



**Judicial Council of California**  
**Trial Court Budget Advisory Committee**

**TRIAL COURT BUDGET ADVISORY COMMITTEE**  
**FUNDING METHODOLOGY SUBCOMMITTEE**

**MATERIALS FOR SEPTEMBER 11, 2024**  
**VIRTUAL MEETING**

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# Judicial Council of California

## Trial Court Budget Advisory Committee

[www.courts.ca.gov/tbac.htm](http://www.courts.ca.gov/tbac.htm)  
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### TRIAL COURT BUDGET ADVISORY COMMITTEE FUNDING METHODOLOGY SUBCOMMITTEE

#### NOTICE AND AGENDA OF OPEN MEETING

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

THIS MEETING IS BEING CONDUCTED BY ELECTRONIC MEANS

THIS MEETING IS BEING RECORDED

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**Date:** Wednesday, September 11, 2024  
**Time:** 12:00 p.m. to 12:30 p.m.  
**Public Call-in Number:** <https://jcc.granicus.com/player/event/3271>

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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 emailed to [tbac@jud.ca.gov](mailto:tbac@jud.ca.gov).

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

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

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

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

Approve minutes of the June 18, 2024, Funding Methodology Subcommittee meeting.

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#### **II. PUBLIC COMMENT (CAL. RULES OF COURT, RULE 10.75(K)(1))**

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This meeting will be conducted by electronic means with a listen-only conference line available for the public. As such, the public may submit comments for this meeting only in writing. 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 [tbac@jud.ca.gov](mailto:tbac@jud.ca.gov). Only written comments received by 12:00 p.m. on September 10, 2024 will be provided to advisory body members prior to the start of the meeting.

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**III. DISCUSSION AND POSSIBLE ACTION ITEM (ITEM 1)**

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**Item 1**

**2024–25 Sargent Shriver Civil Counsel Pilot Program Pro Rata Distribution for a Mid-Cycle Allocation (Action Required)**

Consideration of an allocation methodology for additional grant funds to current Sargent Shriver Civil Counsel Pilot Program recipients.

Presenter(s)/Facilitator(s): Ms. Laura Brown, Senior Analyst, Judicial Council Center for Families, Children & the Courts

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**IV. ADJOURNMENT**

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**Adjourn**



Judicial Council of California  
Trial Court Budget Advisory Committee

[www.courts.ca.gov/tcbac.htm](http://www.courts.ca.gov/tcbac.htm)

[tcbac@jud.ca.gov](mailto:tcbac@jud.ca.gov)

TRIAL COURT BUDGET ADVISORY COMMITTEE  
FUNDING METHODOLOGY SUBCOMMITTEE

MINUTES OF OPEN MEETING

June 18, 2024  
12:00 p.m. – 12:30 p.m.

<https://jcc.granicus.com/player/event/3270>

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**Advisory Body Members Present:** Judges: Hon. Jonathan B. Conklin (Cochair), Hon. Wendy G. Getty, Hon. David C. Kalemkarian, Hon. Patricia L. Kelly, and Hon. Kevin M. Seibert.

Executive Officers: Mr. Chad Finke (Cochair), Mr. James Kim, Ms. Krista LeVier, Mr. Brandon E. Riley, Mr. David W. Slayton, and Mr. David H. Yamasaki.

**Advisory Body Members Absent:** Hon. Judith C. Clark and Mr. Neal Taniguchi.

**Others Present:** Mr. Zlatko Theodorovic, Ms. Fran Mueller, Ms. Donna Newman, and Ms. Rose Lane.

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OPEN MEETING

**Call to Order and Roll Call**

The chair welcomed the members, called the meeting to order at 12:02 p.m., and took roll call.

**Approval of Minutes**

The subcommittee approved minutes from the April 16, 2024, Funding Methodology Subcommittee meeting.

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DISCUSSION ITEMS (ITEM 1)

**Item 1 – Funding Methodology Subcommittee Annual Work Plan (Action Required)**

Discuss updates to the Funding Methodology Subcommittee annual Work Plan for 2024–25 and beyond.

**Action:** *The Funding Methodology Subcommittee unanimously voted to approve the following recommendations for considerations by the Trial Court Budget Advisory Committee (TCBAC) at its July 2, 2024 meeting:*

1. *Remove from the work plan: Item 1– Develop an ongoing, workload-based methodology for allocation of Court Interpreter Program funding including, but not limited to, video remote interpreting and cross assignments, will be removed effective in 2024–25;*
2. *Move to 2024–25: Item 2 – Reevaluate the court cluster system which is determined by the number of Authorized Judicial Positions;*
3. *Add to the work plan: Item 3 – Consider further refinements to the Workload Formula policy, including methodologies to allocate future budget reductions and/or the restoration of funding that had previously been reduced due to budget shortfalls;*
4. *Add to the work plan: Item 4 – Reevaluate the Trial Court Minimum Operating and Emergency Fund Balance Policy;*
5. *Retain on the work plan: Item 5 – Review the base funding floor amounts annually, if requested by the applicable courts, for consideration by the TCBAC no later than December of each year, to determine whether an inflationary adjustment is needed; and*
6. *Retain on the work plan: Item 6 – Review Workload Formula Adjustment Request Process submissions as referred by the TCBAC chair.*

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**A D J O U R N M E N T**

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There being no further business, the meeting was adjourned at 12:32 p.m.

Approved by the advisory body on  enter date.

JUDICIAL COUNCIL OF CALIFORNIA  
BUDGET SERVICES  
Report to the Funding Methodology Subcommittee  
(Action Item)

**Title:** 2024–25 Sargent Shriver Civil Counsel Pilot Program Pro Rata Distribution for a Mid-Cycle Allocation

**Date:** 9/11/2024

**Contact:** Laura Brown, Senior Analyst, Judicial Council Center for Families, Children & the Courts  
916-643-8052 | Laura.Brown@jud.ca.gov

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**Issue**

Consider an allocation methodology recommendation from the Shriver Civil Counsel Act Implementation Committee (Shriver Committee) to distribute additional grant funds in fiscal year 2024–25 to existing pilot projects on a pro rata basis from the current year Trial Court Trust Fund (TCTF) program allocation.

**Background**

On April 12, 2024, the Shriver Committee approved the distribution of up to \$5 million in program reserves to current pilot projects on a pro rata basis according to the award amounts for the 2023–26 grant cycle and allowed pilot projects to spend their allocation during fiscal years 2024–25 and 2025–26 (Link A). Pilot projects are operated by qualified legal service providers in partnership with their local superior courts to provide legal representation and assistance to low-income Californians in housing, domestic violence prevention, civil harassment restraining orders, probate conservatorships, guardianships of the person, elder abuse, or child custody matters.

The Shriver Committee considered opening proposals to new projects but decided to focus on current pilot projects due to limitations of time to complete a new, statewide request for proposals in line with obtaining Judicial Council and advisory body approvals, executing contracts with new providers, and staff capacity. On April 25, 2024, a request for proposal was released to current pilot projects to submit revised project plans, budgets, and budget narratives to demonstrate how they would spend their proposed pro rata amounts. Of the 14 pilot projects, eight submitted proposals for their pro rata amount, three submitted a proposal for less than their pro rata share, and three pilot projects did not submit a proposal. All proposals were approved by the pilot projects and court partners, as required.

Of the \$5 million, a total of \$3.6 million was requested by the pilot projects. On June 18, 2024<sup>1</sup>, the Shriver Committee met and approved the eleven proposals that were received. See

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<sup>1</sup> The June 18, 2024 Shriver Civil Counsel Act Implementation Committee meeting was closed to the public under California Rules of Court, rule 10.75(D)(9), Evaluation of individual grant applications.

JUDICIAL COUNCIL OF CALIFORNIA  
BUDGET SERVICES  
Report to the Funding Methodology Subcommittee  
(Action Item)

Attachment A, Column E for the pro rata amounts according to the award amounts for the 2023–26 grant cycle, and Column F for the actual amounts requested by the pilot projects.

On July 21, 2023, the Judicial Council approved 14 grant awards for a total of \$48.4 million for the 2023–26 grant cycle (Link B). After Judicial Council approval, the Justice and Diversity Center of the Bar Association of San Francisco reduced their pilot project’s budget, which lowered the total grant awards to \$48.1 million for the 2023–26 grant cycle. The following table shows the totals of the initial grant amounts and the additional \$3.6 million mid-cycle allocation.

Initial 2023–26 Total Grant Awards	Additional 2023–26 Mid-Cycle Allocation	Revised 2023–26 Total Grant Awards
\$48,033,963	\$3,568,382	\$51,602,345

On July 12, 2024, the Judicial Council approved the \$21.0 million TCTF allocation for 2024–25 for the Sargent Shriver Civil Counsel Pilot Program, which included the \$5 million of additional funding for the mid-cycle allocation (Link C). Given that \$3.6 million of the \$5 million was requested by the pilot projects, the Shriver program will hold the unrequested amount of \$1.4 million in the program’s reserves to be allocated in the 2026–29 grant cycle. After the allocation of the \$3.6 million, total reserve funding for the program is \$20 million.

**Recommendation**

The Shriver Committee recommends the Funding Methodology Subcommittee approve the mid-cycle allocation methodology to distribute an additional \$3.6 million to current pilot projects on a pro rata basis as identified in Attachment A and allow pilot projects to spend their allocations during fiscal years 2024–25 and 2025–26. This recommendation will be considered by the Trial Court Budget Advisory Committee, the Judicial Branch Budget Committee, and then the Judicial Council at its November 15, 2024, business meeting.

**Attachments and Links**

1. Attachment A: Table of Mid-Cycle Allocation Pro Rata Distribution Amounts.
2. Link A: Shriver Civil Counsel Act Implementation Committee meeting minutes, April 12, 2024, <https://www.courts.ca.gov/documents/Shriver-20240412-Minutes.pdf>.
3. Link B: Judicial Council Report, July 21, 2023, Item 23-066, *Sargent Shriver Civil Counsel Act: Selection of Pilot Projects*, <https://jcc.legistar.com/View.ashx?M=F&ID=12124930&GUID=FB567EA4-D0EA-4B2E-A554-6352E555984D>.
4. Link C: Judicial Council Report, July 12, 2024, Item 24-032, *Trial Court Budget: Allocations from the Trial Court Trust Fund and Trial Court Allocations for Fiscal Year 2024-25*, <https://jcc.legistar.com/View.ashx?M=F&ID=13077708&GUID=08C509A8-B264-4D66-AFDC-B3EC97A5D296>.

### Mid-Cycle Allocation Pro Rata Distribution Amounts

A	B	C	D	E	F	G
Lead Legal Services Agency	Court Partner	Case Type	Approved 2023–26 Grant Awards	\$5M Pro Rata Amount	Amount Requested	Total Revised 2023–26 Grant Amounts <sup>2</sup>
California Rural Legal Assistance	San Joaquin	Housing	2,456,611	255,716	255,716	2,712,327
Central California Legal Services	Fresno	Housing	1,979,657	206,068	206,068	2,185,725
Centro Legal de la Raza	Alameda	Housing	2,168,678	225,745	225,745	2,394,423
Greater Bakersfield Legal Assistance	Kern	Housing	3,066,468	319,198	319,077	3,385,545
Justice & Diversity Center of the Bar Association of San Francisco	San Francisco	Child Custody	1,219,949	126,988	126,988	1,346,937
Legal Access Alameda	Alameda	Child Custody	313,938	32,679	0	313,938
Legal Aid Foundation of Santa Barbara	Santa Barbara	Housing Guardianship Conservatorship	3,914,413	407,463	117,125	4,031,538
Legal Aid Society of San Diego	San Diego	Housing	10,149,125	1,056,453	0	10,149,125
Legal Services of Northern California	Yolo	Housing	1,147,846	119,483	119,483	1,267,329
Los Angeles Center for Law and Justice	Los Angeles	Child Custody	3,007,407	313,050	313,050	3,320,457
Neighborhood Legal Services of Los Angeles	Los Angeles	Housing	12,911,086	1,343,954	1,343,954	14,255,040
Public Law Center	Orange	Child Custody	489,484	50,952	0	489,484
San Diego Volunteer Lawyer Program (custody) <sup>3</sup>	San Diego	Child Custody	1,392,980	144,999	144,202	1,537,182
San Diego Volunteer Lawyer Program (domestic violence)	San Diego	Domestic Violence	961,185	100,053	99,774	1,060,959
San Luis Obispo Legal Assistance Foundation	San Luis Obispo	Housing Elder Abuse Guardianship Conservatorship	2,855,136	297,200	297,200	3,152,336
<b>TOTAL</b>			<b>\$48,033,963</b>	<b>\$5,000,000</b>	<b>\$3,568,382</b>	<b>\$51,602,345</b>

<sup>2</sup> Total Revised 2023–26 Grant Amounts are inclusive of approved TCTF allocations for 2023–24, 2025–25 and the allocation to be requested for 2025–26.

<sup>3</sup> San Diego Volunteer Lawyer Program is one pilot project, but their funding is separated by case type to demonstrate compliance with Gov. Code 68651(2), which states that proposals to provide counsel in child custody cases should be considered among the highest priorities for funding and that up to 20 percent of available funds shall be directed to programs involving actions under the Family Code

([https://leginfo.legislature.ca.gov/faces/codes\\_displayText.xhtml?lawCode=GOV&division=&title=8.&part=&chapter=2.1.&article=](https://leginfo.legislature.ca.gov/faces/codes_displayText.xhtml?lawCode=GOV&division=&title=8.&part=&chapter=2.1.&article=))