



Judicial Council of California

Trial Court Budget Advisory Committee

TRIAL COURT BUDGET ADVISORY COMMITTEE

MATERIALS APRIL 16, 2025 VIRTUAL MEETING

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Judicial Council of California

Trial Court Budget Advisory Committee

www.courts.ca.gov/tcbac.htm
tcbac@jud.ca.gov

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JCCAccessCoordinator@jud.ca.gov

TRIAL COURT BUDGET ADVISORY COMMITTEE

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

Date: Wednesday, April 16, 2025
Time: 12:00 p.m. – 2:00 p.m.
Public Video Livestream: <https://jcc.granicus.com/player/event/4014>

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.

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

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

Call to Order and Roll Call

Approval of Minutes

Approve minutes of the February 26, 2025, Trial Court Budget Advisory Committee meeting.

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

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. Only written comments received by 12:00 p.m. on April 15, 2025, will be provided to advisory body members prior to the start of the meeting.

III. DISCUSSION AND POSSIBLE ACTION ITEMS (ITEMS 1-6)

Item 1

Fiscal Year (FY) 2026–27 Budget Change Concepts Under Purview of the Trial Court Budget Advisory Committee (Action Required)

Consideration of budget change concepts for FY 2026–27 from other advisory bodies under purview of the Trial Court Budget Advisory Committee.

Facilitators: Hon. Jonathan B. Conklin, Chair, Trial Court Budget Advisory Committee
Ms. Rebecca Fleming, Vice Chair, Trial Court Budget Advisory Committee

Item 2

Allocations from the State Trial Court Improvement and Modernization Fund (IMF) for FY 2025–26 (Action Required)

Consideration of allocations from the IMF in support of the trial courts for FY 2025–26.

Presenter: Mr. Luis Castillo, Analyst, Judicial Council Budget Services

Item 3

Community Assistance, Recovery, and Empowerment (CARE) Act Allocations for FY 2025–26 (Action Required)

Consideration of CARE Act allocations to the trial courts for FY 2025–26.

Presenter: Mr. Don Will, Deputy Director, Judicial Council Center for Families, Children & the Courts

Item 4

Funding Reallocation in 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 5

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 6

Allocation Methodologies for Potential Future Funding Reductions and Restoration (Action Required)

Consideration of allocation methodologies for potential reductions and restoration of funding for the trial courts in future budget years.

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

IV. ADJOURNMENT

Adjourn



Judicial Council of California
Trial Court Budget Advisory Committee

www.courts.ca.gov/tcbac.htm
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TRIAL COURT BUDGET ADVISORY COMMITTEE

MINUTES OF OPEN MEETING

February 26, 2025

12:00 p.m. – 12:30 p.m.

<https://jcc.granicus.com/player/event/4140>

Advisory Body Members Present: Judges: Hon. Jonathan B. Conklin (Chair), Hon. J. Eric Bradshaw, Hon. Judith C. Clark, Hon. Julie A. Emede, Hon. Kimberly A. Gaab, Hon. Samantha P. Jessner, Hon. David C. Kalemkarian, Hon. Patricia L. Kelly, Hon. Lisa M. Rogan, and Hon. Sonny S. Sandhu

Executive Officers: Ms. Rebecca Fleming (Vice Chair), Ms. Stephanie Cameron, Mr. Chad Finke, Mr. Kevin Harrigan, Mr. Shawn C. Landry, Mr. Brandon E. Riley, Mr. Michael M. Roddy, Mr. Chris Ruhl, Ms. Kim Turner, and Mr. David H. Yamasaki

Advisory Body Members Absent: Hon. Wendy G. Getty, Hon. Michael J. Reinhart, Mr. Darrel E. Parker, and Mr. David W. Slayton

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

OPEN MEETING

Call to Order and Roll Call

The chair called the meeting to order at 12:00 p.m., and took roll call.

Approval of Minutes

The advisory body approved the minutes of the February 6, 2025, Trial Court Budget Advisory Committee (TCBAC) meeting.

DISCUSSION AND ACTION ITEMS (ITEM 1-2)

Item 1 – Fiscal Year (FY) 2024–25 Trial Court Trust Fund Court Interpreters Program Mid-Year Reallocation (Action Required)

Consideration of mid-year reallocation of Trial Court Trust Fund Court Interpreters Program unspent funding for FY 2024–25.

Action: The TCBAC unanimously voted to approve the following recommendations for consideration by the Judicial Branch Budget Committee and then the Judicial Council at its April 25, 2025, business meeting:

1. Approve the FY 2024–25 mid-year reallocation of \$699,000 and augmentation of \$11.6 million from the remaining \$30.4 million program savings balance, as outlined in Attachment A;
2. Direct council staff to conduct an additional survey prior to the end of FY 2024–25 to reallocate available savings to those courts with a funding shortfall based on final expenditures for the current year; and
3. Direct council staff to repeat the mid-year survey and reallocation process in FY 2025–26 and determine if the trial courts need additional funding from the remaining program savings balance of \$18.8 million to support court interpreter services.

Item 2 – FY 2024–25 Community Assistance, Recovery, and Empowerment (CARE) Act Mid-Year Reallocation (Action Required)

Consideration of mid-year reallocation of CARE Act unspent funding for FY 2024–25.

Action: The TCBAC unanimously voted to approve a reallocation of \$400,000 of unspent CARE Act funding in FY 2024–25 to two trial courts as outlined in Attachment A for consideration by the Judicial Branch Budget Committee and then the Judicial Council at its April 25, 2025, business meeting.

A D J O U R N M E N T

There being no further business, the meeting was adjourned at 12:16 p.m.

Approved by the advisory body on .

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Trial Court Budget Advisory Committee
(Action Item)

Title: Fiscal Year (FY) 2026–27 Budget Change Concepts Under Purview of the Trial Court Budget Advisory Committee

Date: 4/16/2025

Contact: Rose Lane, Senior Analyst, Judicial Council Budget Services
916-643-6926 | rosemary.lane@jud.ca.gov

Issue

Review and prioritize the budget change proposal (BCP) concepts for (FY) 2026–27 developed by other advisory committees that will impact the trial courts for which the Trial Court Budget Advisory Committee (TCBAC) was identified as having purview and the opportunity to provide input. This input will be incorporated in the budget proposals to be considered by the Judicial Branch Budget Committee (Budget Committee).

Background

FY 2026–27 BCP Concept Development

At its January 22, 2025 meeting¹, the TCBAC discussed potential FY 2026–27 BCP concepts that were the result of full trial court participation and input. In advance of the meeting, each TCBAC member reached out to specific courts to identify funding priorities that were summarized for the discussion at the January 22, 2025, meeting.

The TCBAC considered the prioritization of the FY 2026–27 budget concepts from the funding priorities reported by the trial courts and approved two BCP concepts, which are described below.

1. **Inflationary Adjustment for Trial Courts (Consumer Price Index)** – \$66 million ongoing to address general inflationary costs for the trial courts based on the Consumer Price Index published by the Department of Finance.
2. **Trial Court Equity Funding to Statewide Average** – \$45.3 million ongoing to fund all trial courts to at least the statewide average funding level as determined by the Judicial Council-approved Workload Formula methodology.

Additionally, the TCBAC affirmed it will support the following trial court funding priorities if they are submitted through other committees:

- New and deferred facility maintenance funding (including facility modifications, upgrades, and

¹Trial Court Budget Advisory Committee meeting materials (Jan. 22, 2025), <https://courts.ca.gov/system/files/file/tcbac-20250122-materials.pdf>;
Trial Court Budget Advisory Committee meeting minutes (Jan. 22, 2025), <https://courts.ca.gov/system/files/file/tcbac-20250122-minutes.pdf>.

- deferred maintenance);
- Funding for courthouse construction (including courthouses not managed by the Judicial Council and associated security measures);
- Funding for unfunded mandates (including AB 1058, California Family Code 3150 counsel for minors, mental health diversion, conservatorship changes, and post-conviction work);
- Increased and ongoing technology funding (including information technology modernization, equipment purchases, staff, support, licensing, and infrastructure); and
- Funding for the Self-help program.

Budget Change Proposal Concept Process

The current BCP process for the judicial branch was approved by the Judicial Council and was effective December 16, 2016. The process provides an opportunity for applicable advisory bodies to offer input and prioritize BCP concepts developed by other committees as time permits.²

At its February 20, 2025, meeting, the Budget Committee reviewed 30 budget concepts for FY 2026–27 for the judicial branch. Of the total proposals, there are 14 concepts for which the TCBAC was identified as having purview, including the two proposals submitted by the TCBAC. These concepts are shown in the table below. Details for each of them are included in the report submitted to the Budget Committee on February 20, 2025³.

FY 2026–27 BCP Concepts Under Purview of the TCBAC

Concept Number	BCP Concept	FY 2026–27 Estimated Amount (in thousands)	Submitted By
26-01	Inflationary Adjustment for Trial Courts (Consumer Price Index)	\$65,603	TCBAC
26-02	Trial Court Equity Funding to Statewide Average	45,324	TCBAC
26-03	Court-Appointed Dependency Counsel: Expanding Court Services, Supporting Federal Match, and Workload Study	3,766	Center for Families, Children & the Courts (CFCC)
26-04	Language Access Expansion in the California Courts	50,000	CFCC
26-15	Capital Outlay Funding: FY 2026–27 through FY 2030–31	1,717,730	Facilities Services (FS)
26-16	Facilities Program Support	9,680	FS

² Judicial Council of Cal., Advisory Com. Rep., *Judicial Branch Budget: Budget Change Proposal Process* (Dec. 16, 2016), <https://jcc.legistar.com/View.ashx?M=F&ID=4817140&GUID=6165243B-1678-4074-B1D7-AB5A1467CA6F>.

³ Judicial Branch Budget Committee meeting materials (Feb. 20, 2025), <https://courts.ca.gov/system/files/file/jbbc-20250220-materials.pdf>

Concept Number	BCP Concept	FY 2026–27 Estimated Amount (in thousands)	Submitted By
26-17	Orange Central Justice Center – Facility Modification	28,083	FS
26-18	Trial Court Facility Modifications	27,955	FS
26-19	Trial Court Facilities Maintenance and Utilities	74,163	FS
26-20	Water Conservation and Leak Detection Measures in Courthouses	22,364	FS
26-21	Building Management Systems Guidelines and Assessment	2,000	FS
26-22	Waterborne Pathogen Management Program Implementation	2,604	FS
26-23	Trial Court Deferred Maintenance	133,917	FS
26-24	Trial Court Physical Security Assessment and Evaluation	2,825	FS

The Budget Committee will consider these concepts at its May 16, 2025, meeting to determine which proposals will move forward in the budget development process for consideration by the Judicial Council at its July 18, 2025, business meeting.

Recommendation

Consider the following options for the FY 2026–27 BCP concepts under the purview of the TCBAC that impact the trial courts for consideration by the Budget Committee:

1. Review and prioritize some or all of the additional BCP concepts developed by other advisory committees;
2. Revisit the BCP concepts recommended by the TCBAC and consider incorporating the additional concepts in ranking order; and/or
3. Submit the additional concepts to the Budget Committee without prioritization.

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Trial Court Budget Advisory Committee
(Action Item)

Title: Allocations from the State Trial Court Improvement and Modernization Fund (IMF) for Fiscal Year (FY) 2025–26

Date: 4/16/2025

Contact: Luis Castillo, Fiscal Analyst, Judicial Council Budget Services
415-865-4015 | Luis.Castillo@jud.ca.gov

Issue

Consider recommendations from the Revenue and Expenditure Subcommittee for the FY 2025–26 allocations from the IMF to fund specific programs and services for the trial courts and the delegation of authority to the Administrative Director of the Judicial Council to authorize baseline technical adjustments to the IMF allocations. The proposed allocations include updated costs for current service levels as reflected in the FY 2025–26 Governor’s Budget and do not include any new programs or services.

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

Proposed FY 2025–26 Allocations

The proposed FY 2025–26 IMF allocations for various Judicial Council offices, totaling \$47.9 million, are detailed in Attachment 2A and represent an increase of \$1.3 million from the previous year. Attachment 2B provides narrative descriptions of the programs receiving IMF funding allocations.

As approved by the Judicial Council at its June 24, 2016, business meeting, the IMF retains a reserve of \$2 million to protect against possible declines in revenue. The reserve is available for expenditure, if needed, to support program operations¹. The reserve is not expected to be needed to support the FY 2025–26 allocation recommendations. Based on current revenue estimates, the IMF is estimated to have a sufficient fund balance for the proposed allocations and remain solvent for the foreseeable future (Attachment 2C, Row 25).

¹Judicial Council meeting (June 24, 2016),
[https://jcc.legistar.com/View.ashx?M=F&ID=4496693&GUID=FE6C1F1D-A68F-4CB8-B4E7-0596B5A59994](https://jcc.legistar.com/View.ashx?M=F&ID=4496693&GUID=FE6C1F1D-A68F-4CB8-B4E7-0596B5A59994;);
Judicial Council meeting minutes (June 24, 2016),
<https://jcc.legistar.com/View.ashx?M=M&ID=463476&GUID=26AF2EFA-74F7-4F01-AE8D-2A556C3986CD>

The proposed FY 2025–26 allocation requests by Judicial Council offices are described below:

1. **Audit Services** – Conducts operational audits, risk assessments, and recommends improvements to all judicial branch entities.
 - a. *Approve an allocation of \$433,000; an increase of \$34,000 from the FY 2024–25 allocation.*
 - i. The allocation is for conducting performance and compliance audits of the 58 trial courts.
 - ii. The adjustment is due to increased staffing and rent costs.
2. **Branch Accounting and Procurement** – Supports the trial courts’ financial and human resources Phoenix System.
 - a. *Approve an allocation of \$305,000; an increase of \$3,000 from the FY 2024–25 allocation.*
 - i. The allocation is for two staff, one in the treasury unit and one in the accounting unit, and for providing contract-related services to produce statewide leveraged procurement agreements.
 - ii. The adjustment is due to increased staffing and rent costs.
3. **Budget Services** – Supports meetings of various budget committees and subcommittees related to trial court funding, policies, and other issues.
 - a. *Approve an allocation of \$8,000; a decrease of \$10,000 from the FY 2024–25 allocation.*
 - i. The allocation is for the Trial Court Budget Advisory Committee and subcommittee meetings, and annual revenue distribution and collections reporting trainings.
 - ii. The decrease reflects the transition from in-person meetings and trainings to remote forums.
4. **Center for Families, Children & the Courts** – Supports various programs within the courts for litigants.
 - a. *Approve an allocation of \$5.5 million; an increase of \$66,000 from the FY 2024–25 allocation.*
 - i. The allocation is for providing domestic violence forms in languages other than English to all courts; enabling all courts to use Hotdocs document assembly applications while filing documents; court-based assistance to self-represented litigants; supporting the Beyond the Bench conference, Child & Family Focused Education Conference, and Youth Summit; funding for legal services agencies and their court partners to provide representation to indigent persons; updating the Self-represented Litigants Statewide Support Program and expanding the online California Courts Self-Help Center on the judicial branch website; and for recruitment of new court interpreters.

- ii. The \$66,000 increase is from the Shriver Civil Counsel Program cy pres funding. This funding is the available balance from class action lawsuits collected in FY 2019–20 and can only be used for this purpose. Minor revenue deposits have continued to be collected related to lawsuits from that year. The requested increase represents the use of the remaining balance of that revenue.
 - iii. The \$5 million for Self-Help Centers comprises a majority of the allocation. Budget bill language requires unspent funds for Self-Help to revert to the General Fund.
- 5. **Center for Judicial Education and Resources (CJER)** – Provides education to judges, court leaders, court staff faculty, managers, supervisors, and lead staff.
 - a. *Approve an allocation of \$2.8 million; an increase of \$638,000 from the FY 2024–25 allocation.*
 - i. The allocation is for faculty development, participant expenses, training for court leaders, the Court Clerks Training Institute, and for newly elected or appointed judges and subordinate judicial officers’ education programs.
 - ii. Due to the recent increases in judicial appointments and the need to ensure that new judges meet the requirements of California Rule of Court 10.462, CJER is expanding its mandatory Judicial College by adding a second session. This expansion, coupled with rising costs for in-person education—including hotel accommodations, travel, and catering—necessitates a \$638,000 increase in the Judicial Education program allocation for FY 2025–26.
- 6. **Criminal Justice Services** – Supports the Judicial Council’s Criminal Jury Instructions Advisory Committee.
 - a. *Approve an allocation of \$9,000; there is no change from the FY 2024–25 allocation.*
 - i. The allocation is for the criminal portion of the Jury Instructions and is funded by royalties generated from their sales, which are deposited in the IMF.
- 7. **Human Resources** – Supports the Trial Court Labor Relations Academy and Forum to assist trial court staff in addressing various labor issues.
 - a. *Approve an allocation of \$23,000; an increase of \$23,000 from the FY 2024–25 allocation.*
 - i. The Academy and Forum is held every other year. There was no academy held in FY 2024–25, therefore funding was not needed.
- 8. **Information Technology** – Supports information technology systems for the 58 trial courts.
 - a. *Approve an allocation of \$34.2 million; an increase of \$653,000 from the FY 2024–25 allocation.*
 - i. The allocation is for the Data Center and Cloud Service to host services for the 58 trial courts, the appellate courts, and the Supreme Court; the distribution and mandated reporting of uniform civil fees collected by the 58 trial courts; the California Courts Protective Order Registry; for developing

and supporting a standardized level of network infrastructure for the trial courts; the Enterprise Policy and Planning program which provides a variety of Oracle products to the courts; Data Integration; and the Jury Management System.

- ii. The increase is primarily due to costs associated with a hardware refresh cycle for telecom equipment. This refresh occurs over two fiscal years and is completed on average every five years.
- iii. The adjustment also includes increased staffing and rent costs.

9. **Legal Services** – Supports the various Judicial Council offices and the courts, manages litigation, is responsible for maintaining the California Rules of Court and Judicial Council forms, and supports the Civil Jury Instructions Advisory Committee.

a. *Approve an allocation of \$2.3 million; a decrease of \$439,000 from the FY 2024–25 allocation.*

- i. The allocation is for the Regional Office Assistance Group of Legal Services to provide direct services to the trial courts, the Litigation Management Program, which manages litigation and provides for the defense and indemnification of all judicial branch entities, bench officers, and employees, and for the civil portion of the Jury Instructions which is funded by royalties generated from their sales.
- ii. The adjustment is due to an anticipated decrease in settlement expenditures for the Litigation Management Program.

10. **Leadership Support Services** – Supports the trial court judicial officers for the Commission on Judicial Performance defense master insurance policy.

a. *Approve an allocation of \$2.3 million; an increase of \$296,000 from the FY 2024–25 allocation.*

- i. The allocation is for the Judicial Performance Defense Insurance program which is used to pay the insurance premium for trial court judges and judicial officers for the Commission on Judicial Performance defense master insurance policy.
- ii. The adjustment is due to increased premium, staffing, and rent costs.

11. **Research, Analytics, and Data (formerly the Office of Court Research within Business Management Services)** – As of July 1, 2025, Business Management Services will be dissolved, and the Data Analytics Advisory Committee will be supported by the Research, Analytics, and Data (RAD) office. The RAD supports the judicial branch’s research, data, and analytic functions and conducts the workload study and judicial needs assessment.

a. *Approve an allocation of \$9,000; there is no change from the FY 2024–25 allocation.*

- i. The allocation is for the Data Analytics Advisory Committee meeting expenses for court personnel and judges related to workload studies.

Delegation of Authority for Technical Adjustments

The annual allocations from the IMF approved by the Judicial Council are estimated based on available information at the time allocation requests are developed. Authority for technical baseline budget adjustments is necessary to address mid-year revisions to budgets for funded personal services and rent increases approved by the Department of Finance and included in the annual Budget Act. Delegating authority to the Administrative Director to address these adjustments mid-year to a maximum of 10 percent of specific allocations will allow for greater efficiency in the implementation of required budgetary adjustments.

The Administrative Director currently has delegated authority to transfer allocations approved by the Judicial Council between projects and programs not to exceed 20 percent of the allocations to be reduced or augmented.

Recommendation

The following recommendations from the Revenue and Expenditure Subcommittee are presented to the Trial Court Budget Advisory Committee for consideration:

1. Approve a total of \$47.9 million in allocations for FY 2025–26 from the IMF to fund specific programs and services for the trial courts.
2. Approve the delegation of authority to the Administrative Director to authorize baseline technical adjustments, up to a maximum of 10 percent of specific allocations, to allow for the efficient implementation of required budgetary adjustments.

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

Attachments

Attachment 2A: Judicial Council of California Approved FY 2024–25 and Proposed FY 2025–26 Allocations, State Trial Court Improvement and Modernization Fund – State Operations and Local Assistance Appropriations

Attachment 2B: State Trial Court Improvement and Modernization Fund Summary of Programs

Attachment 2C: State Trial Court Improvement and Modernization Fund Condition Statement FY 2025–26

Judicial Council of California
Approved FY 2024–25 and Proposed FY 2025–26 Allocations
State Trial Court Improvement and Modernization Fund
State Operations and Local Assistance Appropriations

#	Program Name and Adjustments	Office	FY 2024–25 Allocations	Recommended FY 2025–26 Allocations			\$ Change from FY 2024–25	% Change from FY 2024–25
			Judicial Council Approved Allocations	State Operations	Local Assistance	Total		
A	B	C	D	E	F	G = (E + F)	H = (G - D)	I = (H/D)
1	Audit Services	AS	\$ 399,000	\$ 433,000	-	\$ 433,000	\$ 34,000	8.5%
2	Treasury Services - Cash Management	BAP	105,000	109,000	-	109,000	\$ 4,000	3.8%
3	Trial Court Master Agreements	BAP	197,000	196,000	-	196,000	\$ (1,000)	-0.5%
4	Budget Focused Training and Meetings	BS	13,000	-	5,000	5,000	\$ (8,000)	-61.5%
5	Revenue Distribution Training	BS	5,000	-	3,000	3,000	\$ (2,000)	-40.0%
6	Court Interpreter Testing etc.	CFCC	143,000	-	143,000	143,000	\$ -	0.0%
7	Domestic Violence Forms Translation	CFCC	17,000	-	17,000	17,000	\$ -	0.0%
8	Interactive Software - Self-Rep Electronic Forms	CFCC	60,000	-	60,000	60,000	\$ -	0.0%
9	Sargent Shriver Civil Counsel- Cy Pres Funding	CFCC	27,000	-	93,000	93,000	\$ 66,000	244.4%
10	Self-Help Center	CFCC	5,000,000	-	5,000,000	5,000,000	\$ -	0.0%
11	Statewide Multidisciplinary Education	CFCC	67,000	-	67,000	67,000	\$ -	0.0%
12	Statewide Support for Self-Help Programs	CFCC	100,000	-	100,000	100,000	\$ -	0.0%
13	CJER Faculty	CJER	48,000	-	48,000	48,000	\$ -	0.0%
14	Essential Court Management Education	CJER	40,000	40,000	-	40,000	\$ -	0.0%
15	Essential Court Personnel Education	CJER	130,000	-	130,000	130,000	\$ -	0.0%
16	Judicial Education	CJER	1,973,000	-	2,611,000	2,611,000	\$ 638,000	32.3%
17	Jury System Improvement Projects	CJS	9,000	9,000	-	9,000	\$ -	0.0%
18	Trial Court Labor Relations Academies and Forums	HR	-	-	23,000	23,000	\$ 23,000	
19	California Courts Protective Order Registry (CCPOR)	IT	1,020,000	441,000	606,000	1,047,000	\$ 27,000	2.6%
20	Data Integration	IT	1,782,000	871,000	909,000	1,780,000	\$ (2,000)	-0.1%
21	Judicial Branch Technology Services (JBTS) Data Center and Cloud Service	IT	7,483,000	2,019,000	5,464,000	7,483,000	\$ -	0.0%
22	Jury Management System	IT	600,000	-	600,000	600,000	\$ -	0.0%
23	Statewide Planning and Dev Support	IT	2,032,000	466,000	1,566,000	2,032,000	\$ -	0.0%
24	Telecom	IT	5,681,000	1,330,000	4,384,000	5,714,000	\$ 33,000	0.6%
25	Telecommunications	IT	14,500,000	-	15,100,000	15,100,000	\$ 600,000	4.1%
26	Uniform Civil Filing Services	IT	472,000	424,000	43,000	467,000	\$ (5,000)	-1.1%
27	Jury System Improvement Projects	LS	10,000	-	10,000	10,000	\$ -	0.0%
28	Litigation Management Program	LS	1,700,000	-	1,200,000	1,200,000	\$ (500,000)	-29.4%
29	Regional Office Assistance Group	LS	1,030,000	1,091,000	-	1,091,000	\$ 61,000	5.9%
30	Judicial Performance Defense Insurance	LSS	1,980,000	2,000	2,274,000	2,276,000	\$ 296,000	14.9%
31	Data Analytics Advisory Committee	RAD	9,000	-	9,000	9,000	\$ -	0.0%
32	Total		\$ 46,632,000	\$ 7,431,000	\$ 40,465,000	\$ 47,896,000	\$ 1,264,000	2.7%

Totals by Office		Office	Judicial Council Approved Allocations	State Operations	Local Assistance	Total	\$ Change from FY 2024–25	% Change from FY 2024–25
Legend		C	D	E	F	G = (E + F)	H = (G - D)	I = (H/D)
33	Audit Services	AS	\$ 399,000	\$ 433,000	\$ -	\$ 433,000	\$ 34,000	8.5%
34	Branch Accounting and Procurement	BAP	302,000	305,000	-	305,000	\$ 3,000	1.0%
35	Budget Services	BS	18,000	-	8,000	8,000	\$ (10,000)	-55.6%
36	Center for Families, Children and the Courts	CFCC	5,414,000	-	5,480,000	5,480,000	\$ 66,000	1.2%
37	Center for Judicial Education and Resources	CJER	2,191,000	40,000	2,789,000	2,829,000	\$ 638,000	29.1%
38	Criminal Justice Services	CJS	9,000	9,000	-	9,000	\$ -	100.0%
39	Human Resources	HR	-	-	23,000	23,000	\$ 23,000	100.0%
40	Information Technology	IT	33,570,000	5,551,000	28,672,000	34,223,000	\$ 653,000	1.9%
41	Legal Services	LS	2,740,000	1,091,000	1,210,000	2,301,000	\$ (439,000)	-16.0%
42	Leadership Services Support	LSS	1,980,000	2,000	2,274,000	2,276,000	\$ 296,000	100.0%
43	Research, Analytics, and Data	RAD	9,000	-	9,000	9,000	\$ -	0.0%
Total Allocations			\$ 46,632,000	\$ 7,431,000	\$ 40,465,000	\$ 47,896,000	\$ 1,264,000	2.7%

**State Trial Court Improvement and Modernization Fund
Summary of Programs**

Row #	Program Name	Office	Program Description
A	B	C	D
1	Audit Services	AS	Conducts performance and compliance audits of the State's 58 trial courts per the annual audit plan.
2	Treasury Services - Cash Management	BAP	Used for the compensation, operating expenses, and equipment costs for two accounting staff.
3	Trial Court Master Agreements	BAP	Pays for personal services, phone services, and rent allocation for one position in Branch Accounting and Procurement to provide contract related services for the production of statewide leveraged procurement agreements.
4	Budget Focused Training and Meetings	BS	Supports meetings of the Trial Court Budget Advisory Committee and associated subcommittees on the preparation, development, and implementation of the budget for trial courts and provides input to the Judicial Council on policy issues affecting Trial Court Funding.
5	Revenue Distribution Training	BS	Pays for annual training on Revenue Distribution to all the collection programs as well as annual CRT training.
6	Court Interpreter Testing etc.	CFCC	Pays for the testing, orientation, and recruitment of new interpreters.
7	Domestic Violence Forms Translation	CFCC	This program makes available to all courts translation of domestic violence protective order forms in languages other than English. Since 2000, these forms have been translated into Spanish, Vietnamese, Chinese, and Korean based on data from various language needs studies.
8	Interactive Software - Self-Rep Electronic Forms	CFCC	This program enables all courts to use HotDocs document assembly applications, which present court users with a Q&A format that automatically populates fields across all filing documents.
9	Sargent Shriver Civil Counsel- Cy Pres Funding	CFCC	This program provides funding for legal services agencies and their court partners to represent indigent persons in cases involving housing, child custody, guardianship, conservatorships, and domestic violence.
10	Self-Help Center	CFCC	Provides court-based assistance to self-represented litigants.
11	Statewide Multidisciplinary Education	CFCC	Supports the biannual Beyond the Bench conference, biannual Child & Family Focused Education Conference and annual Youth Summit.
12	Statewide Support for Self-Help Programs	CFCC	The Self-represented Litigants Statewide Support Program updates and expands the Self-Help Guide to the California Courts on the public website of the judicial branch and facilitates the translation of over 50 Judicial Council forms that are used regularly by self-represented litigants.
13	CJER Faculty	CJER	Lodging, meals, and travel for faculty development participants. Primarily, this program supports development of pro bono judge and court staff faculty who will teach all CJER programs for the trial courts.
14	Essential Court Management Education	CJER	National and statewide training for court leaders, including Institute for Court Management courses, CJER Core 40 and Core 24 courses, and other local and regional courses for managers, supervisors and lead staff.
15	Essential Court Personnel Education	CJER	The Court Clerks Training Institute—courtroom and court legal process education in civil, traffic, criminal, probate, family, juvenile, appellate. Regional and local court personnel courses. The biennial Trial Court Judicial Attorneys Institute.
16	Judicial Education	CJER	Programs for all newly elected or appointed judges and subordinate judicial officers required by Rule of Court, rule 10.462 (c)(1) to complete the new judge education programs offered by CJER; Judicial Institutes, courses for experienced judges; programs for Presiding Judges, Court Executive Officers, and Supervising Judges.
17	Jury System Improvement Projects	CJS	This program is related to Jury Instructions and is a "self-funding" PCC. Funds in this account are generated by royalties from sales of criminal and civil jury instructions. The funds are deposited pursuant to the Government Code.
18	Trial Court Labor Relations Academies and Forums	HR	The Judicial Council's Human Resources office has updated its Trial Court Labor Relations Training Program to align with its biennial funding model. The program includes a one-day, in-person session in spring for seasoned court professionals in labor relations, focusing on current trends and strategies. The funding allocation will be used to pay for conference rooms, materials, lunch for participants, and lodging for trial court attendees on a limited basis. Additionally, a three-day virtual Labor Relations Academy I is held annually in summer, aimed at court managers and human resources staff new to labor negotiations. This program reflects a comprehensive effort to enhance trial court employees' skills and knowledge in the field of labor relations within the judicial branch.
19	California Courts Protective Order Registry (CCPOR)	IT	The California Courts Protective Order Registry (CCPOR) is a statewide repository of protective orders containing both data and scanned images of orders that can be accessed by judges, court staff, and law enforcement officers. CCPOR allows judges and law enforcement officers to view orders issued by other court divisions and across county lines.
20	Data Integration	IT	Data Integration provides system interfaces between Judicial Council systems and the computer systems of our justice partners, such as courts, law enforcement agencies, the Department of Justice and others. Without the Integrated Services Backbone, the current systems for sharing protective orders, for example, would not function.

**State Trial Court Improvement and Modernization Fund
Summary of Programs**

Row #	Program Name	Office	Program Description
A	B	C	D
21	Judicial Branch Technology Services (JBTS) Data Center and Cloud Service	IT	<p>The JBTS hosts services for the 58 California superior courts, all the Courts of Appeal, and the Supreme Court and has over 10,000 supported users. Major installations in the JBTS include the following:</p> <ul style="list-style-type: none"> * Appellate Court Case Management System (ACCMS) * California Court Protective Order Registry (CCPOR) * Phoenix - (Trial Court Financial and Human Resources System) * Sustain Interim Case Management System (ICMS) * Computer Aided Facilities Management (CAFM) System * Civil, Small Claims, Probate, and Mental Health Trial Court Case Management System (V3) * Integrated Services Backbone (ISM) <p>This program provides consistent, cost-effective, and secure hosting services, including ongoing maintenance and operational support, data network management, desktop computing and local server support, tape back-up and recovery, help desk services, email services, and a disaster recovery program.</p>
22	Jury Management System	IT	<p>The allocation for the Jury Program is to distribute funds to the trial courts in the form of grants to improve court jury management systems. All trial courts are eligible to apply for the jury funding. The number of courts receiving grants varies according to the amount of grant funding available and the number of jury grant requests received.</p>
23	Statewide Planning and Dev Support	IT	<p>This program provides the trial courts access to a variety of Oracle products (e.g., Oracle Enterprise Database, Real Application Clusters, Oracle Security Suite, Oracle Advanced Security, Diagnostic Packs, Oracle WebLogic Application Server) without cost to the courts.</p>
24,25	Telecommunications Support	IT	<p>This program develops and supports a standardized level of network infrastructure for the California superior courts. This infrastructure provides a foundation for local systems (email, jury, CMS, VOIP, etc.) and enterprise system applications such as Phoenix, provides operational efficiencies via shared services at the CCTC, and secures valuable court information resources.</p>
26	Uniform Civil Filing Services	IT	<p>This program supports the distribution and mandated reporting of uniform civil fees collected by all 58 superior courts, with an average of \$52 million distributed per month. The system generates reports for the State Controller's Office and various entities that receive the distributed funds. There are over 200 fee types collected by each court, distributed to 31 different entities (e.g., Trial Court Trust Fund, County, Equal Access Fund, Law Library, etc.), requiring 65,938 corresponding distribution rules that are maintained by Uniform Civil Fee System (UCFS). UCFS benefits the public by minimizing the amount of penalties paid to the state for incorrect or late distributions and ensuring that the entities entitled to a portion of the civil fees collected, as mandated by law, receive their correct distributions.</p>
27	Jury System Improvement Projects	LS	<p>This program is related to Jury Instructions and is a "self-funding" PCC. Funds in this account are generated by royalties from sales of criminal and civil jury instructions. The funds are deposited under the Government Code.</p>
28	Litigation Management Program	LS	<p>This program provides for the defense and indemnification of all Judicial Branch entities, their bench officers, and employees. Defense of these parties is for government claims, pre-litigation claims, and litigation, as well as for various risk reduction measures, as required by Government Code sections 810–811.9, 825–825.6, 900.3, and 995–996.6 and California Rules of Court, rules 10.201 and 10.202.</p>
29	Regional Office Assistance Group	LS	<p>The allocation for the Regional Office Assistance Group is used to pay for attorneys and support personnel to provide direct legal services to the trial courts in the areas of transactions/business operations, legal opinions, ethics, and labor and employment law.</p>
30	Judicial Performance Defense Insurance	LSS	<p>The allocation for the Judicial Performance Defense program is used to pay the insurance premium for trial court judges and judicial officers for the Commission on Judicial Performance (CJP) defense master insurance policy and associated costs to provide for online enrollment and submission of compliance information. The program (1) covers defense costs in CJP proceedings related to CJP complaints; (2) protects judicial officers from exposure to excessive financial risk for acts committed within the scope of their judicial duties, and (3) lowers the risk of conduct that could lead to complaints through required ethics training for judicial officers.</p>
31	Data Analytics Advisory Committee	RAD	<p>Pays for meeting expenses of the Data Analytics Advisory Committee and travel expenses for court personnel and judges related to workload studies.</p>

State Trial Court Improvement and Modernization Fund
Fund Condition Statement
FY 2025-26

Updated: February 19, 2025

#	Description	Estimated					
		2021-22 (Year-End Financial Statement)	2022-23 (Year-End Financial Statement)	2023-24 (Year-End Financial Statement)	2024-25	2025-26	2026-27
		A	B	C	D	E	F
1	Beginning Balance	16,886,288	23,242,054	38,128,109	38,371,462	37,031,345	31,317,345
2	Prior-Year Adjustments	8,176,338	8,638,611	-284,477	0	0	0
3	Adjusted Beginning Balance	25,062,626	31,880,665	37,843,632	38,371,462	37,031,345	31,317,345
4	REVENUES¹:						
5	Jury Instructions Royalties	538,154	429,853	453,482	471,000	471,000	471,000
6	Interest from Surplus Money Investment Fund	210,218	1,550,086	3,133,621	2,396,000	1,917,000	1,917,000
7	Escheat-Unclaimed Checks, Warrants, Bonds	0	1,000	3,088	1,000	1,000	1,000
8	50/50 Excess Fines Split Revenue	4,986,200	7,504,000	2,862,000	3,302,000	3,137,000	3,137,000
9	2% Automation Fund Revenue	8,455,157	8,327,104	7,419,361	7,462,000	7,044,000	7,044,000
10	Other Revenues/State Controller's Office Adjustments	285,925	171,078	84,495	2,000	2,000	2,000
11	Class Action Residue	952,317	329,186	118,425	2,000	0	0
12	Subtotal Revenues	15,428,439	18,311,387	14,074,472	13,636,000	12,572,000	12,572,000
13	Transfers and Other Adjustments						
14	To Trial Court Trust Fund (Gov. Code, § 77209(j))	-13,397,000	-13,397,000	-13,397,000	-13,397,000	-13,397,000	-13,397,000
15	To Trial Court Trust Fund (Budget Act)	-594,000	-594,000	-594,000	-594,000	-594,000	-594,000
16	General Fund Transfer (Gov. Code, § 20825.1)	-270,000	0	0	0	0	0
17	Total Revenues, Transfers, and Other Adjustments	1,167,439	4,320,387	83,472	-355,000	-1,419,000	-1,419,000
18	Total Resources	26,230,065	36,201,052	37,927,104	38,016,462	35,612,345	29,898,345
19	EXPENDITURES:						
20	Judicial Branch Total State Operations	5,217,956	5,319,495	6,726,611	7,235,000	7,431,000	7,930,000
21	Judicial Branch Total Local Assistance	44,734,883	36,857,436	37,105,883	37,654,117	40,465,000	42,157,000
22	Pro Rata and Other Adjustments	307,171	180,012	117,148	314,000	617,000	617,000
23	Less funding provided by General Fund (Local Assistance)	-47,272,000	-44,284,000	-44,394,000	-44,218,000	-44,218,000	-44,218,000
24	Total Expenditures and Adjustments	2,988,011	-1,927,057	-444,358	985,117	4,295,000	6,486,000
25	Fund Balance	23,242,054	38,128,109	38,371,462	37,031,345	31,317,345	23,412,345
26	Fund Balance - less restricted funds	19,677,611	35,519,627	36,080,861	35,031,345	29,317,345	21,412,344
27	Structural Balance	-1,820,572	6,247,444	527,830	-1,340,117	-5,714,000	-7,905,000

¹ Revenue estimates are as of FY 2025-26 Governor's Budget

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Trial Court Budget Advisory Committee
(Action Item)

Title: Community Assistance, Recovery, and Empowerment (CARE) Act
Allocations for FY 2025–26

Date: 4/16/2025

Contact: Don Will, Deputy Director, Judicial Council Center for Families,
Children & the Courts
415-865-7557 | don.will@jud.ca.gov

Issue

Consideration of CARE Act allocations to the trial courts for fiscal year (FY) 2025–26.

Background

The Budget Act of 2024 included \$26.5 million to fund trial court operations related to the CARE Act. The program was rolled out in two cohorts and all courts were required to implement the CARE Act by December 1, 2024.

At its business meeting on July 21, 2023¹, the Judicial Council approved an allocation methodology for FY 2023–24 and subsequent years that included the following:

1. For Cohort One courts implementing the CARE Act, an allocation for court operations that employs the Workload Formula with a base of 25 CARE Act cases calculated at \$93,225;
2. For Cohort One courts implementing the CARE Act, an allocation for staff and other operational costs that employs the Workload Formula with a base of \$98,000, prorated to the amount that Cohort One courts are estimated to receive in FY 2024–25 when all courts are implementing the CARE Act;
3. For Cohort Two courts, an allocation that employs the Workload Formula with a base of \$98,000, prorated to the amount that remains after the allocation described in recommendation 2 and after reduction by 0.5 percent to hold as a reserve for Cohort One courts that require additional program funding, with any unspent funding from the court allocations and this reserve redistributed through the reallocation process via the approved methodology; and

¹ Judicial Council of Cal., Advisory Com. Rep., Trial Court Budget: Fiscal Year 2023–24 Allocation of Community Assistance, Recovery, and Empowerment (CARE) Act Funding (June 7, 2023), <https://jcc.legistar.com/View.ashx?M=F&ID=12125820&GUID=BB56211B-2F20-4BB8-8E94-B0909B17F695>.

4. A method to reallocate unspent funds during the fiscal year.

Proposed CARE Act Allocations for FY 2025–26

The FY 2025–26 Governor’s Budget included \$32.9 million for CARE Act trial court operations and is recommended to be allocated consistent with the approved methodology outlined above. The proposed allocations to the trial courts are displayed in Attachment 3A.

The final allocation of the \$32.9 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

Approve the CARE Act allocations to the trial courts for FY 2025–26 as outlined in Attachment 3A, including any technical adjustments and contingent on funding included in the enacted budget for FY 2025–26.

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

Attachments

Attachment 3A: Care Act Allocation of Court Operations Budget FY 2025–26

CARE Act Allocation of Court Operations Budget FY 2025–26

Col. A	Col. B	Col. C	Col. D	Col. E	Col. F	Col. G	Col. H	Col. I
Court	Final Workload Allocation			Staff/Other		Court/Ops		Total
	Final Workload Allocation	Percentage	Distribution	Base	Final Staff/Other Costs	Base	Final Hearing Costs	Total Allocation
Alameda	89,736,650	3.56%	751,677	98,000	\$ 679,154	93,225	\$ 326,260	\$ 1,005,414
Alpine	978,500	0.04%	8,196	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
Amador	4,508,080	0.18%	37,762	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
Butte	13,971,923	0.55%	117,035	98,000	\$ 188,485	93,225	\$ 129,508	\$ 317,994
Calaveras	3,478,322	0.14%	29,136	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
Colusa	2,506,641	0.10%	20,997	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
Contra Costa	53,284,741	2.11%	446,338	98,000	\$ 443,084	93,225	\$ 231,599	\$ 674,682
Del Norte	3,867,969	0.15%	32,400	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
El Dorado	9,526,802	0.38%	79,801	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
Fresno	63,747,461	2.53%	533,979	98,000	\$ 510,842	93,225	\$ 258,769	\$ 769,612
Glenn	2,997,045	0.12%	25,105	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
Humboldt	8,921,029	0.35%	74,727	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
Imperial	10,504,343	0.42%	87,989	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
Inyo	2,549,184	0.10%	21,353	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
Kern	64,062,338	2.54%	536,616	98,000	\$ 512,882	93,225	\$ 259,587	\$ 772,469
Kings	11,101,306	0.44%	92,990	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
Lake	5,096,756	0.20%	42,693	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
Lassen	2,800,148	0.11%	23,455	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
Los Angeles	732,713,543	29.06%	6,137,554	98,000	\$ 4,843,212	93,225	\$ 1,995,991	\$ 6,839,203
Madera	12,403,858	0.49%	103,901	98,000	\$ 178,330	93,225	\$ 125,436	\$ 303,766
Marin	14,327,907	0.57%	120,017	98,000	\$ 190,791	93,225	\$ 130,433	\$ 321,223
Mariposa	1,853,846	0.07%	15,529	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
Mendocino	7,646,197	0.30%	64,048	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
Merced	17,012,600	0.67%	142,506	98,000	\$ 208,177	93,225	\$ 137,405	\$ 345,582
Modoc	1,406,022	0.06%	11,778	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
Mono	2,439,556	0.10%	20,435	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
Monterey	26,329,671	1.04%	220,550	98,000	\$ 268,517	93,225	\$ 161,600	\$ 430,117
Napa	9,282,739	0.37%	77,757	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
Nevada	6,639,488	0.26%	55,615	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
Orange	188,291,022	7.47%	1,577,214	98,000	\$ 1,317,414	93,225	\$ 582,193	\$ 1,899,607
Placer	25,173,615	1.00%	210,866	98,000	\$ 261,030	93,225	\$ 158,598	\$ 419,628
Plumas	1,915,282	0.08%	16,043	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
Riverside	137,769,526	5.46%	1,154,023	98,000	\$ 990,225	93,225	\$ 450,995	\$ 1,441,221
Sacramento	108,993,944	4.32%	912,985	98,000	\$ 803,869	93,225	\$ 376,269	\$ 1,180,137
San Benito	4,808,390	0.19%	40,277	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
San Bernardino	144,252,144	5.72%	1,208,324	98,000	\$ 1,032,208	93,225	\$ 467,830	\$ 1,500,038
San Diego	173,468,681	6.88%	1,453,055	98,000	\$ 1,221,421	93,225	\$ 543,701	\$ 1,765,122
San Francisco	63,222,900	2.51%	529,585	98,000	\$ 507,445	93,225	\$ 257,407	\$ 764,852
San Joaquin	51,550,851	2.04%	431,814	98,000	\$ 431,855	93,225	\$ 227,096	\$ 658,951
San Luis Obispo	18,799,273	0.75%	157,472	98,000	\$ 219,748	93,225	\$ 142,044	\$ 361,793
San Mateo	43,346,545	1.72%	363,091	98,000	\$ 378,722	93,225	\$ 205,791	\$ 584,512
Santa Barbara	27,473,608	1.09%	230,132	98,000	\$ 275,925	93,225	\$ 164,571	\$ 440,496
Santa Clara	96,100,018	3.81%	804,979	98,000	\$ 720,365	93,225	\$ 342,785	\$ 1,063,149
Santa Cruz	17,003,334	0.67%	142,428	98,000	\$ 208,117	93,225	\$ 137,381	\$ 345,498
Shasta	16,359,995	0.65%	137,039	98,000	\$ 203,951	93,225	\$ 135,710	\$ 339,661
Sierra	978,500	0.04%	8,196	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
Siskiyou	4,337,464	0.17%	36,333	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
Solano	29,080,663	1.15%	243,593	98,000	\$ 286,333	93,225	\$ 168,744	\$ 455,077
Sonoma	30,554,838	1.21%	255,942	98,000	\$ 295,880	93,225	\$ 172,572	\$ 468,452
Stanislaus	32,303,460	1.28%	270,589	98,000	\$ 307,204	93,225	\$ 177,113	\$ 484,317
Sutter	8,164,586	0.32%	68,390	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
Tehama	6,113,757	0.24%	51,212	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
Trinity	2,142,278	0.08%	17,945	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
Tulare	32,165,439	1.28%	269,433	98,000	\$ 306,310	93,225	\$ 176,755	\$ 483,065
Tuolumne	4,989,596	0.20%	41,795	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
Ventura	44,799,399	1.78%	375,261	98,000	\$ 388,131	93,225	\$ 209,563	\$ 597,694
Yolo	15,477,215	0.61%	129,644	98,000	\$ 198,234	93,225	\$ 133,417	\$ 331,651
Yuba	6,239,055	0.25%	52,261	98,000	\$ 98,000	93,225	\$ 93,225	\$ 191,225
Reserve								\$ 164,419
Total	2,521,570,045	100.00%	21,121,860	5,684,000	\$ 21,121,860	5,407,050	\$ 11,597,422	\$ 32,883,700

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Trial Court Budget Advisory Committee
(Action Item)

Title: Funding Reallocation in Fiscal Year (FY) 2025–26 with No New Money

Date: 4/16/2025

Contact: Oksana Tuk, Senior Analyst, Judicial Council Budget Services
916-643-8027 | oksana.tuk@jud.ca.gov

Issue

Consideration of a recommendation from the Funding Methodology Subcommittee for 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,¹ 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.

¹ 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,² 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,³ 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 the 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.⁴ The partial restoration of \$42 million revises the 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.

² 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>.

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

⁴ 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>.

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 Funding Methodology Subcommittee recommends⁵ the preliminary reallocation for FY 2025–26 as presented in Attachment 4A. The funding reallocation 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 4A. 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 5 of the agenda.

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

Attachments

1. **Attachment 4A:** Preliminary Funding Reallocation in FY 2025–26 with No New Money

⁵ Funding Methodology Subcommittee meeting materials (March 11, 2025), <https://courts.ca.gov/system/files/file/tcbac-20250311-fms-materials.pdf>

Preliminary Funding Reallocation in FY 2025-26 with No New Money Attachment 4A

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 Reallocation)	2024-25 Workload Formula Percentage (AFTER 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%	(322,933)	-	(322,933)	44,569,570	94.83%
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%	(134,301)	-	(134,301)	89,752,203	94.83%
Butte	13,707,099	14,689,951	93.31%	13,930,522	94.83%	(14)	-	(14)	13,930,508	94.83%
San Joaquin	49,951,911	53,533,653	93.31%	50,766,116	94.83%	(50)	-	(50)	50,766,066	94.83%
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%	-	-	-	14,323,909	91.36%
Sacramento	109,842,203	122,332,264	89.79%	111,751,670	91.35%	-	-	-	111,751,670	91.35%
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%	-	10,289	10,289	4,399,540	90.88%
Shasta	16,201,831	18,198,452	89.03%	16,483,479	90.58%	-	41,867	41,867	16,525,346	90.81%
Orange	186,230,932	209,526,287	88.88%	189,468,320	90.43%	-	545,825	545,825	190,014,145	90.69%
Nevada	6,570,957	7,425,652	88.49%	6,685,185	90.03%	-	26,019	26,019	6,711,204	90.38%
Napa	9,487,748	10,740,134	88.34%	9,652,680	89.87%	-	41,698	41,698	9,694,378	90.26%
El Dorado	9,519,963	10,819,495	87.99%	9,685,455	89.52%	-	52,255	52,255	9,737,711	90.00%
San Mateo	42,988,911	49,033,290	87.67%	43,736,218	89.20%	-	282,669	282,669	44,018,887	89.77%
Yolo	15,341,081	17,504,806	87.64%	15,607,767	89.16%	-	102,732	102,732	15,710,498	89.75%
Calaveras	3,299,313	3,767,570	87.57%	3,356,668	89.09%	-	22,911	22,911	3,379,578	89.70%
Trinity	1,987,739	2,276,992	87.30%	2,022,293	88.81%	-	15,880	15,880	2,038,173	89.51%
San Bernardino	135,901,495	156,640,095	86.76%	138,263,969	88.27%	-	1,389,990	1,389,990	139,653,960	89.16%
Riverside	134,884,127	155,691,163	86.64%	137,228,916	88.14%	-	1,454,775	1,454,775	138,683,691	89.08%
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%
Total:	2,481,867,415	2,718,089,203	91.31%	2,523,207,415	92.83%	(5,576,277)	5,576,277	0	2,523,207,415	92.83%

Floor courts (2)
Cluster 1 courts (13)

* This display has been updated since the FMS meeting on March 11, 2025 and includes technical adjustments to the reallocation consistent with the Workload Formula policy.

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Trial Court Budget Advisory Committee
(Action Item)

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

Date: 4/16/2025

Contact: Oksana Tuk, Senior Analyst, Judicial Council Budget Services
916-643-8027 | oksana.tuk@jud.ca.gov

Issue

Consideration of an allocation methodology recommendation from the Funding Methodology Subcommittee 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 Consumer Price Index (CPI) adjustment was not included in the final budget.

In FYs 2021–22, 2022–23, and 2023–24, the final 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 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.¹ This approach ensured all courts received funding to address inflationary cost increases.

¹ 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>.

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.²

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.³

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.⁴

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 augmentation. The Judicial Council approved the FY 2024–25 partial restoration at its February 21, 2025, business meeting⁵ and the funding was distributed to the trial courts in the March 2025 distribution.

Consistent with the Judicial Council’s policy regarding CPI funding included in the budget, the Funding Methodology Subcommittee recommends that the \$40 million for operational cost increases for the trial courts be allocated as a proportional increase of 1.6 percent over each trial

² 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>.

³ 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>.

⁴ 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>.

⁵ 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>.

court's FY 2024–25 Workload Formula allocation.⁶ 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 5A).

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 4 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 5A, 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 4 of the agenda).

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

Attachments

1. **Attachment 5A:** \$40 Million for Trial Court Operational Cost Increases for FY 2025–26

⁶ Funding Methodology Subcommittee meeting materials (March 11, 2025), <https://courts.ca.gov/system/files/file/tcbac-20250311-fms-materials.pdf>

\$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%
Total:	2,481,867,415	2,718,089,203	91.31%	2,523,207,415	(0)	40,000,000	94.30%

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 the Legislature's approval of the enacted budget for FY 2025–26.

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES
Report to the Trial Court Budget Advisory Committee
(Action Item)

Title: Allocation Methodologies for Potential Future Funding Reductions and Restoration

Date: 4/16/2025

Contact: Oksana Tuk, Senior Analyst, Judicial Council Budget Services
916-643-8027 | oksana.tuk@jud.ca.gov

Issue

Consideration of recommendations from the Funding Methodology Subcommittee (FMS) for allocation methodologies for potential reductions and restoration of funding for the trial courts in future budget years. Establishing policy recommendations and a long-term strategy will increase transparency and allow the Judicial Council to address these types of budget situations more efficiently going forward.

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.

Currently there are no “standard” methodologies for addressing funding reductions and restorations. The Workload Formula policy states that a methodology for applying a funding reduction will be determined for each year in which it occurs. Additionally, a policy does not exist for the restoration of funding when a reduction previously occurred.

The FMS prepares an annual work plan that guides its work for each fiscal year. The current workplan, approved by the Trial Court Budget Advisory Committee at its July 2, 2024 meeting¹ added the task to consider further refinements to the Workload Formula policy, including methodologies to allocate future budget reductions and the restoration of funding that had previously been reduced due to budget shortfalls.

Beginning in the fall of 2024, the FMS held four meetings to address this new item on the work plan. The individual meetings are described below.

October 30, 2024² – 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

¹ Trial Court Budget Advisory Committee meeting materials (July 2, 2024)
<https://courts.ca.gov/system/files/file/tcbac-20240702-materials.pdf>

² Funding Methodology Subcommittee meeting materials (October 30, 2024)
https://courts.ca.gov/system/files/file/tcbac-20241030-fms-materials_0.pdf

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.

Additionally, the subcommittee requested that Judicial Council staff meet with members of the subcommittee to obtain input for additional methodology options for consideration. An initial meeting with council staff occurred on November 14, 2024, and subsequent meetings occurred to deliberate other allocation methodology approaches.

December 17, 2024³ – The FMS continued to review previous allocation methodologies for budget reductions and funding restoration and discuss other options for consideration in future fiscal years. 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, 2024.⁴

February 5, 2025⁵ – The hypothetical scenarios requested at the December 17, 2024, meeting were presented for model purposes only to the FMS. The subcommittee considered the impact of the methodologies on the trial courts and the long-term strategies to allocate potential funding reductions and restorations moving forward.

March 11, 2025⁶ – The FMS considered allocation methodology options for a restoration of funding in a *future fiscal year* that follows a reduction in a prior fiscal year and in situations when the budget act language specifically refers to the funding as a restoration associated with a prior reduction.

Addressing Potential Future Reductions and Restoration of Funding

Allocation Methodology Options for Budget Reductions

During these meetings, the FMS discussed the reduction methodology options described below:

1. Pro rata reduction allocation based on each court’s Workload Formula need or allocation amount. This methodology was not chosen because it does not advance the Workload Formula’s principle of improving funding equity among the trial courts.

³ Funding Methodology Subcommittee meeting materials (December 17, 2024)

<https://courts.ca.gov/system/files/file/tcbac-20241217-fms-materials.pdf>

⁴ 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>.

⁵ Funding Methodology Subcommittee meeting materials (February 5, 2025),

<https://courts.ca.gov/system/files/file/tcbac-20250205-fms-materials.pdf>

⁶ Funding Methodology Subcommittee meeting materials (March 11, 2025)

<https://courts.ca.gov/system/files/file/tcbac-20250311-fms-materials.pdf>

2. Reverse Workload Formula equity reduction allocations *with* reduction limitation calculated on court's Workload Formula need or allocation. While this methodology supports the principle of equity, it does not advance funding stability and predictability for the trial courts.
3. Reverse Workload Formula equity reduction allocation *without* reduction limitation calculated on each court's Workload Formula need or allocation.

The FMS recommended option #3 because it promotes funding stability and predictability and is consistent with the existing Workload Formula policy. This is the same Judicial Council approved methodology⁷ that was used in FY 2020–21 to allocate the \$167.8 million reduction that occurred due to the projected deficit resulting from the COVID-19 pandemic. This methodology was most recently used in FY 2024–25 to allocate the initial \$97 million reduction due to the state's projected multi-year budget shortfall. This recommendation supports the Workload Formula's core principles of funding equity, stability, and predictability for the trial courts.

The steps to calculate the recommended reduction methodology described in #3 above are listed below. All calculations are based on the Workload Formula allocation.

- 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 up to 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 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 \$167.8 million reduction in FY 2020–21 and the \$97 million reduction in FY 2024–25 were calculated based on the above steps utilizing a 4 percent band around the statewide average funding level. For model purposes only, a hypothetical example of a \$100 million reduction using this methodology is shown in Attachment 6A.

Allocation Methodology Options for Funding Restoration in the Same Fiscal Year

At its February 5, 2025, meeting, the FMS also discussed various funding restoration options and approved an allocation methodology recommendation for a funding restoration that *occurs in the same fiscal year* the reduction took place. The subcommittee recommended using the initial methodology which would be recalculated with the restored funding. The initial reduction amount is backed out of the formula and recalculated with the revised reduction amount after the restoration.

⁷ 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>.

The recommendation is the same methodology that was approved by the Judicial Council at its February 21, 2025, business meeting⁸ for the current-year partial restoration of \$42 million of the \$97 million reduction included in the Budget Act of 2024. This option is displayed in Attachment 6B.

The discussion on restoration options was continued at the next FMS meeting on March 11, 2025⁹. 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 Methodology Options for Restoration of Funding in a Future Fiscal Year

At its March 11, 2025, meeting, the FMS considered allocation methodology options for a restoration of funding in a *future fiscal year* that follows a reduction in a prior fiscal year. The subcommittee also determined a restoration would be guided by specific budget act language that associates the restoration with a prior reduction. The FMS discussed the restoration methodology options described below:

1. Restoration of funding exactly how it was reduced.
2. Restoration via the Workload Formula methodology based on each court's Workload Formula need or allocation amount.
3. Pro rata restoration allocation based on each court's Workload Formula need or allocation amount.
4. Workload Formula restoration with equity adjustment.

The FMS acknowledged that review of all of the allocation options brought value to the discussion and each of the options had pros and cons when considering the impact on trial courts statewide.

The FMS recommended option #2, which is the restoration methodology based on the existing council-approved Workload Formula calculated on the Workload Formula need amount. This option was chosen because it provides a more tailored approach, supports funding equity, and aligns with the Workload Formula's principles of stability and predictability.

To provide context to the deliberations and assist the subcommittee with its consideration of various allocation methodologies, Judicial Council staff developed a trial court funding and Workload Formula resource guide (Attachment 6D). 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

⁸ 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>

⁹ Funding Methodology Subcommittee meeting materials (March 11, 2025)
<https://courts.ca.gov/system/files/file/tcbac-20250311-fms-materials.pdf>

statewide funding need for the trial courts, and recent examples of funding reductions and restorations included in the state budget.

Recommendation

1. Approve the reverse Workload Formula equity reduction allocation without reduction limitation calculated on each court's Workload Formula allocation for any potential future funding reduction. The steps are outlined on page 3 and utilize a 4 percent band around the statewide average funding level as displayed in Attachment 6A.
2. Approve an allocation methodology for a restoration of funding that *occurs in the same fiscal year* the reduction took place based on a recalculation of the reduction using the initial methodology with restored funding as displayed in Attachment 6B.
3. Approve an allocation methodology for a restoration of funding in a *future fiscal year* that follows a reduction in a prior fiscal year based on the existing Judicial Council-approved Workload Formula methodology calculated on the Workload Formula need amount as displayed in Attachment 6C.

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

Attachments

1. **Attachment 6A:** Reverse Workload Formula Equity Reduction Allocation without Reduction Limitation
2. **Attachment 6B:** Recalculate Reduction Using Initial Methodology with Restored Funding
3. **Attachment 6C:** Workload Formula Restoration
4. **Attachment 6D:** Trial Court Funding and Workload Formula Resource Guide

Reverse Workload Formula Equity Reduction Allocation without Reduction Limitation

Attachment 6A

This scenario represents a methodology using a reduction of \$100 million as an example.

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 \$100m Reduction)
	A	B	C(A/B)
Alameda	88,446,403	94,645,177	93.45%
Alpine	978,500	549,681	178.01%
Amador	4,318,750	4,684,703	92.19%
Butte	13,707,099	14,689,951	93.31%
Calaveras	3,299,313	3,767,570	87.57%
Colusa	2,454,902	2,635,032	93.16%
Contra Costa	51,597,645	59,907,816	86.13%
Del Norte	4,483,485	3,875,339	115.69%
El Dorado	9,519,963	10,819,495	87.99%
Fresno	63,133,105	66,287,167	95.24%
Glenn	2,990,182	3,237,289	92.37%
Humboldt	8,900,393	9,318,361	95.51%
Imperial	10,163,038	8,073,327	125.88%
Inyo	2,512,390	2,676,571	93.87%
Kern	66,272,438	68,776,330	96.36%
Kings	10,774,613	12,025,488	89.60%
Lake	5,078,997	6,056,222	83.86%
Lassen	2,581,880	2,580,519	100.05%
Los Angeles	713,278,790	791,102,381	90.16%
Madera	12,659,634	13,875,025	91.24%
Marin	14,079,161	15,677,866	89.80%
Mariposa	1,860,977	1,846,094	100.81%
Mendocino	7,672,588	7,775,002	98.68%
Merced	16,500,078	18,264,043	90.34%
Modoc	1,372,099	1,480,959	92.65%
Mono	2,417,935	2,038,771	118.60%
Monterey	26,002,768	28,560,984	91.04%
Napa	9,487,748	10,740,134	88.34%
Nevada	6,570,957	7,425,652	88.49%
Orange	186,230,932	209,526,287	88.88%
Placer	24,862,554	27,355,659	90.89%
Plumas	1,897,592	1,629,248	116.47%
Riverside	134,884,127	155,691,163	86.64%
Sacramento	109,842,203	122,332,264	89.79%
San Benito	4,779,146	4,197,092	113.87%
San Bernardino	135,901,495	156,640,095	86.76%
San Diego	176,701,558	189,500,353	93.25%
San Francisco	64,458,077	55,305,114	116.55%
San Joaquin	49,951,911	53,533,653	93.31%
San Luis Obispo	18,523,163	19,492,482	95.03%
San Mateo	42,988,911	49,033,290	87.67%
Santa Barbara	26,681,819	29,058,002	91.82%
Santa Clara	93,382,508	97,354,039	95.92%
Santa Cruz	16,363,507	16,940,790	96.59%
Shasta	16,201,831	18,198,452	89.03%
Sierra	978,500	623,149	157.02%
Siskiyou	4,314,253	4,841,098	89.12%
Solano	28,669,037	31,445,139	91.17%
Sonoma	30,480,267	30,732,916	99.18%
Stanislaus	31,437,389	37,054,820	84.84%
Sutter	8,192,412	9,485,325	86.37%
Tehama	5,876,354	6,426,611	91.44%
Trinity	1,987,739	2,276,992	87.30%
Tulare	32,682,780	38,548,955	84.78%
Tuolumne	4,818,467	5,085,552	94.75%
Ventura	44,177,371	46,999,346	94.00%
Yolo	15,341,081	17,504,806	87.64%
Yuba	6,144,600	7,883,564	77.94%
Total:	2,481,867,415	2,718,089,203	91.31%

Floor courts (2)
Cluster 1 courts (13)

Reverse Workload Formula without Limitation Reduction of \$100m on WF Allocation	2024-25 Workload Formula Allocation (AFTER \$100m Reduction)	2024-25 Workload Formula Percentage (AFTER \$100m Reduction)	2024-25 Workload Formula Percentage CHANGE (AFTER \$100m Reduction)
D	E	F	G
(3,615,728)	84,830,676	89.63%	-3.82%
-	978,500	178.01%	0.00%
(174,149)	4,144,600	88.47%	-3.72%
(540,465)	13,166,634	89.63%	-3.68%
(113,748)	3,185,565	84.55%	-3.02%
(98,992)	2,355,910	89.41%	-3.76%
(1,778,897)	49,818,749	83.16%	-2.97%
(180,792)	4,302,693	111.03%	-4.67%
(328,213)	9,191,750	84.96%	-3.03%
(3,177,113)	59,955,992	90.45%	-4.79%
(120,576)	2,869,606	88.64%	-3.72%
(447,904)	8,452,490	90.71%	-4.81%
(511,445)	9,651,593	119.55%	-6.33%
(101,310)	2,411,081	90.08%	-3.79%
(3,335,097)	62,937,341	91.51%	-4.85%
(434,476)	10,340,137	85.99%	-3.61%
(175,105)	4,903,892	80.97%	-2.89%
(104,112)	2,477,768	96.02%	-4.03%
(28,762,280)	684,516,509	86.53%	-3.64%
(510,488)	12,149,146	87.56%	-3.68%
(567,729)	13,511,432	86.18%	-3.62%
(75,042)	1,785,935	96.74%	-4.06%
(386,116)	7,286,473	93.72%	-4.97%
(665,350)	15,834,728	86.70%	-3.64%
(55,329)	1,316,771	88.91%	-3.74%
(97,501)	2,320,434	113.82%	-4.78%
(1,048,537)	24,954,231	87.37%	-3.67%
(327,103)	9,160,645	85.29%	-3.05%
(226,542)	6,344,414	85.44%	-3.05%
(6,420,557)	179,810,376	85.82%	-3.06%
(1,002,559)	23,859,995	87.22%	-3.66%
(76,519)	1,821,073	111.77%	-4.70%
(4,650,308)	130,233,819	83.65%	-2.99%
(4,429,281)	105,412,922	86.17%	-3.62%
(192,714)	4,586,431	109.28%	-4.59%
(4,685,383)	131,216,112	83.77%	-2.99%
(7,125,320)	169,576,238	89.49%	-3.76%
(3,243,791)	61,214,286	110.68%	-5.87%
(1,969,582)	47,982,329	89.63%	-3.68%
(932,160)	17,591,003	90.25%	-4.78%
(1,482,099)	41,506,811	84.65%	-3.02%
(1,075,919)	25,605,901	88.12%	-3.70%
(4,699,385)	88,683,123	91.09%	-4.83%
(823,478)	15,540,029	91.73%	-4.86%
(558,579)	15,643,252	85.96%	-3.07%
-	978,500	157.02%	0.00%
(148,740)	4,165,513	86.04%	-3.07%
(1,156,051)	27,512,986	87.50%	-3.68%
(1,533,890)	28,946,377	94.19%	-4.99%
(1,083,845)	30,353,544	81.92%	-2.92%
(282,444)	7,909,967	83.39%	-2.98%
(236,958)	5,639,395	87.75%	-3.69%
(68,530)	1,919,209	84.29%	-3.01%
(1,126,782)	31,555,998	81.86%	-2.92%
(242,485)	4,575,982	89.98%	-4.77%
(2,051,757)	42,125,615	89.63%	-3.71%
(528,904)	14,812,177	84.62%	-3.02%
(211,843)	5,932,757	75.25%	-2.69%
(100,000,000)	2,381,867,415	87.63%	-3.68%

Recalculate Reduction Using Initial Methodology with Restored Funding

Attachment 6B

Court	2024-25 Final Workload Formula Allocation	2024-25 Workload Formula	2024-25 Workload Formula Percentage (BEFORE Restoration)
	A	B	C
Alameda	88,446,403	94,645,177	93.45%
Alpine	978,500	549,681	178.01%
Amador	4,318,750	4,684,703	92.19%
Butte	13,707,099	14,689,951	93.31%
Calaveras	3,299,313	3,767,570	87.57%
Colusa	2,454,902	2,635,032	93.16%
Contra Costa	51,597,645	59,907,816	86.13%
Del Norte	4,483,485	3,875,339	115.69%
El Dorado	9,519,963	10,819,495	87.99%
Fresno	63,133,105	66,287,167	95.24%
Glenn	2,990,182	3,237,289	92.37%
Humboldt	8,900,393	9,318,361	95.51%
Imperial	10,163,038	8,073,327	125.88%
Inyo	2,512,390	2,676,571	93.87%
Kern	66,272,438	68,776,330	96.36%
Kings	10,774,613	12,025,488	89.60%
Lake	5,078,997	6,056,222	83.86%
Lassen	2,581,880	2,580,519	100.05%
Los Angeles	713,278,790	791,102,381	90.16%
Madera	12,659,634	13,875,025	91.24%
Marin	14,079,161	15,677,866	89.80%
Mariposa	1,860,977	1,846,094	100.81%
Mendocino	7,672,588	7,775,002	98.68%
Merced	16,500,078	18,264,043	90.34%
Modoc	1,372,099	1,480,959	92.65%
Mono	2,417,935	2,038,771	118.60%
Monterey	26,002,768	28,560,984	91.04%
Napa	9,487,748	10,740,134	88.34%
Nevada	6,570,957	7,425,652	88.49%
Orange	186,230,932	209,526,287	88.88%
Placer	24,862,554	27,355,659	90.89%
Plumas	1,897,592	1,629,248	116.47%
Riverside	134,884,127	155,691,163	86.64%
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San Diego	176,701,558	189,500,353	93.25%
San Francisco	64,458,077	55,305,114	116.55%
San Joaquin	49,951,911	53,533,653	93.31%
San Luis Obispo	18,523,163	19,492,482	95.03%
San Mateo	42,988,911	49,033,290	87.67%
Santa Barbara	26,681,819	29,058,002	91.82%
Santa Clara	93,382,508	97,354,039	95.92%
Santa Cruz	16,363,507	16,940,790	96.59%
Shasta	16,201,831	18,198,452	89.03%
Sierra	978,500	623,149	157.02%
Siskiyou	4,314,253	4,841,098	89.12%
Solano	28,669,037	31,445,139	91.17%
Sonoma	30,480,267	30,732,916	99.18%
Stanislaus	31,437,389	37,054,820	84.84%
Sutter	8,192,412	9,485,325	86.37%
Tehama	5,876,354	6,426,611	91.44%
Trinity	1,987,739	2,276,992	87.30%
Tulare	32,682,780	38,548,955	84.78%
Tuolumne	4,818,467	5,085,552	94.75%
Ventura	44,177,371	46,999,346	94.00%
Yolo	15,341,081	17,504,806	87.64%
Yuba	6,144,600	7,883,564	77.94%
Total:	2,481,867,415	2,718,089,203	91.31%

Reallocation of Reduction Restoration					
2024-25 Initial Reduction (\$96.982 million)	2024-25 Revised Reduction (\$55.642 million)	2024-25 Partial Restoration (\$41.34 million)	2024-25 Workload Formula Allocation (AFTER Restoration)	2024-25 Workload Formula Percentage (AFTER Restoration)	2024-25 Workload Formula Percentage CHANGE
D	E	F	G	H	I
(4,324,870)	(2,884,769)	1,440,100	89,886,503	94.97%	1.52%
-	-	-	978,500	178.01%	0.00%
(167,223)	(95,942)	71,281	4,390,031	93.71%	1.52%
(583,710)	(360,287)	223,423	13,930,522	94.83%	1.52%
(111,187)	(53,833)	57,354	3,356,668	89.09%	1.52%
(94,059)	(53,965)	40,094	2,494,996	94.69%	1.52%
(1,738,846)	(841,887)	896,959	52,494,605	87.63%	1.50%
(138,333)	(79,366)	58,966	4,542,452	117.21%	1.52%
(320,824)	(155,331)	165,492	9,685,455	89.52%	1.53%
(3,029,033)	(2,020,422)	1,008,611	64,141,716	96.76%	1.52%
(115,557)	(66,299)	49,258	3,039,440	93.89%	1.52%
(425,808)	(284,022)	141,786	9,042,179	97.04%	1.52%
(368,916)	(246,074)	122,842	10,285,880	127.41%	1.52%
(95,542)	(54,816)	40,726	2,553,116	95.39%	1.52%
(3,142,777)	(2,096,291)	1,046,485	67,318,923	97.88%	1.52%
(429,257)	(246,280)	182,977	10,957,590	91.12%	1.52%
(171,163)	(82,871)	88,292	5,167,289	85.32%	1.46%
(92,113)	(52,849)	39,265	2,621,145	101.57%	1.52%
(28,238,886)	(16,201,647)	12,037,239	725,316,029	91.68%	1.52%
(495,278)	(284,158)	211,119	12,870,753	92.76%	1.52%
(474,469)	(229,721)	244,748	14,323,909	91.36%	1.56%
(65,897)	(37,808)	28,090	1,889,067	102.33%	1.52%
(355,283)	(236,981)	118,303	7,790,891	100.20%	1.52%
(651,946)	(374,045)	277,902	16,777,980	91.86%	1.52%
(52,864)	(30,330)	22,534	1,394,633	94.17%	1.52%
(92,113)	(41,754)	31,021	2,448,957	120.12%	1.52%
(1,019,502)	(584,924)	434,578	26,437,346	92.56%	1.52%
(319,738)	(154,806)	164,932	9,652,680	89.87%	1.54%
(221,442)	(107,214)	114,228	6,685,185	90.03%	1.54%
(6,276,002)	(3,038,614)	3,237,387	189,468,320	90.43%	1.55%
(976,477)	(560,239)	416,238	25,278,792	92.41%	1.52%
(58,157)	(33,367)	24,790	1,922,382	117.99%	1.52%
(4,545,609)	(2,200,820)	2,344,789	137,228,916	88.14%	1.51%
(3,701,694)	(1,792,227)	1,909,467	111,751,670	91.35%	1.56%
(149,818)	(85,956)	63,862	4,843,008	115.39%	1.52%
(4,579,894)	(2,217,420)	2,362,474	138,263,969	88.27%	1.51%
(6,764,332)	(3,880,936)	2,883,396	179,584,953	94.77%	1.52%
(2,527,201)	(1,685,691)	841,510	65,299,587	118.07%	1.52%
(2,430,393)	(1,616,188)	814,205	50,766,116	94.83%	1.52%
(890,721)	(594,128)	296,593	18,819,756	96.55%	1.52%
(1,448,731)	(701,423)	747,307	43,736,218	89.20%	1.52%
(1,037,243)	(595,103)	442,140	27,123,960	93.34%	1.52%
(4,448,653)	(2,967,335)	1,481,318	94,863,826	97.44%	1.52%
(774,120)	(516,352)	257,767	16,621,274	98.11%	1.52%
(546,003)	(264,355)	281,648	16,483,479	90.58%	1.55%
-	-	-	978,500	157.02%	0.00%
(145,391)	(70,393)	74,998	4,389,251	90.67%	1.55%
(1,122,454)	(643,991)	478,462	29,147,499	92.69%	1.52%
(1,404,359)	(936,734)	467,625	30,947,892	100.70%	1.52%
(1,059,443)	(512,944)	546,499	31,983,888	86.32%	1.47%
(276,085)	(133,670)	142,415	8,334,826	87.87%	1.50%
(229,402)	(131,616)	97,786	5,974,139	92.96%	1.52%
(66,987)	(32,433)	34,554	2,022,293	88.81%	1.52%
(1,101,413)	(533,265)	568,148	33,250,929	86.26%	1.47%
(232,387)	(155,007)	77,381	4,895,848	96.27%	1.52%
(2,147,664)	(1,432,532)	715,132	44,892,503	95.52%	1.52%
(516,996)	(250,311)	266,685	15,607,767	89.16%	1.52%
(207,074)	(100,258)	106,816	6,251,416	79.30%	1.35%
(96,982,000)	(55,642,000)	41,340,000	2,523,207,415	92.83%	1.52%

Floor courts (2)
Cluster 1 courts (13)

Workload Formula Restoration

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)
	A	B	C (A/B)	D	E
Alameda	89,886,503	94,645,177	94.97%	890,100	95.91%
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%	138,153	95.77%
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%	2,860,658	92.40%
Del Norte	4,542,452	3,875,339	117.21%	-	117.21%
El Dorado	9,685,455	10,819,495	89.52%	278,215	92.09%
Fresno	64,141,716	66,287,167	96.76%	623,404	97.70%
Glenn	3,039,440	3,237,289	93.89%	197,849	100.00%
Humboldt	9,042,179	9,318,361	97.04%	87,635	97.98%
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%	646,814	98.82%
Kings	10,957,590	12,025,488	91.12%	168,813	92.52%
Lake	5,167,289	6,056,222	85.32%	511,670	93.77%
Lassen	2,621,145	2,580,519	101.57%	-	101.57%
Los Angeles	725,316,029	791,102,381	91.68%	9,128,814	92.84%
Madera	12,870,753	13,875,025	92.76%	130,600	93.70%
Marin	14,323,909	15,677,866	91.36%	201,419	92.65%
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%	199,755	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%	272,029	93.52%
Napa	9,652,680	10,740,134	89.87%	242,256	92.13%
Nevada	6,685,185	7,425,652	90.03%	158,116	92.16%
Orange	189,468,320	209,526,287	90.43%	3,831,465	92.26%
Placer	25,278,792	27,355,659	92.41%	265,490	93.38%
Plumas	1,922,382	1,629,248	117.99%	-	117.99%
Riverside	137,228,916	155,691,163	88.14%	6,360,117	92.23%
Sacramento	111,751,670	122,332,264	91.35%	1,578,871	92.64%
San Benito	4,843,008	4,197,092	115.39%	-	115.39%
San Bernardino	138,263,969	156,640,095	88.27%	6,149,674	92.19%
San Diego	179,584,953	189,500,353	94.77%	1,782,175	95.71%
San Francisco	65,299,587	55,305,114	118.07%	-	118.07%
San Joaquin	50,766,116	53,533,653	94.83%	503,462	95.77%
San Luis Obispo	18,819,756	19,492,482	96.55%	183,319	97.49%
San Mateo	43,736,218	49,033,290	89.20%	1,413,735	92.08%
Santa Barbara	27,123,960	29,058,002	93.34%	273,279	94.28%
Santa Clara	94,863,826	97,354,039	97.44%	915,576	98.38%
Santa Cruz	16,621,274	16,940,790	98.11%	159,321	99.05%
Shasta	16,483,479	18,198,452	90.58%	314,190	92.30%
Sierra	978,500	623,149	157.02%	-	157.02%
Siskiyou	4,389,251	4,841,098	90.67%	80,728	92.33%
Solano	29,147,499	31,445,139	92.69%	296,739	93.64%
Sonoma	30,947,892	30,732,916	100.70%	-	100.70%
Stanislaus	31,983,888	37,054,820	86.32%	2,539,743	93.17%
Sutter	8,334,826	9,485,325	87.87%	421,034	92.31%
Tehama	5,974,139	6,426,611	92.96%	60,440	93.90%
Trinity	2,022,293	2,276,992	88.81%	254,699	100.00%
Tulare	33,250,929	38,548,955	86.26%	2,682,589	93.22%
Tuolumne	4,895,848	5,085,552	96.27%	47,828	97.21%
Ventura	44,892,503	46,999,346	95.52%	442,010	96.46%
Yolo	15,607,767	17,504,806	89.16%	510,773	92.08%
Yuba	6,251,416	7,883,564	79.30%	1,141,053	93.77%
Total:	2,523,207,415	2,718,089,203	92.83%	50,000,000	94.67%

Floor courts (2)

Cluster 1 courts (13)

Trial Court Funding and Workload Formula Resource Guide

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.¹ 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.

¹ 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.

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.²
- 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.³ 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.

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

³ 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.⁴ 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.⁵

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.⁶

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.⁷

⁴ 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>.

⁵ 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>.

⁶ 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>.

⁷ 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 TCBAC to establish a base funding floor amount of \$750,000 effective in FY 2014–15.⁸

On March 15, 2019, the Judicial Council approved increasing the base funding floor amount from \$750,000 to \$800,000⁹ and took further action at its business meeting on March 11, 2022, to increase the base funding floor to \$950,000, effective July 1, 2022.¹⁰ 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.¹¹ 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.

⁸ 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>.

⁹ 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>.

¹⁰ 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>.

¹¹ 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”:¹²

“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.”

¹² 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.¹³ 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.¹⁴

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.¹⁵

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.¹⁶

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:

¹³ 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>.

¹⁴ 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>.

¹⁵ 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>.

¹⁶ 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 TCBAC considered the implementation of the current policy to reallocate existing funding among the courts for the 2024–25 allocations.¹⁷ 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 methodology¹⁸ to allocate this reduction, using a 4 percent band around the statewide funding level, is described below:

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

¹⁸ 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.¹⁹ 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.²⁰ 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 2023–24.²¹

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

¹⁹ 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>.

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

²¹ 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,²² 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.²³ 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.²⁴

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 2022–23.²⁵ The budget also included funding for new judgeships and civil assessment backfill that was allocated via the Workload Formula methodology.

²² 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>.

²³ 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>.

²⁴ 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>.

²⁵ 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.²⁶ 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.

²⁶ 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.²⁷ 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.²⁸ 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 TCBAC that the committee study special circumstance workload;²⁹ 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.³⁰

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

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.³² 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

²⁷ 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>.

²⁸ 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>.

²⁹ 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>.

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

³¹ 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>.

³² 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 2020–21.³³

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).

³³ 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