



Judicial Council of California

Trial Court Budget Advisory Committee

www.courts.ca.gov/tcbac.htm

tcbac@jud.ca.gov

TRIAL COURT BUDGET ADVISORY COMMITTEE FUNDING METHODOLOGY SUBCOMMITTEE

MINUTES OF OPEN MEETING

June 18, 2025

12:00 p.m. – 1:00 p.m.

<https://jcc.granicus.com/player/event/4020>

Advisory Body Members Present: Judges: Hon. Jonathan B. Conklin (Cochair), Hon. J. Eric Bradshaw, Hon. Judith C. Clark, Hon. Samantha P. Jessner, and Hon. David C. Kalemkarian

Executive Officers: Mr. Chad Finke (Cochair), Ms. Stephanie Cameron, Mr. Chris Ruhl, Mr. David W. Slayton, Ms. Kim Turner, and Mr. David H. Yamasaki

Advisory Body Members Absent: Hon. Patricia L. Kelly, Ms. Rebecca Fleming, and Mr. Shawn C. Landry

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

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 March 11, 2025, Funding Methodology Subcommittee (FMS) meeting.

DISCUSSION AND ACTION ITEM (ITEM 1)

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

Consideration of updates to the Funding Methodology Subcommittee annual work plan for FY 2025–26.

Action: *The FMS unanimously voted to approve the following recommendations for consideration by the Trial Court Budget Advisory Committee (TCBAC) at its meeting on July 2, 2025:*

1. **Reevaluate the court cluster system which is determined by the number of authorized judicial positions.** Move this item from FY 2024–25 to FY 2025–26 to allow additional time for the Data Analytics Advisory Committee to review the statewide four-cluster model and its criteria;
2. **Consider further refinements to the Workload Formula policy, including methodologies to allocate future budget reductions and/or the restoration of funding that had previously been reduced due to budget shortfalls.** Remove this item from the workplan as proposed policy updates to the Workload Formula for allocation methodologies for potential future reductions and funding restorations, developed by the FMS in FY 2024–25, will be considered by the Judicial Council at its business meeting on July 18, 2025;
3. **Reevaluate the Trial Court Minimum Operating and Emergency Fund Balance Policy.** Move this item from FY 2024–25 to FY 2025–26 and consider if the current Trial Court Minimum Operating and Emergency Fund Balance policy should be repealed. The policy has been suspended since FY 2012–13 while evaluation of the state-level emergency reserve and fund balance cap were underway to determine the impact on trial court operations;
4. **Evaluate the Equity-Based Reallocation Policy.** Add this new item to the work plan to evaluate the current equity-based reallocation policy, including technical refinements and clarification of the application of the existing methodology (e.g., penetration of courts into the band around the statewide funding level, both from above and below; implementation of the reallocation when contributing courts generate more funding than the need of the receiving courts; and defining the “second year of no new money”);
5. **Evaluate the impact of the Resource Assessment Study data on the Workload Formula calculation and timing of implementation of new caseweights in the model.** Add this new item to the work plan to evaluate the impact of the Resource Assessment Study data, including updated caseweights from the 2024 study, on the Workload Formula calculation and the timing of data updates, to allow trial courts time to plan for potential changes in their allocations in coordination with the Data Analytics Advisory Committee;
6. **Evaluate Bureau of Labor Statistics factor.** Add this new item to the work plan to evaluate the impact of the Bureau of Labor Statistics factor in the Workload Formula;
7. **Review Workload Formula policy to address adjustments as needed.** Add this item to the work plan as an ongoing process. This reflects one of the primary responsibilities of the FMS which is to review the existing Workload Formula policy to ensure that it stays current to advance the goal of funding equity, stability, and predictability to support trial court operations;
8. **Review the base funding floor amounts annually, if requested by the applicable courts, for consideration by the TCBAC, no later than December of each year, to determine whether an inflationary adjustment is needed.** Retain this item in the work plan as an ongoing process for the funding floor courts to request augmentations as needed to support their core operations; and
9. **Review Workload Formula Adjustment Request Process submissions as referred by the TCBAC chair.** Retain this item in the work plan, as the Workload Formula policy requires the

FMS to review annual Adjustment Request Process submissions from the trial courts and to prioritize the requests in its work plan.

A D J O U R N M E N T

There being no further business, the meeting was adjourned at 12:36 p.m.

Approved by the advisory body on July 31, 2025.