calculating the cost of counsel consistent with the current methodology used by Judicial Council staff to determine the courts’ proportional need for court-appointed counsel funding. If the committee does not recommend replacing the method, courts would have the option of determining their actual costs (Cal. Rules of Court, appen. F, § 5(a)) or adopting a flat rate fee structure that ensures that the fees collected from a responsible person do not exceed the actual costs of services provided in the applicable proceeding (<i>Id.</i>, § 5(c)). Status/Timeline: Anticipate circulating for comment in the Spring cycle with an effective date of January 1, 2027. Fiscal Impact/Staff Resources: The project is unlikely to have a significant fiscal impact on the trial courts or the Judicial Council; staff resources include CFCC staff and Legal Services. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial Courts, Court-Appointed Counsel, parents and children. AC Collaboration: TCBAC.								
11.	Juvenile Law: Amend rule 5.640 to permit electronic services of psychological or medication documentation (One-Time Project) Supported Strategic Plan Branch Goals: <table><tr><td>I Access ☒</td><td>II Independence ☐</td><td>III Modernization ☒</td><td>IV Quality ☒</td><td>V Education ☐</td><td>VI Infrastructure ☐</td><td>VII Funding ☐</td></tr></table>	I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐	Priority: 2b
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	Project Summary: If time and resources permit, the committee will consider recommending revisions to rule 5.640 to permit courts to have the option of accepting electronic service or creating their own local rules for electronic service of psychological or medical documentation necessary to administer psychotropic medication. Status/Timeline: Anticipate circulating for comment in the Spring cycle with an effective date of January 1, 2027. Fiscal Impact/Staff Resources: CFCC staff, in consultation with staff from Legal Services, will prepare any the amended rule as needed.								

#	New or One-Time Projects								
	☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Any draft rules proposal will circulate for public comment to a list of family and juvenile law related stakeholders as well as all court executives and presiding judges. AC Collaboration: None.								
12.	Protective Orders: Consider new and revised rules and forms regarding requests to change or end Domestic Violence Prevention Act orders (New Project)	Priority: 2b							
Supported Strategic Plan Branch Goals:									
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Project Summary: If time and resources permit, the committee will consider recommending revisions to the rules and forms regarding requests to change or end orders issued in Domestic Violence Prevention Act cases to address court operational concerns and to refine the forms for greater clarity. This will include consideration of forms related to making the request, serving the request, and orders issued as a result of the request. The committee will also consider whether to amend existing rules of court or adopt new rules of court to clarify this process. Status/Timeline: Anticipate circulating for comment in the Spring 2027 cycle with an effective date of January 1, 2028. Fiscal Impact/Staff Resources: CFCC staff, in consultation with staff from Legal Services, will prepare any new or amended rules and new or revised forms needed. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Any draft rules proposal will circulate for public comment to a list of family and domestic violence prevention law related stakeholders as well as all court executives and presiding judges. AC Collaboration: None.									

#	New or One-Time Projects								
13.	Juvenile Law: Advise on court appointed counsel funding allocation methodology (New Project)	Priority: 2							
Supported Strategic Plan Branch Goals: <table border="0" style="width: 100%;"> <tr> <td style="text-align: center;">I Access ☒</td> <td style="text-align: center;">II Independence ☐</td> <td style="text-align: center;">III Modernization ☐</td> <td style="text-align: center;">IV Quality ☒</td> <td style="text-align: center;">V Education ☐</td> <td style="text-align: center;">VI Infrastructure ☐</td> <td style="text-align: center;">VII Funding ☐</td> </tr> </table>			I Access ☒	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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Project Summary: Members of the committee will provide input as appropriate to members of TCBAC reviewing the workload model for court appointed dependency counsel. Status/Timeline: Ongoing. The Budget Act of 2025 specifies that \$186.7 million be appropriated to the California Court Appointed counsel for FY 2025–26. Fiscal Impact/Staff Resources: CFCC staff, Budget Services. ☒ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Court appointed counsel providers. AC Collaboration: TCBAC.									

#	Ongoing Projects and Activities								
1.	Juvenile Law: Update rules and forms for consistency with Indian Child Welfare Act requirements	Priority: 1a							
Supported Strategic Plan Branch Goals:									
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Project Summary: Maintain rule and form compliance with the Indian Child Welfare Act (ICWA) and its requirements as needed. Status/Timeline: Ongoing. Any required rules and forms proposals this year are anticipated to circulate for comment in the Spring cycle with an effective date of January 1, 2027. Fiscal Impact/Staff Resources: CFCC staff, Legal Services. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: None. AC Collaboration: Tribal Court–State Court Forum.									
2.	Rules and Forms: Consider miscellaneous technical changes	Priority: 1a							
Supported Strategic Plan Branch Goals:									
<table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☐</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>			I Access ☐	II Independence ☐	III Modernization ☒	IV Quality ☐	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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Project Summary: Develop rule and form changes as necessary to make corrections and adjustments meeting the criteria of rule 10.22(d)(2): “a nonsubstantive technical change or correction or a minor substantive change that is unlikely to create controversy....” These include revisions to forms that contain dollar figures based on statutory criteria that the Judicial Council is mandated to adjust on a regular basis. Status/Timeline: Ongoing. Fiscal Impact/Staff Resources: CFCC staff, Legal Services. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts.									

#	Ongoing Projects and Activities													
	Internal/External Stakeholders: None. AC Collaboration: None.													
3.	Juvenile Law: Family First Prevention Services Act implementation						Priority: 1a							
Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☒</td> <td>III Modernization ☐</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☒</td> </tr> </table>								I Access ☒	II Independence ☒	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☒
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Project Summary: Monitor implementation of the federal Family First Prevention Services Act (FFPSA), which reforms federal child welfare financing streams, title IV-E, and title IV-B of the Social Security Act, to provide services to families who are at risk of entering the child welfare system. California's title IV-E program was audited by the federal government in 2025 and is expected to receive implementations for the state's child welfare financing. Status/Timeline: Ongoing. Fiscal Impact/Staff Resources: CFCC Staff, Legal Services and Governmental Affairs. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: California Department of Social Services, Chief Probation Officers of California, Child Welfare Directors Association. AC Collaboration: None.														
4.	Protective Orders Working Group						Priority: 1							
Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>								I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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#	Ongoing Projects and Activities												
	Project Summary: As lead committee for POWG, work with CSCAC and CLAC to ensure protective order forms are written in consistent language that is comprehensible to non-attorneys, while maintaining legal accuracy. POWG will work collaboratively on the protective order projects identified in this agenda and the agendas of the other committees that make up the working group. Status/Timeline: Ongoing. Fiscal Impact/Staff Resources: CFCC staff, Legal Services, and Criminal Justice Services. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: none. AC Collaboration: CSCAC and CLAC as needed.												
5.	Juvenile Law: Advise on Court Appointed Special Advocates (CASA) grants program funding and program oversight (Welf. & Inst. Code, § 100 et seq.)					Priority: 1							
Supported Strategic Plan Branch Goals: <table><tr><td>I Access ☐</td><td>II Independence ☐</td><td>III Modernization ☐</td><td>IV Quality ☒</td><td>V Education ☐</td><td>VI Infrastructure ☐</td><td>VII Funding ☒</td></tr></table>							I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☒
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Project Summary: Oversee recommendations to the Judicial Council for allocation of \$2.713 million and any other needed changes to support CASA programs. Status/Timeline: Ongoing. Fiscal Impact/Staff Resources: CFCC staff, Budget Services. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: California Court Appointed Special Advocate Association. AC Collaboration: None.													

6.	Family and Juvenile Law: Provide recommendations to Judicial Council on Domestic Violence issues	Priority: 1							
Supported Strategic Plan Branch Goals: <table border="0" style="width: 100%;"> <tr> <td style="text-align: center;">I Access ☐</td> <td style="text-align: center;">II Independence ☐</td> <td style="text-align: center;">III Modernization ☐</td> <td style="text-align: center;">IV Quality ☒</td> <td style="text-align: center;">V Education ☒</td> <td style="text-align: center;">VI Infrastructure ☐</td> <td style="text-align: center;">VII Funding ☐</td> </tr> </table>			I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☒	VI Infrastructure ☐	VII Funding ☐
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Project Summary: Provide recommendations to the council on statewide judicial branch domestic violence issues in the area of family and juvenile law, including projects referred from the work of the Domestic Violence Practice and Procedure Task Force and the Violence Against Women Education Program. Status/Timeline: Ongoing. Fiscal Impact/Staff Resources: CFCC staff, Criminal Justice Services, and Legal Services. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: None. AC Collaboration: CSCAC, CLAC, and Tribal Court–State Court Forum.									
7.	Family and Juvenile Law: Review pending legislation	Priority: 1							
Supported Strategic Plan Branch Goals: <table border="0" style="width: 100%;"> <tr> <td style="text-align: center;">I Access ☐</td> <td style="text-align: center;">II Independence ☒</td> <td style="text-align: center;">III Modernization ☐</td> <td style="text-align: center;">IV Quality ☒</td> <td style="text-align: center;">V Education ☐</td> <td style="text-align: center;">VI Infrastructure ☐</td> <td style="text-align: center;">VII Funding ☐</td> </tr> </table>			I Access ☐	II Independence ☒	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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Project Summary: As requested by the Legislation Committee, review and recommend positions on legislation related to family and juvenile law matters. Status/Timeline: Ongoing. Fiscal Impact/Staff Resources: CFCC staff, Governmental Affairs, and Legal Services staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: None. AC Collaboration: None.									

8.	Family and Juvenile Law: Review enacted legislation	Priority: 1							
Supported Strategic Plan Branch Goals: <table border="0" style="width: 100%;"> <tr> <td style="text-align: center;">I Access ☐</td> <td style="text-align: center;">II Independence ☒</td> <td style="text-align: center;">III Modernization ☒</td> <td style="text-align: center;">IV Quality ☐</td> <td style="text-align: center;">V Education ☐</td> <td style="text-align: center;">VI Infrastructure ☐</td> <td style="text-align: center;">VII Funding ☐</td> </tr> </table>			I Access ☐	II Independence ☒	III Modernization ☒	IV Quality ☐	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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Project Summary: Review all legislation referred by the Judicial Council’s Governmental Affairs office that may affect issues within the advisory committee’s purview and, where appropriate, propose to the council rules and forms or revisions to implement or align with the legislation. Status/Timeline: Ongoing; will only take further action upon approval of Rules Committee. Fiscal Impact/Staff Resources: CFCC staff, Governmental Affairs, and Legal Services staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: None. AC Collaboration: As appropriate based on specific legislation.									
9.	Juvenile Law: Intercounty transfers	Priority: 1							
Supported Strategic Plan Branch Goals: <table border="0" style="width: 100%;"> <tr> <td style="text-align: center;">I Access ☐</td> <td style="text-align: center;">II Independence ☐</td> <td style="text-align: center;">III Modernization ☒</td> <td style="text-align: center;">IV Quality ☐</td> <td style="text-align: center;">V Education ☐</td> <td style="text-align: center;">VI Infrastructure ☐</td> <td style="text-align: center;">VII Funding ☐</td> </tr> </table>			I Access ☐	II Independence ☐	III Modernization ☒	IV Quality ☐	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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Project Summary: Review requests under rule 5.610(h) to approve local collaborative agreements for alternative juvenile court transfer forms in lieu of using form JV-550. This project originated from the Judicial Council Delegations to the Administrative Director of the Courts (October 25, 2013, Item 99), who then delegated the project to the committee. The committee will review any such requests that are presented during the upcoming year. Status/Timeline: Ongoing. Fiscal Impact/Staff Resources: CFCC staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: None.									

	<i>AC Collaboration:</i> None.								
10.	Juvenile Law: Child and Family Services Reviews (CFSR) process	Priority: 1							
Supported Strategic Plan Branch Goals:									
<table border="0"> <tr> <td>I <i>Access</i> ☒</td> <td>II <i>Independence</i> ☐</td> <td>III <i>Modernization</i> ☐</td> <td>IV <i>Quality</i> ☒</td> <td>V <i>Education</i> ☐</td> <td>VI <i>Infrastructure</i> ☐</td> <td>VII <i>Funding</i> ☐</td> </tr> </table>			I <i>Access</i> ☒	II <i>Independence</i> ☐	III <i>Modernization</i> ☐	IV <i>Quality</i> ☒	V <i>Education</i> ☐	VI <i>Infrastructure</i> ☐	VII <i>Funding</i> ☐
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Project Summary: The Court Improvement Plan (CIP) is a federal grant from the Administration of Children and Families, Children’s Bureau, to a state’s highest court to continuously improve court processes and legal representation in child welfare proceedings. California’s CIP, in part, provides funding to juvenile courts. The Children’s Bureau conducts periodic onsite reviews of the state’s child welfare system. Round 4 of this review, known as a Child and Family Services Review (CFSR), began in 2022 with a letter from the Children’s Bureau to the Chief Justice requiring judicial branch participation, including the provision of a Legal-Judicial Specialist on the CFSR team and implementation of Program Improvement Plan (PIP) strategies. At that time, the Chief Justice designated the cochairs of the Family and Juvenile Law Advisory Committee to be her representatives in the CFSR. Under the CFSR, the federal government determines whether the state child welfare system is in substantial conformity with required safety, permanency, and well-being outcomes for foster children under federal law (45 C.F.R. §§ 1355.33(c), 1355.34, 1355.35(a)). To achieve substantial conformity, California developed a PIP that was approved by the federal administration in June 2025. The PIP sets forth benchmarks the state must meet to avoid losing federal funding. California must make sufficient progress to reach substantial conformity under its PIP within 18 months of approval. The committee will develop and monitor implementation of judicial branch key activities listed in California’s PIP to obtain substantial compliance of the CFSR. In addition, the committee has been asked by the Children’s Bureau and the California Department of Social Services (CDSS) to help CDSS develop and implement legal and judicial strategies to address areas in the child welfare services system that need improvement. Status/Timeline: Ongoing. Fiscal Impact/Staff Resources: CFCC staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: California Department of Social Services, Chief Probation Officers of California, Child Welfare Directors Association. AC Collaboration: None.									

11.	Family Law: Review approval of training providers under rules 5.210, 5.215, 5.225, 5.230, and 5.518	Priority: 1							
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Project Summary: In consultation with the Family and Juvenile Law Advisory Committee, Judicial Council staff approve mandated education and training programs for court-connected mediators, child custody recommending counselors, and evaluators. Status/Timeline: Ongoing. Fiscal Impact/Staff Resources: CFCC staff and Legal Services. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: None. AC Collaboration: None.									
12.	Family and Juvenile Law: Serve as subject matter resource	Priority: 1							
Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☐</td> <td>IV Quality ☒</td> <td>V Education ☒</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>			I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☒	VI Infrastructure ☐	VII Funding ☐
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Project Summary: The committee serves as a subject matter resource on family and juvenile law for other advisory groups to avoid duplication of effort and contribute to the development of recommendations for the Judicial Council. Such efforts may include providing family and juvenile law expertise and review to working groups, advisory committees, and subcommittees as needed. Status/Timeline: Ongoing. Fiscal Impact/Staff Resources: CFCC staff, Governmental Affairs, Legal Services, and Criminal Justice Services. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: TBD, depending on the subject matter and scope of the issues raised.									

	AC Collaboration: Respective advisory bodies.								
13.	Family Law: Certification of Statewide Uniform Guideline Support Calculators	Priority: 1							
Supported Strategic Plan Branch Goals: <table border="0" style="width: 100%;"> <tr> <td style="text-align: center;">I Access ☐</td> <td style="text-align: center;">II Independence ☐</td> <td style="text-align: center;">III Modernization ☐</td> <td style="text-align: center;">IV Quality ☒</td> <td style="text-align: center;">V Education ☐</td> <td style="text-align: center;">VI Infrastructure ☐</td> <td style="text-align: center;">VII Funding ☐</td> </tr> </table>			I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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Project Summary: Review requests under rule 5.275 and Family Code section 3830 from developers to certify new guideline support calculators for use in the superior courts. Status/Timeline: Ongoing. Fiscal Impact/Staff Resources: CFCC staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: None. AC Collaboration: None.									
14.	Rules and Forms: Update Judicial Council forms within the committee's purview that have a gender identity question or term	Priority: 2b							
Supported Strategic Plan Branch Goals: <table border="0" style="width: 100%;"> <tr> <td style="text-align: center;">I Access ☒</td> <td style="text-align: center;">II Independence ☐</td> <td style="text-align: center;">III Modernization ☐</td> <td style="text-align: center;">IV Quality ☒</td> <td style="text-align: center;">V Education ☐</td> <td style="text-align: center;">VI Infrastructure ☐</td> <td style="text-align: center;">VII Funding ☐</td> </tr> </table>			I Access ☒	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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Project Summary: Revise forms containing gendered terms or gender identity questions to remove gendered language and conform to legislative changes providing for nonbinary gender identity as the forms are being revised for other reasons. Status/Timeline: Ongoing. Fiscal Impact/Staff Resources: CFCC staff and Legal Services. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts.									

	Internal/External Stakeholders: None. AC Collaboration: None.								
15.	Family Law: Assembly Bill 1058 child support program funding	Priority: 2							
Supported Strategic Plan Branch Goals:									
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Project Summary: Continue to monitor the implementation of the current workload-based funding methodology for the AB 1058 Child Support Commissioner Program and population-based funding methodology for the Family Law Facilitator Program, including its impact on smaller courts and the overall performance of the program as federally mandated. Status/Timeline: Ongoing. Fiscal Impact/Staff Resources: CFCC staff will work with Budget Services staff to coordinate work with TCBAC, if any changes to the methodology are suggested. ☒ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: Department of Child Support Services. AC Collaboration: None.									
16.	Family and Juvenile Law: Advise on Judicial Branch education for family and juvenile law	Priority: 2							
Supported Strategic Plan Branch Goals:									
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Project Summary: Contribute to planning efforts in support of family and juvenile law judicial branch education. Status/Timeline: Ongoing. Fiscal Impact/Staff Resources: CFCC staff and Center for Judicial Education and Resources.									

	☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: None. AC Collaboration: Center for Judicial Education and Resources Advisory Committee.								
17.	Juvenile Law: Advise on distribution of federal title IV-E reimbursement for dependency counsel	Priority: 2							
Supported Strategic Plan Branch Goals:									
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Project Summary: Beginning in 2019, a change in the federal Child Welfare Policy Manual permits attorneys who provide dependency representation to claim reimbursement for specified legal activities. The Budget Act of 2025 includes \$66 million to support this federal reimbursement. The ongoing funding to support federal reimbursement was first included in the Budget Act of 2019. In July 2019, the Council authorized distribution of these funds to court appointed dependency counsel statewide. Status/Timeline: Ongoing. Fiscal Impact/Staff Resources: CFCC staff, Legal Services, and Branch Accounting and Procurement. ☒ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: Court Executive Advisory Committees \ Subcommittee, California Department of Social Services, Child Welfare Directors Association, Court Appointed Counsel in Dependency Providers. AC Collaboration: Joint Rules Subcommittee of Trial Court Presiding Judges and Court Executive Advisory Committees.									
18.	Juvenile Law: Blue Ribbon Commission on Children in Foster Care (BRC) recommendations	Priority: 2							
Supported Strategic Plan Branch Goals:									
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I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
Project Summary: As requested by Judicial Council members, provide input on council accepted recommendations from the BRC. Consider ongoing process to monitor issues raised in the August 2014 BRC Final Report.									

	Status/Timeline: Ongoing, as needed. Fiscal Impact/Staff Resources: CFCC staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: None. AC Collaboration: None.													
19.	Family Law: Elkins Family Law Task Force recommendations						Priority: 2							
Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☐</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>								I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐								
Project Summary: As requested by Judicial Council members, provide input on council accepted recommendations from the Elkins Family Law Task Force. And consider ongoing process to monitor issues raised in the December 2013 Elkins Family Law Implementation Task Force Final Report. Status/Timeline: Ongoing, as needed. Fiscal Impact/Staff Resources: CFCC staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: None. AC Collaboration: None.														
20.	Mental Health Law: Mental Health Issues Implementation Task Force referrals						Priority: 2							
Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☐</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>								I Access ☒	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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	Project Summary: As requested by Judicial Council members, provide input on council accepted recommendations and consider ongoing process to monitor issues raised in the December 2015 Mental Health Issues Implementation Task Force Final Report. Coordinate with Judicial Council staff and other advisory committees on developing and implementing recommendations to improve access and procedures in mental health proceedings, including review and consideration of implementation of select recommendations referred by the Judicial Council following the task force's final report to the council. Status/Timeline: Ongoing, as needed. Fiscal Impact/Staff Resources: CFCC staff, Legal Services, and Criminal Justice Services. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: None. AC Collaboration: Collaborative Justice Courts Advisory Committee and CLAC.								
21.	Probate Guardianship: Court coordination and allegations of child abuse and neglect Supported Strategic Plan Branch Goals: <table border="0" data-bbox="247 824 1927 922"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☐</td> <td>IV Quality ☐</td> <td>V Education ☐</td> <td>VI Infrastructure ☒</td> <td>VII Funding ☐</td> </tr> </table> Project Summary: Work collaboratively with Probate and Mental Health as well as the Advisory Committee on Providing Access and Fairness on issues related to court coordination and allegations of child abuse and neglect in guardianship cases. Status/Timeline: Ongoing, as needed. Fiscal Impact/Staff Resources: CFCC staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: None. AC Collaboration: PMHAC and Advisory Committee on Providing Access and Fairness.	I Access ☒	II Independence ☐	III Modernization ☐	IV Quality ☐	V Education ☐	VI Infrastructure ☒	VII Funding ☐	Priority: 2
I Access ☒	II Independence ☐	III Modernization ☐	IV Quality ☐	V Education ☐	VI Infrastructure ☒	VII Funding ☐			

22.	Protective Orders: Access to the California Courts Protective Order Registry	Priority: 2							
Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☐</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☒</td> <td>VII Funding ☐</td> </tr> </table>			I Access ☒	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☒	VII Funding ☐
I Access ☒	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☒	VII Funding ☐			
Project Summary: As lead committee for POWG, work with CSCAC and CLAC to examine the need for statewide guidance and policies on access to the California Courts Protective Order Registry. Status/Timeline: Ongoing. Fiscal Impact/Staff Resources: CFCC staff and Legal Services. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: California DOJ. AC Collaboration: CSCAC and CLAC.									

III. LIST OF 2024–2025 PROJECT ACCOMPLISHMENTS

#	Project Highlights and Achievements
1.	Implemented legislative changes requiring form changes (anticipated effective date: July 1, 2025). Juvenile Law: Restitution Orders. Provided recommendation that, effective July 1, 2025, the council revise two forms to implement Assembly Bill 1186 (Stats. 2024, ch. 805), which amended provisions of the Penal Code and the Welfare and Institutions Code regarding restitution liability in criminal and juvenile court, including eliminating joint and several liability for co-offending children in juvenile delinquency cases.
2.	Implemented legislation changes requiring rule or form changes (anticipated effective date: January 1, 2026). a. Family Law: Joint Petition for Dissolution or Legal Separation. Provided recommendation that, effective January 1, 2026, the council amend four rules of court, adopt three forms, and approve an information sheet to implement Senate Bill 1427 (Stats. 2024, ch. 190), which authorizes parties who do not qualify to use the current summary dissolution process to file a joint summons and joint petition to ask the court for a dissolution of the marriage or domestic partnership or for a legal separation. b. Family Law: Standards for Computer Software Used to Assist in Determining Support. Provided recommendation that, effective January 1, 2026, the council amend a rule of court to bring standards for calculating child support into conformity with Senate Bill 343 (Stats. 2023, ch. 213) and other existing law, to update terminology and requirements related to technology for calculating support, and to clarify existing language regarding the use of scenarios to test the accuracy of support calculations. c. Family Law and Protective Orders: Implementation of Senate Bill 599 and Assembly Bill 3072 Provided recommendation that, effective January 1, 2026, the council adopt one rule of court, amend one standard of judicial administration, approve five forms, and revise thirteen forms to implement Senate Bill 599 (Stats. 2023, ch. 493) and Assembly Bill 3072 (Stats. 2024, ch. 317), which made a number of changes to judicial considerations for child custody and visitation orders in cases involving domestic violence. d. Juvenile Law: Date Child Entered Foster Care Provided recommendation that, effective January 1, 2026, the council amend one rule of court to implement Assembly Bill 2664 (Stats. 2024, ch. 412), which amended Welfare and Institutions Code section 361.49 to clarify the date a child is deemed to have entered foster care for the purpose of establishing timelines for the provision of reunification services.

#	Project Highlights and Achievements
	e. Juvenile Law: Implementation of the Racial Justice Act Provided recommendation that, effective January 1, 2026, the council adopt five new forms to implement the Racial Justice Act, Assembly Bill 2542 (Stats. 2020, ch. 317) and Assembly Bill 256 (Stats. 2022, ch. 739), in juvenile delinquency matters. The new forms include a request form, an information sheet, an order form, and two findings and order forms. f. Juvenile Law: Retention of Juvenile Jurisdiction and Clarifying Rules for Petitions Requesting Juvenile Case Files of Deceased Children Provided recommendation that, effective January 1, 2026, the council (1) amend one rule of court to comply with Assembly Bill 1756 (Stats. 2023, ch. 478), which amended Welfare and Institutions Code section 10850.4 to extend the juvenile court’s jurisdiction in cases involving the death of a child or nonminor dependent; (2) amend one rule of court to implement Senate Bill 1161 (Stats. 2023, ch. 782), which amended the definition of a “juvenile case file” in Welfare and Institutions Code section 827(e); and (3) adopt one rule of court, amend two rules of court, adopt six forms, approve one form, and revise six forms to clarify the different legal standards for requesting a juvenile delinquency file or living child’s juvenile dependency case file versus a deceased child’s juvenile dependency case file under Welfare and Institutions Code section 827.delinquency file or living child’s juvenile dependency case file versus a deceased child’s juvenile dependency case file under Welfare and Institutions Code section 827. g. Juvenile Law: Family Finding and Engagement and ICWA Inquiry: Recent Supreme Court Decisions Provided recommendation that, effective January 1, 2026, the council amend 4 rules of court and revise 22 court forms to implement Assembly Bill 81 (Stats. 2024, ch. 656), which addressed the implementation of the Indian Child Welfare Act (25 U.S.C. §§ 1901 et. seq.), including ICWA inquiry, and Assembly Bill 2929 (Stats. 2024, ch. 845), which addressed family finding in juvenile dependency cases, and to respond to two recent decisions from the Supreme Court of California—<i>In re. Kenneth D.</i>, 16 Cal.5th 1087, and <i>In re. Dezi C.</i>, 16 Cal.5 1112—regarding ICWA inquiry. h. Protective Orders: Changes to Domestic Violence and Juvenile Forms to Implement Assembly Bill 2759 Provided recommendation that, effective January 1, 2026, the council adopt two new forms and revise eight forms to implement Assembly Bill 2759 (Stats. 2024, ch. 535), which created new requirements for granting a firearm exemption to a restraining order that includes a firearm or ammunition prohibition.

3.	The committee provided recommendations to the Judicial Council on rules and forms changes within its purview to assist court operations and to improve access to and quality of justice to the public: a. Juvenile Law: A Revision to Form JV-915-INFO Provided recommendation that, effective January 1, 2026, the council correct legal inaccuracies in Information on Filing a Petition to Terminate Juvenile Sex Offender Registration (form JV-915-INFO) by revising the existing form, which assists applicants seeking to terminate their juvenile sex offender registration requirement. b. Family Law: Rules and Forms to Determine Parental Relationship Based on Gestational Carrier Agreement. Provided recommendation that, effective July 1, 2026, the council adopt six forms and approve five forms for use in a new form series for parties (intended parents) who conceive a child with a surrogate under the terms of a gestational carrier agreement and then seek a judgment of parentage for that child. The committee also recommended that council also adopt a new rule of court, amend several rules of court, repeal one rule, and revise three forms specific to surrogacy cases.
4.	Provided oversight to implementation of new program to expand funding for court appointed counsel in dependency proceedings.
5.	Provided technical assistance and position recommendations on family and juvenile related proposed legislation via numerous legislative review meetings.
6.	Approved list of training providers for court connected child custody mediators, recommending counselors and evaluators as directed by the Judicial Council.
7.	AB 1058 Funding related activities: the committee continued to make recommendations to the council for ongoing funding allocations based on the approved funding methodologies for the program.
8.	Provided recommendations to the Judicial Council for allocation of the \$2.713 million in funding for CASA programs based on the approved methodology. Submitted and published a legislatively-mandated report entitled Report on California Court Appointed Special Advocate Association Funding Allocations and Program Development for Year Three .
9.	Provided support for the activities and meetings of the Violence Against Women Education Program.
10.	Provided recommendations to the Judicial Council for allocation and distribution of \$9.1 million to six trial courts for Cycle 3 Firearm Relinquishment Grant awards for 2024–25 through 2025–26.

Probate and Mental Health Advisory Committee
Annual Agenda¹—2025–2026
Approved by Rules Committee: October XX, 2025

I. COMMITTEE INFORMATION

Chair:	Hon. Jayne Chong-Soon Lee, Judge, Superior Court of California, County of San Joaquin
Lead Staff:	Corby Sturges, Attorney, Center for Families, Children & the Courts Julia Kaufman, Attorney, Center for Families, Children & the Courts
Advisory Committee’s Charge/Membership: Rule 10.44 (a) of the California Rules of Court states the charge of the Probate and Mental Health Advisory Committee, which is to make recommendations to the council for improving the administration of justice in proceedings involving decedents’ estates, trusts, conservatorships, guardianships, and other probate matters, and mental health and developmental disabilities issues. Rule 10.44 (b) sets forth additional duties of the advisory committee. Rule 10.44 (c) sets forth the membership position of the advisory committee. The Probate and Mental Health Advisory Committee currently has 17 members. The current committee roster is available on the advisory committee’s webpage.	
Subgroups of the Advisory Committee:² 1. Legislation Subcommittee 2. Conservatorship Subcommittee 3. Guardianship Subcommittee 4. Mental Health Subcommittee	

¹ The Annual Agenda outlines the work an advisory body will focus on in the coming year or cycle and identifies areas of collaboration with other advisory bodies and Judicial Council staff resources.

² For the definition of “subcommittee” see Cal. Rules of Court, rule 10.30(c); for “working group,” see rule 10.70; for “workstream,” see rule 10.53(c); and for “education curriculum committee,” see rule 10.50(c)(6).

Advisory Body and Subgroup Meetings Planned for 2025–2026³

- The committee plans to meet remotely once a month. The committee currently meets on the fourth Thursday of every month.
- The Legislation Subcommittee plans to meet remotely once a month from February through August during the 2026 legislative session.
- Additional meetings of the committee and subcommittees will be set as workload dictates.

Notices and agendas of all meetings are posted on the committee’s webpage as required by rule [10.75](#).

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

³ Refer to section IV.2 (Meeting frequency) of the [Operating Standards for Judicial Council Advisory Bodies](#) for governance on in-person meetings.

Note: Because of the current budget and staffing constraints, advisory body chairs and staff must first consider meeting remotely. The chair of the Executive and Planning Committee is extending the suspension of advisory body in-person meetings for the 2025–2026 annual agenda cycle. If an in-person meeting is needed, the responsible Judicial Council office head must seek approval from their advisory body’s internal oversight committee chair. Please see the prioritization memo dated June 23, 2025, for additional details.

II. COMMITTEE PROJECTS

Priority Levels and Branch Goals Key:

Refer to the following key for populating your project priority levels and branch goals. For each Priority Level 1 proposal, the advisory body **must** provide a specific reason why it should be done this year and how it fits within the identified category. If an advisory committee is interested in pursuing any Priority Level 2 proposals, please include justification as to why the proposal should be approved at this time.

Priority Levels for Non-Rules/Forms	
1	Must be done
2	Should be done
Priority Levels for Rules/Forms Proposals	
1a (Legal Compliance)	Proposal urgently needed to conform to or accurately reflect the law.
1b (Council Directive)	Council has directed the committee to consider new or amended rules and forms.
1c (Urgent Remedial Action)	Change is urgently needed to remedy a problem that is causing significant cost or inconvenience to the courts or the public.
1d (Financial/ Legal Risk Mitigation)	Proposal is otherwise urgent and necessary, such as a proposal that would mitigate exposure to immediate or severe financial or legal risk.
2a (Useful Changes in Law)	Useful, but not necessary, to implement changes in law.
2b (Responsive to Concerns)	Responsive to identified concerns or problems.
2c (Helpful Advancing Branch Goals)	Helpful in otherwise advancing Judicial Council goals and objectives.

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

#	New or One-Time Projects													
1.	New CARE Act Rules and Forms						Priority: 1a, 1c							
Supported Strategic Plan Branch Goals:														
<table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>								I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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Project Summary: The committee will develop a recommendation for new and amended rules and new and revised forms as needed to implement the Community Assistance, Recovery, and Empowerment (CARE) Act (Welf. & Inst. Code, §§ 5970–5987), as amended by Senate Bill 27 (Umberg; Stats. 2025, ch. 528). The recommendation will also respond to feedback and suggestions from courts and the executive branch. The project is expected to include revisions to the petition forms and the accompanying declaration form as well as the information sheets to conform to changes to the law and to make the forms more user friendly. The committee will also consider developing a recommendation for approval of an optional form for courts to use to refer a person to the CARE process. Status/Timeline: New and amended rules and new and revised forms anticipated to take effect July 1, 2026, January 1, 2027, or both. Fiscal Impact/Staff Resources: Statutory amendments may impose costs and draw on trial court resources, but the rule amendments and form revisions themselves are unlikely to have a significant impact on the courts or the Judicial Council; staff resources include committee staff, Center for Families, Children & the Courts (CFCC), Legal Services, Governmental Affairs, and Editing and Graphics (EGG) staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: trial courts, California Health and Human Services Agency, Department of Health Care Services, county behavioral health agencies, self-represented petitioners, public AC Collaboration: TBD														
2.	One-time revision of forms for petition for appointment of a probate conservator, order appointing a conservator, and letters of conservatorship						Priority: 1a, 1c							
Supported Strategic Plan Branch Goals:														
<table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>								I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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#	New or One-Time Projects								
	Project Summary: The committee will develop a recommendation for revisions to <i>Petition for Appointment of Probate Conservator</i> (form GC-310), <i>Order Appointing Probate Conservator</i> (form GC-340), and <i>Letters of Conservatorship</i> (form GC-350). The recommendation will bring the forms into conformity with the conservatorship statutes, as amended by Assembly Bill 1194 (Stats. 2021, ch. 417) and Assembly Bill 1663 (Stats. 2022, ch. 894), simplify the forms, and reorganize them to make them more user friendly and easier for self-represented petitioners and conservators to understand. The recommendation will include adoption of new separate forms for appointment of a limited conservator and will propose moving some material from the principal petition and order forms to new attachments. The committee will also consider developing an information form to guide petitioners for appointment of a conservator. Status/Timeline: Revised forms anticipated to take effect January 1, 2027. Fiscal Impact/Staff Resources: The project is unlikely to have a significant fiscal impact on the trial courts or the Judicial Council; staff resources include committee staff, CFCC, Legal Services, and EGG staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial courts, self-represented litigants, county public guardians and conservators, public AC Collaboration: n/a								
3.	One-time recommendation of revisions to form used to specify a conservator’s duties and for a conservator to acknowledge receipt of required materials Supported Strategic Plan Branch Goals: <table><tr><td>I Access ☒</td><td>II Independence ☐</td><td>III Modernization ☒</td><td>IV Quality ☒</td><td>V Education ☐</td><td>VI Infrastructure ☐</td><td>VII Funding ☐</td></tr></table>	I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐	Priority: 1a, 1c
I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
	Project Summary: The committee will develop a recommendation for revisions to <i>Duties of Conservator and Acknowledgment of Receipt of Handbook for Conservators</i> (form GC-348), the form used to implement the requirement in Probate Code section 1834, to conform to changes in the law enacted since 2011, particularly changes enacted by Assembly Bill 1663 (Stats. 2022, ch. 894). Recommended revisions may lead to separation of this form into two separate forms, one to explain the duties and liabilities of a conservator and another for the conservator to file with the court to acknowledge receipt of the required materials. If the committee recommends two separate forms, it will also recommend amending rule 7.1051 to reflect that separation. Status/Timeline: Form or forms anticipated to take effect January 1, 2027.								

#	New or One-Time Projects															
	Fiscal Impact/Staff Resources: The project is unlikely to have a significant fiscal impact on the trial courts or the Judicial Council; staff resources include committee staff, CFCC, Legal Services, and EGG staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: conservators, conservatees, trial courts, public AC Collaboration: n/a															
4.	New recommendation of revisions to form used for nomination of a guardian	Priority: 1a, 1c														
	Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access</td> <td>II Independence</td> <td>III Modernization</td> <td>IV Quality</td> <td>V Education</td> <td>VI Infrastructure</td> <td>VII Funding</td> </tr> <tr> <td>☒</td> <td>☐</td> <td>☒</td> <td>☒</td> <td>☐</td> <td>☐</td> <td>☐</td> </tr> </table>		I Access	II Independence	III Modernization	IV Quality	V Education	VI Infrastructure	VII Funding	☒	☐	☒	☒	☐	☐	☐
I Access	II Independence	III Modernization	IV Quality	V Education	VI Infrastructure	VII Funding										
☒	☐	☒	☒	☐	☐	☐										
	Project Summary: The committee will develop a recommendation for revisions to <i>Consent of Proposed Guardian, Nomination of Guardian, and Consent to Appointment of Guardian and Waiver of Notice</i> (form GC-211) to conform to existing law, to provide for the conditional nomination of a guardian under Probate Code section 1502, as amended by Assembly Bill 495 (Stats. 2025, ch. 664), and to improve usability. The recommended revisions may include separating this multipurpose form into two or even three different forms. Status/Timeline: Revised form or forms anticipated to take effect January 1, 2027. Fiscal Impact/Staff Resources: The project is unlikely to have a significant fiscal impact on the trial courts or the Judicial Council; staff resources include committee staff, CFCC, Legal Services, and EGG staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: families, self-help centers, trial courts, public AC Collaboration: n/a															

#	New or One-Time Projects								
5.	One-time revision of Handbook for Conservators	Priority: 1							
Supported Strategic Plan Branch Goals:									
<table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>			I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
Project Summary: Committee staff will continue revising and updating the Judicial Council's <i>Handbook for Conservators</i> to reflect recent changes to the law, simplify the language, and reorganize the <i>Handbook</i> to make it more user friendly for conservators to access online. The <i>Handbook</i> fulfills the council's duty under Probate Code section 1835 to develop an information package, make the package available to the courts, and periodically to update the package when changes to the law warrant. (Prob. Code, § 1835(c), (e).) The courts may in turn use the information package to fulfill their duty under Probate Code section 1835(a)–(b) to provide conservators with specified information. The Judicial Council approved the first edition of the <i>Handbook</i> in 1991 to serve as the information package required by section 1835; it was published in 1992. The second edition was published in 2002. The Rules Committee approved work on the third edition of the <i>Handbook</i> in this committee's 2015 and 2016 annual agendas. The council approved the third edition, effective October 28, 2016. Changes to the law since that edition and a shift to primarily online use require another round of updates to both content and format. The committee will recommend translation of the <i>Handbook</i> into Spanish. Depending on available resources, the committee will also recommend translation into additional languages or promotion of low-cost alternatives to formal translation. Status/Timeline: Committee staff anticipates submitting the revised <i>Handbook</i> to the Judicial Council in late 2025. Fiscal Impact/Staff Resources: No projected fiscal impact to trial courts or Judicial Council; staff resources include committee staff, CFCC staff, Legal Services staff, and EGG staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: trial courts, conservators, public AC Collaboration: n/a									
6.	One-time report to the Legislature on court effectiveness in conservatorship cases	Priority: 1							
Supported Strategic Plan Branch Goals:									
<table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>			I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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#	New or One-Time Projects								
	Project Summary: Probate Code section 1458 (added by Assembly Bill 1194; Stats. 2021, ch. 417, § 4) requires the Judicial Council to “report to the Legislature the findings of a study measuring court effectiveness in conservatorship cases, including the effectiveness of protecting the legal rights and best interests of a conservatee.” The statute requires the report to include specific caseload statistics and to recommend “statewide performance measures to be collected, best practices to protect the legal rights of conservatees, and staffing needs to meet case processing requirements.” Council staff, working with a contractor, have finalized the research tool and are selecting courts for participation. Case file review and focus groups have begun and are anticipated to be completed in 2025. The contractor has also begun to analyze the data and will begin drafting the report soon. The committee will continue to serve as a resource to staff on the recommendations to be included in the report. It will review the final report and recommend council approval and submission to the Legislature. Status/Timeline: Report to the Legislature due January 1, 2027. Fiscal Impact/Staff Resources: Minimal fiscal impact to trial courts; Judicial Council staff has engaged a consultant using funds appropriated for that purpose. Committee staff, CFCC research staff, and the consultant are collaborating on the research that will serve as the basis of the report’s conclusions and recommendations. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Legislature, trial courts, persons interested in conservatorship proceedings AC Collaboration: n/a								
7.	New recommendation to revise forms used in the fee waiver process in civil actions and proceedings, probate guardianship proceedings, and probate conservatorship proceedings Supported Strategic Plan Branch Goals: <table><tr><td>I Access ☒</td><td>II Independence ☐</td><td>III Modernization ☒</td><td>IV Quality ☒</td><td>V Education ☐</td><td>VI Infrastructure ☐</td><td>VII Funding ☐</td></tr></table>	I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐	Priority: 1a
I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
	Project Summary: The committee will collaborate with the Civil and Small Claims Advisory Committee to recommend revisions to forms FW-001, FW-001-GC, and FW-001-INFO to implement the exclusion, by Senate Bill 54 (Stats. 2025, ch. 646), of veterans service-connected disability compensation from income used to calculate an applicant’s eligibility for a waiver of court fees under Government Code section 68632(b). The committees will consider recommending additional revisions to these and other forms used in the fee waiver process in response to concerns raised by courts and members of the public.								

#	New or One-Time Projects								
	Status/Timeline: Revised forms are anticipated to take effect January 1, 2027. Fiscal Impact/Staff Resources: The project is unlikely to have a significant fiscal impact on the trial courts or the Judicial Council; staff resources include committee staff, CFCC, Legal Services, and EGG staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: trial courts, public AC Collaboration: Civil and Small Claims Advisory Committee								
8.	Explore options for promoting recognition and enforcement of tribal court conservatorship orders under the California Conservatorship Jurisdiction Act	Priority: 2b							
	Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>		I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
	Project Summary: The committee will explore options to promote recognition and enforcement of conservatorship orders issued by tribal courts. The options to be considered may include a proposal for Judicial Council–sponsored legislation, a recommendation for education, and a recommendation for revision of the forms used to register conservatorships established by courts of other jurisdictions, including tribal courts, in California under the California Conservatorship Jurisdiction Act (Probate Code, §§ 1980–2033). Status/Timeline: Any proposed legislation, new or amended rules of court, or new or revised forms would circulate for public comment. Fiscal Impact/Staff Resources: The project is unlikely to have a significant fiscal impact on the trial courts or the Judicial Council; staff resources include committee staff, CFCC, Legal Services, and EGG staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: trial courts, tribes and tribal courts, conservators and conservatees, public AC Collaboration: Tribal Court–State Court Forum								

#	New or One-Time Projects								
9.	<i>New recommendation regarding forms used for proof of personal service in decedents' estates, guardianships, conservatorships, and other proceedings under the Probate Code</i>	Priority: 1a							
Supported Strategic Plan Branch Goals: <table border="0" style="width: 100%;"> <tr> <td style="text-align: center;">I Access ☒</td> <td style="text-align: center;">II Independence ☐</td> <td style="text-align: center;">III Modernization ☒</td> <td style="text-align: center;">IV Quality ☒</td> <td style="text-align: center;">V Education ☐</td> <td style="text-align: center;">VI Infrastructure ☐</td> <td style="text-align: center;">VII Funding ☐</td> </tr> </table>			I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
Project Summary: The committee will consider recommending revising or revoking certain proof of service forms or developing an information sheet to implement Assembly Bill 747 (Stats. 2025, ch. 563). This bill, among other things, amended Code of Civil Procedure section 417.10, effective January 1, 2027, to require that proof of personal service of a summons under CCP section 415.10 include one or more photos showing the date, time, and GPS coordinates of the location of each effected or attempted service. Several sections of the Probate Code require personal service to comply with CCP 415.10 and, by implication, the proof of service requirements added by AB 747. Status/Timeline: Circulation for comment planned for spring 2026, with an anticipated effective date of January 1, 2027 Fiscal Impact/Staff Resources: The project is unlikely to have a significant fiscal impact on the trial courts or the Judicial Council; staff resources include committee staff, CFCC, Legal Services, and EGG staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: trial courts, self-represented litigants, attorneys, legal service providers, process servers, sheriff's offices AC Collaboration: Civil and Small Claims Advisory Committee, Family and Juvenile Law Advisory Committee									

#	Ongoing Projects and Activities													
1.	Review pending legislation						Priority: 1							
Supported Strategic Plan Branch Goals:														
<table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>								I Access ☐	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☐	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐								
Project Summary: The Legislation Subcommittee reviews pending legislation affecting judicial administration, practice, or procedure in proceedings under the Probate Code, the Lanterman-Petris-Short Act, the CARE Act, and other statutes protecting persons with mental health disorders or developmental disabilities; provides technical assistance to Governmental Affairs office, legislative staff, sponsors, and stakeholders, as appropriate; and recommends positions to the council's Legislation Committee, as required by rule 10.34(a)(3). Status/Timeline: Ongoing Fiscal Impact/Staff Resources: Governmental Affairs staff, Legal Services staff, CFCC staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: TBD, depending on subject matter and scope of legislation. AC Collaboration: TBD, depending on subject matter and scope of legislation. In the past, the committee has collaborated with the Civil and Small Claims Advisory Committee, the Collaborative Justice Courts Advisory Committee, the Criminal Law Advisory Committee, the Family and Juvenile Law Advisory Committee, and the Tribal Court–State Court Forum.														
2.	Review enacted legislation						Priority: 1							
Supported Strategic Plan Branch Goals:														
<table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>								I Access ☐	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☐	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐								
Project Summary: Review all enacted legislation referred to the committee by the Judicial Council's Governmental Affairs staff to determine whether it raises issues within the advisory committee's purview and, when appropriate, develop recommendations for amendment to the rules of court or revisions to Judicial Council forms to implement the legislation or to bring rules and forms into conformity with it.														

#	Ongoing Projects and Activities								
	Status/Timeline: Ongoing Fiscal Impact/Staff Resources: Governmental Affairs staff, Legal Services staff, CFCC staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: TBD; any proposal for new or amended rules of court or new or revised forms would circulate for public comment. AC Collaboration: TBD, depending on subject matter and scope of legislation.								
3.	Update rules and forms to use gender-neutral language Supported Strategic Plan Branch Goals: <table><tr><td>I Access ☒</td><td>II Independence ☐</td><td>III Modernization ☒</td><td>IV Quality ☒</td><td>V Education ☐</td><td>VI Infrastructure ☐</td><td>VII Funding ☐</td></tr></table>	I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐	Priority: 2b
I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
	Project Summary: As rules are amended and forms are revised for independent reasons, the committee will continue to review and, when possible, replace gendered terms or gender identity questions to conform to legislation providing for gender neutrality and nonbinary gender identity. Status/Timeline: Ongoing Fiscal Impact/Staff Resources: Committee staff, Legal Services staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: TBD; any proposal for new or amended rules of court or new or revised forms would circulate for public comment. AC Collaboration: TBD								
4.	Review suggestions	Priority: 1							

#	Ongoing Projects and Activities													
	Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table> Project Summary: As mandated by rule 10.21(c), review suggestions referred by the Chief Counsel from members of the judicial branch and the public for improving judicial administration, practice, and procedure in decedents' estate, trust, guardianship, conservatorship, and other proceedings under the Probate Code, as well as civil mental health proceedings under the Lanterman-Petris-Short Act and the CARE Act, and recommend action by the council or one of its committees. Status/Timeline: Ongoing Fiscal Impact/Staff Resources: Indeterminate fiscal impact on the trial courts or the Judicial Council; staff resources include committee staff, Governmental Affairs, Legal Services, CFCC, and other staff TBD ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: TBD, depending on subject matter and scope of suggestion AC Collaboration: TBD							I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐								
5.	Monitor developments in California guardianship law related to immigrant children					Priority: 1								
	Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☐</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table> Project Summary: Continue to monitor the implementation, in probate guardianship proceedings, of Code of Civil Procedure section 155 (added by Stats. 2014, ch. 685, § 1), Probate Code section 1510.1 (added by Stats. 2015, ch. 694), and other statutes concerning state judicial findings to support (proposed) wards' federal petitions for Special Immigrant Juvenile classification. If necessary, develop recommendations to amend rules of court or revise forms. Status/Timeline: Ongoing. Any proposal for new or amended rules of court or new or revised forms would circulate for public comment.							I Access ☒	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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#	Ongoing Projects and Activities													
	Fiscal Impact/Staff Resources: Committee staff, Governmental Affairs, Legal Services, and CFCC staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: TBD AC Collaboration: Family and Juvenile Law Advisory Committee; others TBD													
6.	Miscellaneous technical changes to rules and forms						Priority: 1							
Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>								I Access ☐	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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Project Summary: Develop rule and form changes as necessary to make corrections and adjustments meeting the criteria in rule 10.22(d)(2): “a nonsubstantive technical change or correction or a minor substantive change that is unlikely to create controversy....” These include revisions to forms containing dollar amounts that the Judicial Council is mandated to adjust on a regular basis based on statutory criteria. Status/Timeline: Ongoing Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: n/a AC Collaboration: n/a														
7.	Provide subject-matter expertise						Priority: 1							
Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>								I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
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#	Ongoing Projects and Activities
	<i>Project Summary:</i> The committee serves as a subject-matter resource for the Judicial Council, its internal committees, other advisory bodies, and Judicial Council staff to support legal work, avoid duplication of efforts, and contribute to the development of recommendations for council action. These efforts may include providing probate and mental health procedural expertise and review to working groups, advisory committees, subcommittees, and Judicial Council staff, as needed. <i>Status/Timeline:</i> Ongoing <i>Fiscal Impact/Staff Resources:</i> Governmental Affairs, Legal Services, Criminal Justice Services, and CFCC staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Internal/External Stakeholders:</i> TBD, depending on the subject matter and scope of the issues raised <i>AC Collaboration:</i> TBD, depending on the subject matter and scope of the issues raised

III. LIST OF 2024–2025 PROJECT ACCOMPLISHMENTS

#	Project Highlights and Achievements
1.	Recommended amended rules of court and new and revised Judicial Council forms—including a revised simplified petition form and a new streamlined alternative petition form for use by licensed behavioral health professionals—to implement amendments to the CARE Act (Senate Bill 42), effective July 1, 2025.
2.	Recommended amended rules of court and revised Judicial Council forms to implement statutory amendments (Senate Bill 1106) to the notice required when a conservator or guardian changes the residence of a conservatee or ward and the notice required when a conservatee dies, effective July 1, 2025.
3.	Recommended revisions to the forms used to succeed to a decedent’s real property in California in response to amendment of the statutes governing that process (Assembly Bill 2016), effective April 28, 2025.
4.	Applied the procedure in Probate Code section 890 to adjust the dollar amounts used to determine the maximum values of different types of property eligible for the summary procedures to succeed to a decedent’s property of “small value” and developed a recommendation to revise the forms used in those summary procedures, except the procedures modified by Assembly Bill 2016, to reflect the adjusted amounts, effective April 28, 2025.
5.	Developed a recommendation to revise two forms used to transfer conservatorships established in other jurisdictions, including tribes, into California under the California Conservatorship Jurisdiction Act (CCJA) to conform the CCJA acceptance procedure to the procedure under California law for appointment of a conservator.
6.	Developed a recommendation to revise two forms used by conservators and approve one form for use by courts to provide statutorily required information to conservatees.
7.	Provided technical assistance on pending legislation, including Senate Bill 27, which amended the CARE Act to obviate the need for Judicial Council–sponsored legislation.
8.	Determined that Assembly Bill 2224 did not require a recommendation for new or amended rules of court of new or revised forms to conform to the bill’s amendments to Code of Civil Procedure section 155.

Traffic Advisory Committee
Annual Agenda¹—2025–2026
Approved by Rules Committee: [Date]

I. COMMITTEE INFORMATION

Chair:	Hon. Maria Lucy Armendariz, Judge, Superior Court of California, County of Los Angeles
Lead Staff:	Jamie Schechter, Attorney, Criminal Justice Services Office
Advisory Body’s Charge/Membership: Rule 10.54 of the California Rules of Court states the charge of the Traffic Advisory Committee, which is to make recommendations to the Judicial Council for improving the administration of justice in the area of traffic procedure, practice, and case management and in other areas as set forth in the fish and game, boating, forestry, public utilities, parks and recreation, and business licensing bail schedules. Rule 10.54 of the California Rules of Court also sets forth the membership position of the advisory body. The Traffic Advisory Committee currently has 13 members. The current committee roster is available on the committee’s web page.	
Subgroups of the Advisory Body²: None.	

¹ The Annual Agenda outlines the work an advisory body will focus on in the coming year or cycle and identifies areas of collaboration with other advisory bodies and Judicial Council staff resources.

² For the definition of “subcommittee” see Cal. Rules of Court, rule 10.30(c); for “working group,” see rule 10.70; for “workstream,” see rule 10.53(c); and for “education curriculum committee,” see rule 10.50(c)(6).

Advisory Body and Subgroup Meetings Planned for 2025-2026³

List the date, time, remote meeting, or location of meeting if meeting in person (see footnote 3 for in-person meetings).

- Remote meeting October 2025
- Bi-weekly telephone conferences as needed throughout the year.

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

³ Refer to section IV. 2 (Meeting frequency) of the [Operating Standards for Judicial Council Advisory Bodies](#) for governance on in-person meetings. Note: Because of the current budget and staffing constraints, advisory body chairs and staff must first consider meeting remotely. The chair of the Executive and Planning Committee is extending the suspension of advisory body in-person meetings for the 2025–2026 annual agenda cycle. If an in-person meeting is needed, the responsible Judicial Council office head must seek approval from their advisory body’s internal oversight committee chair. Please see the prioritization memo dated June 23, 2025, for additional details.

II. COMMITTEE PROJECTS

Priority Levels and Branch Goals Key:

Refer to the following key for populating your project priority levels and branch goals. For each Priority Level 1 proposal, the advisory body **must** provide a specific reason why it should be done this year and how it fits within the identified category. If an advisory committee is interested in pursuing any Priority Level 2 proposals, please include justification as to why the proposal should be approved at this time.

Priority Levels for Non-Rules/Forms	
1	Must be done
2	Should be done
Priority Levels for Rules/Forms Proposals	
1a (Legal Compliance)	Proposal urgently needed to conform to or accurately reflect the law.
1b (Council Directive)	Council has directed the committee to consider new or amended rules and forms.
1c (Urgent Remedial Action)	Change is urgently needed to remedy a problem that is causing significant cost or inconvenience to the courts or the public.
1d (Financial/ Legal Risk Mitigation)	Proposal is otherwise urgent and necessary, such as a proposal that would mitigate exposure to immediate or severe financial or legal risk.
2a (Useful Changes in Law)	Useful, but not necessary, to implement changes in law.
2b (Responsive to Concerns)	Responsive to identified concerns or problems.
2c (Helpful Advancing Branch Goals)	Helpful in otherwise advancing Judicial Council goals and objectives.

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

#	New or One-Time Projects								
1.	Revision of Trial by Declaration Forms	Priority: 1a							
Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>			I Access ☐	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☐	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
Project Summary: The committee proposes to revise the Trial by Written Declaration forms (forms TR-200, et seq.), and consider adopting new alternate forms for courts that use the MyCitations trial by declaration feature. Litigants charged with Vehicle Code infractions have an option for a trial by written declaration pursuant to Vehicle Code section 40902. Procedurally, the litigant is given instructions (form TR-200), pays bail up front (the cost for the infraction if convicted), and provides a written statement and evidence (form TR-205.) The officer is given instructions (form TR-210) and provides a written statement (form TR-235.) The judicial officer then makes a decision (form TR-215) and returns the bail if the litigant is found not guilty. If the litigant is unhappy with the decision, they may request a trial de novo (form TR-220.) And the judicial officer grants or denies the request for a trial de novo (form TR-225.) These forms have not been substantively revised since 1999 and are inconsistent with plain language standards. Additionally, Government Code section 68645.4 changes the procedure for courts that opt to use MyCitations to provide trial by online or written declaration. Notwithstanding Vehicle Code section 40902, if the court chooses the trial by declaration feature through MyCitations (which is optional for the court to offer), the litigant uses MyCitations for the trial by declaration process. Through MyCitations, the litigant generally does not pay bail up front (unless the court makes express findings as to why a particular litigant should pay bail up front), and the litigant does not have the right to a trial de novo. (Gov. Code, § 68645.2(a)(2),(4).) If a court uses MyCitations for the trial by declaration, the court should be following the same procedure for the paper process. (Gov. Code, § 68645.2(b).) A court may adopt local rules or forms to implement this procedure, unless the Judicial Council adopts rules and forms for the purpose of the statute. (Gov. Code, § 68645.2(c).) Currently only two courts use the trial by declaration feature in MyCitations, however twelve courts have signed up for the trial by declaration feature and are expected to onboard it by late 2026. For consistency and standardization, the committee proposes considering alternate forms for the trial by declaration process for MyCitation courts. Status/Timeline: Anticipated circulation for comment in Spring 2026, with effective date of January 2027. Fiscal Impact/Staff Resources: Committee staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i>									

#	New or One-Time Projects								
	Internal/External Stakeholders: Trial courts, other justice system partners, and any proposal will be circulated for public comment. AC Collaboration: N/A								
2.	Consider Recommending Judicial Council–Sponsored Legislation to Improve the Processing of Infraction Cases (one-time project)	Priority: 1c							
Supported Strategic Plan Branch Goals: <table><tr><td>I <i>Access</i> ☐</td><td>II <i>Independence</i> ☐</td><td>III <i>Modernization</i> ☒</td><td>IV <i>Quality</i> ☒</td><td>V <i>Education</i> ☐</td><td>VI <i>Infrastructure</i> ☐</td><td>VII <i>Funding</i> ☐</td></tr></table>			I <i>Access</i> ☐	II <i>Independence</i> ☐	III <i>Modernization</i> ☒	IV <i>Quality</i> ☒	V <i>Education</i> ☐	VI <i>Infrastructure</i> ☐	VII <i>Funding</i> ☐
I <i>Access</i> ☐	II <i>Independence</i> ☐	III <i>Modernization</i> ☒	IV <i>Quality</i> ☒	V <i>Education</i> ☐	VI <i>Infrastructure</i> ☐	VII <i>Funding</i> ☐			
Project Summary: To consider the following issues affecting courts and litigants, and to explore possible solutions, including potential legislative proposals. 1. MyCitations is an online program developed by the Judicial Council that allows a litigant to request an ability-to-pay determination for infraction fines and fees. In Fall 2025, this program will begin offering eligible litigants, on a trial basis, the option of electing traffic violator school through MyCitations. However, statutory timeframes for reporting traffic violator school completion and payment of the fine may present challenges to managing this option in MyCitations. Courts have also raised questions about how reduced fine amounts should be distributed when the litigant has requested traffic violator school together and an ability-to-pay reduction through MyCitations. Potential solutions could include proposed legislation amending timeframes for reporting and resulting fine distribution when a litigant wants to request an ability-to-pay determination together with traffic violator school. 2. Prior to 2022, when a litigant did not interact with the court by paying, appearing, or otherwise handling their traffic tickets, courts had the authority to report the failures to appear to the DMV, which resulted in litigants having their driver’s licenses suspended for reasons unrelated to unsafe driving. Assembly Bill 2746 (Stats. 2022, ch. 800) eliminated such authority. In the years since the passage of AB 2746, stakeholders have identified two public safety issues that may require legislative fixes or additional guidance to courts: A. Unadjudicated Vehicle Code infractions where the litigant has failed to appear: Vehicle Code § 1803 requires courts to report most adjudicated moving violations to the DMV which then assesses points on the relevant driver’s license. If a litigant fails to resolve or appear in court for their Vehicle Code infraction, Vehicle Code § 40903 allows courts to conduct a trial in absentia. After a trial in absentia, courts can then report to the DMV per Vehicle Code § 1803. When a litigant fails to appear on a ticket, some courts use the trial in absentia procedure described above. However, other courts leave the unadjudicated failure to appear tickets in a									

#	New or One-Time Projects													
	pending status and, as a result, tickets can remain unadjudicated indefinitely. A litigant may have several unadjudicated outstanding tickets related to moving violations and, because the tickets are unadjudicated, the DMV is not notified and is unable to assess points. Potential solutions could include new legislation regarding reporting of moving violations or changes to the trial in absentia process. B. Out of state commercial vehicle compliance for equipment violations: Prior to AB 2746, if a court reported a failure to appear on a commercial driver for equipment violations, the DMV would place a hold or suspension on a commercial driver’s license, and the vehicle had to be brought into compliance with California equipment law for the hold or suspension to be lifted on the out of state driver. Because courts are no longer authorized to report failures to appear to the DMV, the out of state commercial vehicle may never be brought into compliance for the equipment violations. Additionally, there is no mechanism for courts to process owner responsibility violations for out of state vehicles when the litigant fails to appear, and it is unclear how to process the owner’s responsibility citations when the vehicle is registered out of state. The committee will explore solutions to ensure courts may process and adjudicate owner’s responsibility tickets for out of state commercial vehicles. Status/Timeline: If a proposal is developed and approved by the Legislation Committee, anticipated to circulate for comment in Spring 2026, be submitted to council in Fall 2026, and, if approved, lead to introduction of legislation that would, if enacted, take effect January 1, 2028 Fiscal Impact/Staff Resources: Committee staff, Governmental Affairs. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial courts, Department of Motor Vehicles, other justice system partners, JCC Governmental Affairs, Legislation Committee, and any proposal will be circulated for public comment. AC Collaboration: N/A													
3.	Develop Strategies and Recommendations Relating to Recognition and Enforcement of Tribal Court Orders						Priority: 2							
Supported Strategic Plan Branch Goals														
<table><tr><td>I Access ☒</td><td>II Independence ☐</td><td>III Modernization ☐</td><td>IV Quality ☒</td><td>V Education ☒</td><td>VI Infrastructure ☐</td><td>VII Funding ☒</td></tr></table>								I Access ☒	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☒	VI Infrastructure ☐	VII Funding ☒
I Access ☒	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☒	VI Infrastructure ☐	VII Funding ☒								

#	New or One-Time Projects
	<i>Project Summary:</i> The Tribal Court-State Court Forum (Forum) hosted an event on September 19, 2025, focused on identifying and addressing barriers to the recognition and enforcement of tribal court orders of various kinds. At the event there was a session devoted to the issues of road safety and traffic in tribal communities (particularly for driving under the influence violations), the cross-jurisdictional issues and challenges that arise in these cases, and possible solutions to those issues. The Forum is evaluating the issues raised and developing possible solutions, which could include assistance from this committee in the form of a workgroup. <i>Status/Timeline:</i> TBD. <i>Fiscal Impact/Staff Resources:</i> Committee staff and staff resources of the tribal projects unit. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> <i>Internal/External Stakeholders:</i> Tribal courts, state courts, law enforcement, Department of Motor Vehicles. <i>AC Collaboration:</i> Tribal Court-State Court Forum, CLAC.

#	Ongoing Projects and Activities								
1.	2026 Bail Schedules Revision	Priority: 1a							
Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☐</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>			I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☐	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
Project Summary: The Traffic Advisory Committee is required to revise and update the Uniform Bail and Penalty Schedules annually to conform with new laws, as required by Penal Code section 1269b and California Rule of Court 4.102. Status/Timeline: Anticipated circulation for comment in October 2025 and to go the Council in December with a January 2026 effective date. Fiscal Impact/Staff Resources: Committee staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: Will be circulated for public comment. AC Collaboration: N/A									
2.	Review Pending and Enacted Legislation	Priority: 1							
Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☒</td> <td>III Modernization ☐</td> <td>IV Quality ☐</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>			I Access ☐	II Independence ☒	III Modernization ☐	IV Quality ☐	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☐	II Independence ☒	III Modernization ☐	IV Quality ☐	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
Project Summary: Review pending and enacted legislation that may impact traffic court administration. Provide subject matter expertise on legislation, including fiscal impacts for the courts. Propose rules and forms necessary to comply with legislation or other directives. Status/Timeline: Ongoing. Fiscal Impact/Staff Resources: Committee Staff, Governmental Affairs. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: N/A									

#	Ongoing Projects and Activities						
	<i>AC Collaboration:</i> N/A						
3.	Traffic Bench Officer and Temporary Judge Training						Priority: 1
Supported Strategic Plan Branch Goals:							
I Access ☐ II Independence ☐ III Modernization ☐ IV Quality ☒ V Education ☐ VI Infrastructure ☐ VII Funding ☐							
Project Summary: Provide support as requested by the Center for Judicial Education and Research (CJER) with development of traffic training programs and materials for bench officers and temporary judges assigned to traffic proceedings. Status/Timeline: Ongoing. Fiscal Impact/Staff Resources: Committee staff, CJER staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: N/A AC Collaboration: CJER Governing Committee.							

III. LIST OF 2024-2025 PROJECT ACCOMPLISHMENTS

Provide highlights and achievements of completed projects included in the previous year's Annual Agenda. Provide brief, broad outcome(s) and completed date.

#	Project Highlights and Achievements
1.	The committee updated the Uniform Bail and Penalties Schedule to be consistent with 2023-2024 legislation, completed December 2024.
2.	The committee provided Government Affairs office and the council's Legislation Committee subject matter expertise on pending traffic bills, including operational and fiscal impacts of proposed legislation, ongoing.
3.	The committee began to explore solutions to traffic violator school and MyCitations and revisions to form TR-235.