



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

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

**MATERIALS MARCH 11, 2025**  
**VIRTUAL MEETING**

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# 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)

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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:** Tuesday, March 11, 2025  
**Time:** 12:00 p.m. to 1:30 p.m.  
**Public Video Livestream:** <https://jcc.granicus.com/player/event/4163>

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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 [tcbac@jud.ca.gov](mailto:tcbac@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 February 5, 2025, 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 [tcbac@jud.ca.gov](mailto:tcbac@jud.ca.gov). Only written comments received by 12:00 p.m. on March 10, 2025 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 1-3)**

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**Item 1**

**Funding Reallocation in Fiscal Year (FY) 2025–26 with No New Money (Action Required)**

Consideration of a reallocation of existing funding in FY 2025–26 to support equity for the trial courts per the Workload Formula policy regarding no new money.

Presenter: Ms. Oksana Tuk, Senior Analyst, Judicial Council Budget Services

**Item 2**

**Allocation Methodology for \$40 Million for Trial Court Operational Cost Increases (Action Required)**

Consideration of an allocation methodology for the ongoing \$40 million included in the FY 2025–26 Governor’s Budget to address operational cost increases for the trial courts.

Presenter: Ms. Oksana Tuk, Senior Analyst, Judicial Council Budget Services

**Item 3**

**Allocation Methodologies for Potential Future Funding Restoration (Action Required)**

Consideration of allocation methodology options for potential restoration of funding for trial courts in future budget years.

Presenter: Ms. Oksana Tuk, Senior Analyst, Judicial Council Budget Services

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**IV. ADJOURNMENT**

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**Adjourn**



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

**MINUTES OF OPEN MEETING**

February 5, 2025

12:30 p.m. – 1:30 p.m.

<https://jcc.granicus.com/player/event/4098>

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**Advisory Body Members Present:** Judges: Hon. Jonathan B. Conklin (Cochair), Hon. J. Eric Bradshaw, Hon. Samantha P. Jessner, Hon. David C. Kalemkarian, and Hon. Patricia L. Kelly  
Executive Officers: Mr. Chad Finke (Cochair), Ms. Stephanie Cameron, Ms. Rebecca Fleming, Mr. Shawn C. Landry, Mr. Chris Ruhl, Mr. David W. Slayton, Ms. Kim Turner, and Mr. David H. Yamasaki

**Advisory Body Members Absent:**

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

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**OPEN MEETING**

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**Call to Order and Roll Call**

The chair called the meeting to order at 12:30 p.m. and took roll call.

**Approval of Minutes**

The advisory body approved the minutes of the December 17, 2024, Funding Methodology Subcommittee (FMS) meeting.

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

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**Item 1 – Allocation Methodologies for Potential Budget Reductions and Funding Restoration (Action Required)**

Consideration of allocation methodology options for potential future budget reductions and restoration of funding for trial courts.

**Action:** The FMS unanimously voted to approve the following recommendations for consideration by the Trial Court Budget Advisory Committee, the Judicial Branch Budget Committee, and then the Judicial Council at its July 18, 2025, business meeting:

1. Approve the 'reverse Workload Formula equity reduction allocation without reduction limitation' methodology to address potential future budget reductions, as outlined in Option 2b and displayed in Attachment D;
2. Approve the 'recalculate reduction using initial methodology with restored funding' approach to address potential funding restorations that occur in the same year in which the initial reduction took place, as outlined in Option 5 and displayed in Attachment I; and
3. Defer consideration of an allocation methodology for potential restoration of funding in future years to the next FMS meeting.

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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 1:35 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:** Funding Reallocation in Fiscal Year (FY) 2025–26 with No New Money  
**Date:** 3/11/2025  
**Contact:** Oksana Tuk, Senior Analyst, Judicial Council Budget Services  
916-643-8027 | [oksana.tuk@jud.ca.gov](mailto:oksana.tuk@jud.ca.gov)

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**Issue**

Consideration of a reallocation of existing funding in FY 2025–26 to support equity for the trial courts according to the Workload Formula policy regarding no new money. This policy supports the Workload Formula’s core principles to advance the goal of funding equity, stability, and predictability to support trial court operations.

**Background**

At its January 17, 2020, business meeting,<sup>1</sup> the Judicial Council approved technical refinements to the Workload Formula policy. Specifically, the equity-based reallocation of existing funding for every second year in which no new money was included in the budget would be based on the beginning Workload Formula allocations. The reallocation would be distributed to courts via distance from the statewide average funding level and court size based on the Workload Formula need, in the following sequence:

1. Up to a 1 percent reduction for courts above the 2 percent band to courts below the 2 percent band.
2. Up to a 2 percent reduction for courts above 105 percent of funding need to courts below the 2 percent band.
3. Courts above 105 percent of funding need will not fall below 104 percent of funding need.
4. Courts that penetrate into the band following the up-to-1-percent reallocation will not be eligible for additional funding from the 2 percent reallocation from courts above 105 percent of funding need.

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<sup>1</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Technical Refinement of Approved Workload Formula Methodology* (December 20, 2019), <https://jcc.legistar.com/View.ashx?M=F&ID=7976128&GUID=DC14BAC5-0079-4C0C-A0E6-52C7EC068BB0>.

Since the Workload Formula was implemented in FY 2018–19, there have been no instances of the equity-based reallocation of funding due to a second year of no new money included in the state budget.

At its July 12, 2024, business meeting,<sup>2</sup> the Judicial Council approved an amended definition for the term “new money”. Specifically, the council established that because Consumer Price Index (CPI) funding, when included in the budget, is used to address inflationary costs for all trial courts, such funding should not be considered “new money” for the purpose of allocation via the Workload Formula.

The Budget Act of 2023 included a \$74.1 million CPI adjustment to address trial court operational cost increases due to inflation. No other augmentations of new money were included in the budget for the trial courts.

The FY 2024–25 Governor’s Budget, released in January 2024, did not include any new funding for the trial courts due to the state’s fiscal deficit. Therefore, based on the council’s updated policy regarding the definition of new money, it was determined that FY 2024–25 would be the second year of no new money, as FY 2023–24 only included CPI funding, and the equity-based reallocation process would be implemented in FY 2024–25.

At its May 1, 2024, meeting,<sup>3</sup> the Trial Court Budget Advisory Committee (TCBAC) approved a funding reallocation of \$7.2 million for FY 2024–25 according to the Workload Formula policy. Subsequently, the FY 2024–25 May Revision included a \$97 million reduction for trial court operational funding due to the state’s multiyear deficit. Because the second year of no new money (FY 2024–25) also included a sizeable reduction, the TCBAC determined that implementation of the reallocation policy would result in a double reduction to some courts that would compound the adverse impact of the cuts on critical programs and services to the public. Therefore, the TCBAC recommended that the reallocation policy not be implemented in FY 2024–25.

The FY 2025–26 Governor’s Budget, released on January 10, 2025, included an ongoing partial restoration of \$42 million of the \$97 million reduction beginning in FY 2024–25. The Legislature approved a one-time increase in the Trial Court Trust Fund budget in FY 2024–25 to fund the restoration, and the Judicial Council approved the current year allocations to the courts at its February 21, 2025, business meeting.<sup>4</sup> The partial restoration of \$42 million revises the

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<sup>2</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Allocations from the Trial Court Trust Fund and Trial Court Allocations for Fiscal Year 2024–25* (June 17, 2024), <https://jcc.legistar.com/View.ashx?M=F&ID=13077708&GUID=08C509A8-B264-4D66-AFDC-B3EC97A5D296>

<sup>3</sup> Trial Court Budget Advisory Committee meeting materials (May 1, 2024), <https://courts.ca.gov/system/files/file/tcbac-20240501-materialspdf.pdf>

<sup>4</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Allocation for Partial Restoration of Trial Court Operations Funding for Fiscal Year 2024–25* (February 7, 2025), <https://jcc.legistar.com/View.ashx?M=F&ID=13753142&GUID=14594704-3AD4-4E4C-B048-F8BA3A96B894>.

ongoing reduction to trial court operational funding from \$97 million to \$55 million, which results in a new baseline funding level for the courts beginning in FY 2024–25.

The FY 2025–26 Governor’s Budget also included \$40 million ongoing General Fund to address increases in operational costs for the trial courts, which is considered CPI funding and not new money per the Workload Formula policy. Since the Budget Act of 2024 did not include new funding for the trial courts and the proposed budget for FY 2025–26 only includes CPI funding of \$40 million, then FY 2025–26 would be considered the second year of no new money according to the Workload Formula policy and the equity-based reallocation process would be implemented.

The preliminary reallocation for FY 2025–26 is presented in **Attachment 1A** and is calculated based on the available FY 2024–25 Workload Formula allocation and need amounts for each court at this time. The current FY 2024–25 Workload Formula allocation, approved by the Judicial Council at its business meeting on February 21, 2025, reflects the revised ongoing reduction of \$55 million for the trial courts. The new calculated need amount for FY 2025–26 will be available in April 2025 based on updated data provided by the Judicial Council’s Research, Analytics, and Data office (formerly the Office of Court Research).

***The final reallocation will be updated based on the new calculated need and other technical adjustments for FY 2025–26 and is contingent on funding included in the enacted budget for FY 2025–26.***

### **Recommendation**

1. Approve the equity-based reallocation of existing funding for the trial courts for FY 2025–26 based on specified steps in the Workload Formula policy regarding no new money as displayed in Attachment 1A. The final reallocation will be based on the new calculated need and technical adjustments for FY 2025–26 and is contingent on funding included in the enacted budget for FY 2025–26.
2. Approve the sequence of funding adjustments for FY 2025–26 so that the equity-based reallocation of existing funding as noted in recommendation #1 occurs first before adding the \$40 million for increased operational costs for the trial courts, which is detailed in Item 2 of the agenda.

These recommendations will be considered by the TCBAC, the Judicial Branch Budget Committee, and then the Judicial Council at its July 18, 2025, business meeting.

### **Attachments**

1. **Attachment 1A:** Preliminary Funding Reallocation in FY 2025–26 with No New Money



# Preliminary Funding Reallocation in FY 2025-26 with No New Money

**Final reallocation will be updated based on new calculated need and other technical adjustments for FY 2025-26**

Court	2024-25 Final Workload Formula Allocation as of July 1, 2024	2024-25 Workload Formula Need as of July 1, 2024	2024-25 Workload Formula Percentage (BEFORE \$42m Restoration)	2024-25 Revised Workload Formula Allocation (AFTER \$42m Restoration)	2024-25 Workload Formula Percentage (AFTER \$42m Restoration)	Funding Reallocated from Courts Contributing to Equity (second year of no "new money")	Funding Reallocated to Courts Receiving an Equity Adjustment (second year of no "new money")	Net Total of Funding Reallocation	2024-25 Revised Workload Formula Allocation (AFTER \$7.2m Reallocation)	2024-25 Workload Formula Percentage (AFTER \$7.2m Reallocation)
	A	B	C (A/B)	D	E (D/B)	F	G	H (F + G)	I (D + H)	J (I/B)
Alpine	978,500	549,681	178.01%	978,500	178.01%	-	-	-	978,500	178.01%
Sierra	978,500	623,149	157.02%	978,500	157.02%	-	-	-	978,500	157.02%
Imperial	10,163,038	8,073,327	125.88%	10,285,880	127.41%	(242,200)	-	(242,200)	10,043,680	124.41%
Mono	2,417,935	2,038,771	118.60%	2,448,957	120.12%	-	-	-	2,448,957	120.12%
San Francisco	64,458,077	55,305,114	116.55%	65,299,587	118.07%	(1,659,153)	-	(1,659,153)	63,640,433	115.07%
Plumas	1,897,592	1,629,248	116.47%	1,922,382	117.99%	-	-	-	1,922,382	117.99%
Del Norte	4,483,485	3,875,339	115.69%	4,542,452	117.21%	-	-	-	4,542,452	117.21%
San Benito	4,779,146	4,197,092	113.87%	4,843,008	115.39%	-	-	-	4,843,008	115.39%
Mariposa	1,860,977	1,846,094	100.81%	1,889,067	102.33%	-	-	-	1,889,067	102.33%
Lassen	2,581,880	2,580,519	100.05%	2,621,145	101.57%	-	-	-	2,621,145	101.57%
Sonoma	30,480,267	30,732,916	99.18%	30,947,892	100.70%	(307,329)	-	(307,329)	30,640,563	99.70%
Mendocino	7,672,588	7,775,002	98.68%	7,790,891	100.20%	(77,750)	-	(77,750)	7,713,141	99.20%
Santa Cruz	16,363,507	16,940,790	96.59%	16,621,274	98.11%	(169,408)	-	(169,408)	16,451,866	97.11%
Kern	66,272,438	68,776,330	96.36%	67,318,923	97.88%	(687,763)	-	(687,763)	66,631,160	96.88%
Santa Clara	93,382,508	97,354,039	95.92%	94,863,826	97.44%	(973,540)	-	(973,540)	93,890,285	96.44%
Humboldt	8,900,393	9,318,361	95.51%	9,042,179	97.04%	(93,184)	-	(93,184)	8,948,996	96.04%
Fresno	63,133,105	66,287,167	95.24%	64,141,716	96.76%	(662,872)	-	(662,872)	63,478,844	95.76%
San Luis Obispo	18,523,163	19,492,482	95.03%	18,819,756	96.55%	(194,925)	-	(194,925)	18,624,831	95.55%
Tuolumne	4,818,467	5,085,552	94.75%	4,895,848	96.27%	(50,856)	-	(50,856)	4,844,992	95.27%
Ventura	44,177,371	46,999,346	94.00%	44,892,503	95.52%	(469,993)	-	(469,993)	44,422,509	94.52%
Inyo	2,512,390	2,676,571	93.87%	2,553,116	95.39%	-	-	-	2,553,116	95.39%
Alameda	88,446,403	94,645,177	93.45%	89,886,503	94.97%	(946,452)	-	(946,452)	88,940,052	93.97%
Butte	13,707,099	14,689,951	93.31%	13,930,522	94.83%	(146,900)	-	(146,900)	13,783,622	93.83%
San Joaquin	49,951,911	53,533,653	93.31%	50,766,116	94.83%	(535,337)	-	(535,337)	50,230,779	93.83%
San Diego	176,701,558	189,500,353	93.25%	179,584,953	94.77%	-	-	-	179,584,953	94.77%
Colusa	2,454,902	2,635,032	93.16%	2,494,996	94.69%	-	-	-	2,494,996	94.69%
Modoc	1,372,099	1,480,959	92.65%	1,394,633	94.17%	-	-	-	1,394,633	94.17%
Glenn	2,990,182	3,237,289	92.37%	3,039,440	93.89%	-	-	-	3,039,440	93.89%
Amador	4,318,750	4,684,703	92.19%	4,390,031	93.71%	-	-	-	4,390,031	93.71%
Santa Barbara	26,681,819	29,058,002	91.82%	27,123,960	93.34%	-	-	-	27,123,960	93.34%
Tehama	5,876,354	6,426,611	91.44%	5,974,139	92.96%	-	-	-	5,974,139	92.96%
Madera	12,659,634	13,875,025	91.24%	12,870,753	92.76%	-	-	-	12,870,753	92.76%
Solano	28,669,037	31,445,139	91.17%	29,147,499	92.69%	-	-	-	29,147,499	92.69%
Monterey	26,002,768	28,560,984	91.04%	26,437,346	92.56%	-	-	-	26,437,346	92.56%
Placer	24,862,554	27,355,659	90.89%	25,278,792	92.41%	-	-	-	25,278,792	92.41%
Merced	16,500,078	18,264,043	90.34%	16,777,980	91.86%	-	-	-	16,777,980	91.86%
Los Angeles	713,278,790	791,102,381	90.16%	725,316,029	91.68%	-	-	-	725,316,029	91.68%
Marin	14,079,161	15,677,866	89.80%	14,323,909	91.36%	-	22,675	22,675	14,346,584	91.51%
Sacramento	109,842,203	122,332,264	89.79%	111,751,670	91.35%	-	179,185	179,185	111,930,855	91.50%
Kings	10,774,613	12,025,488	89.60%	10,957,590	91.12%	-	-	-	10,957,590	91.12%
Siskiyou	4,314,253	4,841,098	89.12%	4,389,251	90.67%	-	23,987	23,987	4,413,238	91.16%
Shasta	16,201,831	18,198,452	89.03%	16,483,479	90.58%	-	95,834	95,834	16,579,313	91.10%
Orange	186,230,932	209,526,287	88.88%	189,468,320	90.43%	-	1,214,996	1,214,996	190,683,316	91.01%
Nevada	6,570,957	7,425,652	88.49%	6,685,185	90.03%	-	54,402	54,402	6,739,586	90.76%
Napa	9,487,748	10,740,134	88.34%	9,652,680	89.87%	-	85,415	85,415	9,738,095	90.67%
El Dorado	9,519,963	10,819,495	87.99%	9,685,455	89.52%	-	102,661	102,661	9,788,116	90.47%
San Mateo	42,988,911	49,033,290	87.67%	43,736,218	89.20%	-	490,333	490,333	44,226,551	90.20%
Yolo	15,341,081	17,504,806	87.64%	15,607,767	89.16%	-	175,048	175,048	15,782,815	90.16%
Calaveras	3,299,313	3,767,570	87.57%	3,356,668	89.09%	-	37,676	37,676	3,394,343	90.09%
Trinity	1,987,739	2,276,992	87.30%	2,022,293	88.81%	-	22,770	22,770	2,045,063	89.81%
San Bernardino	135,901,495	156,640,095	86.76%	138,263,969	88.27%	-	1,566,401	1,566,401	139,830,370	89.27%
Riverside	134,884,127	155,691,163	86.64%	137,228,916	88.14%	-	1,556,912	1,556,912	138,785,827	89.14%
Sutter	8,192,412	9,485,325	86.37%	8,334,826	87.87%	-	94,853	94,853	8,429,680	88.87%
Contra Costa	51,597,645	59,907,816	86.13%	52,494,605	87.63%	-	599,078	599,078	53,093,683	88.63%
Stanislaus	31,437,389	37,054,820	84.84%	31,983,888	86.32%	-	370,548	370,548	32,354,436	87.32%
Tulare	32,682,780	38,548,955	84.78%	33,250,929	86.26%	-	385,490	385,490	33,636,418	87.26%
Lake	5,078,997	6,056,222	83.86%	5,167,289	85.32%	-	60,562	60,562	5,227,851	86.32%
Yuba	6,144,600	7,883,564	77.94%	6,251,416	79.30%	-	78,836	78,836	6,330,251	80.30%
<b>Total:</b>	<b>2,481,867,415</b>	<b>2,718,089,203</b>	<b>91.31%</b>	<b>2,523,207,415</b>	<b>92.83%</b>	<b>(7,217,661)</b>	<b>7,217,661</b>	<b>(0)</b>	<b>2,523,207,415</b>	<b>92.83%</b>

Floor courts (2)  
Cluster 1 courts (13)

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

**Title:** Allocation Methodology for \$40 Million for Trial Court Operational Cost Increases

**Date:** 3/11/2025

**Contact:** Oksana Tuk, Senior Analyst, Judicial Council Budget Services  
916-643-8027 | [oksana.tuk@jud.ca.gov](mailto:oksana.tuk@jud.ca.gov)

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**Issue**

Consideration of an allocation methodology for the \$40 million ongoing General Fund included in the fiscal year (FY) 2025–26 Governor’s Budget proposal to address increases in operational costs for the trial courts.

**Background**

Each year, the cost of maintaining existing service levels in the California court system increases due to the general inflationary pressures facing all government operations. In recognition of these cost pressures, the related budget actions since FY 2020–21 are described below.

The FY 2020–21 Governor’s Budget included \$61.7 million ongoing General Fund for an overall 3.0 percent increase in funding for the trial courts to address inflationary cost pressures. The Administration also committed to work with the Judicial Council to determine the best way to address future costs. Due to the state’s projected revenue loss associated with the COVID-19 pandemic, the Budget Act of 2020 included a \$167.8 million reduction for the trial courts and an overall reduction of \$200 million for the judicial branch. The requested CPI adjustment was not included in the final budget.

In FYs 2021–22, 2022–23, and 2023–24, the final budget included a Consumer Price Index (CPI) adjustment to address trial court operational cost increases due to inflation. This funding was intended to benefit all courts. Therefore, it was not allocated according to the Judicial Council’s Workload Formula methodology. Rather, it was allocated proportionally based on applying the CPI percentage increase to the prior year’s Workload Formula allocation for each court in each respective fiscal year.

The Budget Act of 2021 included \$72.2 million ongoing General Fund for the trial courts to address inflationary cost increases. The Judicial Council approved the allocation of the \$72.2 million to all courts using the 3.7 percent CPI–based increase over each court’s FY 2020–21

Workload Formula allocation.<sup>1</sup> This approach ensured all courts received funding to address inflationary cost increases.

The following year, the Budget Act of 2022 included \$84.2 million ongoing General Fund for inflationary cost increases. The Judicial Council approved the allocation of the \$84.2 million to all courts as a 3.8 percent increase over each court’s FY 2021–22 Workload Formula allocation.<sup>2</sup>

For the third consecutive year, the Budget Act of 2023 included \$74.1 million ongoing General Fund for the trial courts in recognition of increasing operational cost pressures due to rising inflation. The Judicial Council approved the allocation of the \$74.1 million to all courts as a 3.0 percent increase over each court’s FY 2022–23 Workload Formula allocation.<sup>3</sup>

At its July 12, 2024, business meeting, the Judicial Council revisited the Workload Formula definition of “new money” for the trial courts as it relates to CPI funding. The council approved the recommendation that CPI funding included in the budget to address inflationary costs for the trial courts is *not* considered “new money” for the purpose of allocating funding via the Workload Formula. The definition of “new money” in the Workload Formula policy was revised accordingly to exclude CPI funding.<sup>4</sup>

To keep pace with rising operational costs, the Judicial Council submitted a budget change proposal for FY 2024–25 requesting \$73.1 million for a 2.9 percent CPI adjustment. Due to the state’s projected multiyear deficit, the Budget Act of 2024 included a \$97 million reduction to trial court operational funding and the requested CPI adjustment was not included.

For the FY 2025–26 Governor’s Budget, the Judicial Council again submitted a budget change proposal requesting \$67 million, representing a 2.7 percent CPI adjustment, to address ongoing inflationary cost increases for the trial courts.

Despite the challenging fiscal environment, the FY 2025–26 Governor’s Budget included \$40 million ongoing General Fund to address increases in operational costs for the trial courts. In addition, to mitigate the impact of the \$97 million reduction on access to justice, the budget included a partial restoration of \$42 million beginning in FY 2024–25. The Legislature approved a one-time increase in the Trial Court Trust Fund budget in the current year for this

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<sup>1</sup> Judicial Council of Cal., Judicial Branch Budget Com. Rep., *Trial Court Budget: Allocation Methodology of \$72.2 Million Trial Court Funding in Governor’s Proposed 2021–22 Budget* (June 17, 2021),

<https://jcc.legistar.com/View.ashx?M=F&ID=9499530&GUID=797D4736-AE15-43D3-84D7-4676D4D7C4B0>.

<sup>2</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Allocations from the Trial Court Trust Fund and Trial Court Allocations for 2022–23* (June 28, 2022),

<https://jcc.legistar.com/View.ashx?M=F&ID=11018996&GUID=EFC36BA3-294F-4DC3-8C7E-1AC030ED7B72>.

<sup>3</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Allocations from the Trial Court Trust Fund and Trial Court Allocations for 2023–24* (June 23, 2023),

<https://jcc.legistar.com/View.ashx?M=F&ID=12124713&GUID=2A166CFF-E318-4E77-AA91-C06AE38FDFC2>.

<sup>4</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Allocations from the Trial Court Trust Fund and Trial Court Allocations for Fiscal Year 2024–25* (June 17, 2024),

<https://jcc.legistar.com/View.ashx?M=F&ID=13077708&GUID=08C509A8-B264-4D66-AFDC-B3EC97A5D296>.

augmentation, and the Judicial Council approved the FY 2024–25 partial restoration at its February 21, 2025, business meeting.<sup>5</sup>

Consistent with the Judicial Council’s policy regarding CPI funding included in the budget, the \$40 million for operational cost increases for the trial courts is proposed to be allocated as a proportional increase of 1.6 percent over each trial court’s FY 2024–25 Workload Formula allocation. The proposed allocations are based on the revised FY 2024–25 Workload Formula allocation after the \$42 million restoration, which established a new \$55 million baseline reduction for the trial courts beginning in FY 2024–25 (Attachment 2A).

For FY 2025–26, the \$40 million would be added to the allocation *after* applying the equity-based funding reallocation in the second year of no new money, per the Workload Formula policy, as described in Item 1 of the agenda.

***The final allocation of the \$40 million will be updated based on any needed technical adjustments and is contingent on funding included in the enacted budget for FY 2025–26.***

### **Recommendation**

1. Approve the \$40 million allocation for operational cost increases as a proportional increase over each trial court’s FY 2024–25 Workload Formula allocation as displayed in Attachment 2A, including technical adjustments to the calculation and contingent on funding included in the enacted budget for FY 2025–26.
2. Approve the sequence of funding adjustments for FY 2025–26 so that the \$40 million allocation is added after the equity-based reallocation of existing funding in the second year of no new money (as described in Item 1 of the agenda).

This recommendation will be considered by the Trial Court Budget Advisory Committee, the Judicial Branch Budget Committee, and then the Judicial Council at its July 18, 2025, business meeting.

### **Attachments**

1. **Attachment 2A:** \$40 Million for Trial Court Operational Cost Increases for FY 2025–26

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<sup>5</sup> Judicial Council meeting report (February 21, 2025), <https://jcc.legistar.com/View.ashx?M=F&ID=13753142&GUID=14594704-3AD4-4E4C-B048-F8BA3A96B894>.

### \$40 Million for Trial Court Operational Cost Increases for FY 2025-26

Court	2024-25 Final Workload Formula Allocation as of July 1, 2024	2024-25 Workload Formula Need as of July 1, 2024	2024-25 Workload Formula Percentage (BEFORE \$42m Restoration)	2024-25 Revised Workload Formula Allocation (AFTER \$42m Restoration)	2025-26 Funding Reallocation of \$7.2m (second year of no "new money")	2025-26 \$40m Inflationary Increase Funding	Workload Formula Percentage (AFTER \$7.2m Reallocation and \$40m Inflationary Increase)
	A	B	C(A/B)	D	E	F	G
Alameda	88,446,403	94,645,177	93.45%	89,886,503	(946,452)	1,424,956	95.48%
Alpine	978,500	549,681	178.01%	978,500	-	15,512	180.83%
Amador	4,318,750	4,684,703	92.19%	4,390,031	-	69,594	95.20%
Butte	13,707,099	14,689,951	93.31%	13,930,522	(146,900)	220,838	95.33%
Calaveras	3,299,313	3,767,570	87.57%	3,356,668	37,676	53,213	91.51%
Colusa	2,454,902	2,635,032	93.16%	2,494,996	-	39,553	96.19%
Contra Costa	51,597,645	59,907,816	86.13%	52,494,605	599,078	832,188	90.01%
Del Norte	4,483,485	3,875,339	115.69%	4,542,452	-	72,011	119.07%
El Dorado	9,519,963	10,819,495	87.99%	9,685,455	102,661	153,542	91.89%
Fresno	63,133,105	66,287,167	95.24%	64,141,716	(662,872)	1,016,828	97.30%
Glenn	2,990,182	3,237,289	92.37%	3,039,440	-	48,184	95.38%
Humboldt	8,900,393	9,318,361	95.51%	9,042,179	(93,184)	143,344	97.57%
Imperial	10,163,038	8,073,327	125.88%	10,285,880	(242,200)	163,060	126.43%
Inyo	2,512,390	2,676,571	93.87%	2,553,116	-	40,474	96.90%
Kern	66,272,438	68,776,330	96.36%	67,318,923	(687,763)	1,067,196	98.43%
Kings	10,774,613	12,025,488	89.60%	10,957,590	-	173,709	92.56%
Lake	5,078,997	6,056,222	83.86%	5,167,289	60,562	81,916	87.67%
Lassen	2,581,880	2,580,519	100.05%	2,621,145	-	41,553	103.18%
Los Angeles	713,278,790	791,102,381	90.16%	725,316,029	-	11,498,318	93.14%
Madera	12,659,634	13,875,025	91.24%	12,870,753	-	204,038	94.23%
Marin	14,079,161	15,677,866	89.80%	14,323,909	22,675	227,075	92.96%
Mariposa	1,860,977	1,846,094	100.81%	1,889,067	-	29,947	103.95%
Mendocino	7,672,588	7,775,002	98.68%	7,790,891	(77,750)	123,508	100.79%
Merced	16,500,078	18,264,043	90.34%	16,777,980	-	265,979	93.32%
Modoc	1,372,099	1,480,959	92.65%	1,394,633	-	22,109	95.66%
Mono	2,417,935	2,038,771	118.60%	2,448,957	-	38,823	122.02%
Monterey	26,002,768	28,560,984	91.04%	26,437,346	-	419,107	94.03%
Napa	9,487,748	10,740,134	88.34%	9,652,680	85,415	153,022	92.09%
Nevada	6,570,957	7,425,652	88.49%	6,685,185	54,402	105,979	92.19%
Orange	186,230,932	209,526,287	88.88%	189,468,320	1,214,996	3,003,611	92.44%
Placer	24,862,554	27,355,659	90.89%	25,278,792	-	400,741	93.87%
Plumas	1,897,592	1,629,248	116.47%	1,922,382	-	30,475	119.86%
Riverside	134,884,127	155,691,163	86.64%	137,228,916	1,556,912	2,175,468	90.54%
Sacramento	109,842,203	122,332,264	89.79%	111,751,670	179,185	1,771,581	92.95%
San Benito	4,779,146	4,197,092	113.87%	4,843,008	-	76,775	117.22%
San Bernardino	135,901,495	156,640,095	86.76%	138,263,969	1,566,401	2,191,876	90.67%
San Diego	176,701,558	189,500,353	93.25%	179,584,953	-	2,846,931	96.27%
San Francisco	64,458,077	55,305,114	116.55%	65,299,587	(1,659,153)	1,035,184	116.94%
San Joaquin	49,951,911	53,533,653	93.31%	50,766,116	(535,337)	804,787	95.33%
San Luis Obispo	18,523,163	19,492,482	95.03%	18,819,756	(194,925)	298,347	97.08%
San Mateo	42,988,911	49,033,290	87.67%	43,736,218	490,333	693,343	91.61%
Santa Barbara	26,681,819	29,058,002	91.82%	27,123,960	-	429,992	94.82%
Santa Clara	93,382,508	97,354,039	95.92%	94,863,826	(973,540)	1,503,861	97.99%
Santa Cruz	16,363,507	16,940,790	96.59%	16,621,274	(169,408)	263,494	98.67%
Shasta	16,201,831	18,198,452	89.03%	16,483,479	95,834	261,310	92.54%
Sierra	978,500	623,149	157.02%	978,500	-	15,512	159.51%
Siskiyou	4,314,253	4,841,098	89.12%	4,389,251	23,987	69,582	92.60%
Solano	28,669,037	31,445,139	91.17%	29,147,499	-	462,071	94.16%
Sonoma	30,480,267	30,732,916	99.18%	30,947,892	(307,329)	490,612	101.30%
Stanislaus	31,437,389	37,054,820	84.84%	31,983,888	370,548	507,035	88.68%
Sutter	8,192,412	9,485,325	86.37%	8,334,826	94,853	132,131	90.26%
Tehama	5,876,354	6,426,611	91.44%	5,974,139	-	94,707	94.43%
Trinity	1,987,739	2,276,992	87.30%	2,022,293	22,770	32,059	91.22%
Tulare	32,682,780	38,548,955	84.78%	33,250,929	385,490	527,122	88.62%
Tuolumne	4,818,467	5,085,552	94.75%	4,895,848	(50,856)	77,613	96.80%
Ventura	44,177,371	46,999,346	94.00%	44,892,503	(469,993)	711,674	96.03%
Yolo	15,341,081	17,504,806	87.64%	15,607,767	175,048	247,427	91.58%
Yuba	6,144,600	7,883,564	77.94%	6,251,416	78,836	99,103	81.55%
<b>Total:</b>	<b>2,481,867,415</b>	<b>2,718,089,203</b>	<b>91.31%</b>	<b>2,523,207,415</b>	<b>(0)</b>	<b>40,000,000</b>	<b>94.30%</b>

Floor courts (2)

Cluster 1 courts (13)

\* The final reallocation will be updated based on the new calculated need and other technical adjustments for FY 2025-26 and contingent on funding included in the enacted budget for FY 2025-26.

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

**Title:** Allocation Methodologies for Potential Future Funding Restoration

**Date:** 3/11/2025

**Contact:** Oksana Tuk, Senior Analyst, Judicial Council Budget Services  
916-643-8027 | [oksana.tuk@jud.ca.gov](mailto:oksana.tuk@jud.ca.gov)

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### **Issue**

Consideration of allocation methodology options for the restoration of funding associated with a budget reduction for the trial courts in a future fiscal year. Establishing a policy recommendation and long-term strategy will increase transparency and allow the Judicial Council to address this type of budget situation more efficiently going forward.

This issue is a continuation of the ongoing work of the Funding Methodology Subcommittee (FMS) to consider alternative allocation approaches based on the Workload Formula's core principles to advance the goal of funding equity, stability, and predictability to support trial court operations.

### **Background**

The Judicial Council allocates funding to the trial courts according to its approved allocation methodology, known as the Workload Formula, in addition to other allocation methodologies. The Workload Formula determines the need for funding based on workload measures and has been in place since fiscal year (FY) 2018–19.

To assist with ongoing deliberations and consideration of various allocation methodologies, Judicial Council staff developed a trial court funding and Workload Formula resource guide (**Attachment 3A**). The resource guide includes information on the history of trial court funding, principles of the Workload Formula and the implementation of these principles, data components used in the Workload Formula model to calculate the statewide funding need for the trial courts, and recent examples of funding reductions and restorations included in the state budget.

At its October 30, 2024, meeting,<sup>1</sup> the FMS discussed the allocation methodologies used for previous budget reductions and the restoration of funding in FY 2021–22, as well as various options for future consideration. The subcommittee voted to defer action to allow additional time for further deliberation and to consider input from subcommittee members and the trial courts.

The subcommittee also requested that Judicial Council staff meet with members of the subcommittee to obtain input for additional methodology options for consideration. An initial

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<sup>1</sup> Funding Methodology Subcommittee meeting materials (October 30, 2024)  
[https://courts.ca.gov/system/files/file/tcbac-20241030-fms-materials\\_0.pdf](https://courts.ca.gov/system/files/file/tcbac-20241030-fms-materials_0.pdf)

meeting with council staff occurred on November 14, 2024, and subsequent meetings occurred to deliberate other allocation methodology approaches.

At its December 17, 2024, meeting,<sup>2</sup> the FMS continued to review previous allocation methodologies for budget reductions and funding restoration, and discuss other options for future consideration. The subcommittee directed Judicial Council staff to produce a series of reduction and restoration scenarios using hypothetical dollar amounts to illustrate various allocation methodology approaches for consideration at a future meeting.

The requested scenarios were calculated based on the FY 2024–25 Workload Formula allocation and need amounts for each court as approved by the Judicial Council at its business meeting on July 12, 2024.<sup>3</sup> The scenarios were presented for model purposes only to the FMS at its February 5, 2025, meeting.<sup>4</sup> The FMS approved an allocation methodology recommendation for a potential funding restoration that *occurs in the same fiscal year* the reduction took place.

The subcommittee determined that additional time was needed to consider allocation methodology options for a potential funding restoration in a *future fiscal year* that follows a reduction in a prior fiscal year.

### **Allocation Options for Future Restoration of Funding**

The allocation methodology options for a restoration of funding in a future fiscal year that follows a reduction in a prior fiscal year are based on a hypothetical restoration of \$50 million. The restoration would be applied when a budget reduction in a fiscal year is followed by a restoration in a subsequent fiscal year, and the budget act language specifically refers to the funding as a restoration associated with a prior reduction.

The allocation methodology options, using the hypothetical \$50 million restoration, are presented for model purposes only in **Attachments 3B through 3E** and are described in further detail below:

1. ***Restore funding exactly how it was reduced.*** Funding is allocated to the courts in the same amounts, or a portion thereof, as the initial reduction. This scenario is displayed in **Attachment 3B**.
2. ***Workload Formula.*** The restoration is treated as “new money” and funding is allocated to the courts in the same way new money is allocated using the existing Workload Formula methodology. In general, the Workload Formula allocates the first 50 percent of

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<sup>2</sup> Funding Methodology Subcommittee meeting materials (December 17, 2024)  
<https://courts.ca.gov/system/files/file/tcbac-20241217-fms-materials.pdf>

<sup>3</sup> Judicial Council of Cal., Advisor Com. Rep., *Trial Court Budget: Allocations from the Trial Court Trust Fund and Trial Court Allocations for Fiscal Year 2024–25* (June 17, 2024),  
<https://jcc.legistar.com/View.ashx?M=F&ID=13077708&GUID=08C509A8-B264-4D66-AFDC-B3EC97A5D296>.

<sup>4</sup> Funding Methodology Subcommittee meeting materials (February 5, 2025),  
<https://courts.ca.gov/system/files/file/tcbac-20250205-fms-materials.pdf>

new funding to courts under the statewide average and then the remaining 50 percent is allocated to all courts. This option is presented in two scenarios using both the Workload Formula need and allocation and is displayed in **Attachment 3C**.

3. ***Pro rata restoration allocation.*** This approach will allocate the restoration proportionally to all trial courts based on each court's Workload Formula need or allocation amount. Courts with a greater need or allocation amount will receive a larger share of the restoration. These two scenarios are displayed in **Attachment 3D**.
4. ***Workload Formula with equity adjustment.*** The restoration will first fund those courts under and up to the statewide average, or a portion thereof. To the extent there is additional funding after this step, the remaining amount will be allocated using the existing Workload Formula methodology as described in option #2. This scenario is displayed in **Attachment 3E**.
5. ***Recalculate reduction using initial methodology with restored funding.*** Funding is allocated to the courts using the same methodology approved for the initial reduction. For this approach, the initial reduction amount is backed out of the formula and recalculated with the revised reduction amount. This is the methodology that was approved by the Judicial Council at its February 21, 2025, business meeting<sup>5</sup> for the partial restoration of \$42 million in FY 2024–25 for the \$97 million reduction included in the Budget Act of 2024. The initial \$97 million reduction was recalculated using the revised ongoing \$55 million reduction beginning in FY 2024–25.

## **Recommendation**

Consider the various options for allocation methodologies for the restoration of funding associated with a budget reduction for the trial courts in a future fiscal year to establish a policy recommendation and long-term strategy to address this type of budget situation going forward.

This recommendation will be considered by the Trial Court Budget Advisory Committee, the Judicial Branch Budget Committee, and then the Judicial Council at its July 18, 2025, business meeting.

## **Attachments**

1. **Attachment 3A:** Trial Court Funding and Workload Formula Resource Guide
2. **Attachment 3B:** Funding Restoration Exactly as Reduced
3. **Attachment 3C:** Workload Formula Restoration
4. **Attachment 3D:** Pro Rata Allocation Restoration
5. **Attachment 3E:** Workload Formula with Equity Adjustment Restoration

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<sup>5</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Allocation for Partial Restoration of Trial court Operations Fund for Fiscal Year 2024–25* (February 7, 2025), <https://jcc.legistar.com/View.ashx?M=F&ID=13753142&GUID=14594704-3AD4-4E4C-B048-F8BA3A96B894>





# Trial Court Funding and Workload Formula Resource Guide

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February 2025



Judicial Council of California

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## Background

The allocation of funding appropriated in the state budget to the trial courts is one of the principal responsibilities of the Judicial Council. To carry out this responsibility, the Judicial Council has taken a considerable amount of time and effort over the past several decades to review and refine the allocation process.

**Trial Court Funding Act**—During the 1990s, the state was confronted with a system of funding the trial courts that resulted in a wide disparity in the services offered from court to court and the relative level of funding provided to each court. Many courts did not have sufficient resources to meet their basic constitutional and statutory mandates. County-based funding for the trial courts maximized resources for the courts in counties that set judicial services as a high priority and minimized resources in counties with other priorities.

In an effort to address both the disparities in funding and access to the courts, the Governor and Legislature passed Assembly Bill 233, the Lockyer-Eisenberg Trial Court Funding Act (Stats. 1997, ch. 850), which created a new structure in which the 58 county-funded courts became primarily state-funded.<sup>1</sup> The intent of this change in funding structure was to address the disparity in funding levels across the county court systems and ensure that all Californians have access to justice and similar experiences in resolving their legal disputes in trial courts throughout the state. The act also required the state to assume full responsibility for any growth in the cost of trial court operations.

Immediately upon its passage by the Legislature, the Judicial Council highlighted the primary benefits of AB 233:

- Promote a stable, consistent funding source for the trial courts;
- Promote fiscal responsibility and accountability by the trial courts in managing scarce resources in the most efficient and effective manner;
- Recognize the state as having primary responsibility for trial court funding, thereby enabling the courts, the state, and the counties to engage in long-term planning;
- Enhance equal access to justice by removing disparities resulting from the varying ability of individual counties to address the operating needs of the courts and provide basic and constitutionally mandated services; and
- Provide significant financial relief in all 58 counties, which allowed the counties to redirect local resources to critical programs that serve local constituents.

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<sup>1</sup> Assem. Bill 233 (Stats. 1997, ch. 850), [http://www.leginfo.ca.gov/pub/97-98/bill/asm/ab\\_0201-0250/ab\\_233\\_bill\\_19971010\\_chaptered.pdf](http://www.leginfo.ca.gov/pub/97-98/bill/asm/ab_0201-0250/ab_233_bill_19971010_chaptered.pdf).

The goal of providing equal access to justice is supported by ensuring that there is funding equity among the trial courts. The act came after more than a decade of failed or deficient funding attempts by the Legislature to bring more funding equity to the courts. Previous initiatives in the 1980s and 1990s included (1) block grants for counties for certain judicial positions, (2) increased state participation in the funding of judges' salaries and benefits, and (3) realignment funds, which shifted revenues from the counties to the state General Fund to provide local relief from the fiscal pressures of funding the courts in their respective counties. Unfortunately, these solutions only made modest gains in addressing the funding disparities.

**State Appropriations Limit Adjustment**—In fiscal year (FY) 2005–06, the Governor and the Legislature agreed on a funding approach for the trial courts (Gov. Code, § 77202) to ensure that (1) state appropriations for the trial courts are not eroded, (2) sufficient funding is provided to sustain service levels, and (3) operational cost changes are accommodated without degrading the quality of court services to the public. This new methodology was also intended to grant budgetary independence, as is appropriate for a separate branch of government, and allow for multiyear budget planning, including multiyear bargaining agreements with court labor unions.

In addition to the state General Fund appropriations for the judicial branch to support the trial courts, Government Code section 77202 authorized the use of a cost-of-living and growth adjustment computed by multiplying the year-to-year percentage change in the state appropriations limit as described in section 3 of article XIII B of the California Constitution.

Factors used to calculate the state appropriations limit include changes in population and inflation. The population factor was intended to account for changes in trial court workload, and the inflation factor was intended to address changes in staffing and operating costs. The state appropriations limit adjustment was applied to the state Budget Act appropriations that supported trial court allocations. However, it did not specify how allocations between trial courts were to be made. This funding adjustment process was in place for several fiscal years before it was suspended during the Great Recession, beginning in 2009–10, and never reinstated.

**Trial Court Funding Workgroup**—On September 19, 2012, Governor Edmund G. Brown, Jr., and Chief Justice Tani G. Cantil-Sakauye announced in a joint letter the creation of a new working group to evaluate the state's progress in achieving the goals of the Lockyer-Isenberg Trial Court Funding Act of 1997. The Trial Court Funding Workgroup examined both the express requirements and intent of AB 233 to determine the success of the judicial branch in implementing this major reform.

In a report submitted to the Judicial Council in April 2013, the workgroup concluded that the judicial branch had substantially complied with the Trial Court Funding Act. However, it was also determined that the judicial branch must continue to work to ensure that litigants across the state have equal access to justice and that funding for the branch is allocated in a manner that promotes greater access to the courts.

The workgroup also recommended that the branch identify and consider implementing efficiencies and best practices more uniformly, and adopt appropriate measures to assess improvements in providing access to justice for all Californians.

**Trial Court Budget Working Group**—Concurrent with the work of the Trial Court Funding Workgroup, the Judicial Council’s Trial Court Budget Working Group began an examination of the trial court funding allocation methodologies used by the Judicial Council with the intent to create a budget development methodology and a more equitable allocation methodology for consideration by the Judicial Council.

As a result of the work of these two workgroups, the Judicial Council adopted foundational changes to the way funds were allocated to the trial courts. The most significant actions are identified below, ending with the landmark policy decision to approve the Workload-Based Allocation and Funding Methodology (known as WAFM) on April 26, 2013.

### **Trial Court Allocations Before 2013**

- Prior to 1997, courts were funded by county board of supervisors, which led to wide disparities in levels of funding and access to justice across the 58 counties.
- In FY 1998–99, the Judicial Council directed the Trial Court Budget Commission to allocate \$3 million in ongoing funding to address courts with insufficient resources. Twelve courts qualified for this funding that was approved by the Judicial Council at its January 26, 2000, business meeting.<sup>2</sup>
- Between fiscal years 1998–99 and 2004–05, augmentations to trial court funding were provided through requests for funding submitted to the Department of Finance and the Legislature, and included in the final enacted budgets. The courts applied for funds based on Judicial Council priorities, and working groups made decisions regarding which of the applications to approve.
- In 2005, the Judicial Council approved the use of a weighted caseload study, the Resource Assessment Study (RAS), to assess the need for trial court staff based on workload measures.<sup>3</sup> The RAS model was used for three successive fiscal years, 2005–06 through 2007–08, to allocate a portion of new state appropriations limit funding to courts that the model identified as being historically underfunded. Over three years, approximately \$32 million in new funding was redirected to the baseline budgets of those underfunded courts using the RAS model.

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<sup>2</sup> Judicial Council of Cal., Staff Rep., mins. (Jan. 26, 2000), <https://courts.ca.gov/sites/default/files/courts/default/2024-10/min0100.pdf>.

<sup>3</sup> Judicial Council of Cal., *Report Summary: Fiscal Year 2005–2006 Trial Court Budget Allocations* (July 20, 2005), <https://courts.ca.gov/sites/default/files/courts/default/2024-12/0705item1.pdf>.

- Until FY 2013–14, most changes in trial court funding were allocated based on courts’ then-proportionate share of historical statewide allocations.

### **Implementation of the Workload-Based Allocation Funding Methodology**

At its April 2013 business meeting, the Judicial Council affirmed a shift from a funding model based on historical levels to one based on workload need when it adopted a recommendation from the Trial Court Budget Working Group, now the Trial Court Budget Advisory Committee (TCBAC), for a new trial court budget development and allocation process.

The Trial Court Budget Working Group adopted the RAS model as the basis for the trial court budget development and allocation process. The RAS model demonstrated that the trial courts were funded below necessary levels. At the time, there was no new funding available for equalization and any additional funding for some courts had to be offset by funding reductions to others. Given the extreme financial hardship under which all courts were operating, the Trial Court Budget Working Group recommended against immediate full equalization of Trial Court Trust Fund allocations—the primary special fund that supports trial court operations—based on the RAS model.

Instead, a five-year transition plan to move from historical allocations to workload-based allocations was implemented starting in FY 2013–14. The plan called for 10 percent of allocations to be based on WAFM in that year, increasing to 50 percent in FY 2017–18. In addition, any new money appropriated for general trial court operations was to be allocated using WAFM, and an amount of historical base funding equal to the new money amount would also be reallocated using WAFM. This was intended to accelerate the movement of courts towards greater equity in funding.

Following the action taken at its April 2013 meeting, the Judicial Council approved several subsequent modifications to the WAFM model as described below:

- July 25, 2013–(1) exempted the cluster 1 courts (the cluster system is discussed in more detail in the [Cluster Model section](#) beginning on page 18) from any funding reallocation using WAFM, (2) simplified the cost of labor adjustment calculations, (3) employed a cluster-average salary for the court executive officer, (4) determined that the Bureau of Labor Statistics (BLS) Category 92: Local Government should be used as the comparator, and (5) approved the use of a blended local-state government BLS factor if the proportion of state employees in a jurisdiction is greater than 50 percent;
- August 22, 2013–approved an adjustment request process (ARP) by which trial courts could request adjustments to funding based on workload factors not accounted for in the WAFM model but deemed essential to the operation of a trial court;
- February 20, 2014–(1) approved use of a three-year average BLS adjustment factor, (2) adopted a full-time equivalent (FTE) dollar allotment floor for courts with fewer than 50 employees, (3) established an absolute and graduated funding floor and cap on the size

of the allocation adjustment for courts eligible for the graduated funding floor, and (4) eliminated the cluster 1 exemption put in place in July 2013; and

- July 28, 2017—changed the deadlines and submission requirements for the ARP.

In addition to these policy changes, annual allocations via WAFM were approved by the Judicial Council at its July business meetings. The table below summarizes the reallocation schedule; amount of new funding, if applicable, allocated to the trial courts each year; and the total WAFM-related allocations.

### WAFM Five-Year Implementation

Fiscal Year	Percentage Reallocation	New Funding Allocated (in millions)	Total WAFM-Related Allocation (in millions)
2013–14	10	\$60.0	\$1,498.2
2014–15	15	\$22.7 (shortfall); \$86.3 new	\$1,571.4
2015–16	30	\$67.9	\$1,704.3
2016–17	40	\$19.6	\$1,737.3
2017–18	50	\$0	\$1,745.5

### Implementation of the Workload Formula

In the spring of 2017 and with the end of the five-year transition plan approaching, the TCBAC’s Funding Methodology Subcommittee (FMS) revisited one of the items on its work plan, which was to review WAFM for FY 2018–19 and beyond. To better formulate its approach, the FMS undertook an evaluation of the first five years of WAFM. The goal of this process was threefold: (1) to better understand the model’s impact on the trial courts, (2) to assess whether WAFM achieved the goals that had been set when the model was first put into place in FY 2013–14, and (3) to inform any revisions to the funding methodology going forward.

From those discussions, the FMS articulated a set of objectives, principles, and measures that were later formally adopted as the basis for the modifications to WAFM moving forward. The key objective of WAFM for FY 2018–19 and beyond was to reach equity of available funding based on a model that uses workload and related factors to identify funding need. This was consistent with the underlying objectives of WAFM when it was first established.

At the Judicial Council’s January 12, 2018, business meeting, the work of the FMS and TCBAC culminated with the council approving new policy parameters for the allocation process now known as the Workload Formula. Effective in FY 2018–19, the intent of the Workload Formula was to further the objectives of the judicial branch in reaching workload-based equitable funding

for the trial courts.<sup>4</sup> Additionally, the guiding principles for the Workload Formula were modified from a primary focus on equity to also reflect concerns about the need for greater stability and predictability in funding for the courts. The principles of the Workload Formula include the following:

- Minimize volatility, and maximize stability and predictability to the extent possible;
- Commit to evaluating all submissions as submitted via the Adjustment Request Process;
- Allow time for adjustment and adaptation;
- Be responsive to local circumstances;
- Maintain transparency and accountability;
- Preserve the independent authority of the trial courts; and
- Simplify reporting while maintaining transparency.

At its July 19, 2019, business meeting, the Judicial Council approved recommendations related to how the Workload Formula–based allocations are calculated. These recommendations increased the accuracy and transparency of the Workload Formula by including all relevant sources of funding.<sup>5</sup>

At its September 24, 2019, business meeting, the Judicial Council approved a recommendation to change the Workload Formula policy regarding reallocations in years when no “new money” was included in the budget.<sup>6</sup>

At its January 17, 2020, business meeting, the Judicial Council approved additional changes to the Workload Formula methodology. Changes included technical refinements to the Workload Formula parameters to provide clear allocation methodologies to further the goals of funding equity, minimize adverse funding impacts to the trial courts, and provide clear direction on applying policy parameters.<sup>7</sup>

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<sup>4</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Workload-Based Allocation and Funding Methodology* (Dec. 8, 2017), <https://jcc.legistar.com/View.ashx?M=F&ID=5722980&GUID=EB419556-68BE-4685-A012-6A8D8502A126>.

<sup>5</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Workload Formula-Allocations* (June 25, 2019), <https://jcc.legistar.com/View.ashx?M=F&ID=7338800&GUID=9284F0B3-BCAE-4C0C-A110-49AA99D8A139>.

<sup>6</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Policy for Courts that Exceed 100 Percent of Workload Formula Funding* (Sept. 5, 2019), <https://jcc.legistar.com/View.ashx?M=F&ID=7684283&GUID=BAC36D10-9191-44F8-A59D-4BA133D2560A>.

<sup>7</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Technical Refinement of Approved Workload Formula Methodology* (Dec. 20, 2019), <https://jcc.legistar.com/View.ashx?M=F&ID=7976128&GUID=DC14BAC5-0079-4C0C-A0E6-52C7EC068BB0>.



## Implementation Adjustments and Refinements

### Base Funding Floor Courts

In order to provide the two smallest trial courts with funding to support the minimum level of staffing and operational costs, a base funding floor policy was established.

When WAFM was implemented in FY 2013–14, it was determined that the smallest courts' funding needs could not be established using workload metrics alone. For that reason, the Judicial Council approved a recommendation from the TCBCAC to establish a base funding floor amount of \$750,000 effective in FY 2014–15.<sup>8</sup>

On March 15, 2019, the Judicial Council approved increasing the base funding floor amount from \$750,000 to \$800,000<sup>9</sup> and took further action at its business meeting on March 11, 2022, to increase the base funding floor to \$950,000, effective July 1, 2022.<sup>10</sup> The base funding floor is currently allocated to the two smallest trial courts, Alpine and Sierra. The funding is allocated through a pro rata adjustment to the allocations of all other courts that do not qualify for the base funding floor.

The latest update to the base funding floor amount occurred on March 24, 2023, when the Judicial Council approved the policy change that allowed the two funding floor courts to receive inflationary funding consistent with the other 56 courts when Consumer Price Index (CPI) funding is included in the final budget.<sup>11</sup> The CPI measures inflation as experienced by consumers in their day-to-day living expenses, and the Department of Finance publishes an annual CPI factor that is used to determine the rate of cost increases for various state entities.

In FY 2023–24, the inflationary CPI adjustment was calculated at 3 percent which brought the base funding floor amount to \$978,500. This amount is the same for FY 2024–25 because the Budget Act of 2024 did not include a CPI adjustment due to the state's projected multiyear deficit.

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<sup>8</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Allocations: Revisions to the Workload-Based Allocation and Funding Methodology* (Feb. 10, 2014), <https://courts.ca.gov/sites/default/files/courts/default/2024-10/jc-20140220-itemk.pdf>.

<sup>9</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Base Funding Floor Allocation* (Feb. 13, 2019), <https://jcc.legistar.com/View.ashx?M=F&ID=7058011&GUID=805D0070-0C38-40C7-A8CE-F08E82D8DDD5>.

<sup>10</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Base Funding Floor Allocation* (Feb. 18, 2022), <https://jcc.legistar.com/View.ashx?M=F&ID=10541345&GUID=95859AA1-D4C0-4EAA-B339-EE6F27359A29>.

<sup>11</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Base Funding Floor Inflationary Increases* (Mar. 3, 2023), <https://jcc.legistar.com/View.ashx?M=F&ID=11695190&GUID=BB0B0101-F2C4-4E59-A1EC-59301CF1CE4B>.

## Definition and Impact of “New Money”

At its January 12, 2018, business meeting, the Judicial Council approved new policy parameters for the Workload Formula that specifically addressed how new money included in the budget is to be allocated in the Workload Formula, including the definition of “new money”:<sup>12</sup>

*“New money” is defined as any new ongoing allocation of general discretionary dollars to support costs of trial court workload, excluding funding for benefits and retirement increases.*

Examples of funding that were subsequently identified as new money and allocated to the trial courts using the Workload Formula methodology include:

- FY 2019–20: new judgeship funding; and
- FY 2022–23: equity funding, civil assessment backfill funding, and new judgeship funding.

The Workload Formula allocates funding in years with “new money” in the following manner:

1. Bring all cluster 1 courts up to 100 percent of funding need.
2. Allocate up to 50 percent of remaining funding to courts under the statewide average funding ratio. Allocated funds will bring courts up to but not over the statewide average funding ratio.
3. The first 50 percent allocation of new funding to courts below the statewide average will be scaled by courts’ distance from the statewide average and size based on the courts’ Workload Formula need.
4. Allocate remaining funding to all courts based on the Workload Formula.
5. Allow no court’s allocation to exceed 100 percent of its need unless it is the result of a funding floor calculation.

In fiscal years 2021–22, 2022–23, and 2023–24, the budget included a CPI adjustment to address trial court operational cost increases due to inflation. This funding was intended to benefit all courts. Therefore, it was not allocated according to the Workload Formula methodology described above. Rather, it was allocated proportionally based on applying the CPI percentage increase to the prior year’s Workload Formula allocation for each court in each respective fiscal year. In making the determination to allocate the CPI increases in this manner at the time, the Judicial Council did not specifically address whether the CPI increases, on their own, meet the definition of “new money.”

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<sup>12</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Workload-Based Allocation and Funding Methodology* (Dec. 8, 2017), <https://jcc.legistar.com/View.ashx?M=F&ID=5722980&GUID=EB419556-68BE-4685-A012-6A8D8502A126>.

The Budget Act of 2021 included \$72.2 million ongoing General Fund for the trial courts to address inflationary cost increases. The Judicial Council approved the allocation of the \$72.2 million to all courts using the 3.7 percent CPI-based increase over each court's FY 2020–21 Workload Formula allocation.<sup>13</sup> This approach ensured all courts received funding to address inflationary cost increases.

The following year, the Budget Act of 2022 included \$84.2 million ongoing General Fund for inflationary cost increases. The Judicial Council approved the allocation of the \$84.2 million to all courts as a 3.8 percent increase over each court's FY 2021–22 Workload Formula allocation.<sup>14</sup>

For the third consecutive year, the Budget Act of 2023 included \$74.1 million ongoing General Fund for the trial courts in recognition of increasing operational cost pressures due to rising inflation. The Judicial Council approved the allocation of the \$74.1 million to all courts as a 3 percent increase over each court's FY 2022–23 Workload Formula allocation.<sup>15</sup>

At its July 12, 2024, business meeting, the Judicial Council revisited the “new money” concept as it relates to CPI funding. The council approved the recommendation that CPI funding included in the budget to address inflationary costs for the trial courts is *not* considered “new money” for the purpose of allocating funding via the Workload Formula. The definition of “new money” in the Workload Formula policy was revised accordingly to exclude CPI funding.<sup>16</sup>

### **Allocations in Fiscal Years with “No New Money”**

At its January 17, 2020, business meeting, the Judicial Council approved recommendations to make technical refinements to the Workload Formula policy parameters. Specifically, the reallocation of existing funding for every second year in which no new money is included in the budget will be based on the beginning Workload Formula allocations, distributed to courts via distance from the statewide average and size based on Workload Formula need, in the following sequence:

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<sup>13</sup> Judicial Council of Cal., Judicial Branch Budget Com. Rep., *Trial Court Budget: Allocation Methodology of \$72.2 Million Trial Court Funding in Governor's Proposed 2021–22 Budget* (June 17, 2021), <https://jcc.legistar.com/View.ashx?M=F&ID=9499530&GUID=797D4736-AE15-43D3-84D7-4676D4D7C4B0>.

<sup>14</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Allocations from the Trial Court Trust Fund and Trial Court Allocations for 2022–23* (June 28, 2022), <https://jcc.legistar.com/View.ashx?M=F&ID=11018996&GUID=EFC36BA3-294F-4DC3-8C7E-1AC030ED7B72>.

<sup>15</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Allocations from the Trial Court Trust Fund and Trial Court Allocations for 2023–24* (June 23, 2023), <https://jcc.legistar.com/View.ashx?M=F&ID=12124713&GUID=2A166CFF-E318-4E77-AA91-C06AE38FDFC2>.

<sup>16</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Allocations from the Trial Court Trust Fund and Trial Court Allocations for Fiscal Year 2024–25* (June 17, 2024), <https://jcc.legistar.com/View.ashx?M=F&ID=13077708&GUID=08C509A8-B264-4D66-AFDC-B3EC97A5D296>.

1. Up to 1 percent reduction for courts above the 2 percent band to courts below the 2 percent band.
2. Up to 2 percent reduction for courts above 105 percent of funding need to courts below the 2 percent band.
3. Courts above 105 percent of funding need will not fall below 104 percent of funding need.
4. Courts that penetrate into the band following the up to 1 percent reallocation will not be eligible for additional funding from the 2 percent reallocation from courts above 105 percent of funding need.

In anticipation of no new money included in the FY 2024–25 budget given the state’s projected multiyear deficit, the TCBCAC considered the implementation of the current policy to reallocate existing funding among the courts for the 2024–25 allocations.<sup>17</sup> Based on this policy, there would have been a funding reallocation of \$7.2 million for FY 2024–25. However, because the Budget Act of 2024 included a reduction of \$97 million for the trial courts, it was determined that the reallocation of the \$7.2 million would not be implemented, as this would have resulted in double reductions for some courts.

Since the Workload Formula was implemented in FY 2018–19, there have been no instances of the reallocation of funding due to a second year of no new money included in the budget.

## **Funding Reduction Methodology**

Currently, there is no “standard” methodology for addressing funding reductions. The Workload Formula policy states that a methodology for applying a funding reduction will be determined for each fiscal year in which a reduction occurs. Three recent examples of funding reductions that occurred in fiscal years 2020–21, 2023–24, and 2024–25 are described below.

### **Reduction in Fiscal Year 2020–21**

The Budget Act of 2020 included a \$167.8 million reduction to trial court baseline funding due to the sizeable budget deficit projected as a result of the COVID-19 pandemic. The Judicial Council–approved methodology<sup>18</sup> to allocate this reduction, using a 4 percent band around the statewide funding level, is described below:

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<sup>17</sup> Trial Court Budget Advisory Com. Rep. (May 1, 2024), <https://courts.ca.gov/system/files/file/tcbac-20240501-materialspdf.pdf>.

<sup>18</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Allocations from the Trial Court Trust Fund and Trial Court Allocations for Fiscal Year 2020–21* (July 2, 2020), <https://jcc.legistar.com/View.ashx?M=F&ID=8651228&GUID=27A3B6D8-9783-4865-8C5A-F6697EB58734>.

- Courts within the established band around the statewide average funding level take a proportional reduction, but do not fall outside of the band;
- Courts above the band take an additional 1 percent cut from those within the band without falling into the band;
- Courts below the band take less of a cut than those within the band, scaled by their size and distance from the statewide average, not taking more of a cut than those inside of the band; and
- Cluster 1 courts—all of which are above the band—take the same percentage reduction as courts within the band but are not required to take the additional percentage reduction as those other courts above the band.

The full amount of the reduction was restored in the Budget Act of 2021, and the funding was allocated to the courts in the same amounts as the initial reduction.

### Reduction in Fiscal Year 2022–23

Per the Budget Act of 2022, effective FY 2023–24, the civil assessment backfill amount decreased by \$10 million to \$100 million ongoing, due to the elimination of one-time funding for prior uncollected debt. The backfill amount was also reduced by an additional \$2.5 million for debt service obligation payments as approved by the Judicial Council at its May 12, 2023, business meeting.<sup>19</sup> As a result, there was a total reduction of \$12.5 million ongoing to the amount of civil assessment backfill funding allocated to the trial courts beginning in FY 2023–24.

The \$12.5 million was reduced proportionally based on the courts’ percentage of FY 2022–23 civil assessment backfill funding, with additional adjustments to three courts funded over 100 percent and a redirection of \$421,000 to five courts below the statewide average funding level.<sup>20</sup> As approved by the Judicial Council at its July 21, 2023, business meeting, the \$12.5 million ongoing reduction was reflected in the trial court allocations beginning in FY 2023–24.<sup>21</sup>

### Reduction in Fiscal Year 2024–25

Due to the state’s projected multiyear deficit, the Budget Act of 2024 included an ongoing reduction of \$97 million to trial court operational funding. At its July 12, 2024, business

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<sup>19</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Policy for Courts With Specified Debt Service Obligations Included in the Workload Formula* (Apr. 21, 2023), <https://jcc.legistar.com/View.ashx?M=F&ID=11916929&GUID=4F4B033A-9A14-4C88-8654-8CF355F8E8D5>.

<sup>20</sup> Judicial Branch Budget Com. Rep. (June 6, 2023), <https://courts.ca.gov/system/files/file/jbbc-20230606-materials.pdf>.

<sup>21</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Allocations from the Trial Court Trust Fund and Trial Court Allocations for 2023–24* (June 23, 2023), <https://jcc.legistar.com/View.ashx?M=F&ID=12124713&GUID=2A166CFF-E318-4E77-AA91-C06AE38FDFC2>.

meeting,<sup>22</sup> the Judicial Council approved the allocation methodology for this reduction, which was similar to the methodology used for the FY 2020–21 reduction. The \$97 million reduction was calculated based on the steps described on page 13 utilizing a 4 percent band around the statewide average funding level.

The FY 2025–26 Governor’s Budget proposed to restore \$42 million of the \$97 million reduction beginning in FY 2024–25. On a one-time basis, in FY 2024–25, the partial restoration will be funded by available reserves in the Trial Court Trust Fund. The administration will reassess the condition of the Trial Court Trust Fund in the spring of 2025 to evaluate the need for a General Fund backfill.

## **Recent Funding to Support Equity**

### **Funding Provided in Fiscal Year 2018–19**

The Budget Act of 2018 included \$75 million in discretionary funding intended to benefit all trial courts and allocated according to a methodology determined by the Judicial Council.<sup>23</sup> The budget also included \$47.8 million that was allocated by the Judicial Council according to WAFM to 35 courts to equalize funding and bring all courts up to the statewide average funding level based on caseweights at that time.<sup>24</sup>

### **Funding Provided in Fiscal Year 2022–23**

The Budget Act of 2022 included \$100 million ongoing General Fund to promote fiscal equity among the trial courts. This funding was allocated by the Judicial Council according to the Workload Formula and distributed to 22 of the 58 courts below the statewide average funding level to bring them as close to the statewide average as calculated for FY 2022–23.<sup>25</sup> The budget also included funding for new judgeships and civil assessment backfill that was allocated via the Workload Formula methodology.

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<sup>22</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Allocations from the Trial Court Trust Fund and Trial Court Allocations for Fiscal Year 2024–25* (June 17, 2024), <https://jcc.legistar.com/View.ashx?M=F&ID=13077708&GUID=08C509A8-B264-4D66-AFDC-B3EC97A5D296>.

<sup>23</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Allocation of \$75 Million in Discretionary Funds* (Aug. 30, 2018), <https://jcc.legistar.com/View.ashx?M=F&ID=6613660&GUID=262131C4-DD88-4D30-9B94-CE8E2550BEC3v>.

<sup>24</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: 2018–19 Trial Court Base Allocations* (June 8, 2018), <https://jcc.legistar.com/View.ashx?M=F&ID=6353563&GUID=B6C7B821-0722-4663-B27A-A23B367148E2>.

<sup>25</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Allocations from the Trial Court Trust Fund and Trial Court Allocations for 2022–23* (June 28, 2022), <https://jcc.legistar.com/View.ashx?M=F&ID=11018996&GUID=EFC36BA3-294F-4DC3-8C7E-1AC030ED7B72>.

## Resource Assessment Study Implementation

### RAS Policies and Methodology

In 2000, the Judicial Council’s Office of Court Research (now known as the Research, Analytics, and Data Office) was directed to develop workload measures for nonjudicial trial court staff with the goal of developing a method for allocating resources to the trial courts that takes workload into account. The Judicial Council approved the Resource Allocation Study model, known as RAS, at its July 20, 2005, meeting.<sup>26</sup> Later, RAS was revised to Resource Assessment Study to better reflect the model’s use in assessing, not allocating, workload.

The RAS model is based on weighted caseload, a nationally known and accepted methodology for trial court workload measurement. The methodology for weighted caseload was developed by the National Center for State Courts and is based on the principle that funding should be linked to workload. In addition to California, at least 30 other states use weighted caseload models to measure the work activities of court staff, judicial officers, and other entities connected with the court system.

Weighted caseload relies on three basic components: (1) annual, three-year average court filings; (2) caseweights and other model parameters that estimate how much time or resources court case processing activities take; and (3) a staff-year value, which quantifies the amount of time staff have for their work activities. The resulting calculation is an estimate of the staff needed for each court’s case processing work, expressed as full-time equivalents (FTE).

As part of the process for determining annual trial court allocations, the RAS FTE need is computed and then converted to a dollar estimate. The RAS FTE need is calculated using the average of the three most recent years of filings data and the most current set of workload measures available.

California’s RAS model calculates over 20 different caseweights. It uses an average number of processing minutes per case type, taking into account differences in workload complexity and time to process, and multiplies those weighting factors by the number of filings in each case type in each court. The total number of minutes for all case types in a court, based on each court’s unique case mix, constitutes the “workload” for each court. This workload is then used to calculate how many trial court staff are needed to process these cases. The RAS is updated periodically to address changes in the caseweights, which are often driven by changes in the law that impact case processing.

The model was first used in three fiscal years (2005–06 through 2007–08) to identify historically underfunded courts and redirect a portion of new state appropriations limit funding to those courts identified, based on workload, as the most severely underfunded.

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<sup>26</sup> Judicial Council of Cal., Staff Rep., *Report Summary: Fiscal Year 2005–2006 Trial Court Budget Allocations* (July 20, 2005), <https://courts.ca.gov/sites/default/files/courts/default/2024-12/0705item1.pdf>.

In February 2013, the Judicial Council approved an updated version of the RAS model with caseweights and other parameters derived from a 2010 time study.<sup>27</sup> In the same year, the Judicial Council approved a recommendation to adopt a new funding model, known as WAFM (described in detail beginning on page 6) that would use the RAS model as the basis for its workload-based funding model.<sup>28</sup> The council's approval of the RAS models were made with the understanding that ongoing technical adjustments would be made to the model as needed and as more data became available.

Two technical adjustments were proposed to the model following its approval in 2013: (1) a recommendation from the TCBC that the committee study special circumstance workload;<sup>29</sup> and (2) a request to develop an interim caseweight (pending the RAS model update) to measure the workload in complex civil cases, following the dissolution of the complex civil pilot program and corresponding State Trial Court Improvement and Modernization Fund funding. An interim caseweight to measure complex civil workload was approved by the Judicial Council at its June 26, 2015, meeting and implemented starting with the FY 2015–16 budget allocations.<sup>30</sup>

The sequential update of the RAS model was approved by the Judicial Council at its July 27, 2017, business meeting.<sup>31</sup>

On July 24, 2020, the Judicial Council approved the adoption of a new, interim caseweight to measure the workload of mental health certification hearings under Welfare and Institutions Code section 5250 that are performed by court staff.<sup>32</sup> Starting on July 1, 2018, these petitions started being collected in the Judicial Branch Statistical Information System. Since they have a very different workload profile than that of other mental health filings, it was more accurate to establish a separate weight for certification workload rather than use the existing mental health caseweight. Establishing an interim, separate weight helped ensure that the workload for this

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<sup>27</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Courts: Update of the Resource Assessment Study Model* (Feb. 8, 2013), <https://courts.ca.gov/sites/default/files/courts/default/2024-10/jc-20130226-itemm.pdf>.

<sup>28</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget Working Group: Recommendation of New Budget Development and Allocation Methodology* (Apr. 24, 2013), <https://courts.ca.gov/sites/default/files/courts/default/2024-10/jc-20130426-itemp.pdf>.

<sup>29</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Allocations: Revisions to the Workload-Based Allocation and Funding Methodology* (Feb. 10, 2014), <https://courts.ca.gov/sites/default/files/courts/default/2024-10/jc-20140220-itemk.pdf>.

<sup>30</sup> Judicial Council of Cal., mins., (June 25, 2015), <https://courts.ca.gov/sites/default/files/courts/default/2024-10/jc-20150626-minutes.pdf>.

<sup>31</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Courts: Update of Resource Assessment Study Model* (June 13, 2017), <https://jcc.legistar.com/View.ashx?M=F&ID=5338582&GUID=FA2962D0-141A-40D4-B9CA-CB5C2467A49Cv>.

<sup>32</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Courts: Interim Caseweight for Mental Health Certification Hearings for Use in Resource Assessment Study Model* (June 30, 2020), <https://jcc.legistar.com/View.ashx?M=F&ID=8643451&GUID=CDF1174A-E96B-4478-9BF5-AE2ACEA883FC>.



case type was captured as part of the annual RAS updates until the workload could be more fully studied during the RAS model update and a more permanent weight was developed.

Mental Health Certification was included as a caseweight category, and workload was captured during a time study as part of the 2024 RAS model update. (The 2024 update is not yet completed or approved.)

### Converting FTE to Dollars

Once the number of staff has been calculated, this information is converted into dollars using an average salary cost, adjustments for cost-of-labor differentials based on U.S. BLS data, retirement and health costs, operating expenditure and equipment costs, and other adjustments to account for court size. The workload need is updated each year to reflect the most recent three-year average of filings data.

### RAS Model Overview

Each fiscal year, the RAS model is used to estimate the total FTE need in each court using the following formula:

$$\text{Total Need (FTE)} = \text{Staff Need} + \text{Manager Need} + \text{Administrative Staff Need}$$

#### Step 1: Staff Need

Staff need is calculated using a weighted caseload methodology. The total need is calculated for each case type and then summed across all case types using the following formula:

$$\text{Staff Need (FTE)} = \frac{\text{Average Filings} * \text{Caseweight (mins.)} + \text{Court Reporter Need}}{\text{Staff Year Value (mins.)}}$$

The components of this formula include:

- Average filings: three-year average filings for a given case type;
- Caseweight: estimated staff time to process a filing of a given case type;
- Staff year value: estimated minutes available for case processing per FTE per year; and
- Court reporter need: judicial need multiplied by a factor of 1.25 in relevant case types.

The methodology for determining judicial need, which is the number of judgeships needed in the trial courts, is a workload-based methodology similar to the RAS which is used to assess staff need in the trial courts. The judicial need methodology was first approved by the Judicial Council in August 2001 and later modified and approved by the council in August 2004. The model was updated in 2010 and most recently in 2018, and the resulting updated caseweights were approved by the Judicial Council in December 2011 and September 2019, respectively.

## Step 2: Manager Need

Manager need is calculated by dividing the staff need (Step 1), plus each court's court interpreter FTE, by a ratio of staff to managers and supervisors. This allocates managerial resources in proportion to staffing need using the following formula:

$$\text{Manager Need (FTE)} = \frac{\text{Staff Need (FTE)} + \text{Court Interpreters (FTE)}}{\text{Cluster Ratio}}$$

The cluster manager ratio is calculated using actual data as reported by the courts in the last three years' Schedule 7A data. The Schedule 7A process establishes all authorized trial court positions by classification and associated costs, and is used to develop the annual budget. To reflect economies of scale, separate ratios are calculated for courts in clusters 1, 2, 3, and 4.

## Step 3: Administrative Staff Need

Staff support need is based on the same principles as manager need (Step 2). In this case, the combined staff and manager need is added to existing Non-RAS FTE before applying the ratio.

$$\text{Administrative Staff Need (FTE)} = \frac{\text{Staff Need (FTE)} + \text{Manager Need (FTE)} + \text{Non-RAS FTE}}{\text{Cluster Ratio}}$$

The cluster administrative staff ratio is calculated using actual data as reported by the courts in the last three years' Schedule 7A data. To reflect economies of scale, separate ratios are calculated for courts in clusters 1 and 2, and a pooled ratio is used for clusters 3 and 4.

## Cluster Model

The cluster model is used in both the RAS model and the Workload Formula. It is used in two areas in the RAS model and two areas in the Workload Formula. (It is also used when making decisions in the Workload Formula, specifically to identify the smallest courts (cluster 1) to bring them to the 100 percent funding level.) Decisions on clustering may involve discussions and recommendations by the Data Analytics Advisory Committee and the FMS as their use impacts the RAS and the Workload Formula.

## Cluster Model Background

The current four-cluster model was developed in the early 2000s. It was primarily informed based on the number of Authorized Judicial Positions (AJP). Courts were ranked by their number of AJPs first and then grouped into four clusters. The model was used as a stable proxy for court size.

Cluster boundaries were created based on a clear break in the number of AJPs. The smallest of the 58 trial courts, those with two AJPs, comprised cluster 1 courts. The remaining three clusters were identified based on natural breaks—or jumps—in the total number of AJPs.

Based on the most recent review (done in FY 2020–21), the number of AJPs had not changed significantly since their initial use in the RAS model in FY 2004–05. Notable exceptions included the Riverside, San Bernardino, and San Francisco superior courts:

- Riverside and San Bernardino had significant increases in their AJPs due to allocations of new judgeships approved by the Legislature over the last few years. However, these increases did not change their cluster status (they were/are cluster 4).
- San Francisco’s AJP count dropped from 65 to 55.9 when the court eliminated 10 subordinate judicial officer positions in 2014. Due to this change, San Francisco was moved from cluster 4 to cluster 3. The request to change clusters was submitted via an ARP to the TCBAC, and the change was approved by the Judicial Council in FY 2020–21.<sup>33</sup>

### Cluster Model Use in RAS/Workload Formula

The cluster model is applied in two areas when developing the RAS model and in two areas in the Workload Formula. The ratios are updated every three years:

#### **RAS:**

1. Supervisor/Manager ratio (RAS): The number of staff to supervisor
2. Administrative Staff (Program 90)/Case Processing Staff (Program 10) ratio (RAS): The number of Program 90 staff (Human Resources, Information Technology, etc.) to Program 10 staff (case processing)

#### **Workload Formula:**

1. Court Executive Officer Salary (Workload Formula)
2. Operating Expenses and Equipment (Workload Formula)—Essential one number for C1 and one for all others

The cluster concept is also used in the Workload Formula when identifying the smallest courts (C1) to bring them to 100 percent of the funding need level (when new money is provided in the Budget Act).

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<sup>33</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Workload Formula Adjustment Request Process (ARP), Cluster Assignment Evaluation for the Superior Court of San Francisco County* (June 30, 2020), <https://jcc.legistar.com/View.ashx?M=F&ID=8643165&GUID=506C4AE4-3DD1-4559-B281-C6D055EC103C>.

## Library of Definitions

### Terms

**Adjustment request process (ARP)** – Judicial Council process by which the trial courts can request adjustments to funding based on workload factors not accounted for in the Workload Formula model but deemed essential to the operation of a trial court.

**Allocation** – Method of dividing and distributing appropriated funding to entities within the judicial branch, such as the 58 trial courts.

**Appropriation** – A budget appropriation is a law that designates funding for specific purposes. Appropriations are a part of the budget-making process for governments and associated agencies, and are usually limited in the amount and period of time during which the expenditures are authorized.

**Authorized Judicial Position (AJP)** – Authorized positions that ensure a court has the necessary judicial resources, such as judgeships, commissioners, and referees within a trial court that are officially approved and funded through the state budget process.

**Band** – A statistical concept where a range of values is plotted around the calculated average. (In terms of funding allocation, a 4 percent band would be a range between 2 percent above the statewide average funding level and 2 percent below.)

**Base allocation funding** – Calculated each fiscal year by adjusting the prior year’s ongoing base funding allocation with new ongoing funding and adjustments. (Any one-time expired allocations are removed.)

**Base funding floor** – A set funding amount established and allocated for the two smallest superior courts (Alpine and Sierra). It is based on the minimum level of staffing and operational costs necessary to support general court operations and is not related to their Workload Formula need.

**Bureau of Labor Statistics (BLS)** – The Bureau of Labor Statistics identifies labor cost differences between courts in various regions of the state. It is a component of the Workload Formula need calculation for trial court funding.

**Caseweights** – A component of the Workload Formula (workload analysis) that assigns weights to cases based on the duration and resources required to process the specific case types.

**Cluster model** – The current four-cluster model, developed in the early 2000s, ranks courts by their number of Authorized Judicial Positions. The cluster model is applied in the RAS model, Workload Formula, and other decision points where each cluster carries a particular value.

**Consumer Price Index (CPI)** – A measure of the average change over time in the prices paid by urban consumers for consumer goods and services. The CPI is calculated and provided by the U.S. Bureau of Labor Statistics.

**CPI funding** – Funding included in the budget and allocated to all courts as a specific CPI percent increase over each court’s prior fiscal year Workload Formula allocation.

**Current-year base adjustments** – Various allocation adjustments for base funding for the trial courts including funding floor allocation adjustments, supplemental funding adjustments when a court receives emergency funding in the prior year, and midyear adjustments for court allocations, such as the final reduction for fund balance above the 3 percent statutory cap.

**Data Analytics Advisory Committee (DAAC)** – Advisory body to the Judicial Council that develops and recommends policies on the collection, use, analysis, and sharing of judicial branch data and information resources.

**Discretionary funding** – Funding for the trial courts that has no restriction on what it can be used for and what can be expended at the courts’ discretion.

**Filing** – Submission of documents into the court record with associated filing fee to initiate or continue a legal case. The various filing types include complaints, answers, motions, petitions, briefs, declarations, etc.

**Fiscal year (FY)** – The 12-month period for accounting, financial reporting, and budgeting purposes, not necessarily aligning with a calendar year. California’s fiscal year begins July 1 and ends June 30 of the following year.

**Full-time equivalent (FTE)** – Excluding overtime but including holidays and paid vacations, the value that results from dividing the maximum amount of regular time a position is authorized to work in a fiscal year (July 1–June 30) by the standard maximum annual time established by the court (typically 2,080 hours). For example, a position authorized to work no more than 1,040 regular hours in a fiscal year is assigned an FTE value of 0.5. Except for temporary help blankets, the FTE value for each position can equal but not exceed 1.0.

**Funding Methodology Subcommittee (FMS)** – A subcommittee of the Trial Court Budget Advisory Committee tasked to review and refine the Workload Formula, develop allocation methodologies for nondiscretionary funding, evaluate existing allocation methodologies, and consider alternative methodologies to advance the goal of funding equity and stability to support trial court operations.

**Inflation** – The gradual price increase of goods and services in an economy over time that are indexed and typically referred to as the Consumer Price Index.

**Judicial Need** – The workload-based methodology used to determine the number of judgeships needed in the trial courts. This methodology is separate from, but similar to, the Resource Assessment Study, which is used to assess staff need in the trial courts.

**New money** – Any new ongoing discretionary funding to support the cost of trial court workload, excluding funding for benefits and retirement increases

**Nonbase allocations** – Various funding included in the budget as a separate item with dollar amounts that change annually (i.e., self-help, dependency counsel, and court interpreters funding).

**Non-TCTF base allocations** – Funding provided from the General Fund for employee benefits and pretrial funding. Typically, a static amount per court provided in December distributions.

**One-time allocations** – Funding identified as one-time is either provided for a single year, such as funding for COVID-19 related case filing backlog, and allocated in a single year, or provided annually and reallocated each year, such as criminal justice realignment funding.

**Ongoing allocations** – Allocations that remain in the base funding and are carried forward into the base allocation for future fiscal years (i.e., trial court benefit cost changes).

**Prior year adjustment** – An adjustment to the prior year base allocation to account for changes that were not captured previously.

**Resource Assessment Study (RAS)** – The model used to assess the workload need and allocation of staff resources to the trial courts. This methodology is separate from, but similar to, the Judicial Need, which is used to assess the number of judgeships needed in the trial courts.

**Restricted funding** – Typically identified in a budget act through provisional language, allowing expenditures for the specific purpose of the appropriated funding (i.e., CARE Act and court interpreters funding).

**Schedule 7A** – A worksheet used to start the budget process that includes trial courts' budgeted salaries and benefits for each court staff position by classification, excluding judges. Schedule 7A data is included in the Workload Formula and RAS models to derive statewide FTEs and salary costs for various positions.

**State appropriations limit (SAL)** – The constitutional limit on the growth of certain appropriations from tax proceeds, generally set to the level of the prior year's appropriation limit as adjusted for changes in cost of living and population.

**Statewide average funding level** – The ratio of available funding in a given fiscal year to the total estimated Workload Formula funding need for all trial courts.

**Superior court** – In California, the trial court in any of the 58 counties that tries and determines legal cases. A single superior court may have branches in multiple cities within the county.

**Trial Court Budget Advisory Committee (TCBAC)** – Advisory body to the Judicial Council that provides input on trial court funding issues and the budget process for the benefit of all courts statewide and proposes recommendations to the Judicial Council on trial court funding consistent with council goals.

**Trial Court Trust Fund (TCTF)** – The special fund within the judicial branch's budget that includes appropriations to fund trial court operations, salaries and benefits of superior court judges, court interpreter services, assigned judge services, and local assistance grants.

**Workload Formula** – The Judicial Council–approved methodology currently used to allocate a portion of funding to the trial courts with a focus on funding equity, stability, and predictability.

**Workload Formula allocation** – The amount of available funding allocated through the Workload Formula methodology.

**Workload Formula need** – The amount of funding needed to fully support annual court workload based on the calculated funding need.

**Workload-Based Allocation Funding Methodology (WAFM)** – Methodology used to allocate funding to the trial courts in fiscal years 2013–14 through 2017–18. Funding was allocated based on workload as derived from filings, which required shifts in the baseline funding from some courts to others and was phased in over a five-year period.

## Acronyms

**APJ** – Authorized Judicial Positions

**ARP** – Adjustment Request Process

**BLS** – Bureau of Labor Statistics

**C1, C2, C3, and C4** – Court clusters 1, 2, 3, and 4 (relative to the four-cluster model)

**CPI** – Consumer Price Index

**CY** – Current Year (in terms of current fiscal year)

**FY** – Fiscal Year (in terms of state fiscal year, it is a 12-month period from July 1 to June 30)

**DAAC** – Data Analytics Advisory Committee

**FMS** – Funding Methodology Subcommittee

**FTE** – Full-time Equivalent

**JBSIS** – Judicial Branch Statistical Information System

**PY** – Prior Year (in terms of previous fiscal year)

**RAS** – Resource Assessment Study

**TCBAC** – Trial Court Budget Advisory Committee

**TCTF** – Trial Court Trust Fund

**WAFM** – Workload-Based Allocation and Funding Methodology

**WF** – Workload Formula

# [For Model Purposes Only]

## Funding Restoration Exactly As Reduced

Attachment 3B

This scenario represents a methodology using a hypothetical restoration amount of \$50 million as an example.

Court	2024-25 Revised Workload Formula Allocation (after \$42m restoration)	2024-25 Workload Formula Need as of July 1, 2024	2024-25 Workload Formula Percentage (BEFORE \$50m Restoration)
	A	B	C (A/B)
Alameda	89,886,503	94,645,177	94.97%
Alpine	978,500	549,681	178.01%
Amador	4,390,031	4,684,703	93.71%
Butte	13,930,522	14,689,951	94.83%
Calaveras	3,356,668	3,767,570	89.09%
Colusa	2,494,996	2,635,032	94.69%
Contra Costa	52,494,605	59,907,816	87.63%
Del Norte	4,542,452	3,875,339	117.21%
El Dorado	9,685,455	10,819,495	89.52%
Fresno	64,141,716	66,287,167	96.76%
Glenn	3,039,440	3,237,289	93.89%
Humboldt	9,042,179	9,318,361	97.04%
Imperial	10,285,880	8,073,327	127.41%
Inyo	2,553,116	2,676,571	95.39%
Kern	67,318,923	68,776,330	97.88%
Kings	10,957,590	12,025,488	91.12%
Lake	5,167,289	6,056,222	85.32%
Lassen	2,621,145	2,580,519	101.57%
Los Angeles	725,316,029	791,102,381	91.68%
Madera	12,870,753	13,875,025	92.76%
Marin	14,323,909	15,677,866	91.36%
Mariposa	1,889,067	1,846,094	102.33%
Mendocino	7,790,891	7,775,002	100.20%
Merced	16,777,980	18,264,043	91.86%
Modoc	1,394,633	1,480,959	94.17%
Mono	2,448,957	2,038,771	120.12%
Monterey	26,437,346	28,560,984	92.56%
Napa	9,652,680	10,740,134	89.87%
Nevada	6,685,185	7,425,652	90.03%
Orange	189,468,320	209,526,287	90.43%
Placer	25,278,792	27,355,659	92.41%
Plumas	1,922,382	1,629,248	117.99%
Riverside	137,228,916	155,691,163	88.14%
Sacramento	111,751,670	122,332,264	91.35%
San Benito	4,843,008	4,197,092	115.39%
San Bernardino	138,263,969	156,640,095	88.27%
San Diego	179,584,953	189,500,353	94.77%
San Francisco	65,299,587	55,305,114	118.07%
San Joaquin	50,766,116	53,533,653	94.83%
San Luis Obispo	18,819,756	19,492,482	96.55%
San Mateo	43,736,218	49,033,290	89.20%
Santa Barbara	27,123,960	29,058,002	93.34%
Santa Clara	94,863,826	97,354,039	97.44%
Santa Cruz	16,621,274	16,940,790	98.11%
Shasta	16,483,479	18,198,452	90.58%
Sierra	978,500	623,149	157.02%
Siskiyou	4,389,251	4,841,098	90.67%
Solano	29,147,499	31,445,139	92.69%
Sonoma	30,947,892	30,732,916	100.70%
Stanislaus	31,983,888	37,054,820	86.32%
Sutter	8,334,826	9,485,325	87.87%
Tehama	5,974,139	6,426,611	92.96%
Trinity	2,022,293	2,276,992	88.81%
Tulare	33,250,929	38,548,955	86.26%
Tuolumne	4,895,848	5,085,552	96.27%
Ventura	44,892,503	46,999,346	95.52%
Yolo	15,607,767	17,504,806	89.16%
Yuba	6,251,416	7,883,564	79.30%
<b>Total:</b>	<b>2,523,207,415</b>	<b>2,718,089,203</b>	<b>92.83%</b>

2024-25 Revised Reduction of \$55.6m	Proportional Restoration of \$50m based on Revised Reduction of \$55.6m	2024-25 Workload Formula Allocation (AFTER \$50m Restoration)	2024-25 Workload Formula Percentage (AFTER \$50m Restoration)
D	E	F (A+E)	G (F/B)
(2,884,769)	2,592,259	92,478,762	97.71%
-	-	978,500	178.01%
(95,942)	86,214	4,476,245	95.55%
(360,287)	323,755	14,254,277	97.03%
(53,833)	48,374	3,405,042	90.38%
(53,965)	48,493	2,543,489	96.53%
(841,887)	756,521	53,251,126	88.89%
(79,366)	71,319	4,613,770	119.05%
(155,331)	139,581	9,825,036	90.81%
(2,020,422)	1,815,555	65,957,271	99.50%
(66,299)	59,577	3,099,016	95.73%
(284,022)	255,223	9,297,402	99.78%
(246,074)	221,122	10,507,002	130.14%
(54,816)	49,258	2,602,374	97.23%
(2,096,291)	1,883,731	69,202,654	100.62%
(246,280)	221,308	11,178,898	92.96%
(82,871)	74,468	5,241,757	86.55%
(52,849)	47,490	2,668,635	103.41%
(16,201,647)	14,558,828	739,874,857	93.52%
(284,158)	255,345	13,126,098	94.60%
(229,721)	206,428	14,530,337	92.68%
(37,808)	33,974	1,923,041	104.17%
(236,981)	212,951	8,003,842	102.94%
(374,045)	336,117	17,114,097	93.70%
(30,330)	27,254	1,421,888	96.01%
(41,754)	37,520	2,486,477	121.96%
(584,924)	525,614	26,962,960	94.40%
(154,806)	139,109	9,791,789	91.17%
(107,214)	96,343	6,781,527	91.33%
(3,038,614)	2,730,504	192,198,824	91.73%
(560,239)	503,432	25,782,224	94.25%
(33,367)	29,983	1,952,365	119.83%
(2,200,820)	1,977,661	139,206,577	89.41%
(1,792,227)	1,610,498	113,362,168	92.67%
(85,956)	77,240	4,920,248	117.23%
(2,217,420)	1,992,578	140,256,547	89.54%
(3,880,936)	3,487,416	183,072,369	96.61%
(1,685,691)	1,514,765	66,814,351	120.81%
(1,616,188)	1,452,310	52,218,426	97.54%
(594,128)	533,884	19,353,640	99.29%
(701,423)	630,300	44,366,518	90.48%
(595,103)	534,761	27,658,720	95.18%
(2,967,335)	2,666,453	97,530,278	100.18%
(516,352)	463,995	17,085,270	100.85%
(264,355)	237,550	16,721,029	91.88%
-	-	978,500	157.02%
(70,393)	63,255	4,452,506	91.97%
(643,991)	578,692	29,726,191	94.53%
(936,734)	841,751	31,789,643	103.44%
(512,944)	460,933	32,444,821	87.56%
(133,670)	120,117	8,454,943	89.14%
(131,616)	118,270	6,092,410	94.80%
(32,433)	29,144	2,051,437	90.09%
(533,265)	479,192	33,730,121	87.50%
(155,007)	139,289	5,035,137	99.01%
(1,432,532)	1,287,276	46,179,779	98.26%
(250,311)	224,930	15,832,696	90.45%
(100,258)	90,092	6,341,507	80.44%
<b>(55,642,000)</b>	<b>50,000,000</b>	<b>2,573,207,415</b>	<b>94.67%</b>

Floor courts (2)  
Cluster 1 courts (13)



# [For Model Purposes Only]

## Workload Formula Restoration

Attachment 3C

This scenario represents a methodology using a hypothetical restoration amount of \$50 million as an example.

Court	2024-25 Revised Workload Formula Allocation (after \$42m restoration)	2024-25 Workload Formula Need as of July 1, 2024	2024-25 Workload Formula Percentage (BEFORE \$50m Restoration)	Workload Formula Restoration of \$50m on WF Need	2024-25 Workload Formula Percentage (AFTER \$50m Restoration)	Workload Formula Restoration of \$50m on WF Allocation	2024-25 Workload Formula Percentage (AFTER \$50m Restoration)	Difference in Restoration Allocation	Difference in Workload Formula Percentage (AFTER \$50m Restoration)
	A	B	C (A/B)		D		E		
Alameda	89,886,503	94,645,177	94.97%	890,100	95.91%	890,100	95.91%	-	0.00%
Alpine	978,500	549,681	178.01%	-	178.01%	-	178.01%	-	0.00%
Amador	4,390,031	4,684,703	93.71%	294,672	100.00%	294,672	100.00%	-	0.00%
Butte	13,930,522	14,689,951	94.83%	138,153	95.77%	138,153	95.77%	-	0.00%
Calaveras	3,356,668	3,767,570	89.09%	410,902	100.00%	410,902	100.00%	-	0.00%
Colusa	2,494,996	2,635,032	94.69%	140,036	100.00%	140,036	100.00%	-	0.00%
Contra Costa	52,494,605	59,907,816	87.63%	2,860,658	92.40%	2,855,500	92.39%	5,157	0.01%
Del Norte	4,542,452	3,875,339	117.21%	-	117.21%	-	117.21%	-	0.00%
El Dorado	9,685,455	10,819,495	89.52%	278,215	92.09%	279,417	92.10%	(1,202)	-0.01%
Fresno	64,141,716	66,287,167	96.76%	623,404	97.70%	623,404	97.70%	-	0.00%
Glenn	3,039,440	3,237,289	93.89%	197,849	100.00%	197,849	100.00%	-	0.00%
Humboldt	9,042,179	9,318,361	97.04%	87,635	97.98%	87,635	97.98%	-	0.00%
Imperial	10,285,880	8,073,327	127.41%	-	127.41%	-	127.41%	-	0.00%
Inyo	2,553,116	2,676,571	95.39%	123,455	100.00%	123,455	100.00%	-	0.00%
Kern	67,318,923	68,776,330	97.88%	646,814	98.82%	646,814	98.82%	-	0.00%
Kings	10,957,590	12,025,488	91.12%	168,813	92.52%	169,403	92.53%	(590)	0.00%
Lake	5,167,289	6,056,222	85.32%	511,670	93.77%	511,670	93.77%	-	0.00%
Lassen	2,621,145	2,580,519	101.57%	-	101.57%	-	101.57%	-	0.00%
Los Angeles	725,316,029	791,102,381	91.68%	9,128,814	92.84%	9,148,630	92.84%	(19,816)	0.00%
Madera	12,870,753	13,875,025	92.76%	130,600	93.70%	130,601	93.70%	(2)	0.00%
Marin	14,323,909	15,677,866	91.36%	201,419	92.65%	202,017	92.65%	(598)	0.00%
Mariposa	1,889,067	1,846,094	102.33%	-	102.33%	-	102.33%	-	0.00%
Mendocino	7,790,891	7,775,002	100.20%	-	100.20%	-	100.20%	-	0.00%
Merced	16,777,980	18,264,043	91.86%	199,755	92.96%	200,094	92.96%	(339)	0.00%
Modoc	1,394,633	1,480,959	94.17%	86,326	100.00%	86,326	100.00%	-	0.00%
Mono	2,448,957	2,038,771	120.12%	-	120.12%	-	120.12%	-	0.00%
Monterey	26,437,346	28,560,984	92.56%	272,029	93.52%	272,077	93.52%	(48)	0.00%
Napa	9,652,680	10,740,134	89.87%	242,256	92.13%	243,362	92.14%	(1,106)	-0.01%
Nevada	6,685,185	7,425,652	90.03%	158,116	92.16%	158,842	92.17%	(726)	-0.01%
Orange	189,468,320	209,526,287	90.43%	3,831,465	92.26%	3,848,507	92.26%	(17,042)	-0.01%
Placer	25,278,792	27,355,659	92.41%	265,490	93.38%	265,601	93.38%	(111)	0.00%
Plumas	1,922,382	1,629,248	117.99%	-	117.99%	-	117.99%	-	0.00%
Riverside	137,228,916	155,691,163	88.14%	6,360,117	92.23%	6,364,861	92.23%	(4,744)	0.00%
Sacramento	111,751,670	122,332,264	91.35%	1,578,871	92.64%	1,583,602	92.65%	(4,732)	0.00%
San Benito	4,843,008	4,197,092	115.39%	-	115.39%	-	115.39%	-	0.00%
San Bernardino	138,263,969	156,640,095	88.27%	6,149,674	92.19%	6,157,451	92.20%	(7,777)	0.00%
San Diego	179,584,953	189,500,353	94.77%	1,782,175	95.71%	1,782,175	95.71%	-	0.00%
San Francisco	65,299,587	55,305,114	118.07%	-	118.07%	-	118.07%	-	0.00%
San Joaquin	50,766,116	53,533,653	94.83%	503,462	95.77%	503,462	95.77%	-	0.00%
San Luis Obispo	18,819,756	19,492,482	96.55%	183,319	97.49%	183,319	97.49%	-	0.00%
San Mateo	43,736,218	49,033,290	89.20%	1,413,735	92.08%	1,419,208	92.09%	(5,472)	-0.01%
Santa Barbara	27,123,960	29,058,002	93.34%	273,279	94.28%	273,279	94.28%	-	0.00%
Santa Clara	94,863,826	97,354,039	97.44%	915,576	98.38%	915,576	98.38%	-	0.00%
Santa Cruz	16,621,274	16,940,790	98.11%	159,321	99.05%	159,321	99.05%	-	0.00%
Shasta	16,483,479	18,198,452	90.58%	314,190	92.30%	315,546	92.31%	(1,356)	-0.01%
Sierra	978,500	623,149	157.02%	-	157.02%	-	157.02%	-	0.00%
Siskiyou	4,389,251	4,841,098	90.67%	80,728	92.33%	81,068	92.34%	(340)	-0.01%
Solano	29,147,499	31,445,139	92.69%	296,739	93.64%	296,753	93.64%	(14)	0.00%
Sonoma	30,947,892	30,732,916	100.70%	-	100.70%	-	100.70%	-	0.00%
Stanislaus	31,983,888	37,054,820	86.32%	2,539,743	93.17%	2,510,040	93.09%	29,703	0.08%
Sutter	8,334,826	9,485,325	87.87%	421,034	92.31%	420,822	92.31%	212	0.00%
Tehama	5,974,139	6,426,611	92.96%	60,440	93.90%	60,440	93.90%	-	0.00%
Trinity	2,022,293	2,276,992	88.81%	254,699	100.00%	254,699	100.00%	-	0.00%
Tulare	33,250,929	38,548,955	86.26%	2,682,589	93.22%	2,649,701	93.13%	32,888	0.09%
Tuolumne	4,895,848	5,085,552	96.27%	47,828	97.21%	47,828	97.21%	-	0.00%
Ventura	44,892,503	46,999,346	95.52%	442,010	96.46%	442,010	96.46%	-	0.00%
Yolo	15,607,767	17,504,806	89.16%	510,773	92.08%	512,719	92.09%	(1,946)	-0.01%
Yuba	6,251,416	7,883,564	79.30%	1,141,053	93.77%	1,141,053	93.77%	-	0.00%
<b>Total:</b>	<b>2,523,207,415</b>	<b>2,718,089,203</b>	<b>92.83%</b>	<b>50,000,000</b>	<b>94.67%</b>	<b>50,000,000</b>	<b>94.67%</b>	<b>(0)</b>	

Floor courts (2)  
Cluster 1 courts (13)

# [For Model Purposes Only]

## Pro Rata Allocation Restoration

Attachment 3D

This scenario represents a methodology using a hypothetical restoration amount of \$50 million as an example.

Court	2024-25 Revised Workload Formula Allocation (after \$42m restoration)	2024-25 Workload Formula Need as of July 1, 2024	2024-25 Workload Formula Percentage (BEFORE \$50m Restoration)	Pro Rata Restoration of \$50m on WF Allocation	2024-25 Workload Formula Percentage (AFTER \$50m Restoration)	Pro Rata Restoration of \$50m on WF Need	2024-25 Workload Formula Percentage (AFTER \$50m Restoration)	Difference in Restoration Allocation	Difference in Workload Formula Percentage (AFTER \$50m Restoration)
	A	B	C(A/B)		D		E		
Alameda	89,886,503	94,645,177	94.97%	1,781,195	96.85%	1,741,024	96.81%	40,171	0.04%
Alpine	978,500	549,681	178.01%	19,390	181.54%	10,112	179.85%	9,278	1.69%
Amador	4,390,031	4,684,703	93.71%	86,993	95.57%	86,176	95.55%	817	0.02%
Butte	13,930,522	14,689,951	94.83%	276,048	96.71%	270,226	96.67%	5,822	0.04%
Calaveras	3,356,668	3,767,570	89.09%	66,516	90.86%	69,305	90.93%	(2,790)	-0.07%
Colusa	2,494,996	2,635,032	94.69%	49,441	96.56%	48,472	96.53%	969	0.04%
Contra Costa	52,494,605	59,907,816	87.63%	1,040,236	98.36%	1,102,021	99.47%	(61,785)	-0.10%
Del Norte	4,542,452	3,875,339	117.21%	90,013	119.54%	71,288	119.05%	18,726	0.48%
El Dorado	9,685,455	10,819,495	89.52%	191,927	91.29%	199,028	91.36%	(7,100)	-0.07%
Fresno	64,141,716	66,287,167	96.76%	1,271,035	98.68%	1,219,371	98.60%	51,665	0.08%
Glenn	3,039,440	3,237,289	93.89%	60,230	95.75%	59,551	95.73%	679	0.02%
Humboldt	9,042,179	9,318,361	97.04%	179,180	98.96%	171,414	98.88%	7,766	0.08%
Imperial	10,285,880	8,073,327	127.41%	203,825	129.93%	148,511	129.25%	55,314	0.69%
Inyo	2,553,116	2,676,571	95.39%	50,593	97.28%	49,236	97.23%	1,356	0.05%
Kern	67,318,923	68,776,330	97.88%	1,333,995	99.82%	1,265,160	99.72%	68,835	0.10%
Kings	10,957,590	12,025,488	91.12%	217,136	92.93%	221,212	92.96%	(4,076)	-0.03%
Lake	5,167,289	6,056,222	85.32%	102,395	87.01%	111,406	87.16%	(9,011)	-0.15%
Lassen	2,621,145	2,580,519	101.57%	51,941	103.59%	47,469	103.41%	4,471	0.17%
Los Angeles	725,316,029	791,102,381	91.68%	14,372,897	93.50%	14,552,546	93.52%	(179,649)	-0.02%
Madera	12,870,753	13,875,025	92.76%	255,047	94.60%	255,235	94.60%	(187)	0.00%
Marin	14,323,909	15,677,866	91.36%	283,843	93.17%	288,399	93.20%	(4,555)	-0.03%
Mariposa	1,889,067	1,846,094	102.33%	37,434	104.36%	33,959	104.17%	3,474	0.19%
Mendocino	7,790,891	7,775,002	100.20%	154,385	102.19%	143,023	102.04%	11,361	0.15%
Merced	16,777,980	18,264,043	91.86%	332,473	93.68%	335,972	93.70%	(3,499)	-0.02%
Modoc	1,394,633	1,480,959	94.17%	27,636	96.04%	27,243	96.01%	393	0.03%
Mono	2,448,957	2,038,771	120.12%	48,529	122.50%	37,504	121.96%	11,025	0.54%
Monterey	26,437,346	28,560,984	92.56%	523,884	94.40%	525,387	94.40%	(1,503)	-0.01%
Napa	9,652,680	10,740,134	89.87%	191,278	91.66%	197,568	91.71%	(6,290)	-0.06%
Nevada	6,685,185	7,425,652	90.03%	132,474	91.81%	136,597	91.87%	(4,123)	-0.06%
Orange	189,468,320	209,526,287	90.43%	3,754,513	92.22%	3,854,294	92.27%	(99,780)	-0.05%
Placer	25,278,792	27,355,659	92.41%	500,926	94.24%	503,215	94.25%	(2,289)	-0.01%
Plumas	1,922,382	1,629,248	117.99%	38,094	120.33%	29,970	119.83%	8,124	0.50%
Riverside	137,228,916	155,691,163	88.14%	2,719,335	89.89%	2,863,982	89.98%	(144,647)	-0.09%
Sacramento	111,751,670	122,332,264	91.35%	2,214,476	93.16%	2,250,336	93.19%	(35,859)	-0.03%
San Benito	4,843,008	4,197,092	115.39%	95,969	117.68%	77,207	117.23%	18,763	0.45%
San Bernardino	138,263,969	156,640,095	88.27%	2,739,845	90.02%	2,881,438	90.11%	(141,592)	-0.09%
San Diego	179,584,953	189,500,353	94.77%	3,558,664	96.65%	3,485,911	96.61%	72,753	0.04%
San Francisco	65,299,587	55,305,114	118.07%	1,293,980	120.41%	1,017,353	119.91%	276,627	0.50%
San Joaquin	50,766,116	53,533,653	94.83%	1,005,984	96.71%	984,766	96.67%	21,217	0.04%
San Luis Obispo	18,819,756	19,492,482	96.55%	372,933	98.46%	358,570	98.39%	14,364	0.07%
San Mateo	43,736,218	49,033,290	89.20%	866,679	90.96%	901,981	91.04%	(35,302)	-0.07%
Santa Barbara	27,123,960	29,058,002	93.34%	537,490	95.19%	534,530	95.18%	2,960	0.01%
Santa Clara	94,863,826	97,354,039	97.44%	1,879,826	99.37%	1,790,854	99.28%	88,972	0.09%
Santa Cruz	16,621,274	16,940,790	98.11%	329,368	100.06%	311,631	99.95%	17,737	0.10%
Shasta	16,483,479	18,198,452	90.58%	326,637	92.37%	334,766	92.42%	(8,128)	-0.04%
Sierra	978,500	623,149	157.02%	19,390	160.14%	11,463	158.86%	7,927	1.27%
Siskiyou	4,389,251	4,841,098	90.67%	86,978	92.46%	89,053	92.51%	(2,076)	-0.04%
Solano	29,147,499	31,445,139	92.69%	577,588	94.53%	578,442	94.53%	(854)	0.00%
Sonoma	30,947,892	30,732,916	100.70%	613,265	102.69%	565,340	102.54%	47,924	0.16%
Stanislaus	31,983,888	37,054,820	86.32%	633,794	88.03%	681,634	88.15%	(47,839)	-0.13%
Sutter	8,334,826	9,485,325	87.87%	165,163	89.61%	174,485	89.71%	(9,322)	-0.10%
Tehama	5,974,139	6,426,611	92.96%	118,384	94.80%	118,219	94.80%	165	0.00%
Trinity	2,022,293	2,276,992	88.81%	40,074	90.57%	41,886	90.65%	(1,812)	-0.08%
Tulare	33,250,929	38,548,955	86.26%	658,902	87.97%	709,119	88.10%	(50,217)	-0.13%
Tuolumne	4,895,848	5,085,552	96.27%	97,016	98.18%	93,550	98.11%	3,466	0.07%
Ventura	44,892,503	46,999,346	95.52%	889,592	97.41%	864,566	97.36%	25,026	0.05%
Yolo	15,607,767	17,504,806	89.16%	309,284	90.93%	322,006	91.00%	(12,721)	-0.07%
Yuba	6,251,416	7,883,564	79.30%	123,878	80.87%	145,020	81.14%	(21,142)	-0.27%
<b>Total:</b>	<b>2,523,207,415</b>	<b>2,718,089,203</b>	<b>92.83%</b>	<b>50,000,000</b>	<b>94.67%</b>	<b>50,000,000</b>	<b>94.67%</b>	<b>0</b>	

Floor courts (2)  
Cluster 1 courts (13)

# [For Model Purposes Only]

## Workload Formula with Equity Adjustment Restoration

Attachment 3E

This scenario represents a methodology using a hypothetical restoration amount of \$50 million as an example.

Court	2024-25 Revised Workload Formula Allocation (after \$42m restoration)	2024-25 Workload Formula Need as of July 1, 2024	2024-25 Workload Formula Percentage (BEFORE \$50m Restoration)	Workload Formula Restoration of \$50m (Equity Adjustment)	2024-25 Workload Formula Percentage (AFTER \$50m Restoration)
	A	B	C(A/B)	D	E
Alameda	89,886,503	94,645,177	94.97%	124,816	95.10%
Alpine	978,500	549,681	178.01%	-	178.01%
Amador	4,390,031	4,684,703	93.71%	294,672	100.00%
Butte	13,930,522	14,689,951	94.83%	19,373	94.96%
Calaveras	3,356,668	3,767,570	89.09%	410,902	100.00%
Colusa	2,494,996	2,635,032	94.69%	140,036	100.00%
Contra Costa	52,494,605	59,907,816	87.63%	3,196,941	92.96%
Del Norte	4,542,452	3,875,339	117.21%	-	117.21%
El Dorado	9,685,455	10,819,495	89.52%	372,571	92.96%
Fresno	64,141,716	66,287,167	96.76%	87,418	96.90%
Glenn	3,039,440	3,237,289	93.89%	197,849	100.00%
Humboldt	9,042,179	9,318,361	97.04%	12,289	97.17%
Imperial	10,285,880	8,073,327	127.41%	-	127.41%
Inyo	2,553,116	2,676,571	95.39%	123,455	100.00%
Kern	67,318,923	68,776,330	97.88%	90,701	98.01%
Kings	10,957,590	12,025,488	91.12%	221,552	92.96%
Lake	5,167,289	6,056,222	85.32%	462,700	92.96%
Lassen	2,621,145	2,580,519	101.57%	-	101.57%
Los Angeles	725,316,029	791,102,381	91.68%	10,109,117	92.96%
Madera	12,870,753	13,875,025	92.76%	27,757	92.96%
Marin	14,323,909	15,677,866	91.36%	250,559	92.96%
Mariposa	1,889,067	1,846,094	102.33%	-	102.33%
Mendocino	7,790,891	7,775,002	100.20%	-	100.20%
Merced	16,777,980	18,264,043	91.86%	200,652	92.96%
Modoc	1,394,633	1,480,959	94.17%	86,326	100.00%
Mono	2,448,957	2,038,771	120.12%	-	120.12%
Monterey	26,437,346	28,560,984	92.56%	113,536	92.96%
Napa	9,652,680	10,740,134	89.87%	331,570	92.96%
Nevada	6,685,185	7,425,652	90.03%	217,855	92.96%
Orange	189,468,320	209,526,287	90.43%	5,311,652	92.96%
Placer	25,278,792	27,355,659	92.41%	151,595	92.96%
Plumas	1,922,382	1,629,248	117.99%	-	117.99%
Riverside	137,228,916	155,691,163	88.14%	7,504,812	92.96%
Sacramento	111,751,670	122,332,264	91.35%	1,970,935	92.96%
San Benito	4,843,008	4,197,092	115.39%	-	115.39%
San Bernardino	138,263,969	156,640,095	88.27%	7,351,904	92.96%
San Diego	179,584,953	189,500,353	94.77%	249,909	94.90%
San Francisco	65,299,587	55,305,114	118.07%	-	118.07%
San Joaquin	50,766,116	53,533,653	94.83%	70,599	94.96%
San Luis Obispo	18,819,756	19,492,482	96.55%	25,706	96.68%
San Mateo	43,736,218	49,033,290	89.20%	1,846,143	92.96%
Santa Barbara	27,123,960	29,058,002	93.34%	38,321	93.48%
Santa Clara	94,863,826	97,354,039	97.44%	128,389	97.57%
Santa Cruz	16,621,274	16,940,790	98.11%	22,341	98.25%
Shasta	16,483,479	18,198,452	90.58%	434,178	92.96%
Sierra	978,500	623,149	157.02%	-	157.02%
Siskiyou	4,389,251	4,841,098	90.67%	111,134	92.96%
Solano	29,147,499	31,445,139	92.69%	84,552	92.96%
Sonoma	30,947,892	30,732,916	100.70%	-	100.70%
Stanislaus	31,983,888	37,054,820	86.32%	2,463,039	92.96%
Sutter	8,334,826	9,485,325	87.87%	482,928	92.96%
Tehama	5,974,139	6,426,611	92.96%	8,475	93.09%
Trinity	2,022,293	2,276,992	88.81%	254,699	100.00%
Tulare	33,250,929	38,548,955	86.26%	2,584,978	92.96%
Tuolumne	4,895,848	5,085,552	96.27%	6,707	96.40%
Ventura	44,892,503	46,999,346	95.52%	61,982	95.65%
Yolo	15,607,767	17,504,806	89.16%	665,063	92.96%
Yuba	6,251,416	7,883,564	79.30%	1,077,308	92.96%
<b>Total:</b>	<b>2,523,207,415</b>	<b>2,718,089,203</b>	<b>92.83%</b>	<b>50,000,000</b>	<b>94.67%</b>

Floor courts (2)  
Cluster 1 courts (13)