



JUDICIAL COUNCIL OF CALIFORNIA

TRIAL COURT BUDGET
ADVISORY COMMITTEE

TRIAL COURT BUDGET ADVISORY COMMITTEE

MATERIALS FOR MAY 31, 2018

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JUDICIAL COUNCIL OF CALIFORNIA

TRIAL COURT BUDGET
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TRIAL COURT BUDGET ADVISORY COMMITTEE

NOTICE AND AGENDA OF OPEN IN-PERSON MEETING

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

THIS MEETING IS BEING RECORDED

Date: May 31, 2018
Time: 10:00 a.m. - 2:00 p.m.
Location: JCC Boardroom, Judicial Council of California
455 Golden Gate Avenue, San Francisco, CA 94102
Public Call-in Number: 1-877-820-7831; passcode 1884843 (listen only)

Meeting materials will be posted on the advisory body web page on the California Courts website at least three business days before the meeting.

Members of the public seeking to make an audio recording of the meeting must submit a written request at least two business days before the meeting. Requests can be e-mailed to [insert e-mail address].

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

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

Call to Order and Roll Call

Approval of Minutes

Approve minutes of the May 7, 2018, Trial Court Budget Advisory Committee teleconference meeting.

II. PUBLIC COMMENT (CAL. RULES OF COURT, RULE 10.75(K)(1)-(2))

In-Person Public Comment

Members of the public requesting to speak during the public comment portion of the meeting must place the speaker's name, the name of the organization that the speaker represents if any, and the agenda item that the public comment will address, on the public comment sign-up sheet. The sign-up sheet will be available at the meeting location at least one hour prior to the meeting start time. The Chair will establish speaking limits at the beginning of the public comment session. While the advisory body welcomes and

encourages public comment, time may not permit all persons requesting to speak to be heard at this meeting.

Written Comment

In accordance with California Rules of Court, rule 10.75(k)(1), written comments pertaining to any agenda item of a regularly noticed open meeting can be submitted up to one complete business day before the meeting. For this specific meeting, comments should be e-mailed to tcbac@jud.ca.gov or mailed or delivered to Judicial Council of California, 455 Golden Gate Avenue, San Francisco, CA, 94102, attention: Ms. Brandy Sanborn. Only written comments received by 10:00 a.m. on May 30, 2018 will be provided to advisory body members prior to the start of the meeting.

III. DISCUSSION AND POSSIBLE ACTION ITEMS (ITEMS 1–8)

Item 1

Extension of V3 Case Management System (CMS) Support (Action Required)

Consideration of recommendations of the Revenue and Expenditure (R&E) to extend use of the funding approved by the Judicial Council in support of V3 CMS past June 30, 2019.

Presenter(s)/Facilitator(s): Hon. Jeffrey Barton, Cochair, Revenue and Expenditure Subcommittee
Ms. Sherri Carter, Cochair, Revenue and Expenditure Subcommittee
Mr. David Yamasaki, Court Executive Officer, Orange County Superior Court

Item 2

Allocations from the State Trial Court Improvement and Modernization Fund (IMF) for 2018-19 (Action Required)

Consideration of recommendations of the R&E Subcommittee regarding allocations from the IMF for 2018-19.

Presenter(s)/Facilitator(s): Hon. Jeffrey Barton, Cochair, Revenue and Expenditure Subcommittee
Ms. Sherri Carter, Cochair, Revenue and Expenditure Subcommittee
Ms. Donna Newman, Budget Supervisor, Judicial Council Budget Services

Item 3

Allocations from the Trial Court Trust Fund (TCTF) for 2018-19 (Action Required)

Consideration of recommendations of the R&E Subcommittee regarding allocations from the TCTF for 2018-19.

Presenter(s)/Facilitator(s): Hon. Jeffrey Barton, Cochair, Revenue and Expenditure Subcommittee
Ms. Sherri Carter, Cochair, Revenue and Expenditure Subcommittee
Ms. Michele Allan, Budget Supervisor, Judicial Council Budget Services

Item 4

Allocation of \$47.8 Million in Governor's Proposed Budget (Action Required)

Consideration of recommendations of the Funding Methodology Subcommittee (FMS) on the allocation methodology for the proposed \$47.8 million and 2018-19 allocations intended to equalize funding among courts by bringing all trial courts up to the statewide average funding level.

Presenter(s)/Facilitator(s): Hon. Jonathan B. Conklin, Cochair, Funding Methodology Subcommittee
Ms. Rebecca Fleming, Cochair, Funding Methodology Subcommittee
Ms. Leah Rose-Goodwin, Manager, Judicial Council Budget Services

Item 5

2018-19 Self-Help Funding Allocations (Action Required)

Consideration of recommendations of the FMS regarding the allocations for self-help for 2018-19, including updated population data to the methodology.

Presenter(s)/Facilitator(s): Hon. Jonathan B. Conklin, Cochair, Funding Methodology Subcommittee
Ms. Rebecca Fleming, Cochair, Funding Methodology Subcommittee
Ms. Leah Rose-Goodwin, Manager, Judicial Council Budget Services
Ms. Bonnie Hough, Managing Attorney, Judicial Council Center for Families, Children, and the Courts

Item 6

Simplified Displays (Action Required)

Consideration of recommendations of the Funding Methodology Subcommittee regarding displays for trial court allocations, including WAFM, beginning in 2018-19.

Presenter(s)/Facilitator(s): Ms. Brandy Sanborn, Budget Manager, Judicial Council Budget Services

Item 7

2018-19 Trial Court Allocations (Action Required)

Consideration of the 2018-19 allocations, including the Workload-based Assessment and Funding Methodology (WAFM), self-help, and benefits.

Presenter(s)/Facilitator(s): Hon. Jonathan B. Conklin, Chair, Trial Court Budget Advisory Committee
Ms. Michele Allan, Budget Supervisor, Judicial Council Budget Services

Item 8

2018-19 Court-Appointed Dependency Counsel Allocations (Action Required)

Consideration of the 2018-19 allocations from the TCTF for court-appointed dependency counsel.

Presenter(s)/Facilitator(s): Mr. Don Will, Principal Manager, Judicial Council Center for Families, Children, and the Courts

IV. INFORMATION ONLY ITEMS (NO ACTION REQUIRED)

Info 1

Budget Update for 2018-19

Update on the budget for 2018-19.

Presenter(s)/Facilitator(s): Mr. Zlatko Theodorovic, Director, Judicial Council Budget Services

V. ADJOURNMENT

Adjourn



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TRIAL COURT BUDGET
ADVISORY COMMITTEE

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TRIAL COURT BUDGET ADVISORY COMMITTEE

MINUTES OF OPEN MEETING

May 7, 2018
12:00 p.m. - 1:30 p.m.
Teleconference

Advisory Body Members Present: Judges: Hon. Jonathan B. Conklin (Chair), Hon. Jeffrey B. Barton, Hon. Andrew S. Blum, Hon. Daniel J. Buckley, Hon. James E. Herman, Hon. Joyce D. Hinrichs, Hon. Patricia M. Lucas, Hon. Charles Margines, Hon. Paul M. Marigonda, and Hon. Brian L. McCabe.

Executive Officers: Ms. Nancy Eberhardt, Mr. Chad Finke, Ms. Rebecca Fleming, Ms. Kimberly Flener, Mr. Kevin Harrigan, Mr. Michael D. Planet, Mr. Michael M. Roddy, Ms. Linda Romero-Soles, Mr. Brian Taylor, Ms. Tania Ugrin-Capobianco, and Mr. David Yamasaki.

Judicial Council staff advisory members: Mr. John Wordlaw and Mr. Zlatko Theodorovic.

Advisory Body Members Absent: Judges: Hon. Mark Ashton Cope.
Executive Officers: Ms. Sherri R. Carter.

Others Present: Hon. Kimberly A. Gaab, Hon. David M. Rubin, Mr. Doug Kauffroath, Ms. Heather Pettit, Ms. Lucy Fogarty, and Ms. Brandy Sanborn.

OPEN MEETING

Call to Order and Roll Call

The chair called the meeting to order at 12:03 p.m. and roll was called.

Approval of Minutes

The advisory body reviewed and approved the minutes of the April 23, 2018 Trial Court Budget Advisory Committee (TCBAC) meeting.

DISCUSSION AND POSSIBLE ACTION ITEMS (ITEM 1 - 2)

Item 1 – Prioritization of Trial Court Budget Change Proposal (BCP) Concepts for 2019-20 (Action Required)

Review and prioritize trial court BCP concepts, and BCP concept submissions in which the TCBAC was identified as having purview and the opportunity to provide input, for submission to the Judicial Branch Budget Committee for its review.

Presenter(s)/Facilitator(s): Hon. Jonathan B. Conklin, Chair, Trial Court Budget Advisory Committee

Action: The Trial Court Budget Advisory Committee unanimously approved to prioritize the BCPs identified by the committee in the following order:

1. *Stabilization of Civil Assessment Revenue, \$155m*
2. *Trial Court Facility Maintenance and Operations, \$31.4m*
3. *Funding for 10 of the 50 Judgeships Authorized by AB 159 (combined with Appellate Court Judicial Workload), \$8.9m - \$16m*
4. *Technology – The committee is prioritizing this general concept that includes the following three specified concepts which are not listed in order of priority and without dollar amounts (to be determined at a later time):*
 - a. *Case Management System (CMS) Replacement for Trial Courts*
 - b. *Digitizing Documents Phase One for the Superior and Appellate Courts*
 - c. *Implementation of Phoenix Roadmap – Cloud Migration, Technical Upgrade and Functional Improvements combined with Phoenix HR Payroll Deployments*

The committee tabled the Support for Trial Court Operations concept for one year. The decision wasn't due to not having concern for funding, but out of recognition of higher priorities and in consideration of the current budget proposal remaining intact.

Action: The Trial Court Budget Advisory Committee unanimously approved the following BCPs in which the committee was identified as having purview and the opportunity to provide input without prioritizing:

- A. *Civil Adjudication of Minor Traffic Infraction - Futures Commission Recommendation (Placeholder), amount to be determined*
- B. *Continuing the Implementation of the Strategic Plan for Language Access in California Courts, \$11.8m*
- C. *Court Appointed Counsel in Juvenile Dependency Proceedings (Auxiliary), supported by the committee with the amount subject to further discussion pending funding received in the Governor's Budget*
- D. *Court Appointed Special Advocates (CASA) in Juvenile Dependency Court (Contingent), \$500k*
- E. *Expansion of Self-Help Funding and Establishment of the Center for Self Help Resources Recommended by the Chief Justice's Commission on the Future of the California Courts, supported by the committee with the amount subject to further discussion pending funding received in the Governor's Budget*
- F. *Judicial Branch Litigation Management Program, \$5.8m*
- G. *Pretrial Detention Reform (Placeholder), amount to be determined*
- H. *Proposition 66 - Death Penalty Reform and Savings Act of 2016 (Placeholder), amount to be determined*
- I. *Statewide Security Systems and Equipment - Maintenance and Replacement, \$6m*

Item 2 – Adjustment to Council-Approved 2017-18 Allocations from the State Trial Court Improvement and Modernization Fund (IMF) (Action Required)

Consideration of an augmentation of the 2017-18 Litigation Management Program (LMP) allocation in the IMF.

Presenter(s)/Facilitator(s): Mr. Eric Schnurpfeil, Deputy Chief Counsel, Judicial Council Legal Services

Action: The Trial Court Budget Advisory Committee unanimously approved a one-time augmentation of \$933,000 to the 2017-18 IMF allocations for the LMP to include 1) a \$150,000 transfer from its Regional Office Assistance Group; 2) a \$183,000 transfer from its Judicial Performance Defense Insurance; and 3) a \$600,000 augmentation from the IMF fund balance.

A D J O U R N M E N T

There being no further business, the meeting was adjourned at 1:06 p.m.

Approved by the advisory body on enter date.

DRAFT

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Trial Court Budget Advisory Committee

(Action Item)

Title: Extension of V3 Case Management System (CMS) Support

Date: 5/23/2018

Contact: Kathy Fink, Manager, Judicial Council Information Technology
415-865-4094 | Kathleen.Fink@jud.ca.gov

Issue

Consideration of the Revenue and Expenditure (R&E) Subcommittee's recommendation to approve extending the sunset of CMS V3 funding from June 30, 2019 to June 30, 2020. This request is not an allocation request from the State Court Improvement and Modernization Fund (IMF); as stated it is an extension of the timeline previously approved by the Judicial Council in April 2015 by one year. No additional funding beyond the projected baseline funding plan is being or will be requested.

Background

In April 2015, a recommendation by the Trial Court Budget Advisory Committee (TCBAC) and the Judicial Council Technology Committee (JCTC) was approved by the Judicial Council to eliminate funding from the IMF for the V3 CMS used by four superior courts including Orange, Sacramento, San Diego, and Ventura beginning in July 2019. Even prior to that time, the V3 courts had begun to work with the JCTC on a path to deploy alternate CMSs and retire CMS V3. A budget change proposal was submitted for Civil CMS (V3) Replacement for 2016-17 and was approved in the state budget.

The 2017-18 five-year projected budget for CMS V3 was based on the end date of CMS V3 funding of June 30, 2019. The budget projected a steep ramp down in 2018-19 and zero funding in 2019-20. However, this steep ramp down and decommissioning of V3 has since been determined not to be feasible in the original timeframe.

Despite projects already underway to convert other CMSs that were failing, the V3 courts have been progressing with their projects to replace CMS V3. All of the affected courts have identified replacement solutions and are working expeditiously to complete their projects. However, as many courts have already experienced, CMS deployment times are longer than projected or desired. Consequently, conversion to new CMSs will extend beyond June 2019.

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Trial Court Budget Advisory Committee

Justification

The projected five-year budget has been revised based on the timelines for the CMS V3 replacement projects. Since the April 2015 Judicial Council decision to sunset the support of CMS V3, costs for support have been reduced and additional reductions are planned for the next fiscal year. The Judicial Council Information Technology office is proposing to utilize savings generated in the original funding plan as approved in 2015-16 to fund the extension for CMS V3 through 2019-20.

These savings have been achieved through reductions in contractors and data center equipment as well as not replacing employees who have left the Judicial Council. Support efforts for CMS V3 are limited to remediating defects, programming legislative/statutory updates, and upgrades to software components where necessary. The reduced levels of support have not been ideal given the ongoing migration work that is required, but all the courts using CMS V3 have agreed to this reduced level to gain additional, critical time to migrate to their new CMSs.

The table below shows a baseline funding plan projected from the allocation approved by the Judicial Council for 2015-16, as well as a proposed plan for an extension through 2019-20. A baseline CMS V3 funding provides \$22.6 million from 2015-16 through 2018-19. The actual expenditures and forecasted obligations through 2018-19 total \$15.0 million. There is an estimated savings of \$7.6 million from the baseline plan. The precise request for 2019-20 will depend on how quickly the courts can ramp down use of CMS V3 as well as other factors that are not known this far in advance such as unexpected increases in software maintenance, maintenance of older V3 CMS equipment, and reductions in Schedule C funding. However, the projected need for 2019-20 is \$3.46 million or less. Even extending the period to June 30, 2020, there remains an overall savings of \$4.1 million from the baseline-funding plan.

#	Description	2015-16	2016-17	2017-18	2018-19	2019-20	Total
1	V3 CMS funding plan as a baseline from 2015-16	\$5,658,100	\$5,658,100	\$5,658,100	\$5,658,100	\$0	\$22,632,400
2	Expenditures/Obligations (2017-18 and 2018-19 are projected values)	\$4,752,099	\$3,681,167	\$3,250,766	\$3,371,838	\$0	\$15,055,870
3	Savings from baseline plan	(\$906,001)	(\$1,976,933)	(\$2,407,334)	(\$2,286,262)	\$0	(\$7,576,530)
4	Expended/Proposed V3 Funding	\$4,752,099	\$3,681,167	\$3,250,766	\$3,371,838	\$3,463,913*	\$18,519,783

**Amount will be subject to funds availability at the time of the 2019-20 allocation process.*

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BUDGET SERVICES
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The requested extension does not constitute an allocation request but a request to extend the timeline for potential use of the funds to 2019-20. The Information Technology office will be required to come back to the R&E Subcommittee and TCBAC next fiscal year to request an IMF allocation in 2019-20 along with other Judicial Council offices. There is currently a negative fund balance projected for 2019-20 using the current revenue projections and expenditure assumptions, and Judicial Council staff continue to work diligently with the Department of Finance to resolve the structural deficit in IMF.

Recommendation

The following recommendation is presented to the Trial Court Budget Advisory Committee for consideration:

1. Approve extending the use of CMS V3 funding through to June 30, 2020, based on reductions achieved each year since the decision to eliminate CMS funding from the IMF. Although the projected need for 2019-20 is currently \$3.46 million, this is not a request for an allocation. The program will return next fiscal year to the R&E Subcommittee in the spring and then to the TCBAC to request an allocation for 2019-20.

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Trial Court Budget Advisory Committee

(Action Item)

Title: Allocations from the State Trial Court Improvement and Modernization Fund (IMF) for 2018-19

Date: 5/31/2018

Contact: Donna Newman, Budget Supervisor, Judicial Council Budget Services
916-263-7498 | Donna.Newman@jud.ca.gov

Issue

Consideration of the Revenue and Expenditure (R&E) Subcommittee recommendation to approve allocations for 2018-19 from the IMF in the amount of \$60,373,276 for the Judicial Council at its July 19-20, 2018 meeting.

Background

The following are the proposed 2018-19 allocation requests by Judicial Council offices (additional details on each of the programs are located on Attachment 2B):

1. **Audit Services** – Conducts operational audits of the superior and appellate courts.
 - a. Approve an allocation of \$370,000
 - i. This represents a savings of \$268,000 from the prior year due to a reassessment of need.
2. **Branch Accounting and Procurement** – Supports the trial courts’ financial and human resources Phoenix System.
 - a. Approve a total allocation of \$1,503,205
 - i. There is a reduction of approximately 30% from the prior year due to a reassessment of need. An additional allocation will be provided to the Judicial Council Information Technology office for its support of the Phoenix program.
3. **Center for Families, Children and the Courts** – Supports various programs within the courts for litigants.
 - a. Approve a total allocation of \$5,244,000
 - i. This request is unchanged from the prior year.
 - ii. Although the allocation of \$5,000,000 is unchanged in amount, there has been a change in how unspent funds will be addressed. Provisional language was added to the 2018-19 Budget Bill that says, “Of the funds appropriated in this

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Trial Court Budget Advisory Committee

item, \$5,000,000 shall be available for support of services for self-represented litigants, and any unexpended funds shall revert to the General Fund.”

4. **Center for Judiciary Education & Research** – Provides education to judges, court leaders, court staff faculty, managers, supervisors, and lead staff.
 - a. Approve a total allocation of \$1,202,000
 - i. This request is unchanged from the prior year.
5. **Court Operations Services** - Program provides court interpreter testing.
 - a. Approve a total allocation of \$143,000
 - i. This request is unchanged from prior year.
6. **Budget Services** - Supports meetings of various committees and subcommittees as they relate to the trial courts funding, policies, and other issues.
 - a. Approve a total allocation of \$337,500
 - i. The two main expenditures are for Treasury Services-Cash Management, and Budget Focused Training and Meetings. A slight increase of \$22,900 is requested due to increased staffing costs.
7. **Human Resources** – Supports the Trial Court Labor Relations Academy in supporting trial court staff in meeting its many labor challenges (not mandated).
 - a. Approve a total allocation of \$22,700
 - i. Through reassessment of need, this program reduced its request by 12%.
8. **Information Technology** – Supports many of the information systems for the Supreme Court, Courts of Appeal, and the 58 superior courts.
 - a. Approve an allocation of \$44,662,371
 - i. The reduced allocation amount of \$12,006,410 was realized in part by the Budget Change Proposal adjustments for one-time and/or full-year cost adjustments; savings for Telecommunications due to revision of hardware refresh costs; and Data Integration savings due to reductions from the renegotiated TIBCO contract and of a projected consultant.
9. **Legal Services Office** – Supports the Judicial Council staff divisions and courts, manages litigation, and is responsible for rules and projects including the California Rules of Court and Judicial Council forms.
 - a. Approve a total allocation of \$6,888,500
 - i. The reduced need of \$181,500 is primarily due to ongoing savings from position vacancies in the Regional Office Assistance Program.

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Trial Court Budget Advisory Committee

The 2018-19 IMF allocation requests total \$60,373,276. This amount is reflected in the IMF Fund Condition Statement (Attachment 2C). The fund is estimated to have a sufficient balance for this level of allocations based on current revenue projections and projections of expenditure savings in 2016-17 and 2017-18. There is a negative fund balance projected for 2019-20 using the current revenue projections and expenditure assumptions, and Judicial Council staff continue to work diligently with Department of Finance to resolve the structural deficit in IMF as well as communicate updates to the R&E Subcommittee and the TCBAC.

Recommendation

The following recommendation is presented to the Trial Court Budget Advisory Committee for consideration:

1. Adopt a recommendation to approve a total of \$60,373,276 in allocations for 2018-19 from the IMF for consideration by the Judicial Council at its July 19-20, 2018 meeting.

Attachments

Attachment 2A: Judicial Council Approved 2017-18 Allocations and 2018-19 Proposed Allocations from the IMF State Operations and Local Assistance Appropriations

Attachment 2B: Summary of Programs

Attachment 2C: IMF Fund Condition Statement

**Judicial Council-Approved 2017-18 Allocations and 2018-19 Proposed Allocations
from the IMF State Operations and Local Assistance Appropriations**

#	Program Name	Office	2017-18 Allocations			Recommended 2018-19 Allocation			\$ Change from 2017-18	% Change from 2017-18
			JC Approved Allocations	Proposed Adjustments	Pending Total Allocations	State Operations	Local Assistance	Total		
A	B	C	D	E	F	G	H	I = (G + H)	J = (I - F)	K = (J/F)
	Program Adjustments									
1	Superior Court Audit Program	AS	\$ 660,000	\$ (22,000)	\$ 638,000	\$ 370,000	\$ -	\$ 370,000	(268,000)	-42%
2	Phoenix Program	BAP	\$ 1,946,898	\$ -	\$ 1,946,898	\$ -	\$ 1,381,205	\$ 1,381,205	(565,693)	-29%
3	Trial Court Procurement/TCAS-MSA-IMF	BAP	\$ 122,000	\$ -	\$ 122,000	\$ 122,000	\$ -	\$ 122,000	-	0%
4	Domestic Violence Forms Translation	CFCC	\$ 17,000	\$ -	\$ 17,000	\$ -	\$ 17,000	\$ 17,000	-	0%
5	Interactive Software - Self-Rep Electronic Forms	CFCC	\$ 60,000	\$ -	\$ 60,000	\$ -	\$ 60,000	\$ 60,000	-	0%
6	Self-Help Center	CFCC	\$ 5,000,000	\$ -	\$ 5,000,000	\$ -	\$ 5,000,000	\$ 5,000,000	-	0%
7	Statewide Multidisciplinary Education	CFCC	\$ 67,000	\$ -	\$ 67,000	\$ -	\$ 67,000	\$ 67,000	-	0%
8	Statewide Support for Self-Help Programs	CFCC	\$ 100,000	\$ -	\$ 100,000	\$ -	\$ 100,000	\$ 100,000	-	0%
9	CJER Faculty	CJER	\$ 316,000	\$ -	\$ 316,000	\$ -	\$ 340,000	\$ 340,000	24,000	8%
10	Distance Education	CJER	\$ 20,000	\$ -	\$ 20,000	\$ -	\$ 7,500	\$ 7,500	(12,500)	-63%
11	Essential Court Management Education	CJER	\$ 18,000	\$ -	\$ 18,000	\$ -	\$ 18,000	\$ 18,000	-	0%
12	Essential Court Personnel Education	CJER	\$ 116,000	\$ -	\$ 116,000	\$ -	\$ 91,000	\$ 91,000	(25,000)	-22%
13	Judicial Education	CJER	\$ 732,000	\$ -	\$ 732,000	\$ -	\$ 745,500	\$ 745,500	13,500	2%
14	Court Interpreter Testing etc.	COSSO	\$ 143,000	\$ -	\$ 143,000	\$ -	\$ 143,000	\$ 143,000	-	0%
15	Budget Focused Training and Meetings	Finance	\$ 50,000	\$ -	\$ 50,000	\$ -	\$ 50,000	\$ 50,000	-	0%
16	Treasury Services - Cash Management (Support)	Finance	\$ 242,100	\$ 22,000	\$ 264,100	\$ 265,000	\$ -	\$ 265,000	900	0%
17	Trial Court Labor Relations Academies and Forums	HR	\$ 25,700	\$ -	\$ 25,700	\$ -	\$ 22,700	\$ 22,700	(3,000)	-12%
18	California Courts Protective Order Registry (CCPOR)	IT	\$ 716,414	\$ -	\$ 716,414	\$ 325,726	\$ 418,285	\$ 744,011	27,597	4%
19	California Courts Technology Center (CCTC)	IT	\$ 9,776,446	\$ -	\$ 9,776,446	\$ 1,479,754	\$ 7,949,505	\$ 9,429,259	(347,187)	-4%
20	Case Management Systems, Civil, Small Claims, Probate and Mental Health (V3)	IT	\$ 4,226,987	\$ -	\$ 4,226,987	\$ 776,811	\$ 2,595,027	\$ 3,371,838	(855,149)	-20%
21	Data Integration	IT	\$ 2,923,704	\$ -	\$ 2,923,704	\$ 554,966	\$ 1,668,285	\$ 2,223,251	(700,453)	-24%
22	Enterprise Policy/Planning (Statewide Development)	IT	\$ 4,542,842	\$ -	\$ 4,542,842	\$ -	\$ 4,721,364	\$ 4,721,364	178,522	4%
23	Interim Case Management Systems	IT	\$ 1,358,787	\$ -	\$ 1,358,787	\$ -	\$ 1,453,628	\$ 1,453,628	94,841	7%
24	Jury Management System	IT	\$ 465,000	\$ 340,000	\$ 805,000	\$ -	\$ 465,000	\$ 465,000	(340,000)	-42%
25	Phoenix Project - Fiscal Management System	IT	\$ 1,758,770	\$ -	\$ 1,758,770	\$ -	\$ 1,772,796	\$ 1,772,796	14,026	1%
26	Telecommunications Program	IT	\$ 16,694,771	\$ -	\$ 16,694,771	\$ -	\$ 15,460,140	\$ 15,460,140	(1,234,631)	-7%
27	Uniform Civil Filing Services	IT	\$ 392,438	\$ -	\$ 392,438	\$ 389,084	\$ -	\$ 389,084	(3,354)	-1%
28	Judicial Performance Defense Insurance	LSO	\$ 1,150,000	\$ (194,000)	\$ 956,000	\$ -	\$ 1,150,000	\$ 1,150,000	194,000	20%
29	Jury System Improvement Projects	LSO	\$ 19,000	\$ -	\$ 19,000	\$ -	\$ 19,000	\$ 19,000	-	0%
30	Litigation Management Program	LSO	\$ 4,500,000	\$ 933,000	\$ 5,433,000	\$ -	\$ 4,500,000	\$ 4,500,000	(933,000)	-17%
31	Regional Office Assistance Group	LSO	\$ 750,000	\$ (150,000)	\$ 600,000	\$ 568,500	\$ -	\$ 568,500	(31,500)	-5%
32	Trial Courts Transactional Assistance Program	LSO	\$ 651,000	\$ 11,000	\$ 662,000	\$ -	\$ 651,000	\$ 651,000	(11,000)	-2%
33	<i>Sub-Total Program Adjustments</i>		\$ 59,561,857	\$ 940,000	\$ 60,501,857	\$ 4,851,841	\$ 50,866,935	\$ 55,718,776	\$ (4,783,081)	-8%
34	BCP Adjustments (reflects one-time and/or full year cost adjustments)									
35	Language Access- BCP	COSSO	\$ -	\$ 352,000	\$ 352,000	\$ -	\$ -	\$ -	(352,000)	
36	Case Management Systems, Civil, Small Claims, Probate and Mental Health (V3) Replacement BCP	IT	\$ 9,200,000	\$ -	\$ 9,200,000	\$ -	\$ 500,000	\$ 500,000	(8,700,000)	-95%
37	Madera CCTC Transition	IT	\$ 572,622	\$ -	\$ 572,622	\$ -	\$ -	\$ -	(572,622)	-100%
38	SRL (Self-Represented Litigants) BCP	IT	\$ -	\$ -	\$ -	\$ -	\$ 3,236,000	\$ 3,236,000	3,236,000	
39	Sustain Justice Edition CMS (FY 2017-18 BCP)	IT	\$ 4,100,000	\$ -	\$ 4,100,000	\$ -	\$ 896,000	\$ 896,000	(3,204,000)	-78%
40	<i>Sub-Total BCP Adjustments</i>		\$ 13,872,622	\$ 352,000	\$ 14,224,622	\$ -	\$ 4,632,000	\$ 4,632,000	(9,592,622)	-67%
41	Group Offsets (reflects reorganization of budget between offices)									
42	Records Management	BAP	\$ 9,500	\$ -	\$ 9,500	\$ -	\$ -	\$ -	(9,500)	-100%
43	Trial Court Workload Study Support	COSSO	\$ 13,000	\$ -	\$ 13,000	\$ -	\$ -	\$ -	(13,000)	-100%
44	Revenue Distribution Training	Finance	\$ -	\$ -	\$ -	\$ -	\$ 9,500	\$ 9,500	9,500	
45	Workload Assessment Advisory Committee	Finance	\$ -	\$ -	\$ -	\$ -	\$ 13,000	\$ 13,000	13,000	
46	<i>Sub-Total Group Offsets</i>		\$ 22,500	\$ -	\$ 22,500	\$ -	\$ 22,500	\$ 22,500	-	0%
47	Total		\$ 73,456,979	\$ 1,292,000	\$ 74,748,979	\$ 4,851,841	\$ 55,521,435	\$ 60,373,276	\$ (14,375,703)	-20%

**Judicial Council-Approved 2017-18 Allocations and 2018-19 Proposed Allocations
from the IMF State Operations and Local Assistance Appropriations**

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Office	JC Approved Allocations	Proposed Adjustments	Pending Total Allocations	State Operations	Local Assistance	Total
C	D	E	E	G	H	I = (G + H)
Totals by Office:						
AS	\$ 660,000	\$ (22,000)	\$ 638,000	\$ 370,000	\$ -	\$ 370,000
BAP	\$ 2,078,398	\$ -	\$ 2,078,398	\$ 122,000	\$ 1,381,205	\$ 1,503,205
CFCC	\$ 5,244,000	\$ -	\$ 5,244,000	\$ -	\$ 5,244,000	\$ 5,244,000
CJER	\$ 1,202,000	\$ -	\$ 1,202,000	\$ -	\$ 1,202,000	\$ 1,202,000
COSSO	\$ 156,000	\$ 352,000	\$ 508,000	\$ -	\$ 143,000	\$ 143,000
Finance	\$ 292,100	\$ 22,000	\$ 314,100	\$ 265,000	\$ 72,500	\$ 337,500
HR	\$ 25,700	\$ -	\$ 25,700	\$ -	\$ 22,700	\$ 22,700
IT	\$ 56,728,781	\$ 340,000	\$ 57,068,781	\$ 3,526,341	\$ 41,136,030	\$ 44,662,371
LSO	\$ 7,070,000	\$ 600,000	\$ 7,670,000	\$ 568,500	\$ 6,320,000	\$ 6,888,500
Total Allocations	\$ 73,456,979	\$ 1,292,000	\$ 74,748,979	\$ 4,851,841	\$ 55,521,435	\$ 60,373,276

Summary of Programs

#	Program Name	Office	Program Description
A	B	C	D
1	Superior Court Audit Program	AS	Conducts operational audits of the superior and appellate courts per the annual audit plan, as approved by the Advisory Committee for Audits and Financial Accountability for the Judicial Branch.
2	Phoenix Program	BAP	The Phoenix Program supports the judicial branch's financial and human resources system (the Phoenix System) with a diverse range of services, including a centralized treasury system, accounting and financial services, trust accounting services, human capital management/payroll services, and core business analysis, training, and support. All 58 courts currently use the financial component of the system. There are currently 13 courts utilizing the payroll component.
3	Trial Court Procurement	BAP	Pays for personal services costs for one FTE to create and maintain statewide procurement agreements for the courts.
4	Domestic Violence Forms Translation	CFCC	This program makes available to all courts, translation of domestic violence protective order forms in languages other than English. Since 2000, these forms have been translated into Spanish, Vietnamese, Chinese and Korean based on data from various language needs studies.
5	Interactive Software-Self-Rep Electronic Forms	CFCC	This program enables all courts to use Hotdocs Document Assembly Applications, which present court users with a Q&A format that automatically populates fields across all filing documents.
6	Self-Help Center	CFCC	Provides court-based assistance to self-represented litigants.
7	Statewide Multidisciplinary Education	CFCC	Supports the annual Youth Court Summit, the biannual Beyond the Bench Conference, and the biannual Family Law Educational Program (in alternating years).
8	Statewide Support for Self-Help Programs	CFCC	The Self-represented Litigants Statewide Support Program updates and expands the online California Courts Self-Help Center on the judicial branch website. Further, this program facilitates the translating of over 50 Judicial Council forms that are used regularly by self-
9	CJER Faculty	CJER	Lodging, meals, and travel for faculty teaching all CJER programs & developing products for the trial courts. Primarily pro bono judge and court staff faculty. Also supports faculty development & training for all audiences.
10	Distance Education	CJER	CJER Online website & toolkits video hosting & on-demand transmission, podcast course hosting, subscription service and transmission.
11	Essential Court Management Education	CJER	National and statewide training for court leaders, including Institute for Court Management (ICM) courses, CJER Core 40 and Core 24 courses, & other local & regional courses for managers, supervisors and lead staff.
12	Essential Court Personnel Education	CJER	The Court Clerks Training Institute - courtroom and court legal process education in civil, traffic, criminal, probate, family, juvenile, appellate. Regional and local court personnel courses. The biennial Trial Court Judicial Attorneys Institute.
13	Judicial Education	CJER	Programs for all newly elected or appointed judges and subordinate judicial officers required by Rule of Court 10.462 (c)(1) to complete the new judge education programs offered by CJER; Assignment overview courses for judges returning to an assignment after two years; the PJs/CEO & Supervising Judges Institutes, Judicial Institutes & courses for experienced judges.
14	Court Interpreter Testing etc.	COS	Pays for spoken language testing of interpreter candidates, new interpreter orientation, and recruitment and outreach.
15	Budget Focused Training and Meetings	Budget Services	Supports meetings of the Trial Court Budget Advisory Committee and associated subcommittees that deal with trial court funding policies and issues.
16	Treasury Services - Cash Management (Support)	Budget Services	Used for the compensation costs for two accounting staff.
17	Trial Court Labor Relations Academies and Forums	HR	<p>The Labor Relations Academy and Forums provide court management staff with comprehensive labor relations knowledge that assists the courts in meeting its labor challenges. The Academies are held once per year in the spring and the Forums are held once per year in the fall.</p> <p>The allocation pays for costs tied to the setup and operations of HR's annual Labor Relations Academies and Forums. Typical expenses include: reimbursement of travel expenses for trial court employees who participate as faculty; lodging for all trial court attendees (including those who serve as faculty); meeting room/conference room rental fees; books/reference materials if needed; and meals for trial court participants of the Labor Relations Forum.</p> <p>Following each Academy, program staff send out surveys to gather feedback and receive suggestions for future events. In addition, participant attendance is gathered and reported to the Judicial Council as part of the Administrative Director's Report to the Council.</p>
18	California Courts Protective Order Registry (CCPOR)	IT	The California Courts Protective Order Registry (CCPOR) is a statewide repository of protective orders containing both data and scanned images of orders that can be accessed by judges, court staff, and law enforcement officers. CCPOR allows judges to view orders issued by other court divisions and across county lines.
19	California Courts Technology Center (CCTC)	IT	<p>The CCTC hosts some level of services for the 58 California superior courts, all the Courts of Appeal and the Supreme Court and has over 10,000 supported users. Major installations in the CCTC include the following:</p> <ul style="list-style-type: none"> • Appellate Court Case Management System (ACCMS) • California Court Protective Order Registry (CCPOR) • Phoenix - Trial Court Financial and Human Resources System • Sustain Interim Case Management System (ICMS) • Computer Aided Facilities Management (CAFM) system • Civil, Small Claims, Probate, and Mental Health Trial Court Case Management System (V3) • Integration Services Backbone (ISB) <p>This program provides consistent, cost effective, and secure hosting services, including ongoing maintenance and operational support, data network management, desktop computing and local server support, tape back-up and recovery, help desk services, email services, and a disaster recovery program.</p>
20	Case Management Systems, Civil, Small Claims, Probate and Mental Health (V3)	IT	V3 is used by the California Superior Courts of Orange, Sacramento, San Diego, and Ventura Counties. The courts use it to process approximately 25% of civil, small claims, probate, and mental health cases statewide.

#	Program Name	Office	Program Description
A	B	C	D
21	Data Integration	IT	Data Integration provides system interfaces between Judicial Council systems and the computer systems of our justice partners, be they courts, law enforcement agencies, the department of justice and others. Without the Integrated Services Backbone (ISB), the current systems for sharing protective orders, for example, would not function.
22	Enterprise Policy/Planning (Statewide Development)	IT	The Enterprise Policy and Planning program provides the trial courts access to a variety of Oracle products (e.g., Oracle Enterprise Database, Real Application Clusters, Oracle Security Suite, Oracle Advanced Security, Diagnostic Packs, Oracle WebLogic Application Server) without cost to the courts.
23	Interim Case Management Systems	IT	This ICMS Unit primarily provides project management and technical expertise to those courts which have their SJE application hosted at the CCTC. This support includes incorporating legislative updates into the SJE application, integrating application upgrades into the CCTC and supporting CCTC infrastructure upgrades. Locally hosted SJE courts also utilize ICMS resources as requested for legislative updates such as traffic amnesty. The ICMS Unit support includes support for SJE interfaces at CCTC including DMV, DOJ, FTB COD collections, IVR/IWR processing, warrants and FTA-FTP collection interfaces among others. The ICMS Unit also provides SJE production support which is critical to ensuring that the SJE application and interfaces are available to support court operations and provide information to local/state justice partners.
24	Jury Management System	IT	The allocation for the Jury Program is used to distribute funds to the trial courts in the form of grants to improve court jury management systems. All trial courts are eligible to apply for the jury funding. The number of courts receiving grants varies according to the amount of grant funding available and the number of jury grant requests received.
25	Phoenix Program	IT	The Phoenix Program supports the judicial branch's financial and human resources system (the Phoenix System) with a diverse range of services, including a centralized treasury system, accounting and financial services, trust accounting services, human capital management/payroll services, and core business analysis, training, and support. All 58 courts currently use the financial component of the system. There are currently 13 courts utilizing the payroll component.
26	Telecommunications Support	IT	* This program develops and supports a standardized level of network infrastructure for the California superior courts. This infrastructure provides a foundation for local systems (email, jury, CMS, VOIP, etc.) and enterprise system applications such as Phoenix via shared services at the CCTC, provides operational efficiencies, and secures valuable court information resources.
27	Uniform Civil Filing Services (UCFS)	IT	This program supports the distribution and mandated reporting of uniform civil fees collected by all 58 superior courts, with an average of over \$47 million distributed per month. The system generates reports for the State Controller's Office and various entities that receive the distributed funds. There are over 215 fee types collected by each court, distributed to 23 different entities (e.g. Trial Court Trust Fund, County, Equal Access Fund, Law Library, etc.), requiring 65,572 corresponding distribution rules that are maintained by UCFS. UCFS benefits the public by minimizing the amount of penalties paid to the state for incorrect or late distributions and ensuring that the entities entitled to a portion of the civil fees collected, as mandated by law, receive their correct distributions.
28	Judicial Performance Defense Insurance	LS	The allocation for the Judicial Performance Defense Insurance program is used to pay the insurance premium for trial court judges and judicial officers for the Commission on Judicial Performance (CJP) defense master insurance policy. The program (1) covers defense costs in CJP proceedings related to CJP complaints; (2) protects judicial officers from exposure to excessive financial risk for acts committed within the scope of their judicial duties, and (3) lowers the risk of conduct that could lead to complaints through required ethics training for judicial officers.
29	Jury System Improvements	LS	This program is related to Jury Instructions and is a "self-funding" PCC. Funds in this account are generated by royalties generated from sales of criminal and civil jury instructions. The funds are deposited pursuant to the Government Code.
30	Litigation Management Program	LS	The allocation for the Litigation Management Program is used to pay settlements, judgments (if any), and litigation costs, including attorney fees, arising from claims and lawsuits brought against trial courts.
31	Regional Office Assistance Group	LS	The allocation for the Regional Office Assistance Group is used to pay for two attorneys and one support personnel working in Sacramento to provide direct legal services to the trial courts in the areas of legal opinions and labor and employment law.
32	Trial Courts Transactional Assistance Program	LS	The allocation for the Trial Court Transactional Assistance Program is used primarily to pay for outside counsel managed by the Legal Services office to represent the trial courts in labor arbitrations and proceedings before the Public Employment Relations Board (PERB). To a lesser extent, the funds are used to pay for outside counsel to assist trial courts with legal services in specialized areas of court operations, e.g., tax and employee benefits.
33	BCP Funding		
34	Language Access- BCP	COS	One-time funding for Video Remote Interpreting Spoken Language Pilot designed to advance language access expansion efforts in the courts.
35	Case Management Systems, Civil, Small Claims, Probate and Mental Health (V3) Replacement BCP	IT	The allocation was to replace V3 Court Case Management Systems in the Superior Courts of California - Orange, Sacramento, San Diego, and Ventura counties.
35	Madera CCTC Transition	IT	One-time funding from IMF to transition from the California Court Technology Center (CCTC) to their own independent information technology infrastructures. Approved by the Judicial Council on January 19, 2017.
37	SRL (Self-Represented Litigants) BCP	IT	The allocation is to design, build and maintain a statewide Self-Represented Litigants e-Services Web Portal to enable those without legal representation to research, e-file, and track non-criminal cases via an online portal
38	Sustain Justice Edition CMS (FY 2017-18 BCP)	IT	The allocation was approved to replace the Sustain Justice Edition Case Management System in the Superior Courts of California - Humboldt, Lake, Madera, Modoc, Plumas, Sierra, San Benito, Trinity and Tuolumne Courts.
39	Programs Reorganized		
40	Revenue Distribution Training/Records Management	Budget Services	Funding moved from BAP to FSO. Pays for annual training on Revenue Distribution to all the collection programs as well as annual CRT training.
41	Workload Assessment Advisory Committee/Trial Court Workload Study	Budget Services	Funding moved from COSSO to FSO. Pays for meeting expenses of the Workload Assessment Advisory Committee (WAAC) and travel expenses for court personnel and judges related to workload studies.

State Trial Court Improvement and Modernization Fund -- Fund Condition Statement

#	Description	Year-End Financial Statement			Estimated			
		2014-15	2015-16	2016-17	2017-2018	2018-2019	2019-2020	2020-2021
		A	B	C	D	E	F	G
1	Beginning Balance	26,206,661	9,255,317	6,956,187	9,300,613	6,297,317	2,998,389	4,243,506
2	Prior-Year Adjustments	2,877,000	753,239	4,188,013	520,415	0	0	0
3	Adjusted Beginning Balance	29,083,661	10,008,556	11,144,200	9,821,028	6,297,317	2,998,389	4,243,506
4	REVENUES:							
5	Jury Instructions Royalties	532,783	552,000	607,672	736,258	748,581	748,581	748,581
6	Interest from SMIF	100,734	170,114	415,663	749,951	749,951	749,951	749,951
7	Escheat-Unclaimed Checks, Warrants, Bonds	2,000	1,085	7,615	2,000	2,000	2,000	2,000
8	50/50 Excess Fines Split Revenue	23,702,658	20,219,295	13,160,903	11,651,850	11,194,497	10,746,717	10,746,717
9	2% Automation Fund Revenue	14,730,023	12,463,280	12,792,097	11,027,329	10,220,439	9,619,927	9,619,927
10	Other Revenues/SCO Adjustments	28,233	62,857	0	10,000	10,000	10,000	10,000
11	Class Action Residue				95,880	95,880	95,880	95,880
12	Subtotal Revenues	39,096,431	33,468,632	26,983,950	24,273,268	23,021,348	21,973,056	21,973,056
13	Transfers and Other Adjustments							
14	To TCTF (GC 77209(k))	(13,397,000)	(13,397,000)	(13,397,000)	(13,397,000)	(13,397,000)	(13,397,000)	(13,397,000)
15	To Trial Court Trust Fund (Budget Act)	(20,594,000)	(594,000)	(594,000)	(594,000)	(594,000)	(594,000)	(594,000)
16	Total Revenues, Transfers, and Other Adjustments	5,105,431	19,477,632	12,992,950	10,282,268	9,030,348	7,982,056	7,982,056
17	Total Resources	34,189,092	29,486,188	24,137,150	20,103,296	15,327,665	10,980,445	3,738,550
18	EXPENDITURES:							
19	Judicial Branch Total State Operations	13,289,265	14,213,000	6,002,763	6,149,110	4,851,841	5,030,050	3,562,943
20	Judicial Branch Total Local Assistance	50,353,510	52,535,000	65,451,774	61,668,869	55,521,435	56,005,901	51,574,150
21	Total Expenditures	63,642,775	66,748,001	71,454,537	67,817,979	60,373,276	61,035,951	55,137,093
22	Expenditure Adjustments:							
23	Pro Rata and Other Adjustments			660,000	306,000	306,000	306,000	306,000
24	Less funding provided by General Fund (Local Assistance)	38,709,000	44,218,000	56,618,000	54,318,000	48,350,000	46,118,000	44,927,000
25	Total Expenditures and Adjustments	24,933,775	22,530,001	14,836,537	13,805,979	12,329,276	15,223,951	10,516,093
26	Fund Balance	9,255,317	6,956,187	9,300,613	6,297,317	2,998,389	-4,243,506	-6,777,543
27	Restricted Funds - Jury Management	816,367	882,733	1,104,525	1,016,783	1,281,364	1,545,945	1,545,945
28	Restricted Funds - Sargent Shriver Civil Counsel	0	0	0	95,880	191,760	287,640	383,520
29	Fund Balance - Less Restricted Funds	8,438,950	6,073,454	8,196,088	5,184,654	1,525,265	-6,077,091	-8,707,008
30	Structural Balance	-19,828,344	-3,052,369	-1,843,587	-3,523,711	-3,298,928	-7,241,895	-2,534,037

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Trial Court Budget Advisory Committee

(Action Item)

Title: 2018-19 Allocations from the Trial Court Trust Fund (TCTF)
Date: 5/31/2018
Contact: Michele Allan, Budget Supervisor, Judicial Council Budget Services
916-263-1374 | Michele.Allan@jud.ca.gov

Issue

Government Code section 68502.5(c)(2)(A) requires the council to make a preliminary allocation in July of each fiscal year and a final allocation in January of each fiscal year.

Consideration of recommendation to approve 2018–19 allocations for discretionary and non-discretionary programs from the Trial Court Trust Fund (TCTF) in the amount of \$2.0 billion for the Judicial Council at its July 19-20, 2018 meeting. Approve recommended allocation of General Fund in the amount of \$68.8 million.

Proposed 2018-19 Preliminary Allocations

1. Program 0140010 - Judicial Council
 - a. Revenue & Expenditure (R&E) Subcommittee recommendation for Judicial Council staff in the amount of \$3,633,676. (Attachment A, line 28)
2. Program 0150010 - Support for Operation of the Trial Courts
 - a. 2017-18 Adjusted TCTF Base Allocation in the amount of \$1,778,582,599. (Attachment A, line 8)
 - i. Adjusted base allocation includes \$9,223,000 criminal justice realignment funding. (Attachment A, line 7)
 - b. New and changed allocations in the amount of \$22,839,843. (Attachment A, line 13)
 - i. Includes \$23,816,127 for non-court interpreter employee benefits. (Attachment A, line 12)
 - c. R&E Subcommittee recommendation for Support of Operation of Trial Courts in the amount of \$39,330,316. (Attachment A, line 48)
3. Program 0150011 - Court Appointed Dependency Counsel
 - a. R&E Subcommittee recommendation to allocate \$136,700,000 for Court Appointed Dependency Counsel. (Attachment A, line 39)

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Trial Court Budget Advisory Committee

4. Program 0150037 - Court Interpreters Benefits
 - a. Funding in the amount of \$1,071,869 for court interpreter employee benefits for 2017–18 cost changes in the 2018 May Revise. (Attachment A, line 15)
 - b. One-time funding in the amount of \$4,000,000 for court interpreter employee benefits, based on an approved 2018-19 BCP, with the anticipation of its inclusion in the 2018-19 Budget Act. (Attachment A, line 16)
5. Program 0150095 - Expenses on Behalf of the Trial Courts
 - a. R&E Subcommittee recommendation in the amount of \$9,175,085 for expenditures incurred by the Judicial Council on behalf of trial courts. (Attachment A, line 37)
6. General Fund
 - a. Approve \$68,818,575 in General Fund for employee benefits (Attachment A, line 2)

Pending and Other Allocations

Two items that will be allocated from the Program 0150010 appropriation are pending. Because the courts have until July 14 to provide their preliminary 2017–18 ending fund balances, the preliminary reduction amounts related to trial court reserves above the 1% cap referenced in Government Code section 68502.5(c)(2)(A) will not be available for TCBAC consideration prior to recommendation to the council at its July 19-20, 2018 meeting. However, the TCBAC will consider the final allocation reductions for fund balance above the 1% cap prior to their recommendation to the Judicial Council prior to February 2019. The allocation of monies, using the council-approved formula, collected through the dependency counsel collections program will be brought to the TCBAC and council once final 2017–18 collections are known. A number of allocations are required by the Budget Act (a \$50 million distribution from the Immediate & Critical Needs Account for court operations; various revenue distributions are required by statute, or are authorized charges for the cost of programs or cash advances.

The \$10 million in urgent needs funding assumes nothing is allocated in 2018–19. If monies are allocated, courts would need to replenish the monies up to what was allocated by the council from their allocations in 2019–20.

The projected 2018–19 ending TCTF fund balance is \$74.0 million. (Attachment B; column F, row 29) Approximately \$17.1 million are monies that are either statutorily restricted or restricted by the council. (Attachment B; column F, row 30) The estimated unrestricted fund balance is \$56.9 million. (Attachment B; column F, row 31) The 2018-19 preliminary allocation requests totaling \$1.99 billion can be supported by the TCTF based on current revenue projections and 2017-18 projected savings.

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Trial Court Budget Advisory Committee

Recommendation

The following recommendation is presented to the Trial Court Budget Advisory Committee for consideration:

1. Adopt a recommendation for a total of \$2.0 billion in preliminary allocations for 2018-19 from the TCTF for consideration by the Judicial Council at its July 19-20, 2018 meeting.
2. Approve \$68.8 million General Fund allocation for employee benefits.

Attachments

Attachment A: 2018-19 Trial Court Trust Fund (TCTF) Recommended Preliminary Allocation

Attachment B: TCTF Fund Condition

2018-19 Trial Court Trust Fund (TCTF) Recommended Preliminary Allocation

2017-18 Base Allocation			Base Allocation Adjustments			2018-19 Base Allocation	2018-19 TCTF Allocations	
A	B	C	D	E	F	G	H	I
2017-18 Ending Base	Less General Fund Employee Benefits	2017-18 TCTF Ending Base (A + B)	2017-18 Adjusted Base Allocation	New and Changed Allocations	Other Allocations	2018-19 TCTF Base Allocation (D + E + F)	Revenue and Expenditure (R&E) Subcommittee Recommendations	2018-19 Total TCTF Allocation (G + H)
1,824,719,885	(68,818,575)	1,755,901,310	1,778,582,599	22,839,843	5,071,869	1,806,494,310	188,839,077	1,995,333,387

Trial Court Trust Fund (TCTF) 2018-19 Allocation

1	2017-18 Ending Base	1,824,719,885
2	Less General Fund Employee Benefits	(68,818,575)
3	2017-18 TCTF Ending Base	1,755,901,310
4	Non-Base Adjustments	
5	Automated Record Keeping and Micrographics	2,550,795
6	Replacement of 2% Automation Fund Allocation	10,907,494
7	Criminal Justice Realignment	9,223,000
8	2017-18 Adjusted TCTF Base Allocation (Program 0150010)	1,778,582,599
9	New and Changed Allocations	
10	Subordinate Judicial Officers Conversions	(1,007,523)
11	Micrographics	31,239
12	2017-18 Non-Court Interpreter Employee Benefits	23,816,127
13	Total, New and Changed Allocations (Program 0150010)	22,839,843
14	Other Allocations	
15	2017-18 Court Interpreter Employee Benefits (Program 0150037)	1,071,869
16	2018-19 Court Interpreter One-time BCP Funding (Program 0150037)	4,000,000
17	Total Other Allocations	5,071,869
18	2018-19 TCTF Base Allocation	1,806,494,310
19	R&E Subcommittee Recommendations	
20	Judicial Council (Staff) - Program 0140010	
21	Sargent Shriver Civil Counsel Pilot Program	500,000
22	Equal Access Fund	246,000
23	Court-Appointed Dependency Counsel Collections	260,000
24	Statewide Support for Collections Programs	625,000
25	Phoenix Financial Services	107,000
26	Phoenix Human Resources Services	1,404,676
27	Statewide E-Filing Implementation	491,000
28		3,633,676
29	Expenses on Behalf of the Trial Courts - Program 0150095	
30	Children in Dependency Case Training	113,000
31	Sargent Shriver Civil Counsel Pilot Program	6,433,142
32	Civil, Small Claims, Probate and Mental Health (V3) Case Management System	564,000
33	California Courts Technology Center	1,045,943
34	Interim Case Management System	361,000
35	Other Post Employment Benefits Valuations	118,000
36	State Controller's Office Audit - Pilot program per GC 77206 (h)(4)	540,000
37		9,175,085
38	Allocation for Court-Appointment Dependency Counsel - Program 0150011	
39	Court-Appointed Dependency Counsel	136,700,000

40	Allocation for Reimbursements - Program 0150010	
41	Jury	14,500,000
42	Replacement Screening Stations	1,900,000
43	Self-Help Center	21,600,000
44	Elder Abuse	332,340
45	California State Auditor Audits	325,000
46	Court-Appointed Dependency Counsel Collections Reimbursement Rollover	pending
47	Court-Appointed Dependency Counsel Collections Reimbursement	672,976
48		39,330,316
49	2018-19 Total TCTF Allocation (Base + R&E Recommendations)	1,995,333,387
50	2018-19 TCTF Allocation by Program	
51	0140010 - Judicial Council	3,633,676
52	0150010 - Support for Operation of the Trial Courts	1,840,752,758
53	0150011 - Court-Appointed Dependency Counsel	136,700,000
54	0150037 - Court Interpreters (Benefits)	5,071,869
55	0150095 - Expenses on Behalf of the Trial Courts	9,175,085
56	Total 2018-19 Allocation by Program	1,995,333,387

Trial Court Trust Fund - Fund Condition Statement

	Description	YEAR END FINANCIAL STATEMENTS			ESTIMATED				
		2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22
#	A	B	C	D	E	F	G	H	I
1	Beginning Fund Balance	21,218,232	6,614,017	34,829,875	66,569,098	73,424,003	74,037,569	68,088,245	59,599,555
2	Prior-Year Adjustments	5,624,798	7,208,461	5,759,000	2,479,627	-	-	-	-
3	TOTAL REVENUES AND TRANSFERS	2,333,631,984	2,431,232,814	2,486,227,327	2,471,289,300	2,642,519,300	2,629,704,300	2,629,704,300	2,629,704,300
4	<i>Total Revenues</i>	<i>1,341,324,951</i>	<i>1,294,611,392</i>	<i>1,270,421,327</i>	<i>1,273,466,000</i>	<i>1,263,322,000</i>	<i>1,250,998,000</i>	<i>1,250,998,000</i>	<i>1,250,998,000</i>
5	Transfers/Charges/Reimbursements								
6	General Fund Transfer	922,648,255	943,724,000	1,021,832,000	986,281,000	1,158,535,000	1,158,535,000	1,158,535,000	1,158,535,000
7	General Fund Transfer - Court-Appointed Dependency Counsel		114,700,000	114,700,000	136,700,000	136,700,000	136,700,000	136,700,000	136,700,000
8	General Fund Transfer - Revenue Backfill	30,900,000	58,900,000	61,300,000	55,000,000	64,300,000	64,300,000	64,300,000	64,300,000
10	<i>Proposed backfill for Civil Assessments</i>				-	-	-	-	-
11	General Fund Loan - Statewide E-Filing				671,000	491,000			
12	Reduction Offset Transfers	26,080,000	6,080,000	6,080,000	6,080,000	6,080,000	6,080,000	6,080,000	6,080,000
14	Net Other Transfers/Charges/Reimbursements	12,678,778	13,217,422	11,894,000	13,091,300	13,091,300	13,091,300	13,091,300	13,091,300
15	Total Resources	2,360,475,014	2,445,055,292	2,526,816,202	2,540,338,025	2,715,943,303	2,703,741,869	2,697,792,545	2,689,303,855
16	EXPENDITURES/ENCUMBRANCES/ALLOCATIONS								
17	Program 30/30.05 (0140010) - Judicial Council (AOC Staff)	4,095,938	3,620,851	2,306,934	3,836,676	3,633,676	2,878,676	2,878,676	2,890,676
18	Program 30.15 (Formerly Program 45.10) (0140019) - Trial Court Operati	15,622,980	12,369,281	-	-	-	-	-	-
19	Program 45.10 (0150010) - Support for Operation of the Trial Courts	1,883,174,214	1,816,242,767	1,860,003,547	1,831,911,214	1,987,411,785	1,986,066,899	1,989,061,432	1,989,061,432
20	Program 0150011 - Court-Appointed Dependency Counsel	-	114,387,117	114,699,919	136,700,000	136,700,000	136,700,000	136,700,000	136,700,000
21	Program 45.15 - Trial Court Security	-	-	-	-	-	-	-	-
22	Program 45.25 (0150019) - Compensation of Superior Court Judges	319,803,869	330,369,783	335,384,000	338,231,000	359,503,000	359,503,000	359,503,000	359,573,000
23	Program 45.35 (0150028) - Assigned Judges	24,792,538	25,199,733	25,923,351	27,005,000	28,117,000	28,117,000	28,117,000	28,117,000
24	Program 45.45 (0150037) - Court Interpreters	96,802,928	99,598,715	102,282,915	108,537,000	108,704,000	104,704,000	104,704,000	104,704,000
25	9892 Supplemental Pension Payments (State Ops)					98,000	105,000	169,000	177,000
26	Program 0150095 - Expenses on Behalf of the Trial Courts	-	-	11,391,069	11,227,777	9,175,085	9,300,277	8,544,088	8,961,088
27	Item 601 - Redevelopment Agency Writ Case Reimbursements	704,280	291,169	108,368	-	-	-	-	-
28	Total, Expenditures/Encumbrances/Allocations	2,353,860,997	2,410,225,417	2,460,247,104	2,466,914,023	2,641,905,733	2,635,653,624	2,638,192,991	2,638,687,991
29	Ending Fund Balance	6,614,017	34,829,875	66,569,098	73,424,003	74,037,569	68,088,245	59,599,555	50,615,864
30	Total Restricted Funds	16,294,708	13,769,783	18,150,799	18,680,758	17,090,893	15,806,374	13,806,532	13,806,532
31	Ending Unrestricted Fund Balance	(9,680,691)	21,060,092	48,418,299	54,743,244	56,946,676	52,281,871	45,793,023	36,809,332
32	Appropriation Authority	2,374,768,317	2,422,079,000	2,492,488,255	2,572,041,000	2,676,665,000	2,732,602,000	2,732,602,000	2,732,602,000
33	Appropriation Authority Surplus/(Deficit)	20,907,320	11,853,583	32,241,151	105,126,977	34,759,267	96,948,376	94,409,009	93,914,009

NOTE: General Fund Transfer - Revenue Backfill Shortfall in the amount of \$7,000,000 is pending for 2017-18. To be determined when all revenues are collected.

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Trial Court Budget Advisory Committee

(Action Item)

Title: Allocation of \$47.8 Million in Governor’s Proposed Budget
Date: 5/24/2018
Contact: Kristin Greenaway, Supervising Research Analyst, Budget Services
415-865-7832 | kristin.greenaway@jud.ca.gov

Issue

Consider a unanimous recommendation of the Funding Methodology Subcommittee (FMS) to adopt the option 1 allocation methodology described below for the proposed \$47.8 million and 2018-19 allocations in an effort to elevate trial courts to the statewide average funding level and to make further progress towards statewide equity of funding.

Background

The Governor’s proposed budget for 2018-19 includes \$47.8 million to be allocated to trial courts that are below 76.9 percent of their overall need according to the Workload-Based Allocation and Funding Methodology (WAFM). This augmentation is intended to equalize funding by bringing all trial courts up to 76.9 percent, the statewide average funding level, according to updated case weights.

The dollar amount and average funding level identified in the Governor’s proposed budget was based on the most current data available at the time. However, since the proposed budget in January 2018, a number of updates have been made to the data inputs that are used to compute WAFM-related funding need, the WAFM base allocation, and the statewide average funding level.

On January 26, 2018, court executives and trial court budget contacts were sent a preliminary version of the proposed allocation of the \$47.8 million (Attachment 4A). This version contained the most current funding need estimates based on the three most-recent years of filings data compiled: 2014-15 through 2016-17. Although updates to other funding methodology inputs had not been finalized at the time, the preliminary draft was sent out to courts in response to concerns expressed about the importance of having allocation information as early as possible for planning purposes. The allocation information was caveated to indicate that the final amounts would change once all of the model inputs had been updated.

Since that time, the following changes have been made to the model inputs:

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- A change in the methodology used to compute RAS (Resource Assessment Study) workload need for infractions workload. This item was approved by the Judicial Council at its May 24, 2018 meeting. The change will affect the full-time equivalent (FTE) need calculations for courts that have experienced a decrease in infractions filings below 100,000 filings since 2013-14. This change was implemented immediately for use in 2018-19 budget allocations and affected the funding need of two courts for the coming fiscal year.
- A technical correction to filings data submitted by one court that resulted in a downward adjustment to their RAS FTE need. The court's funding is above the statewide average funding level and therefore is not eligible to receive any of the proposed \$47.8 million.
- Updated health benefit cost data that affects the computation of the base allocation. The base allocation is used to compute each court's funding level by comparing allocation to funding need, so changes to this number could affect a court's funding level.
- Updated subordinate judicial officer (SJO) conversion and SJO allocation information; these amounts are adjusted annually to reflect any SJO conversions and changes in authorized SJO positions. Also, the January 2018 allocation spreadsheet did not reflect some authorized SJO positions—a few referee positions that are authorized in a small number of courts. This omission has been corrected.

In addition, because the figures used in the Governor's proposed budget were based on non-current data, the \$47.8 million in funding identified to bring courts up to the statewide average, and the statewide average funding level of 76.9 percent, no longer reflect the correct funding levels and percentages. As a result, the FMS was tasked with determining how to allocate the \$47.8 million in funding to best comply with the spirit of the budget language.

At its March 26, 2018 meeting, FMS reviewed two options for allocating this funding (Attachment 4B). Both options start the same way, by allocating funding to bring courts to at least 76.9 percent as stated in the Governor's proposed budget language. Option 1 focused on allocating the remaining dollars to the courts furthest away from the statewide average need, reducing funding inequity across the courts and raising the statewide funding average. Option 2 allocated funding to all courts below the new statewide average.

While option 2 funds a greater number of courts, it distributes the funding across a wider swath of courts. The net effect is that funding inequity is not reduced as much as with option 1.

Recommendation

The Funding Methodology Subcommittee unanimously recommends that the Trial Court Budget Advisory Committee approve option 1 on the basis that it is the best means of carrying out the Governor's intent in providing the funding.

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A spreadsheet showing the proposed allocations of the \$47.8 million with all inputs updated and using the methodology proposed with option 1 is attached (attachment 4C). If adopted, thirty-five courts would receive funding and the new statewide average funding level would become 82 percent.

Attachments

Attachment 4A: Proposed allocation of \$47.8 million distributed to courts January 26, 2018

Attachment 4B: Options 1 and 2 for allocation of \$47.8 million

Attachment 4C: Proposed allocation of \$47.8 million with all inputs updated as of May 22, 2018

DRAFT SCENARIO 01-26-18 - WILL CHANGE BASED UPON THE 2018 BUDGET ACT**BEFORE \$47.8M****AFTER \$47.8M**

Cluster	Court	Total 2018-19 WAFM-Related Allocation	Total 2018-19 WAFM Need	% of Need	Difference From AVG	Total 2018-19 WAFM-Related Allocation	% of Need	Difference from AVG	Share of \$47.8 M allocation	% Increase
4	Alameda	\$71,216,156	\$83,101,281	85.7%	7.1%	\$71,216,156	85.7%	4.9%	\$0	0.0%
1	Alpine	\$750,000	\$423,378	177.1%	98.5%	\$750,000	177.1%	96.4%	\$0	0.0%
1	Amador	\$2,241,405	\$2,875,338	78.0%	-0.7%	\$2,250,281	78.3%	-2.5%	\$8,876	0.4%
2	Butte	\$9,426,399	\$13,374,586	70.5%	-8.1%	\$10,467,143	78.3%	-2.5%	\$1,040,743	11.0%
1	Calaveras	\$2,086,027	\$2,611,213	79.9%	1.3%	\$2,086,027	79.9%	-0.9%	\$0	0.0%
1	Colusa	\$1,924,378	\$1,994,918	96.5%	17.8%	\$1,924,378	96.5%	15.7%	\$0	0.0%
3	Contra Costa	\$38,944,771	\$51,871,341	75.1%	-3.5%	\$40,595,254	78.3%	-2.5%	\$1,650,483	4.2%
1	Del Norte	\$2,409,926	\$2,821,677	85.4%	6.8%	\$2,409,926	85.4%	4.6%	\$0	0.0%
2	El Dorado	\$6,488,321	\$8,706,791	74.5%	-4.1%	\$6,814,060	78.3%	-2.5%	\$325,738	5.0%
3	Fresno	\$46,755,051	\$63,106,468	74.1%	-4.5%	\$49,388,025	78.3%	-2.5%	\$2,632,974	5.6%
1	Glenn	\$1,913,843	\$2,131,424	89.8%	11.2%	\$1,913,843	89.8%	9.0%	\$0	0.0%
2	Humboldt	\$6,057,587	\$7,859,201	77.1%	-1.5%	\$6,150,723	78.3%	-2.5%	\$93,136	1.5%
2	Imperial	\$8,284,100	\$10,646,871	77.8%	-0.8%	\$8,332,393	78.3%	-2.5%	\$48,293	0.6%
1	Inyo	\$1,887,466	\$2,005,208	94.1%	15.5%	\$1,887,466	94.1%	13.3%	\$0	0.0%
3	Kern	\$44,807,319	\$64,925,575	69.0%	-9.6%	\$50,811,684	78.3%	-2.5%	\$6,004,365	13.4%
2	Kings	\$6,455,083	\$8,937,534	72.2%	-6.4%	\$6,994,642	78.3%	-2.5%	\$539,559	8.4%
2	Lake	\$3,168,841	\$4,564,560	69.4%	-9.2%	\$3,572,290	78.3%	-2.5%	\$403,450	12.7%
1	Lassen	\$1,874,990	\$2,147,967	87.3%	8.7%	\$1,874,990	87.3%	6.5%	\$0	0.0%
4	Los Angeles	\$500,585,968	\$638,818,504	78.4%	-0.3%	\$500,585,968	78.4%	-2.4%	\$0	0.0%
2	Madera	\$7,217,836	\$9,793,233	73.7%	-4.9%	\$7,664,324	78.3%	-2.5%	\$446,488	6.2%
2	Marin	\$11,889,816	\$12,566,813	94.6%	16.0%	\$11,889,816	94.6%	13.8%	\$0	0.0%
1	Mariposa	\$1,250,000	\$1,345,390	92.9%	14.3%	\$1,250,000	92.9%	12.1%	\$0	0.0%
2	Mendocino	\$5,177,238	\$7,193,346	72.0%	-6.7%	\$5,629,616	78.3%	-2.5%	\$452,378	8.7%
2	Merced	\$11,118,343	\$15,841,209	70.2%	-8.4%	\$12,397,557	78.3%	-2.5%	\$1,279,214	11.5%
1	Modoc	\$875,002	\$1,028,453	85.1%	6.5%	\$875,002	85.1%	4.3%	\$0	0.0%
1	Mono	\$1,874,999	\$1,921,934	97.6%	18.9%	\$1,874,999	97.6%	16.8%	\$0	0.0%
3	Monterey	\$16,656,950	\$23,133,666	72.0%	-6.6%	\$18,104,739	78.3%	-2.5%	\$1,447,788	8.7%
2	Napa	\$6,805,669	\$8,401,485	81.0%	2.4%	\$6,805,669	81.0%	0.2%	\$0	0.0%
2	Nevada	\$4,485,467	\$5,843,488	76.8%	-1.9%	\$4,573,197	78.3%	-2.5%	\$87,730	2.0%
4	Orange	\$130,557,838	\$158,475,388	82.4%	3.8%	\$130,557,838	82.4%	1.6%	\$0	0.0%
2	Placer	\$15,381,448	\$20,277,183	75.9%	-2.8%	\$15,869,213	78.3%	-2.5%	\$487,765	3.2%
1	Plumas	\$1,098,234	\$1,248,151	88.0%	9.4%	\$1,098,234	88.0%	7.2%	\$0	0.0%
4	Riverside	\$83,795,307	\$115,864,478	72.3%	-6.3%	\$90,677,199	78.3%	-2.5%	\$6,881,892	8.2%
4	Sacramento	\$74,207,648	\$94,570,263	78.5%	-0.2%	\$74,207,648	78.5%	-2.3%	\$0	0.0%
1	San Benito	\$2,490,581	\$3,296,299	75.6%	-3.1%	\$2,579,730	78.3%	-2.5%	\$89,149	3.6%
4	San Bernardino	\$90,489,654	\$122,745,316	73.7%	-4.9%	\$96,062,241	78.3%	-2.5%	\$5,572,587	6.2%
4	San Diego	\$131,053,036	\$149,938,144	87.4%	8.8%	\$131,053,036	87.4%	6.6%	\$0	0.0%
4	San Francisco	\$51,680,101	\$50,233,195	102.9%	24.3%	\$51,680,101	102.9%	22.1%	\$0	0.0%
3	San Joaquin	\$33,539,705	\$44,763,531	74.9%	-3.7%	\$35,032,580	78.3%	-2.5%	\$1,492,875	4.5%
2	San Luis Obispo	\$12,320,922	\$16,966,674	72.6%	-6.0%	\$13,278,362	78.3%	-2.5%	\$957,440	7.8%
3	San Mateo	\$32,338,069	\$44,666,431	72.4%	-6.2%	\$34,956,588	78.3%	-2.5%	\$2,618,519	8.1%
3	Santa Barbara	\$20,368,953	\$27,024,093	75.4%	-3.3%	\$21,149,442	78.3%	-2.5%	\$780,489	3.8%
4	Santa Clara	\$74,824,230	\$84,089,003	89.0%	10.4%	\$74,824,230	89.0%	8.2%	\$0	0.0%
2	Santa Cruz	\$11,476,219	\$15,685,523	73.2%	-5.5%	\$12,275,715	78.3%	-2.5%	\$799,496	7.0%
2	Shasta	\$10,247,416	\$14,686,813	69.8%	-8.9%	\$11,494,110	78.3%	-2.5%	\$1,246,694	12.2%
1	Sierra	\$750,000	\$384,424	195.1%	116.5%	\$750,000	195.1%	114.3%	\$0	0.0%
2	Siskiyou	\$2,797,889	\$2,947,579	94.9%	16.3%	\$2,797,889	94.9%	14.1%	\$0	0.0%
3	Solano	\$19,959,262	\$26,313,149	75.9%	-2.8%	\$20,593,047	78.3%	-2.5%	\$633,784	3.2%
3	Sonoma	\$22,498,598	\$26,973,505	83.4%	4.8%	\$22,498,598	83.4%	2.6%	\$0	0.0%
3	Stanislaus	\$21,175,789	\$31,118,112	68.0%	-10.6%	\$24,353,480	78.3%	-2.5%	\$3,177,690	15.0%
2	Sutter	\$4,842,312	\$6,637,590	73.0%	-5.7%	\$5,194,673	78.3%	-2.5%	\$352,361	7.3%
2	Tehama	\$3,854,151	\$5,482,510	70.3%	-8.3%	\$4,290,691	78.3%	-2.5%	\$436,540	11.3%
1	Trinity	\$1,383,823	\$1,577,454	87.7%	9.1%	\$1,383,823	87.7%	6.9%	\$0	0.0%
3	Tulare	\$18,410,572	\$26,630,928	69.1%	-9.5%	\$20,841,746	78.3%	-2.5%	\$2,431,174	13.2%
2	Tuolumne	\$3,054,903	\$4,353,128	70.2%	-8.4%	\$3,406,821	78.3%	-2.5%	\$351,918	11.5%
3	Ventura	\$33,385,142	\$44,626,190	74.8%	-3.8%	\$34,925,095	78.3%	-2.5%	\$1,539,953	4.6%
2	Yolo	\$9,273,164	\$13,540,159	68.5%	-10.1%	\$10,596,722	78.3%	-2.5%	\$1,323,558	14.3%
2	Yuba	\$4,450,227	\$5,960,508	74.7%	-4.0%	\$4,664,779	78.3%	-2.5%	\$214,552	4.8%
TOTALS		\$1,746,334,148	\$2,221,068,575	78.6%		\$1,794,183,799	80.8%	-2.5%	\$47,849,651	

DRAFT SCENARIO 01-26-18 - WILL CHANGE BASED UPON THE 2018 BUDGET ACT

Cluster	Court	Total 2018-19 WAFM-Related Allocation (Before New Money)	Total 2018-19 WAFM Need	% Need	Option 1: Additional Funding Needed	Option 1: Final Total 2018-19 WAFM-Related Allocation	Option 1: New % Need	Option 2: Additional Funding Needed	Option 2: Final Total 2018-19 WAFM-Related Allocation	Option 2: New % Need
4	Alameda	\$ 71,216,156	\$ 83,101,281	85.7%	\$ -	\$ 71,216,156	85.7%	\$ -	\$ 71,216,156	85.7%
1	Alpine	\$ 750,000	\$ 423,378	177.1%	\$ -	\$ 750,000	177.1%	\$ -	\$ 750,000	177.1%
1	Amador	\$ 2,241,405	\$ 2,875,338	78.0%	\$ 8,876	\$ 2,250,281	78.3%	\$ 2,928	\$ 2,244,333	78.1%
2	Butte	\$ 9,426,399	\$ 13,374,586	70.5%	\$ 1,040,743	\$ 10,467,143	78.3%	\$ 1,013,078	\$ 10,439,477	78.1%
1	Calaveras	\$ 2,086,027	\$ 2,611,213	79.9%	\$ -	\$ 2,086,027	79.9%	\$ -	\$ 2,086,027	79.9%
1	Colusa	\$ 1,924,378	\$ 1,994,918	96.5%	\$ -	\$ 1,924,378	96.5%	\$ -	\$ 1,924,378	96.5%
3	Contra Costa	\$ 38,944,771	\$ 51,871,341	75.1%	\$ 1,650,483	\$ 40,595,254	78.3%	\$ 1,543,185	\$ 40,487,957	78.1%
1	Del Norte	\$ 2,409,926	\$ 2,821,677	85.4%	\$ -	\$ 2,409,926	85.4%	\$ -	\$ 2,409,926	85.4%
2	El Dorado	\$ 6,488,321	\$ 8,706,791	74.5%	\$ 325,738	\$ 6,814,060	78.3%	\$ 307,728	\$ 6,796,049	78.1%
3	Fresno	\$ 46,755,051	\$ 63,106,468	74.1%	\$ 2,632,974	\$ 49,388,025	78.3%	\$ 2,502,436	\$ 49,257,487	78.1%
1	Glenn	\$ 1,913,843	\$ 2,131,424	89.8%	\$ -	\$ 1,913,843	89.8%	\$ -	\$ 1,913,843	89.8%
2	Humboldt	\$ 6,057,587	\$ 7,859,201	77.1%	\$ 93,136	\$ 6,150,723	78.3%	\$ 76,879	\$ 6,134,466	78.1%
2	Imperial	\$ 8,284,100	\$ 10,646,871	77.8%	\$ 48,293	\$ 8,332,393	78.3%	\$ 26,270	\$ 8,310,370	78.1%
1	Inyo	\$ 1,887,466	\$ 2,005,208	94.1%	\$ -	\$ 1,887,466	94.1%	\$ -	\$ 1,887,466	94.1%
3	Kern	\$ 44,807,319	\$ 64,925,575	69.0%	\$ 6,004,365	\$ 50,811,684	78.3%	\$ 5,870,065	\$ 50,677,384	78.1%
2	Kings	\$ 6,455,083	\$ 8,937,534	72.2%	\$ 539,559	\$ 6,994,642	78.3%	\$ 521,072	\$ 6,976,154	78.1%
2	Lake	\$ 3,168,841	\$ 4,564,560	69.4%	\$ 403,450	\$ 3,572,290	78.3%	\$ 394,008	\$ 3,562,848	78.1%
1	Lassen	\$ 1,874,990	\$ 2,147,967	87.3%	\$ -	\$ 1,874,990	87.3%	\$ -	\$ 1,874,990	87.3%
4	Los Angeles	\$ 500,585,968	\$ 638,818,504	78.4%	\$ -	\$ 500,585,968	78.4%	\$ 1,690,540	\$ 502,276,508	78.6%
2	Madera	\$ 7,217,836	\$ 9,793,233	73.7%	\$ 446,488	\$ 7,664,324	78.3%	\$ 426,231	\$ 7,644,067	78.1%
2	Marin	\$ 11,889,816	\$ 12,566,813	94.6%	\$ -	\$ 11,889,816	94.6%	\$ -	\$ 11,889,816	94.6%
1	Mariposa	\$ 1,250,000	\$ 1,345,390	92.9%	\$ -	\$ 1,250,000	92.9%	\$ -	\$ 1,250,000	92.9%
2	Mendocino	\$ 5,177,238	\$ 7,193,346	72.0%	\$ 452,378	\$ 5,629,616	78.3%	\$ 437,498	\$ 5,614,736	78.1%
2	Merced	\$ 11,118,343	\$ 15,841,209	70.2%	\$ 1,279,214	\$ 12,397,557	78.3%	\$ 1,246,446	\$ 12,364,789	78.1%
1	Modoc	\$ 875,002	\$ 1,028,453	85.1%	\$ -	\$ 875,002	85.1%	\$ -	\$ 875,002	85.1%
1	Mono	\$ 1,874,999	\$ 1,921,934	97.6%	\$ -	\$ 1,874,999	97.6%	\$ -	\$ 1,874,999	97.6%
3	Monterey	\$ 16,656,950	\$ 23,133,666	72.0%	\$ 1,447,788	\$ 18,104,739	78.3%	\$ 1,399,935	\$ 18,056,886	78.1%
2	Napa	\$ 6,805,669	\$ 8,401,485	81.0%	\$ -	\$ 6,805,669	81.0%	\$ -	\$ 6,805,669	81.0%
2	Nevada	\$ 4,485,467	\$ 5,843,488	76.8%	\$ 87,730	\$ 4,573,197	78.3%	\$ 75,642	\$ 4,561,110	78.1%
4	Orange	\$ 130,557,838	\$ 158,475,388	82.4%	\$ -	\$ 130,557,838	82.4%	\$ -	\$ 130,557,838	82.4%
2	Placer	\$ 15,381,448	\$ 20,277,183	75.9%	\$ 487,765	\$ 15,869,213	78.3%	\$ 445,821	\$ 15,827,269	78.1%
1	Plumas	\$ 1,098,234	\$ 1,248,151	88.0%	\$ -	\$ 1,098,234	88.0%	\$ -	\$ 1,098,234	88.0%
4	Riverside	\$ 83,795,307	\$ 115,864,478	72.3%	\$ 6,881,892	\$ 90,677,199	78.3%	\$ 6,642,223	\$ 90,437,530	78.1%
4	Sacramento	\$ 74,207,648	\$ 94,570,263	78.5%	\$ -	\$ 74,207,648	78.5%	\$ 149,029	\$ 74,356,677	78.6%
1	San Benito	\$ 2,490,581	\$ 3,296,299	75.6%	\$ 89,149	\$ 2,579,730	78.3%	\$ 82,331	\$ 2,572,912	78.1%
4	San Bernardino	\$ 90,489,654	\$ 122,745,316	73.7%	\$ 5,572,587	\$ 96,062,241	78.3%	\$ 5,318,685	\$ 95,808,369	78.1%
4	San Diego	\$ 131,053,036	\$ 149,938,144	87.4%	\$ -	\$ 131,053,036	87.4%	\$ -	\$ 131,053,036	87.4%
4	San Francisco	\$ 51,680,101	\$ 50,233,195	102.9%	\$ -	\$ 51,680,101	102.9%	\$ -	\$ 51,680,101	102.9%
3	San Joaquin	\$ 33,539,705	\$ 44,763,531	74.9%	\$ 1,492,875	\$ 35,032,580	78.3%	\$ 1,400,280	\$ 34,939,985	78.1%
2	San Luis Obispo	\$ 12,320,922	\$ 16,966,674	72.6%	\$ 957,440	\$ 13,278,362	78.3%	\$ 922,344	\$ 13,243,265	78.1%
3	San Mateo	\$ 32,338,069	\$ 44,666,431	72.4%	\$ 2,618,519	\$ 34,956,588	78.3%	\$ 2,526,126	\$ 34,864,194	78.1%
3	Santa Barbara	\$ 20,368,953	\$ 27,024,093	75.4%	\$ 780,489	\$ 21,149,442	78.3%	\$ 724,589	\$ 21,093,542	78.1%
4	Santa Clara	\$ 74,824,230	\$ 84,089,003	89.0%	\$ -	\$ 74,824,230	89.0%	\$ -	\$ 74,824,230	89.0%
2	Santa Cruz	\$ 11,476,219	\$ 15,685,523	73.2%	\$ 799,496	\$ 12,275,715	78.3%	\$ 767,050	\$ 12,243,269	78.1%
2	Shasta	\$ 10,247,416	\$ 14,686,813	69.8%	\$ 1,246,694	\$ 11,494,110	78.3%	\$ 1,216,314	\$ 11,463,730	78.1%
1	Sierra	\$ 750,000	\$ 384,424	195.1%	\$ -	\$ 750,000	195.1%	\$ -	\$ 750,000	195.1%
2	Siskiyou	\$ 2,797,889	\$ 2,947,579	94.9%	\$ -	\$ 2,797,889	94.9%	\$ -	\$ 2,797,889	94.9%
3	Solano	\$ 19,959,262	\$ 26,313,149	75.9%	\$ 633,784	\$ 20,593,047	78.3%	\$ 579,355	\$ 20,538,617	78.1%
3	Sonoma	\$ 22,498,598	\$ 26,973,505	83.4%	\$ -	\$ 22,498,598	83.4%	\$ -	\$ 22,498,598	83.4%
3	Stanislaus	\$ 21,175,789	\$ 31,118,112	68.0%	\$ 3,177,690	\$ 24,353,480	78.3%	\$ 3,113,322	\$ 24,289,111	78.1%
2	Sutter	\$ 4,842,312	\$ 6,637,590	73.0%	\$ 352,361	\$ 5,194,673	78.3%	\$ 338,631	\$ 5,180,943	78.1%
2	Tehama	\$ 3,854,151	\$ 5,482,510	70.3%	\$ 436,540	\$ 4,290,691	78.3%	\$ 425,199	\$ 4,279,350	78.1%
1	Trinity	\$ 1,383,823	\$ 1,577,454	87.7%	\$ -	\$ 1,383,823	87.7%	\$ -	\$ 1,383,823	87.7%
3	Tulare	\$ 18,410,572	\$ 26,630,928	69.1%	\$ 2,431,174	\$ 20,841,746	78.3%	\$ 2,376,087	\$ 20,786,659	78.1%
2	Tuolumne	\$ 3,054,903	\$ 4,353,128	70.2%	\$ 351,918	\$ 3,406,821	78.3%	\$ 342,913	\$ 3,397,816	78.1%
3	Ventura	\$ 33,385,142	\$ 44,626,190	74.8%	\$ 1,539,953	\$ 34,925,095	78.3%	\$ 1,447,642	\$ 34,832,784	78.1%
2	Yolo	\$ 9,273,164	\$ 13,540,159	68.5%	\$ 1,323,558	\$ 10,596,722	78.3%	\$ 1,295,549	\$ 10,568,714	78.1%
2	Yuba	\$ 4,450,227	\$ 5,960,508	74.7%	\$ 214,552	\$ 4,664,779	78.3%	\$ 202,222	\$ 4,652,450	78.1%
Total		\$ 1,746,334,148	\$ 2,221,068,575	78.6%	\$ 47,849,651	\$ 1,794,183,799	80.8%	\$ 47,849,651	\$ 1,794,183,799	80.8%

BEFORE \$47.8M					AFTER \$47.8 M					
Cluster	Court	Total 2018-19 WAFM Allocation	Total 2018-19 WAFM Need	% Need	Difference from AVG	Total 2018-19 WAFM Allocation	% Need	Difference from AVG	Share of \$47.8 M allocation	% Increase
4	Alameda	69,743,245	81,002,945	86.1%	6.3%	\$69,743,245	86.1%	4.1%	\$0	0.0%
1	Alpine	749,707	423,375	177.1%	97.3%	\$749,707	177.1%	95.1%	\$0	0.0%
1	Amador	2,261,168	2,875,289	78.6%	-1.2%	\$2,281,379	79.3%	-2.6%	\$20,210	0.9%
2	Butte	9,576,442	13,374,342	71.6%	-8.2%	\$10,611,782	79.3%	-2.6%	\$1,035,340	10.8%
1	Calaveras	2,127,670	2,611,172	81.5%	1.7%	\$2,127,670	81.5%	-0.5%	\$0	0.0%
1	Colusa	1,930,075	1,994,887	96.8%	16.9%	\$1,930,075	96.8%	14.8%	\$0	0.0%
3	Contra Costa	39,318,512	49,564,075	79.3%	-0.5%	\$39,326,283	79.3%	-2.6%	\$7,771	0.0%
1	Del Norte	2,383,076	2,821,641	84.5%	4.6%	\$2,383,076	84.5%	2.5%	\$0	0.0%
2	El Dorado	6,527,852	8,706,630	75.0%	-4.8%	\$6,908,217	79.3%	-2.6%	\$380,365	5.8%
3	Fresno	48,594,982	61,505,974	79.0%	-0.8%	\$48,801,502	79.3%	-2.6%	\$206,520	0.4%
1	Glenn	1,945,698	2,131,394	91.3%	11.5%	\$1,945,698	91.3%	9.3%	\$0	0.0%
2	Humboldt	6,112,716	7,859,064	77.8%	-2.0%	\$6,235,722	79.3%	-2.6%	\$123,006	2.0%
2	Imperial	8,167,235	10,646,670	76.7%	-3.1%	\$8,447,529	79.3%	-2.6%	\$280,294	3.4%
1	Inyo	1,987,895	2,005,177	99.1%	19.3%	\$1,987,895	99.1%	17.2%	\$0	0.0%
3	Kern	44,579,581	64,924,267	68.7%	-11.2%	\$51,513,724	79.3%	-2.6%	\$6,934,144	15.6%
2	Kings	6,469,331	8,937,370	72.4%	-7.4%	\$7,091,296	79.3%	-2.6%	\$621,965	9.6%
2	Lake	3,223,882	4,564,481	70.6%	-9.2%	\$3,621,657	79.3%	-2.6%	\$397,775	12.3%
1	Lassen	1,856,423	2,147,934	86.4%	6.6%	\$1,856,423	86.4%	4.5%	\$0	0.0%
4	Los Angeles	510,375,464	638,806,215	79.9%	0.1%	\$510,375,464	79.9%	-2.1%	\$0	0.0%
2	Madera	7,364,077	9,793,045	75.2%	-4.6%	\$7,770,226	79.3%	-2.6%	\$406,148	5.5%
2	Marin	11,818,092	12,566,559	94.0%	14.2%	\$11,818,092	94.0%	12.1%	\$0	0.0%
1	Mariposa	1,173,018	1,345,369	87.2%	7.4%	\$1,173,018	87.2%	5.2%	\$0	0.0%
2	Mendocino	5,267,900	7,193,213	73.2%	-6.6%	\$5,707,407	79.3%	-2.6%	\$439,507	8.3%
2	Merced	11,157,244	15,840,897	70.4%	-9.4%	\$12,568,853	79.3%	-2.6%	\$1,411,609	12.7%
1	Modoc	879,586	1,028,437	85.5%	5.7%	\$879,586	85.5%	3.6%	\$0	0.0%
1	Mono	1,772,320	1,921,905	92.2%	12.4%	\$1,772,320	92.2%	10.2%	\$0	0.0%
3	Monterey	16,712,510	23,133,221	72.2%	-7.6%	\$18,354,899	79.3%	-2.6%	\$1,642,389	9.8%
2	Napa	6,899,925	8,401,332	82.1%	2.3%	\$6,899,925	82.1%	0.2%	\$0	0.0%
2	Nevada	4,548,232	5,843,371	77.8%	-2.0%	\$4,636,383	79.3%	-2.6%	\$88,152	1.9%
4	Orange	131,503,397	158,456,848	83.0%	3.2%	\$131,503,397	83.0%	1.0%	\$0	0.0%
2	Placer	15,546,806	20,276,800	76.7%	-3.1%	\$16,088,491	79.3%	-2.6%	\$541,685	3.5%
1	Plumas	1,087,529	1,248,131	87.1%	7.3%	\$1,087,529	87.1%	5.2%	\$0	0.0%
4	Riverside	85,477,399	115,862,199	73.8%	-6.0%	\$91,930,085	79.3%	-2.6%	\$6,452,686	7.5%
4	Sacramento	73,659,400	94,395,798	78.0%	-1.8%	\$74,897,712	79.3%	-2.6%	\$1,238,313	1.7%
1	San Benito	2,538,265	3,296,242	77.0%	-2.8%	\$2,615,381	79.3%	-2.6%	\$77,117	3.0%
4	San Bernardino	91,291,484	122,742,865	74.4%	-5.4%	\$97,389,503	79.3%	-2.6%	\$6,098,018	6.7%
4	San Diego	134,825,393	149,934,947	89.9%	10.1%	\$134,825,393	89.9%	7.9%	\$0	0.0%
4	San Francisco	52,680,429	50,232,141	104.9%	25.1%	\$52,680,429	104.9%	22.9%	\$0	0.0%
3	San Joaquin	33,381,854	44,735,096	74.6%	-5.2%	\$35,494,762	79.3%	-2.6%	\$2,112,908	6.3%
2	San Luis Obispo	12,450,930	16,955,493	73.4%	-6.4%	\$13,453,222	79.3%	-2.6%	\$1,002,293	8.0%
3	San Mateo	33,036,350	44,665,811	74.0%	-5.9%	\$35,439,788	79.3%	-2.6%	\$2,403,438	7.3%
3	Santa Barbara	20,699,327	27,023,513	76.6%	-3.2%	\$21,441,625	79.3%	-2.6%	\$742,298	3.6%
4	Santa Clara	74,728,773	84,090,893	88.9%	9.1%	\$74,728,773	88.9%	6.9%	\$0	0.0%
2	Santa Cruz	11,585,126	15,685,230	73.9%	-6.0%	\$12,445,340	79.3%	-2.6%	\$860,214	7.4%
2	Shasta	10,337,698	14,659,632	70.5%	-9.3%	\$11,631,587	79.3%	-2.6%	\$1,293,888	12.5%
1	Sierra	738,868	384,421	192.2%	112.4%	\$738,868	192.2%	110.2%	\$0	0.0%
2	Siskiyou	2,942,231	2,947,529	99.8%	20.0%	\$2,942,231	99.8%	17.8%	\$0	0.0%
3	Solano	20,298,984	26,312,624	77.1%	-2.7%	\$20,877,575	79.3%	-2.6%	\$578,591	2.9%
3	Sonoma	22,628,129	26,972,981	83.9%	4.1%	\$22,628,129	83.9%	1.9%	\$0	0.0%
3	Stanislaus	21,703,016	31,117,525	69.7%	-10.1%	\$24,689,992	79.3%	-2.6%	\$2,986,976	13.8%
2	Sutter	5,054,065	6,637,467	76.1%	-3.7%	\$5,266,454	79.3%	-2.6%	\$212,389	4.2%
2	Tehama	3,876,823	5,482,422	70.7%	-9.1%	\$4,349,991	79.3%	-2.6%	\$473,168	12.2%
1	Trinity	1,397,630	1,577,430	88.6%	8.8%	\$1,397,630	88.6%	6.6%	\$0	0.0%
3	Tulare	18,758,820	26,630,469	70.4%	-9.4%	\$21,129,767	79.3%	-2.6%	\$2,370,947	12.6%
2	Tuolumne	3,035,310	4,353,053	69.7%	-10.1%	\$3,453,901	79.3%	-2.6%	\$418,591	13.8%
3	Ventura	33,302,031	44,625,264	74.6%	-5.2%	\$35,407,616	79.3%	-2.6%	\$2,105,586	6.3%
2	Yolo	9,153,934	13,505,143	67.8%	-12.0%	\$10,715,565	79.3%	-2.6%	\$1,561,631	17.1%
2	Yuba	4,455,168	5,960,394	74.7%	-5.1%	\$4,729,235	79.3%	-2.6%	\$274,066	6.2%
TOTALS		\$1,767,699,027	\$2,214,738,616	79.8%		\$1,815,499,027	82.0%		\$47,800,000	

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Trial Court Budget Advisory Committee

(Action Item)

Title: Self-Help Funding Allocations
Date: 5/22/2018
Contact: Kristin Greenaway, Supervising Research Analyst, Budget Services
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Background

On May 21, 2018, the Funding Methodology Subcommittee (FMS) voted unanimously to approve allocations for self-help funding based on more current population data. This methodology update is to be used to reallocate existing self-help funding, totaling \$11.2 million dollars. It will also be used to allocate the proposed \$19.1 million in new self-help funding if approved in the Budget Act of 2018.

Allocation Methodology

The current allocation methodology provides a baseline level of funding of \$34,000 to each of the 58 courts, which totals \$1.972 million. The remainder of the funds includes \$4.228 million (\$6.2 million less the baseline total of \$1.972 million) from the Trial Court Trust Fund (TCTF) and \$5 million from the State Trial Court Improvement and Modernization Fund (IMF). The remaining funds are proportionally allocated based on the county population as a proportion of total state population.

Until this year, the population data used to allocate funding was the 2005 United States Census American Community Survey. The updated methodology would use updated population data drawing from the E-1: California Department of Finance, Demographic Research Unit, Population Estimates for Cities and Counties and the State, January 1, 2016 and 2017. This is the most current data as of April 2018 and is updated annually.

Table 1 below shows the proposed 2018-19 allocation of \$30.3 million in self-help funding by fund. Population estimates and population proportion are shown in columns A and B. TCTF self-help allocation, after the base funding is distributed (column C) are shown in column D, while IMF allocations are shown in column E. Column F shows how the proposed new allocation of \$19.1 million in funding would be distributed. Column G totals all self-help allocations, existing and proposed.

Table 1: IMF and TCTF Funding for Self-Help in 2018-19

County	Total Population	% of State Population	Base of \$34,000	TCTF Self-Help Funding	IMF Self-Help Funding	New \$19.1m	Total Self-Help Allocation
	A	B	C	D = (B * 4,228,000) + C	E = B * 5,000,000	F = B * 19,100,000	G = D + E + F
Alameda	1,645,359	4.163%	34,000	210,011	208,149	795,129	1,213,289
Alpine	1,151	0.003%	34,000	34,123	146	556	34,825
Amador	38,382	0.097%	34,000	38,106	4,856	18,548	61,510
Butte	226,404	0.573%	34,000	58,219	28,642	109,411	196,272
Calaveras	45,168	0.114%	34,000	38,832	5,714	21,828	66,374
Colusa	22,043	0.056%	34,000	36,358	2,789	10,652	49,799
Contra Costa	1,139,513	2.883%	34,000	155,898	144,156	550,676	850,730
Del Norte	27,124	0.069%	34,000	36,902	3,431	13,108	53,441
El Dorado	185,062	0.468%	34,000	53,797	23,412	89,432	166,641
Fresno	995,975	2.520%	34,000	140,542	125,997	481,310	747,849
Glenn	28,731	0.073%	34,000	37,073	3,635	13,884	54,592
Humboldt	136,953	0.347%	34,000	48,650	17,325	66,183	132,158
Imperial	188,334	0.477%	34,000	54,147	23,825	91,013	168,985
Inyo	18,619	0.047%	34,000	35,992	2,355	8,998	47,345
Kern	895,112	2.265%	34,000	129,754	113,238	432,568	675,560
Kings	149,537	0.378%	34,000	49,997	18,917	72,265	141,179
Lake	64,945	0.164%	34,000	40,947	8,216	31,385	80,548
Lassen	30,918	0.078%	34,000	37,307	3,911	14,941	56,159
Los Angeles	10,241,278	25.912%	34,000	1,129,551	1,295,590	4,949,153	7,374,294
Madera	156,492	0.396%	34,000	50,741	19,797	75,626	146,164
Marin	263,604	0.667%	34,000	62,199	33,348	127,388	222,935
Mariposa	18,148	0.046%	34,000	35,941	2,296	8,770	47,007
Mendocino	89,134	0.226%	34,000	43,535	11,276	43,075	97,886
Merced	274,665	0.695%	34,000	63,382	34,747	132,733	230,862
Modoc	9,580	0.024%	34,000	35,025	1,212	4,630	40,867
Mono	13,713	0.035%	34,000	35,467	1,735	6,627	43,829
Monterey	442,365	1.119%	34,000	81,322	55,962	213,775	351,059
Napa	142,408	0.360%	34,000	49,234	18,016	68,819	136,069
Nevada	98,828	0.250%	34,000	44,572	12,502	47,759	104,833
Orange	3,194,024	8.081%	34,000	375,678	404,065	1,543,529	2,323,272
Placer	382,837	0.969%	34,000	74,954	48,431	185,008	308,393
Plumas	19,819	0.050%	34,000	36,120	2,507	9,578	48,205
Riverside	2,384,783	6.034%	34,000	289,110	301,691	1,152,459	1,743,260
Sacramento	1,514,770	3.833%	34,000	196,041	191,627	732,021	1,119,689
San Benito	56,854	0.144%	34,000	40,082	7,192	27,475	74,749
San Bernardino	2,160,256	5.466%	34,000	265,091	273,287	1,043,955	1,582,333
San Diego	3,316,192	8.390%	34,000	388,746	419,520	1,602,568	2,410,834
San Francisco	874,228	2.212%	34,000	127,520	110,596	422,475	660,591
San Joaquin	746,868	1.890%	34,000	113,895	94,484	360,928	569,307
San Luis Obispo	280,101	0.709%	34,000	63,964	35,435	135,360	234,759
San Mateo	770,203	1.949%	34,000	116,392	97,436	372,205	586,033
Santa Barbara	450,663	1.140%	34,000	82,209	57,012	217,785	357,006
Santa Clara	1,938,180	4.904%	34,000	241,335	245,193	936,636	1,423,164
Santa Cruz	276,603	0.700%	34,000	63,589	34,992	133,670	232,251
Shasta	178,605	0.452%	34,000	53,106	22,595	86,312	162,013
Sierra	3,207	0.008%	34,000	34,343	406	1,550	36,299
Siskiyou	44,688	0.113%	34,000	38,780	5,653	21,596	66,029

County	Total Population	% of State Population	Base of \$34,000	TCTF Self-Help Funding	IMF Self-Help Funding	New \$19.1m	Total Self-Help Allocation
	A	B	C	D = (B * 4,228,000) + C	E = B * 5,000,000	F = B * 19,100,000	G = D + E + F
Solano	436,023	1.103%	34,000	80,643	55,160	210,711	346,514
Sonoma	505,120	1.278%	34,000	88,035	63,901	244,102	396,038
Stanislaus	548,057	1.387%	34,000	92,628	69,333	264,852	426,813
Sutter	96,956	0.245%	34,000	44,372	12,266	46,855	103,493
Tehama	63,995	0.162%	34,000	40,846	8,096	30,926	79,868
Trinity	13,628	0.034%	34,000	35,458	1,724	6,586	43,768
Tulare	471,842	1.194%	34,000	84,475	59,691	228,020	372,186
Tuolumne	54,707	0.138%	34,000	39,852	6,921	26,437	73,210
Ventura	857,386	2.169%	34,000	125,718	108,465	414,336	648,519
Yolo	218,896	0.554%	34,000	57,416	27,692	105,783	190,891
Yuba	74,577	0.189%	34,000	41,978	9,434	36,040	87,452
Total	39,523,613	100.000%	1,972,000	6,200,000	5,000,000	19,100,000	30,300,000

Table 2 below shows the TCTF and IMF self-help allocations, totaling \$11.2 million, as proposed with updated population data (columns A and C) compared to as allocated in 2017-18 using 2005 population data (columns B and D). The difference in allocation from 2017-18- to 2018-19 is shown in column E. Since the additional self-help funding proposed in the Budget Act is not certain, this table shows the effects of the change in methodology on existing funds, absent additional funding.

Table 2: Changes to \$11.2m TCTF and IMF Allocations With Updated Population Data

County	2018-19 Proposed TCTF Self-Help Allocation	2017-18 TCTF Allocation (2005 Population Data)	2018-19 Proposed IMF Self-Help Allocation	2017-18 IMF Allocation (2005 Population Data)	\$ Effect of Updates to Population Data
	A	B	C	D	E
Alameda	210,011	205,784	208,149	203,151	9,225
Alpine	34,123	34,141	146	166	(38)
Amador	38,106	38,337	4,856	5,129	(504)
Butte	58,219	58,706	28,642	29,216	(1,061)
Calaveras	38,832	39,199	5,714	6,149	(802)
Colusa	36,358	36,447	2,789	2,894	(194)
Contra Costa	155,898	151,083	144,156	138,460	10,511
Del Norte	36,902	37,321	3,431	3,927	(915)
El Dorado	53,797	54,042	23,412	23,701	(534)
Fresno	140,542	136,312	125,997	120,993	9,234
Glenn	37,073	37,259	3,635	3,854	(405)
Humboldt	48,650	49,074	17,325	17,826	(925)
Imperial	54,147	52,948	23,825	22,407	2,617
Inyo	35,992	36,106	2,355	2,490	(249)
Kern	129,754	122,703	113,238	104,900	15,389
Kings	49,997	50,803	18,917	19,871	(1,760)
Lake	40,947	41,291	8,216	8,623	(751)

County	2018-19 Proposed TCTF Self-Help Allocation	2017-18 TCTF Allocation (2005 Population Data)	2018-19 Proposed IMF Self-Help Allocation	2017-18 IMF Allocation (2005 Population Data)	\$ Effect of Updates to Population Data
	A	B	C	D	E
Lassen	37,307	38,032	3,911	4,769	(1,583)
Los Angeles	1,129,551	1,199,346	1,295,590	1,378,130	(152,335)
Madera	50,741	50,424	19,797	19,422	692
Marin	62,199	62,815	33,348	34,077	(1,345)
Mariposa	35,941	36,072	2,296	2,450	(285)
Mendocino	43,535	44,287	11,276	12,166	(1,642)
Merced	63,382	62,066	34,747	33,190	2,873
Modoc	35,025	35,119	1,212	1,323	(205)
Mono	35,467	35,547	1,735	1,828	(173)
Monterey	81,322	82,322	55,962	57,146	(2,184)
Napa	49,234	49,292	18,016	18,084	(126)
Nevada	44,572	45,382	12,502	13,460	(1,768)
Orange	375,678	383,452	404,065	413,259	(16,968)
Placer	74,954	70,000	48,431	42,574	10,811
Plumas	36,120	36,439	2,507	2,885	(697)
Riverside	289,110	256,174	301,691	262,743	71,884
Sacramento	196,041	191,601	191,627	186,378	9,689
San Benito	40,082	40,555	7,192	7,751	(1,032)
San Bernardino	265,091	260,554	273,287	267,920	9,904
San Diego	388,746	382,825	419,520	412,517	12,924
San Francisco	127,520	124,843	110,596	107,430	5,843
San Joaquin	113,895	110,009	94,484	89,889	8,481
San Luis Obispo	63,964	63,942	35,435	35,408	49
San Mateo	116,392	116,361	97,436	97,399	68
Santa Barbara	82,209	81,956	57,012	56,713	552
Santa Clara	241,335	235,693	245,193	238,521	12,314
Santa Cruz	63,589	63,840	34,992	35,289	(548)
Shasta	53,106	54,642	22,595	24,411	(3,352)
Sierra	34,343	34,398	406	471	(120)
Siskiyou	38,780	39,249	5,653	6,208	(1,024)
Solano	80,643	82,095	55,160	56,878	(3,170)
Sonoma	88,035	88,588	63,901	64,555	(1,207)
Stanislaus	92,628	92,505	69,333	69,188	268
Sutter	44,372	44,402	12,266	12,301	(65)
Tehama	40,846	40,999	8,096	8,277	(334)
Trinity	35,458	35,595	1,724	1,886	(299)
Tulare	84,475	81,842	59,691	56,577	5,747
Tuolumne	39,852	40,623	6,921	7,833	(1,683)
Ventura	125,718	126,966	108,465	109,941	(2,724)
Yolo	57,416	55,650	27,692	25,603	3,855
Yuba	41,978	41,942	9,434	9,393	77
Total	6,200,000	6,200,000	5,000,000	5,000,000	0

In August 2018, the FMS and the TCBAC will be asked to review and approve a proposed update to the self-help funding methodology as one of the items on FMS' 2019-20 workplan is to review the methodology for allocating self-help funding. In addition to considering how and whether to make updates to the model to reflect population changes, the committee may consider a change to the base allocation (currently \$34,000) if workload measures support such an adjustment. This review is being done sooner than scheduled because FMS members had signaled the importance of being able to anticipate changes that might be proposed to the allocation for planning purposes.

Recommendation

Adopt the Funding Methodology Subcommittee's unanimous recommendation that the Trial Court Budget Advisory Committee:

1. Approve the 2018-19 self-help allocations shown in Table 1, contingent on additional self-help funding being provided in the Budget Act of 2018.
2. In the event there are not additional funds for self-help in the Budget Act of 2018, approve use of the updated population data to determine allocation of the existing \$11.2 million in funding for 2018-19, as shown in Table 2.

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Trial Court Budget Advisory Committee

(Action Item)

Title: Simplified Displays
Date: 5/23/2018
Contact: Brandy Sanborn, Budget Manager, Judicial Council Budget Services
415-865-7195 | brandy.sanborn@jud.ca.gov

Issue

Consider a unanimous recommendation of the Funding Methodology Subcommittee (FMS) to adopt the simplified displays for trial court allocations, including the Workload-based Allocation and Funding Methodology (WAFM), beginning in 2018-19.

Background

The FMS included as part of its current-year work plan to simplify display of [WAFM] worksheets for after year five. The approach to simplification was to identify what required updating, and who the audience would be for each document. This led to the update and development of two documents to complete the charge of FMS and to prepare allocation recommendations for the July 19-20, 2018 Judicial Council meeting.

The high-level allocation display (Attachment 6A), with hypothetical numbers, shows what each court's ending, total base allocation was from the prior year and then clearly walks through the changes that impact the new year's base allocation ending in a new base allocation amount.

The path includes the changes only (deltas) as it relates to the WAFM allocation, with a column for any new, discretionary funding allocated via WAFM, followed by the updated WAFM need with a percentage comparison, and ending in other funds that are not allocated via WAFM (also with a column for new, other funding that may be received). This simplified, high-level display does not reflect all allocations such as restricted funding and reimbursements.

The single-court executive summary (Attachment 6B), with hypothetical numbers, was compiled in order to provide a single-page representation per court that reflects current funding and staffing positions, changes from prior year, full dollar amount allocations (not deltas), and relative statewide perspectives for reference. Details such as self-help funding and civil assessments are highlighted for 2018-19; however, these boxes are intended to showcase relevant areas of focus or changes that occur and could change year to year. For additional details above what is reflected in the executive summary, the viewer can refer to the high-level display (Attachment 6A).

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Trial Court Budget Advisory Committee

Finally, there is a glossary of terms on the bottom of the executive summary that may also be updated year to year depending on how the information in this document changes.

Recommendation

The following recommendation is presented to the Trial Court Budget Advisory Committee for consideration:

Approve the attached simplified displays; a high-level display for use in providing a 58-court view of last year allocations, WAFM changes, and other allocations to reach the new-year base allocation totals, and a single court executive summary to be provided to all courts which would be subject to changes annually, both effective 2018-19.

Attachments

Attachment 6A: High-Level Display

Attachment 6B: Executive Summary

Current Year Trial Court Base Allocations

May 2018

**For illustrative purposes.
Dollar amounts are hypothetical.**

Court	Prior Year Total Base Allocation	Changes to WAFM Allocation							CY WAFM Allocation	CY WAFM Need	WAFM Funding to Need	Other Allocations					Current Year Total Base Allocation ²	
	A	PY WAFM Allocation ¹	TCTF Reduction for SJO Conversion	SJO Adjustment (Change from PY)	Automated Recordkeeping & Micrographics (Change from PY)	Benefits Funding (PY)	WAFM Funding Floor Adjustment	New WAFM Funding				J (B:I)	K	L (J/K)	Non-Sheriff Security	SJOs (excludes AB 1058)		Criminal Justice Realignment
		B	C	D	E	F	H	I				M	N	O	Q	R (M:Q)		S (J+R)
Sample Court 1	3,600,000	1,850,000	(18,000)	500	3,000	2,000	1,650	-	1,839,150	2,100,000	87.6%	-	150,000	1,200	-	151,200	-	1,990,350
Sample Court 2	18,000,000	15,000,000	-	(60,000)	1,500	1,250,000	(75)	-	16,191,425	19,500,000	83.0%	1,250,000	2,000,000	1,800	-	3,251,800	-	19,443,225
Sample Court 3	547,125,000	425,000,000	-	4,000,000	500	12,000,000	(2,000)	-	440,998,500	495,001,000	89.1%	-	15,000,000	4,050,000	-	19,050,000	-	460,048,500
Sample Court 4	25,000,000	13,850,000	(250,100)	650,000	(6,500)	3,500,000	(300)	-	17,743,100	22,150,000	80.1%	2,500,400	1,800,000	150,000	-	4,450,400	-	22,193,500
Sample Court 5	6,650,000	4,500,000	-	(1,500)	1,000	125,000	(25)	-	4,624,475	5,700,000	81.1%	-	550,000	2,500	-	552,500	-	5,176,975
Sample Court 6	68,000,700	55,800,700	-	(125,000)	12,800	2,500,700	(500)	-	58,188,700	68,500,000	84.9%	12,000,000	6,750,000	2,405,000	-	21,155,000	-	79,343,700
Sample Court 7	1,518,000	800,000	-	750	(12,500)	21,000	1,250	-	810,500	950,000	85.3%	-	125,000	890	-	125,890	-	936,390
Total	669,893,700	516,800,700	(268,100)	4,464,750	(200)	19,398,700	-	-	540,395,850	613,901,000	88.0%	15,750,400	26,375,000	6,611,390	-	48,736,790	-	589,132,640

1. Prior to implementation of funding floor adjustments.
2. Not inclusive of all allocations such as restricted funding and reimbursements.



SUPERIOR COURT OF CALIFORNIA
 2018-19 ALLOCATION SUMMARY*
 MAY 2018

Court Perspective

Statewide Perspective

	Prior Year 2017-18	Current Year 2018-19	Difference	Prior Year 2017-18	Current Year 2018-19	Difference
WAFM Funding Need	12,345,678	16,966,674	4,620,996	2,225,678,910	2,217,013,520	(8,665,390)
WAFM-Related Allocation	12,318,837	13,573,327*	1,254,490	1,745,554,822	1,840,427,086	23,424,481
<i>*Share of \$47.8m New Funding</i>	0	937,173		0	47,800,000	
<i>Percent of Need Funded via WAFM</i>	99.8%	80.0%		74.4%	83.0%	
Other Allocations	500,866	1,849,845	1,348,979	30,000,000	21,900,000	(8,100,000)
Total Estimated Allocation	12,819,703	15,423,172	2,603,469	1,826,192,314	2,013,020,396	186,828,082
	Prior Year 2016-17	Current Year 2017-18	Difference	Prior Year 2016-17	Current Year 2017-18	Difference
RAS FTE Need	138.00	139.00	1.00	20,222.00	20,111.00	(111.00)

Additional Court Information

2017-18 WAFM Annual Salary

	Salary	Salary-Driven Benefits	Total	FTE
Program 10	7,125,406	2,633,152	9,758,588	106.00
Program 90	1,209,487	487,248	1,696,735	14.00
Total	8,334,893	3,120,400	11,455,293	120.00

WAFM 2018-19 Allocation Highlights

TCTF Reduction for SJO Conversions	0
SJO Adjustment (2017-18)	15,487
Auto. Recordkeeping/Micrographics (2016-17)	14,981
Full-Year Benefits Funding (2017-18)	132,962
Replacement of 2% Automation	130,020
WAFM Funding Floor Adjustment	574

Other 2018-19 Allocations Highlights

Non-Sheriff Security Base	244,286
Subordinate Judicial Officers	417,124
Criminal Justice Realignment	70,753

*Not inclusive of all allocations such as restricted funding and reimbursements.

Self-Help Funding

Statewide Perspective

TCTF	IMF	New	Total
6.2m	5.0m	TBD	TBD

Court Perspective

	2017-18	2018-19	Difference
TCTF	53,934	63,934	10,000
IMF	49,000	50,000	1,000
New Funding	0	132,540	132,540
Total	102,934	246,474	143,540

2016-17 Civil Assessments

State	Total Collected	MOE Obligation	Distributed
	111.7m	48.3m	67.2m

Court	Total Collected	MOE Obligation	Distributed
	143,000	85,000	58,000

Annual MOE obligations not met with court collections are covered by the TCTF.

In 2016-17, the TCTF fund balance covered 4.2m.

FTE
FULL-TIME
EQUIVALENT

IMF
STATE TRIAL COURT
IMPROVEMENT AND
MODERNIZATION
FUND

MOE
MAINTENANCE
OF EFFORT

RAS
RESOURCE
ASSESSMENT
STUDY

SJO
SUBORDINATE
JUDICIAL
OFFICER

TCTF
TRIAL COURT
TRUST FUND

WAFM
WORKLOAD-BASED
ALLOCATION AND
FUNDING
METHODOLOGY

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Trial Court Budget Advisory Committee

(Action Item)

Title: 2018-19 Trial Court Base Allocations
Date: 5/31/2018
Contact: Lucy Fogarty, Deputy Director, Judicial Council Budget Services
415-865-7587 | lucy.fogarty@jud.ca.gov

Issue

Government Code 68502.5(c)(2)(A) requires the Judicial Council to make a preliminary allocation for the trial courts in July of each fiscal year and a final allocation before January. The Trial Court Budget Advisory Committee (TCBAC) should consider trial court base allocations for recommendation to the Judicial Council at its July 19-20, 2018 business meeting.

Recommendations

The TCBAC is being asked to consider base allocations of \$1.940 billion for which allocation methodologies have already been approved by the Judicial Council or considered and recommended by the Funding Methodology Subcommittee. The following recommendations are presented for TCBAC's consideration:

1. Approve the 2018-19 Workload-based Allocation and Funding Methodology (WAFM) allocation of \$1.835 billion (Attachment 7A, column K); and
2. Approve 2018-19 other allocations of \$105.0 million (Attachment 7A, column Q).

1. 2018-19 WAFM Allocations

The 2018-19 WAFM allocation is \$1.835 billion.

Changes to the prior year allocation are:

- a. Reductions for subordinate judicial officer (SJO) conversions totaling \$1,007,523 (Attachment 7A, column C);
- b. Adjustment to SJO allocation totaling \$776,791 (Attachment 7A, column D);
- c. Difference in Automated Recordkeeping and Micrographics collections from 2015-16 to 2016-17 (Attachment 7A, column E);
- d. 2017-18 cost changes for non-interpreter employee benefits totaling \$23,816,127 (Attachment 7A, column F)¹;
- e. Adjustments to Trial Court Trust Fund (TCTF) self-help allocations based on updating population based on current census data (Attachment 7A, column G)²;

¹ Court interpreter benefits costs changes are added to the Court Interpreter Program.

² See TCBAC agenda item 5.

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Trial Court Budget Advisory Committee

- f. Allocation of \$47.8 million in new funding for courts below the statewide average funding ratio expected to be provided in the Budget Act of 2018 (Attachment 7A, column H)³;
- g. Allocation of \$19.1 million in new self-help funding expected to be provided in the Budget Act of 2018 (Attachment 7A, column I)⁴; and
- h. 2018-19 WAFM funding floor adjustment, which includes funding floor allocations for four courts totaling \$177,480, with all other courts sharing pro-rata in the reduction to cover the funding floor allocations (Attachment 7A, column J). The funding floor adjustment may change in the event there are additional WAFM-related allocations in the Budget Act of 2018.

2. Other Allocations

2018-19 other allocations total \$105.0 million and include:

- a. \$41.7 million in non-sheriff security funding (Attachment 7A, column N);
- b. \$54.1 million for SJO salaries and benefits, not including child support commissioners funded by AB 1058 (Attachment 7A, column O); and
- c. \$9.2 million in criminal justice realignment costs based on the most current available post-release community supervision and parole workload data submitted to the Judicial Council's Criminal Justice Services pursuant to Penal Code 13155 (Attachment 7A, column P).

Pending Allocations

The following allocations are pending:

- a. Any changes to appropriations provided for in the Budget Act of 2018;
- b. Reduction amounts related to trial court reserves above the 1% cap referenced in Government Code 68502.5(c)(2)(A) as these will not be available for consideration by TCBAC prior to the Judicial Meeting on July 19-20, 2018⁵; and
- c. Allocation of the \$75.0 million in the Governor's proposed budget pending enactment of the budget.

Attachments

Attachment 7A: 2018-19 Trial Court Base Allocations

³ See TCBAC agenda item 4.

⁴ See TCBAC agenda item 5.

⁵ Courts have until July 14, 2018 to provide preliminary 2017-18 ending fund balances. TCBAC will consider final allocation reductions prior to the Judicial Council meeting in January 2019.

2018-19 Trial Court Base Allocations
May 2018

Court	2017-18 Total Base Allocation	2017-18 WAFM Allocation ¹	Changes to WAFM Allocation								2018-19 WAFM Allocation
			TCTF Reduction for SJO Conversion	SJO Adjustment (Change from PY)	Automated Recordkeeping & Micrographics (Change from PY)	2017-18 Benefits Funding	TCTF Self-Help Adjustment (Change from PY)	2018-19 Funding for Courts Below the Average	2018-19 Self-Help Funding	2018-19 WAFM Funding Floor Adjustment	
	A	B	C	D	E	F	G	H	I	J	K (B.:J)
Alameda	76,715,321	71,190,879	-	39,794	(890)	(1,495,764)	9,225	-	795,129	(6,837)	70,531,536
Alpine	739,145	738,872	-	-	18	10,855	(38)	-	556	(263)	750,000
Amador	2,247,491	2,241,749	-	-	86	19,838	(505)	20,210	18,548	(223)	2,299,704
Butte	10,314,956	9,431,053	-	(5,083)	2,236	149,298	(1,061)	1,035,340	109,411	(1,039)	10,720,154
Calaveras	2,088,044	2,086,404	-	-	23	42,045	(802)	-	21,828	(208)	2,149,290
Colusa	1,928,387	1,924,696	-	-	51	5,523	(194)	-	10,652	(188)	1,940,540
Contra Costa	39,033,643	39,033,643	-	(85,393)	3,992	355,758	10,511	7,771	550,676	(3,865)	39,873,093
Del Norte	2,535,333	2,526,719	-	(116,360)	50	(26,419)	(915)	-	13,108	(232)	2,395,951
El Dorado	6,688,898	6,491,374	-	(1,531)	(279)	38,823	(535)	380,365	89,432	(678)	6,996,971
Fresno	48,184,650	46,825,837	-	(64,488)	2,664	1,821,733	9,236	206,520	481,310	(4,777)	49,278,036
Glenn	1,926,364	1,914,224	-	-	(14)	31,893	(405)	-	13,884	(190)	1,959,392
Humboldt	6,440,016	6,067,419	-	(9,182)	512	54,891	(924)	123,006	66,183	(611)	6,301,294
Imperial	8,750,458	8,097,856	-	35,138	1,436	30,188	2,617	280,294	91,013	(828)	8,537,715
Inyo	2,082,448	1,887,827	-	-	1	100,316	(249)	-	8,998	(194)	1,996,699
Kern	46,746,883	44,870,144	-	(56,019)	1,782	(251,715)	15,388	6,934,144	432,568	(5,035)	51,941,257
Kings	7,209,133	6,457,573	-	(1,708)	454	14,771	(1,760)	621,965	72,265	(694)	7,162,866
Lake	3,445,858	3,192,506	-	(23,140)	86	55,181	(751)	397,775	31,385	(354)	3,652,688
Lassen	2,084,467	1,780,690	-	-	2	77,313	(1,582)	-	14,941	3,635	1,874,999
Los Angeles	538,865,942	499,747,429	(1,007,523)	1,685,798	47,759	10,054,336	(152,335)	-	4,949,153	(49,951)	515,274,666
Madera	7,648,372	7,218,959	-	-	259	144,168	692	406,148	75,626	(761)	7,845,091
Marin	11,919,150	11,829,410	-	(2,249)	91	(7,814)	(1,346)	-	127,388	(1,158)	11,944,322
Mariposa	1,172,483	1,167,971	-	-	24	5,308	(285)	-	8,770	68,211	1,250,000
Mendocino	5,538,797	5,178,759	-	(259)	(270)	91,311	(1,642)	439,507	43,074	(557)	5,749,924
Merced	11,619,071	11,122,840	-	(3,142)	775	33,898	2,873	1,411,609	132,733	(1,231)	12,700,355
Modoc	875,071	871,813	-	-	8	7,971	(205)	-	4,630	(86)	884,130
Mono	1,773,269	1,746,186	-	-	(30)	26,337	(173)	-	6,627	96,052	1,874,999
Monterey	17,944,396	16,675,449	-	(16,019)	712	54,552	(2,184)	1,642,389	213,775	(1,800)	18,566,875
Napa	7,508,251	6,812,495	-	(5,501)	(22)	93,079	(126)	-	68,819	(675)	6,968,069
Nevada	5,247,474	4,477,457	-	8,749	119	63,674	(1,768)	88,152	47,759	(454)	4,683,689
Orange	137,993,948	130,620,384	-	(56,426)	18,884	937,524	(16,968)	-	1,543,529	(12,896)	133,034,030
Placer	16,280,536	15,278,212	-	(12,289)	144	269,927	10,811	541,685	185,008	(1,577)	16,271,921
Plumas	1,099,721	1,098,490	-	-	(46)	(10,218)	(697)	-	9,578	(106)	1,097,001
Riverside	89,211,094	83,837,862	-	(34,526)	8,019	1,594,161	71,884	6,452,686	1,152,459	(9,023)	93,073,521
Sacramento	76,750,330	72,867,797	-	(61,352)	(103,437)	946,700	9,691	1,238,313	732,021	(7,331)	75,622,402
San Benito	2,499,711	2,490,893	-	-	166	48,238	(1,032)	77,117	27,475	(256)	2,642,600
San Bernardino	97,968,627	90,590,969	-	(93,977)	10,002	774,587	9,904	6,098,018	1,043,955	(9,541)	98,423,917
San Diego	136,586,044	131,181,972	-	(120,383)	16,557	3,734,322	12,925	-	1,602,568	(13,224)	136,414,737
San Francisco	52,241,942	51,704,684	-	(16,908)	2,222	984,589	5,842	-	422,475	(5,147)	53,097,757
San Joaquin	34,696,484	33,430,503	-	(17,891)	4,103	(43,342)	8,481	2,112,908	360,928	(3,476)	35,852,214
San Luis Obispo	13,054,314	12,321,118	-	1,032	1,129	127,602	48	1,002,293	135,360	(1,317)	13,587,266
San Mateo	34,482,280	32,430,165	-	(86,706)	817	692,007	68	2,403,438	372,205	(3,471)	35,808,521
Santa Barbara	22,042,267	20,361,423	-	10,761	665	325,925	552	742,298	217,785	(2,099)	21,657,311
Santa Clara	75,731,460	74,849,852	-	(13,171)	1,877	(122,098)	12,314	-	936,636	(7,334)	75,658,075
Santa Cruz	11,783,694	11,494,453	-	(16,684)	689	107,215	(548)	860,214	133,670	(1,219)	12,577,791
Shasta	13,307,053	10,267,708	-	(18,593)	265	91,670	(3,352)	1,293,888	86,312	(1,136)	11,716,763

1. Prior to implementation of the funding floor adjustments.
2. Not inclusive of all allocations such as restricted funding and reimbursements.

2018-19 Trial Court Base Allocations
May 2018

Court	2017-18 Total Base Allocation	Changes to WAFM Allocation									2018-19 WAFM Allocation
		2017-18 WAFM Allocation ¹	TCTF Reduction for SJO Conversion	SJO Adjustment (Change from PY)	Automated Recordkeeping & Micrographics (Change from PY)	2017-18 Benefits Funding	TCTF Self-Help Adjustment (Change from PY)	2018-19 Funding for Courts Below the Average	2018-19 Self-Help Funding	2018-19 WAFM Funding Floor Adjustment	
	A	B	C	D	E	F	G	H	I	J	K (B.:J)
Sierra	736,853	736,648	-	-	(5)	2,345	(120)	-	1,550	9,582	750,000
Siskiyou	2,970,624	2,796,467	-	2,025	(66)	144,829	(1,023)	-	21,596	(287)	2,963,539
Solano	21,155,359	19,959,592	-	2,439	1,052	339,071	(3,170)	578,591	210,710	(2,044)	21,086,241
Sonoma	23,621,856	22,518,260	-	(15,166)	(187)	126,428	(1,207)	-	244,102	(2,217)	22,870,014
Stanislaus	21,743,154	21,196,456	-	(17,831)	1,221	522,902	268	2,986,976	264,852	(2,419)	24,952,424
Sutter	5,112,077	4,843,196	-	-	43	210,891	(66)	212,389	46,855	(515)	5,312,793
Tehama	3,873,657	3,861,352	-	(6,478)	16	22,267	(334)	473,168	30,926	(425)	4,380,493
Trinity	1,906,786	1,383,914	-	-	174	13,842	(299)	-	6,586	(136)	1,404,080
Tulare	18,984,798	18,418,388	-	(6,815)	2,525	338,976	5,747	2,370,947	228,020	(2,070)	21,355,717
Tuolumne	3,375,195	3,047,087	-	8,406	(6)	(18,494)	(1,683)	418,591	26,437	(337)	3,480,001
Ventura	35,973,663	33,422,006	-	(32,463)	1,996	(86,784)	(2,724)	2,105,586	414,336	(3,472)	35,818,481
Yolo	9,941,251	9,013,254	-	381	759	135,685	3,855	1,561,631	105,783	(1,049)	10,820,299
Yuba	4,621,562	4,451,057	-	-	23	4,011	77	274,066	36,040	(462)	4,764,813
Total	1,849,901,174	1,744,082,393	(1,007,523)	776,791	31,239	23,816,127	(0)	47,800,000	19,100,000	(0)	1,834,599,027

1. Prior to implementation of the funding floor adjustments.
2. Not inclusive of all allocations such as restricted funding and reimbursements.

2018-19 Trial Court Base Allocations
May 2018

Court	2018-19 WAFM Need	WAFM Funding to Need	Other Allocations				2018-19 Total Base Allocation ²	
			Non-Sheriff Security	SJOs (excludes AB 1058)	Criminal Justice Realignment	Total Other Allocations		R (K+Q)
Alameda	81,002,945	87.1%	3,212,246	2,019,741	291,550	5,523,537	76,055,073	
Alpine	423,375	177.1%	-	-	202	202	750,202	
Amador	2,875,289	80.0%	-	-	7,470	7,470	2,307,175	
Butte	13,374,342	80.2%	472,190	330,047	99,741	901,978	11,622,132	
Calaveras	2,611,172	82.3%	-	-	6,663	6,663	2,155,952	
Colusa	1,994,887	97.3%	-	-	5,653	5,653	1,946,193	
Contra Costa	49,564,075	80.4%	-	850,172	109,836	960,008	40,833,101	
Del Norte	2,821,641	84.9%	-	116,360	12,922	129,282	2,525,233	
El Dorado	8,706,630	80.4%	-	154,758	43,409	198,167	7,195,138	
Fresno	61,505,974	80.1%	-	1,018,675	422,788	1,441,463	50,719,499	
Glenn	2,131,394	91.9%	9,885	-	2,625	12,509	1,971,902	
Humboldt	7,859,064	80.2%	169,612	161,102	55,120	385,834	6,687,128	
Imperial	10,646,670	80.2%	425,020	151,222	40,785	617,027	9,154,742	
Inyo	2,005,177	99.6%	188,674	-	6,461	195,135	2,191,834	
Kern	64,924,267	80.0%	66,275	1,531,380	350,708	1,948,363	53,889,620	
Kings	8,937,370	80.1%	426,475	265,474	64,206	756,154	7,919,020	
Lake	4,564,481	80.0%	198,615	65,367	13,931	277,914	3,930,602	
Lassen	2,147,934	87.3%	297,009	-	7,067	304,076	2,179,075	
Los Angeles	638,806,215	80.7%	14,448,847	19,855,347	2,710,165	37,014,359	552,289,025	
Madera	9,793,045	80.1%	385,525	-	37,554	423,079	8,268,170	
Marin	12,566,559	95.0%	9,729	64,829	21,604	96,162	12,040,483	
Mariposa	1,345,369	92.9%	-	-	5,451	5,451	1,255,451	
Mendocino	7,193,213	79.9%	302,582	17,930	45,025	365,536	6,115,460	
Merced	15,840,897	80.2%	-	394,167	105,192	499,359	13,199,714	
Modoc	1,028,437	86.0%	798	-	808	1,605	885,735	
Mono	1,921,905	97.6%	24,417	-	1,211	25,628	1,900,628	
Monterey	23,133,221	80.3%	879,396	370,295	34,929	1,284,621	19,851,495	
Napa	8,401,332	82.9%	298,744	386,927	-	685,671	7,653,740	
Nevada	5,843,371	80.2%	438,112	320,695	2,423	761,230	5,444,919	
Orange	158,456,848	84.0%	2,763,301	4,282,161	467,207	7,512,669	140,546,700	
Placer	20,276,800	80.2%	-	970,110	39,775	1,009,885	17,281,806	
Plumas	1,248,131	87.9%	-	-	404	404	1,097,405	
Riverside	115,862,199	80.3%	1,952,380	2,540,304	788,437	5,281,122	98,354,643	
Sacramento	94,395,798	80.1%	1,884,560	1,915,768	127,604	3,927,931	79,550,333	
San Benito	3,296,242	80.2%	-	-	10,095	10,095	2,652,695	
San Bernardino	122,742,865	80.2%	3,304,756	3,251,190	1,025,271	7,581,217	106,005,134	
San Diego	149,934,947	91.0%	664,290	4,364,278	572,803	5,601,370	142,016,107	
San Francisco	50,232,141	105.7%	-	508,842	53,303	562,145	53,659,902	
San Joaquin	44,735,096	80.1%	290,855	853,972	141,535	1,286,362	37,138,576	
San Luis Obispo	16,955,493	80.1%	244,286	417,124	83,992	745,402	14,332,668	
San Mateo	44,665,811	80.2%	447,827	1,648,337	57,947	2,154,111	37,962,632	
Santa Barbara	27,023,513	80.1%	1,066,507	529,336	71,070	1,666,913	23,324,224	
Santa Clara	84,090,893	90.0%	-	752,452	185,752	938,205	76,596,280	
Santa Cruz	15,685,230	80.2%	-	297,927	202	298,129	12,875,920	
Shasta	14,659,632	79.9%	2,662,303	322,217	85,406	3,069,925	14,786,688	

1. Prior to implementation of the funding floor adjustments.
2. Not inclusive of all allocations such as restricted funding and reimbursements.

2018-19 Trial Court Base Allocations
May 2018

Court	2018-19 WAFM Need	WAFM Funding to Need	Other Allocations				2018-19 Total Base Allocation ²
			Non-Sheriff Security	SJOs (excludes AB 1058)	Criminal Justice Realignment	Total Other Allocations	
			N	O	P	Q (N:P)	
	L	M (K/L)				R (K+Q)	
Sierra	384,421	195.1%	-	-	808	808	750,808
Siskiyou	2,947,529	100.5%	-	162,904	7,067	169,970	3,133,510
Solano	26,312,624	80.1%	440,102	630,587	107,817	1,178,506	22,264,748
Sonoma	26,972,981	84.8%	444,752	558,958	119,527	1,123,238	23,993,252
Stanislaus	31,117,525	80.2%	9,427	491,527	95,097	596,051	25,548,475
Sutter	6,637,467	80.0%	249,739	-	28,065	277,804	5,590,597
Tehama	5,482,422	79.9%	-	6,478	14,335	20,813	4,401,305
Trinity	1,577,430	89.0%	520,479	-	1,413	521,893	1,925,973
Tulare	26,630,469	80.2%	15,744	469,091	98,731	583,567	21,939,284
Tuolumne	4,353,053	79.9%	222,898	89,831	7,067	319,796	3,799,797
Ventura	44,625,264	80.3%	1,575,996	657,024	448,228	2,681,248	38,499,729
Yolo	13,505,143	80.1%	589,184	286,546	47,246	922,976	11,743,275
Yuba	5,960,394	79.9%	134,001	-	31,295	165,296	4,930,109
Total	2,214,738,616	82.8%	41,737,537	54,081,452	9,223,000	105,041,989	1,939,641,016

1. Prior to implementation of the funding floor adjustments.

2. Not inclusive of all allocations such as restricted funding and reimbursements.

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Trial Court Budget Advisory Committee

(Action Item)

Title: 2018-19 Allocation of Court-Appointed Dependency Counsel Funding
Date: 5/23/2018
Contact: Don Will, Deputy Director, Judicial Council Center for Families, Children & the Courts
415-865-7557 | don.will@jud.ca.gov

Issue

Approve 2018-19 allocation recommendation to trial courts of \$136.7 million ongoing General Fund designated for court-appointed juvenile dependency counsel costs. Allocation is made following a methodology approved by the Judicial Council.

Background

Court-appointed dependency counsel became a state fiscal responsibility in 1989 through the Brown-Presley Trial Court Funding Act (Sen. Bill 612/Assem. Bill 1197; Stats. 1988, ch. 945), which added section 77003 to the Government Code, defined “court operations” in that section as including court-appointed dependency counsel and made an appropriation to fund trial court operations. In 1997, the Lockyer-Isenberg Trial Court Funding Act of 1997 (Assem. Bill 233; Stats. 1997, ch. 850) provided the funding for, and delineated the parameters of, the transition to state trial court funding that had been outlined in the earlier legislation.

In 2015, the Judicial Council approved recommendations of the Trial Court Budget Advisory Committee (TCBAC) to reallocate funding for court-appointed dependency counsel among the trial courts based on the caseload funding model. The purpose was to provide a more equitable allocation of funding among the courts. Rather than using historical funding levels dating back to the adoption of state trial court funding, the new funding methodology is based on the caseload-based calculation of funding for each court provided by the workload model approved by the Judicial Council through the DRAFT Pilot Program and Court-Appointed Counsel report (*Juvenile Dependency: Court-Appointed– Counsel Funding Reallocation*; April 17, 2015).

Another recommendation approved by the Judicial Council at this time was that a joint subcommittee of the TCBAC and the Family and Juvenile Law Advisory Committee be formed to review that workload model for possible updates and revisions. After a year of research and analysis, the methodology recommended by this joint subcommittee was approved by the Judicial Council (*Juvenile Dependency: Court-Appointed Dependency Counsel Workload and Funding Methodology*; April 15, 2016).

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Trial Court Budget Advisory Committee

Discussion at the April and June 2016 Judicial Council meetings indicated that the issues related to workload and funding for small courts required immediate attention. In July 2016, the Judicial Council directed the Executive and Planning Committee to form a working group to consider changes to the court-appointed juvenile dependency counsel funding methodology as it relates to small courts.

The working group determined that changes were justified in light of the unique costs faced by small courts. It recommended that the funding methodology be modified for 2017–18 and 2018–19 to suspend reallocation-related budget reductions for the 23 smallest courts, adjust the local economic index for all 30 small courts, and adjust the funding allocations of those larger courts receiving increases related to the reallocation to compensate for these increases to the small court budget (*Juvenile Dependency: Small Court Dependency Workload Working Group Final Recommendations*; May 19, 2017).

Justification

\$136.7 million is allocated in the annual budget for court-appointed juvenile dependency counsel. The 2018-19 allocations to trial courts in Attachment 8A were derived by using the methodology designated in the Judicial Council reports listed above. 2018-19 is the final year of the four-year reallocation process approved in April 2015. In this process, court allocations were based on a percentage of historical baseline share of funding prior to 2015-16, and a percentage of the new caseload-based funding model approved by the Judicial Council. In 2018-19, court allocations are based on 100 percent of the caseload-based funding model. The key factors used in this allocation are (for each court):

- A three-year rolling average of original dependency filings;
- A three-year rolling average of number of children in foster care; and
- The Bureau of Labor Statistics (BLS) governmental salary index average, as modified for other Judicial Council budget allocations.

In addition, in 2018-19 as in 2017-18, the allocation was adjusted to reduce the impact of the new funding methodology on small courts. Two adjustments are made in accordance with Judicial Council action of May 2017. Small courts with a BLS average index of under 1.0 are adjusted upwards to 1.0, and small courts whose final funding allocation is less than their 2015-16 funding allocation are adjusted to either the 2015-16 allocation or their total need calculation, whichever is less.

Recommendation

The following recommendation is presented to the Trial Court Budget Advisory Committee for consideration:

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Trial Court Budget Advisory Committee

1. Approve the allocation of \$136.7 million for court-appointed dependency counsel to the trial courts using the methodology specified by the Judicial Council and applied in Attachment 8A.

Attachments

Attachment 8A: 2018-19 Allocation of Dependency Counsel Funding

2018-19 Allocation of Dependency Counsel Funding

Court	Caseload Funding Model Estimated Funding Need	2015-16 Allocation	2016-17 Allocation	2017-18 Allocation	2018-19 Allocation	Diff from Prior Year
	A	B	C	D	E	F
Alameda	\$5,151,397	\$4,037,391	\$3,618,313	\$3,565,629	\$3,543,698	\$21,931
Alpine	\$3,303	\$0	\$399	\$1,799	\$2,741	(\$943)
Amador	\$217,828	\$115,233	\$115,233	\$143,696	\$150,936	(\$7,240)
Butte	\$1,233,336	\$664,923	\$627,554	\$794,546	\$839,362	(\$44,816)
Calaveras	\$267,801	\$123,940	\$142,758	\$220,822	\$199,633	\$21,190
Colusa	\$99,916	\$38,471	\$40,667	\$43,948	\$75,779	(\$31,831)
Contra Costa	\$3,476,688	\$3,030,406	\$2,600,337	\$2,363,610	\$2,366,101	(\$2,492)
Del Norte	\$193,047	\$214,730	\$214,730	\$214,730	\$214,730	\$0
El Dorado	\$791,833	\$788,644	\$655,569	\$548,764	\$544,710	\$4,054
Fresno	\$4,514,190	\$2,900,594	\$2,670,600	\$3,015,746	\$3,072,185	(\$56,440)
Glenn	\$158,239	\$90,417	\$90,417	\$111,158	\$127,997	(\$16,840)
Humboldt	\$908,878	\$543,896	\$462,558	\$522,682	\$686,106	(\$163,424)
Imperial	\$892,571	\$591,128	\$518,512	\$576,150	\$607,450	(\$31,299)
Inyo	\$45,822	\$72,277	\$72,277	\$45,459	\$51,626	(\$6,167)
Kern	\$3,822,411	\$2,347,548	\$2,277,753	\$2,664,810	\$2,629,476	\$35,334
Kings	\$1,095,658	\$354,779	\$443,478	\$700,757	\$745,663	(\$44,906)
Lake	\$243,964	\$296,119	\$296,119	\$272,201	\$276,158	(\$3,958)
Lassen	\$128,659	\$106,891	\$106,891	\$106,891	\$113,680	(\$6,789)
Los Angeles	\$89,641,917	\$40,230,156	\$45,149,389	\$60,560,884	\$61,006,870	(\$445,986)
Madera	\$836,263	\$225,443	\$293,833	\$535,074	\$615,465	(\$80,390)
Marin	\$273,825	\$388,488	\$388,488	\$311,538	\$274,676	\$36,862
Mariposa	\$59,178	\$38,070	\$38,070	\$38,070	\$43,709	(\$5,639)
Mendocino	\$577,623	\$711,060	\$566,908	\$440,581	\$478,761	(\$38,180)
Merced	\$1,175,434	\$738,248	\$751,397	\$844,260	\$808,593	\$35,667
Modoc	\$44,776	\$16,090	\$17,128	\$24,065	\$38,768	(\$14,702)
Mono	\$19,212	\$13,956	\$13,956	\$13,956	\$15,247	(\$1,291)
Monterey	\$972,538	\$434,541	\$494,823	\$682,574	\$669,019	\$13,556
Napa	\$431,992	\$212,285	\$232,362	\$315,051	\$297,172	\$17,880
Nevada	\$143,218	\$226,123	\$226,123	\$202,832	\$172,062	\$30,770
Orange	\$7,630,811	\$6,418,278	\$5,648,065	\$5,366,139	\$5,249,312	\$116,826
Placer	\$999,032	\$518,087	\$687,985	\$895,552	\$687,244	\$208,308
Plumas	\$127,822	\$154,059	\$154,059	\$151,555	\$154,059	(\$2,504)
Riverside	\$11,301,260	\$6,080,322	\$6,411,055	\$8,806,009	\$7,774,251	\$1,031,758
Sacramento	\$7,821,288	\$5,205,426	\$4,832,997	\$5,609,080	\$5,380,343	\$228,736

Court	Caseload Funding Model Estimated Funding Need	2015-16 Allocation	2016-17 Allocation	2017-18 Allocation	2018-19 Allocation	Diff from Prior Year
	A	B	C	D	E	F
San Benito	\$132,665	\$89,163	\$89,163	\$112,410	\$109,459	\$2,951
San Bernardino	\$15,147,057	\$4,963,161	\$5,731,210	\$8,514,703	\$10,308,510	(\$1,793,807)
San Diego	\$7,945,815	\$9,408,199	\$7,711,177	\$6,132,621	\$5,466,007	\$666,614
San Francisco	\$3,954,968	\$3,761,098	\$3,296,146	\$3,060,973	\$2,720,663	\$340,310
San Joaquin	\$3,534,177	\$2,982,578	\$2,601,178	\$2,480,278	\$2,431,196	\$49,081
San Luis Obispo	\$1,031,752	\$699,248	\$647,980	\$703,001	\$702,171	\$830
San Mateo	\$1,148,930	\$554,582	\$668,643	\$960,903	\$790,361	\$170,542
Santa Barbara	\$1,134,275	\$1,557,379	\$1,267,448	\$979,287	\$780,279	\$199,007
Santa Clara	\$4,466,510	\$4,508,063	\$3,780,956	\$3,223,912	\$3,072,557	\$151,355
Santa Cruz	\$658,099	\$863,289	\$713,676	\$598,314	\$493,183	\$105,131
Shasta	\$1,017,498	\$681,818	\$621,700	\$680,076	\$692,470	(\$12,394)
Sierra	\$5,177	\$13,759	\$13,759	\$9,848	\$8,323	\$1,524
Siskiyou	\$219,822	\$245,373	\$245,373	\$245,373	\$245,373	\$0
Solano	\$1,090,751	\$875,639	\$801,057	\$883,349	\$750,338	\$133,010
Sonoma	\$1,452,636	\$1,137,764	\$990,021	\$918,101	\$988,609	(\$70,507)
Stanislaus	\$1,676,803	\$1,107,189	\$1,004,470	\$1,092,505	\$1,141,168	(\$48,663)
Sutter	\$360,963	\$143,904	\$146,804	\$220,511	\$272,224	(\$51,713)
Tehama	\$534,806	\$163,859	\$177,634	\$319,793	\$378,676	(\$58,883)
Trinity	\$114,838	\$93,829	\$93,829	\$96,021	\$95,242	\$779
Tulare	\$2,622,422	\$954,553	\$1,032,410	\$1,591,232	\$1,784,721	(\$193,489)
Tuolumne	\$223,997	\$110,593	\$110,593	\$159,147	\$175,839	(\$16,692)
Ventura	\$2,815,443	\$1,151,975	\$1,284,628	\$1,835,753	\$1,916,083	(\$80,331)
Yolo	\$1,267,239	\$404,107	\$430,429	\$596,503	\$871,747	(\$275,244)
Yuba	\$714,069	\$200,855	\$278,909	\$474,768	\$491,216	(\$16,448)
Reserve	\$0	\$100,000	\$200,000	\$100,000	\$100,000	\$0
Total	\$198,572,440	\$114,700,000	\$114,800,000	\$136,700,000	\$136,700,000	\$0