



# Judicial Council of California

## Trial Court Budget Advisory Committee

### TRIAL COURT BUDGET ADVISORY COMMITTEE

### MATERIALS OCTOBER 29, 2025 VIRTUAL MEETING

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# Judicial Council of California

## Trial Court Budget Advisory Committee

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

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[JCCAccessCoordinator@jud.ca.gov](mailto: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

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**Date:** Wednesday, October 29, 2025  
**Time:** 12:00 p.m. – 1:30 p.m.  
**Public Video Livestream:** <https://jcc.granicus.com/player/event/4017>

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

Members of the public seeking to make an audio recording of the meeting must submit a written request at least two business days before the meeting. Requests can be emailed to [tcbac@jud.ca.gov](mailto:tcbac@jud.ca.gov).

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

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

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##### Call to Order and Roll Call

##### Approval of Minutes

Approve minutes of the August 25, 2025, Trial Court Budget Advisory Committee meeting.

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

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##### Remote Comment

In accordance with California Rules of Court, rule 10.75(i) and (k), individuals wishing to speak about an agenda item during the public comment part of the meeting, must email a request by 12:00 p.m. on Tuesday, October 28, 2025 to [tcbac@jud.ca.gov](mailto:tcbac@jud.ca.gov). The request must state the speaker's name, the name of the organization that the speaker represents, if any, and the agenda item the speaker wishes to address. Only requests received by 12:00 p.m. on October 28, 2025, will receive a reply providing the virtual meeting link and information needed to speak during the public comment time.

**Written Comment**

In accordance with California Rules of Court, rule 10.75(k)(1), written comments pertaining to any agenda item of a regularly noticed open meeting can be submitted up to one complete business day before the meeting. For this specific meeting, comments should be e-mailed to [tcbac@jud.ca.gov](mailto:tcbac@jud.ca.gov). Only written comments received by 12:00 p.m. on October 28, 2025, will be provided to advisory body members prior to the start of the meeting.

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**III. DISCUSSION AND POSSIBLE ACTION ITEMS (ITEMS 1–4)**

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**Item 1**

**Increased Transcript Rate Allocations for Fiscal Year 2025–26 (Action Required)**

Consideration of allocations for fiscal year 2025–26 increased transcript rates.

Presenter: Mr. Marshall Comia, Associate Analyst, Judicial Council Policy and Research

**Item 2**

**Final Adjustments for Year-End Fund Balances for FY 2024–25 (Action Required)**

Consideration of final one-time adjustments for FY 2024–25 year-end fund balances for the trial courts.

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

**Item 3**

**Funding Methodology Subcommittee Work Plan Update for FY 2025–26 (Action Required)**

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

Presenter: Ms. Rose Lane, Senior Analyst, Judicial Council Leadership Support Services

**Item 4**

**Trial Court Budget Advisory Committee Annual Agenda for 2026 (Action Required)**

Consideration of the proposed Trial Court Budget Advisory Committee annual agenda for 2026.

Presenter: Hon. Jonathan B. Conklin, Chair, Trial Court Budget Advisory Committee  
Ms. Rose Lane, Senior Analyst, Judicial Council Leadership Support Services

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**IV. ADJOURNMENT**

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**Adjourn**



## Judicial Council of California

### Trial Court Budget Advisory Committee

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

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

## TRIAL COURT BUDGET ADVISORY COMMITTEE

### MINUTES OF OPEN MEETING

August 25, 2025

12:00 p.m. – 1:00 p.m.

<https://jcc.granicus.com/player/event/4587>

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**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, and Hon. Sonny S. Sandhu

Executive Officers: Ms. Stephanie Cameron, Mr. Chad Finke, Mr. Kevin Harrigan, Mr. Darrel E. Parker, Mr. Brandon E. Riley, Mr. Chris Ruhl, Ms. Kim Turner, and Mr. David H. Yamasaki

**Advisory Body Members Absent:** Hon. Wendy G. Getty, Hon. Michael J. Reinhart, Hon. Lisa M. Rogan, Ms. Rebecca Fleming (Vice-Chair), Mr. Shawn C. Landry, Mr. Michael M. Roddy, and Mr. David W. Slayton

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

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### OPEN MEETING

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#### Call to Order and Roll Call

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

#### Approval of Minutes

The advisory body approved the minutes of the August 11, 2025, Trial Court Budget Advisory Committee meeting.

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### DISCUSSION AND ACTION ITEM (ITEM 1)

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#### Item 1 – Fiscal Year (FY) 2025–26 Trial Court Trust Fund Allocation Increase for Sargent Shriver Civil Counsel Program (Action Required)

Consideration of an allocation increase for the Sargent Shriver Civil Counsel Program for FY 2025–26.

**Action:** The Trial Court Budget Advisory Committee unanimously voted to approve a recommendation by the Revenue and Expenditure Subcommittee for an increase to the approved FY 2025–26 Trial Court Trust Fund allocation for the Sargent Shriver Civil Counsel Pilot Program of \$1.4 million, which results in a total program allocation of \$19.6 million for the current year. This amount will be allocated and distributed to current Shriver projects, on a pro rata basis according to the award amounts for the 2023–26 grant cycle, for FY 2025–26 as identified in Attachment A. This recommendation will be considered by the Judicial Branch Budget Committee and then the Judicial Council at its October 24, 2025, business meeting.

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**INFORMATION ONLY ITEMS (ITEM 1) (NO ACTION REQUIRED)**

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**Info 1 – Funds Held on Behalf of the Trial Courts Annual Report for FY 2023–24**

Annual report for the Funds Held on Behalf of the Trial Courts program regarding open projects and projects completed in FY 2023–24.

**Action:** No action taken.

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**ADJOURNMENT**

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There being no further business, the meeting was adjourned at 12:17 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:** Increased Transcript Rate Allocations for Fiscal Year (FY) 2025–26

**Date:** 10/29/2025

**Contact:** Marshall Comia, Associate Analyst, Policy & Research  
916-263-1905 | [Marshall.Comia@jud.ca.gov](mailto:Marshall.Comia@jud.ca.gov)

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### **Issue**

Consideration of fiscal year (FY) 2025–26 allocations for the ongoing \$7 million General Fund included in the Budget Act of 2025 to cover the additional costs incurred by courts associated with increased transcript rates.

### **Background**

Government Code section 69950 establishes the compensation rates for court reporters based on transcript length. Specifically, it sets the fee for an original ribbon or printed transcript at \$1.13 per 100 words, and \$0.20 per 100 words for each copy purchased at the same time by the court, a party, or another purchaser of the original (Gov. Code, § 69950(a)).

In 2021, Assembly Bill 177 (Stats. 2021, ch. 257) amended section 69950 to increase transcript fees, raising the rate for originals from \$0.85 to \$1.13 per 100 words. Additionally, Senate Bill 170 (Stats. 2021, ch. 240), which amended the Budget Act of 2021, appropriated \$7 million ongoing General Fund to develop a methodology for distributing funds to trial courts to cover the increased costs associated with the higher transcript rates.

### **Allocation Methodology**

The Funding Methodology Subcommittee of the Trial Court Budget Advisory Committee (TCBAC) established the Ad Hoc Court Reporter Funding Subcommittee, consisting of members from the TCBAC, to develop an allocation methodology recommendation for the first year of funding in FY 2021–22. Through deliberations, the ad hoc subcommittee developed a recommendation for an allocation methodology for the \$7 million and presented it to the TCBAC at its November 30, 2021, meeting<sup>1</sup> and to the Judicial Branch Budget Committee on December 7, 2021.<sup>2</sup> The Judicial Council approved the allocation methodology at its January 21, 2022,

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<sup>1</sup> Judicial Council of Cal., Staff Rep., *SB 170 Ongoing \$7 Million Increased Transcript Rate Funding Allocation Methodology* (Nov. 18, 2021), <https://courts.ca.gov/system/files/file/tcbac-20211130-materials.pdf>.

<sup>2</sup> Judicial Council of Cal., Staff Rep., *SB 170 Ongoing \$7 Million Increased Transcript Rate Funding Allocation Methodology* (Nov. 30, 2021), <https://courts.ca.gov/system/files/file/jbbc-20211207-materials.pdf>.

business meeting and directed staff to update the three-year average for the allocation methodology each year based on the most recent data available.<sup>3</sup>

### Annual True-Up Process

Since the funding outlined in this report can only be used for the additional costs that courts incur from increased transcript rates, any unspent funds are required to revert to the General Fund each fiscal year. The actual expenditures for each court from FY 2020–21 will be used to establish a baseline, from which eligible cost increases will be determined. Based on the historical baseline amount and the actual expenditures for the current fiscal year, a true-up process will occur at the end of each fiscal year to pull back any remaining funds. This process and the adjustments for FY 2025–26 are outlined in Table 1 below.

**Table 1. Annual Reversion Calculation for FY 2025–26**

| Court | FY 2020–21 (Baseline) | Actual Expenditures |            |            | 3-Year Average | FY 2025–26 Allocation From \$7M | FY 2025–26 Expenditures | General Fund Reversion |
|-------|-----------------------|---------------------|------------|------------|----------------|---------------------------------|-------------------------|------------------------|
|       |                       | FY 2022–23          | FY 2023–24 | FY 2024–25 |                |                                 |                         |                        |
| A     | \$85,000              | \$90,000            | \$100,000  | \$110,000  | \$100,000      | \$43,260                        | \$120,000               | \$8,260                |

In the example in Table 1, Court A will receive an allocation of \$43,260 from the FY 2025–26 court reporter transcript appropriation based on the existing methodology. At year end, the court’s actual expenditures for FY 2025–26 are \$120,000, a \$35,000 increase from the FY 2020–21 baseline amount ( $\$120,000 - \$85,000 = \$35,000$ ). Taking the difference between the FY 2025–26 allocation (\$43,260) and the \$35,000 increase ( $\$43,260 - \$35,000 = \$8,260$ ), the court will be required to revert the remaining \$8,260 to the General Fund.

### Recommendation

Approve the allocation of the \$7 million to each trial court proportionally using the Judicial Council–approved methodology for FY 2025–26, based on an average of the prior three-year transcript expenditures, as outlined in Attachment A.

The approved recommendation will be considered by the Judicial Branch Budget Committee and then the Judicial Council at its December 12, 2025, business meeting.

### Attachments

1. Attachment A: *Transcript Funding: Recommended FY 2025–26 Allocations*

<sup>3</sup> Judicial Council of Cal., Advisory Com. Rep., *Allocations and Reimbursements to Trial Courts: SB 170 Funding for Increased Transcript Rates* (Dec. 15, 2021), <https://jcc.legistar.com/View.ashx?M=F&ID=10358387&GUID=E6D8CA62-BC80-449F-B7AC-25FF2F4F1AB3>.

Attachment 1A - Transcript Funding: Recommended FY 2025-26 Allocations

| Cluster | Court            | Baseline *<br>FY 2020-21 | Actual Expenditures on<br>Court Reporter Transcripts |                     |                     |                     | Proportion of<br>Average<br>Expenditures<br>(%) | Proportional<br>Allocation<br>of \$7M |
|---------|------------------|--------------------------|------------------------------------------------------|---------------------|---------------------|---------------------|-------------------------------------------------|---------------------------------------|
|         |                  |                          | FY 2022-23                                           | FY 2023-24          | FY 2024-25          | Average             |                                                 |                                       |
|         | <b>Statewide</b> | <b>\$12,739,717</b>      | <b>\$22,616,137</b>                                  | <b>\$23,695,109</b> | <b>\$25,246,096</b> | <b>\$23,852,447</b> | <b>100</b>                                      | <b>\$7,000,000</b>                    |
| 4       | Alameda          | \$316,575.08             | \$551,194.52                                         | \$503,352.62        | \$452,022.99        | \$502,190.04        | 2.11                                            | \$147,378.18                          |
| 1       | Alpine           | 139.20                   | 164.69                                               | 141.24              | 335.07              | 213.67              | 0.00                                            | 62.70                                 |
| 1       | Amador           | 18320.64                 | 31429.90                                             | 29887.69            | 16551.88            | 25956.49            | 0.11                                            | 7,617.48                              |
| 2       | Butte            | 97893.56                 | 93852.23                                             | 111183.44           | 99163.25            | 101399.64           | 0.43                                            | 29,757.85                             |
| 1       | Calaveras        | 26846.07                 | 32234.06                                             | 14406.12            | 45486.57            | 30708.92            | 0.13                                            | 9,012.17                              |
| 1       | Colusa           | 8007.57                  | 8962.50                                              | 15936.70            | 9843.18             | 11580.79            | 0.05                                            | 3,398.63                              |
| 3       | Contra Costa     | 405960.66                | 627383.89                                            | 641016.62           | 567464.66           | 611955.06           | 2.57                                            | 179,591.02                            |
| 1       | Del Norte        | 53390.84                 | 33493.56                                             | 34220.60            | 31718.91            | 33144.36            | 0.14                                            | 9,726.91                              |
| 2       | El Dorado        | 49904.40                 | 109159.31                                            | 90782.81            | 100219.55           | 100053.89           | 0.42                                            | 29,362.91                             |
| 3       | Fresno           | 431682.90                | 675194.77                                            | 664452.92           | 740352.11           | 693333.27           | 2.91                                            | 203,473.16                            |
| 1       | Glenn            | 7650.33                  | 4636.63                                              | 14282.06            | 7714.89             | 8877.86             | 0.04                                            | 2,605.39                              |
| 2       | Humboldt         | 7435.39                  | 4693.25                                              | 4527.74             | 5077.08             | 4766.02             | 0.02                                            | 1,398.69                              |
| 2       | Imperial         | 23298.05                 | 35250.70                                             | 41292.15            | 59191.94            | 45244.93            | 0.19                                            | 13,278.07                             |
| 1       | Inyo             | 10357.10                 | 29840.67                                             | 12613.87            | 20673.30            | 21042.61            | 0.09                                            | 6,175.40                              |
| 3       | Kern             | 709145.12                | 1038790.88                                           | 1016538.97          | 1003014.80          | 1019448.22          | 4.27                                            | 299,178.42                            |
| 2       | Kings            | 275881.52                | 384796.57                                            | 360009.24           | 279145.50           | 341317.10           | 1.43                                            | 100,166.65                            |
| 2       | Lake             | 32335.95                 | 62401.66                                             | 70559.26            | 69381.79            | 67447.57            | 0.28                                            | 19,793.90                             |
| 1       | Lassen           | 30822.35                 | 52085.09                                             | 32865.86            | 51604.40            | 45518.45            | 0.19                                            | 13,358.34                             |
| 4       | Los Angeles      | 3433512.76               | 7314384.71                                           | 7621806.47          | 7882745.65          | 7606312.28          | 31.89                                           | 2,232,231.58                          |
| 2       | Madera           | 83122.68                 | 164173.71                                            | 131650.42           | 97177.11            | 131000.41           | 0.55                                            | 38,444.81                             |
| 2       | Marin            | 45711.35                 | 101810.67                                            | 115781.79           | 87034.20            | 101542.22           | 0.43                                            | 29,799.69                             |
| 1       | Mariposa         | 4709.35                  | 23790.30                                             | 10630.50            | 11188.27            | 15203.02            | 0.06                                            | 4,461.65                              |
| 2       | Mendocino        | 134226.15                | 136446.08                                            | 145339.87           | 154230.46           | 145338.80           | 0.61                                            | 42,652.71                             |
| 2       | Merced           | 156237.40                | 212591.19                                            | 159871.18           | 153581.20           | 175347.86           | 0.74                                            | 51,459.50                             |
| 1       | Modoc            | 7154.80                  | 4142.25                                              | 8534.07             | 12567.48            | 8414.60             | 0.04                                            | 2,469.44                              |
| 1       | Mono             | 2805.75                  | 6889.76                                              | 12007.44            | 3089.16             | 7328.79             | 0.03                                            | 2,150.79                              |
| 3       | Monterey         | 127556.45                | 180728.67                                            | 202571.33           | 232090.74           | 205130.25           | 0.86                                            | 60,199.77                             |
| 2       | Napa             | 90805.57                 | 143355.68                                            | 126090.16           | 106343.61           | 125263.15           | 0.53                                            | 36,761.09                             |
| 2       | Nevada           | 23785.51                 | 51186.78                                             | 69668.91            | 59369.10            | 60074.93            | 0.25                                            | 17,630.25                             |
| 4       | Orange           | 982450.73                | 1664727.05                                           | 2041287.39          | 2188912.63          | 1964975.69          | 8.24                                            | 576,663.26                            |
| 2       | Placer           | 148518.21                | 289885.16                                            | 338621.00           | 362938.52           | 330481.56           | 1.39                                            | 96,986.73                             |
| 1       | Plumas           | 2103.83                  | 3646.08                                              | 7654.59             | 11107.04            | 7469.24             | 0.03                                            | 2,192.00                              |
| 4       | Riverside        | 11186.15                 | 17280.58                                             | 21905.57            | 24815.05            | 21333.73            | 0.09                                            | 6,260.83                              |
| 4       | Sacramento       | 623901.57                | 1147043.45                                           | 1365936.27          | 1517322.39          | 1343434.04          | 5.63                                            | 394,258.84                            |
| 1       | San Benito       | 3765.81                  | 14587.46                                             | 16219.36            | 11952.26            | 14253.03            | 0.06                                            | 4,182.85                              |
| 4       | San Bernardino   | 636886.38                | 1126530.31                                           | 1239640.68          | 1300451.22          | 1222207.40          | 5.12                                            | 358,682.35                            |
| 4       | San Diego        | 501180.75                | 1339811.09                                           | 1619341.04          | 1758132.34          | 1572428.16          | 6.59                                            | 461,461.96                            |
| 3       | San Francisco    | 300913.53                | 463844.20                                            | 683833.72           | 754970.00           | 634215.97           | 2.66                                            | 186,123.96                            |
| 3       | San Joaquin      | 349811.40                | 429188.32                                            | 391653.40           | 465572.03           | 428804.58           | 1.80                                            | 125,841.68                            |
| 2       | San Luis Obispo  | 135605.83                | 237865.67                                            | 233586.90           | 220403.51           | 230618.69           | 0.97                                            | 67,679.88                             |
| 3       | San Mateo        | 280960.99                | 453090.98                                            | 352784.89           | 419130.15           | 408335.34           | 1.71                                            | 119,834.55                            |
| 3       | Santa Barbara    | 134407.98                | 418522.75                                            | 216414.43           | 269186.22           | 301374.47           | 1.26                                            | 88,444.65                             |
| 4       | Santa Clara      | 497742.88                | 657971.51                                            | 619863.69           | 693031.08           | 656955.43           | 2.75                                            | 192,797.32                            |
| 2       | Santa Cruz       | 100254.92                | 142959.21                                            | 120674.01           | 162999.98           | 142211.07           | 0.60                                            | 41,734.81                             |
| 2       | Shasta           | 88542.58                 | 184845.25                                            | 143991.52           | 321480.72           | 216772.50           | 0.91                                            | 63,616.43                             |
| 1       | Sierra           | 698.10                   | 856.26                                               | 4255.28             | 6053.73             | 3721.76             | 0.02                                            | 1,092.23                              |
| 2       | Siskiyou         | 31755.06                 | 48526.21                                             | 47198.64            | 70468.38            | 55397.74            | 0.23                                            | 16,257.63                             |
| 3       | Solano           | 159262.13                | 268888.06                                            | 311807.61           | 297882.49           | 292859.39           | 1.23                                            | 85,945.72                             |
| 3       | Sonoma           | 118224.22                | 201893.11                                            | 179551.45           | 187194.21           | 189546.26           | 0.79                                            | 55,626.32                             |



Attachment 1A - Transcript Funding: Recommended FY 2025-26 Allocations

| Cluster | Court            | Baseline *<br>FY 2020-21 | Actual Expenditures on<br>Court Reporter Transcripts |                     |                     |                     | Proportion of<br>Average<br>Expenditures<br>(%) | Proportional<br>Allocation<br>of \$7M |
|---------|------------------|--------------------------|------------------------------------------------------|---------------------|---------------------|---------------------|-------------------------------------------------|---------------------------------------|
|         |                  |                          | FY 2022-23                                           | FY 2023-24          | FY 2024-25          | Average             |                                                 |                                       |
|         | <b>Statewide</b> | <b>\$12,739,717</b>      | <b>\$22,616,137</b>                                  | <b>\$23,695,109</b> | <b>\$25,246,096</b> | <b>\$23,852,447</b> | <b>100</b>                                      | <b>\$7,000,000</b>                    |
| 3       | Stanislaus       | 239016.29                | 253288.36                                            | 289909.07           | 387674.65           | 310290.69           | 1.30                                            | 91,061.30                             |
| 2       | Sutter           | 36528.42                 | 22578.15                                             | 26776.87            | 41349.38            | 30234.80            | 0.13                                            | 8,873.04                              |
| 2       | Tehama           | 13000.01                 | 35540.78                                             | 18294.10            | 50314.57            | 34716.48            | 0.15                                            | 10,188.28                             |
| 1       | Trinity          | 7874.70                  | 5500.05                                              | 4835.20             | 3974.64             | 4769.96             | 0.02                                            | 1,399.85                              |
| 3       | Tulare           | 298604.18                | 383719.73                                            | 382105.33           | 495772.22           | 420532.43           | 1.76                                            | 123,414.04                            |
| 2       | Tuolumne         | 90623.59                 | 61691.77                                             | 76425.66            | 105205.06           | 81107.50            | 0.34                                            | 23,802.69                             |
| 3       | Ventura          | 168224.17                | 306031.45                                            | 367551.66           | 410332.11           | 361305.07           | 1.51                                            | 106,032.54                            |
| 2       | Yolo             | 138545.20                | 266251.08                                            | 256306.22           | 299862.14           | 274139.81           | 1.15                                            | 80,452.07                             |
| 2       | Yuba             | 23853.10                 | 54508.58                                             | 54660.99            | 49228.03            | 52799.20            | 0.22                                            | 15,495.03                             |

\* Total expenditures in FY 2020-21 will serve as the baseline for the true-up process at the end of FY 2025-26.

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

**Title:** Final Adjustments for Year-End Fund Balances for Fiscal Year 2024–25

**Date:** 10/29/2025

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

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**Issue**

The Judicial Council is required to finalize annual allocations to the trial courts in January of each fiscal year to ensure compliance with statutory limitations on the amount of reserves that courts can carry over to the next fiscal year. As the last step in this process, a one-time reduction of trial court allocations for courts that are above the 3 percent fund balance cap is proposed for fiscal year (FY) 2024–25.

**Background**

Government Code section 68502.5(c)(2)(A) requires the Judicial Council to make a preliminary allocation reduction in July and to finalize allocations in January of each fiscal year. The final allocations are then offset by the amount of fund balance (or reserves) in excess of the fund balance cap authorized in statute. Under Government Code section 77203(b), a trial court may carry over unexpended funds in an amount not to exceed 3 percent of the courts operating budget from the prior fiscal year.<sup>1</sup>

**Process for Reporting Year-End Fund Balances**

At its business meeting on July 29, 2014, the Judicial Council approved an annual process beginning in FY 2015–16 for courts to provide preliminary and final computations of the portion of their ending fund balance that is subject to the statutory cap:<sup>2</sup>

- Trial courts are required to submit the computation form with preliminary year-end information by July 15 of each fiscal year. The information provided by the courts is used by the Judicial Council to make the preliminary reductions to allocations as required by statute. The courts are not required to provide the details related to encumbrances, prepayments, and restricted revenue when submitting the form for the preliminary allocation.

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<sup>1</sup> Added as part of Senate bill 1021 (Stats. 2012, ch. 41), later amended by Senate Bill 95 (Stats. 2019, ch. 36 § 2), effective June 27, 2019.

<sup>2</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Allocations: Funding for General Court Operations and Specific Costs in Fiscal Year 2014–2015* (July 22, 2014), <https://courts.ca.gov/sites/default/files/courts/default/2024-10/jc-20140729-itemc.pdf>.

- Trial courts are required to submit an updated computation form with final year-end information in the fall of each fiscal year when financial records are closed.
- The Judicial Council’s Chief Financial Officer will report to the council the information provided by the courts for the final allocation reduction, if any, before February of each fiscal year.

### **Adjustments for Funds Held on Behalf of the Trial Courts**

Funds Held on Behalf (FHOB) of the Trial Courts is a Judicial Council–approved process that allows the trial courts to request funding that exceeds the 3 percent cap be used to fund allowable projects or expenditures for the benefit of those courts.

This process allows the courts to fund one-time projects or purchases and meet contractual obligations within their limited allocations. Allowable projects include technology improvements, such as new or updated case management systems; court efficiency efforts, including online or smart forms for court users; facilities maintenance or repair allowed under California Rule of Court rule 10.810; and one-time expenditures such as vehicle, equipment, or furniture replacement.

For FY 2024–25, a total of 21 trial courts submitted FHOB requests totaling \$17.7 million.<sup>3</sup> This funding will be retained in the Trial Court Trust Fund as restricted fund balance and courts will be reimbursed for actual expenditures for approved projects in their monthly distribution. The \$17.7 million is used in the calculation to determine the final fund balance reduction for FY 2024–25.

### **Final Trial Court Accounting Records for Fiscal Year 2024–25**

The figures in Attachment 2A reflect the trial courts’ final accounting records for FY 2024–25. This information was reviewed by the Judicial Council’s Budget Services and Branch Accounting and Procurement staff.

The final one-time net reduction of \$2.9 million for FY 2024–25 represents a total reduction of \$20.6 million above the fund balance cap, after allowable accounting adjustments, which is then offset by \$17.7 million in applicable FHOB requests for the trial courts.

- Column A displays the calculated fund balance cap amount for each court;
- Column J shows the courts’ FY 2024–25 fund balance amounts subject to the cap, excluding statutorily restricted funds per Government Code section 77203(b), encumbrances consistent with the state contracting process, prepayments, and approved FHOB requests which are held in the Trial Court Trust Fund;

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<sup>3</sup> Fiscal Planning Subcommittee meeting materials (October 10, 2025), <https://courts.ca.gov/system/files/file/tcbac-20251010-fps-materials.pdf>

- Column K displays the courts' final amount above the 3 percent cap totaling \$17.1 million;
- Column M provides the FY 2024–25 adjustments to the courts' FY 2022–23 and FY 2023–24 fund balance cap, totaling \$3.4 million;
- Column N displays the courts' final reduction of \$20.6 million, which affects 33 courts;
- Column O reflects the final FHOB requests for FY 2024–25 totaling \$17.7 million, which are pending approval by the Judicial Council at its December 12, 2025, business meeting; and
- Column P displays the net reduction of \$2.9 million for the fund balance above the 3 percent cap after accounting for the FHOB requests. The reduction will be allocated to the trial courts in the January 2026 distribution #7.

### **Recommendation**

Approve the final FY 2024–25 year-end fund balance reduction of \$2.9 million, which reflects a total reduction of \$20.6 million above the fund balance cap offset by \$17.7 million in applicable FHOB requests. The \$2.9 million reduction will be allocated to the trial courts in January 2026.

This recommendation will be considered by the Judicial Branch Budget Committee and then the Judicial Council at its December 12, 2025, business meeting.

### **Attachments**

**Attachment 2A:** FY 2024–25 Final Adjustments for Year-End Fund Balances

## FY 2024–25 Final Adjustments for Year-End Fund Balances

| Court           | Fund Balance Cap | FY 2024–25 Ending Fund Balance | Encumbrance Reserves at June 30 | Excluded Funds per GG 77203 | Prepayments | Prepaid Expenses for CFR related to FHOB FY 2022–23 and prior | Cannabis Conviction Resentencing | FHOB Returned to Court for FY 2022–23 and prior | FHOB Related to CFR FY 2022–23 and prior | Fund Balance Subject to Cap¹ | Current Year Reduction | FHOB Returned to TCTF | Prior Year Disencumbrance | Total Final Reduction | Approved FY 2024–25 FHOB² | Net Reduction after FHOB (January 2026 Dist. #7) |
|-----------------|------------------|--------------------------------|---------------------------------|-----------------------------|-------------|---------------------------------------------------------------|----------------------------------|-------------------------------------------------|------------------------------------------|------------------------------|------------------------|-----------------------|---------------------------|-----------------------|---------------------------|--------------------------------------------------|
|                 | A                | B                              | C                               | D                           | E           | F                                                             | G                                | H                                               | I                                        | J<br>(B-C-D-E+F+G-H-I)       | K                      | L                     | M                         | N<br>(K+L+M)          | O                         | P<br>(N-O)                                       |
| ALAMEDA         | 3,672,384        | 7,491,677                      | 2,278,106                       | 2,201,240                   | 0           | 0                                                             | 0                                | 0                                               | 0                                        | 3,012,331                    | 0                      | 0                     | 0                         | 0                     |                           | 0                                                |
| ALPINE          | 32,121           | 239,348                        | 5,906                           | 18,724                      | 139,151     | 0                                                             | 0                                | 0                                               | 0                                        | 75,566                       | 43,446                 | 0                     | 0                         | 43,446                | 43,445                    | 1                                                |
| AMADOR          | 150,119          | 1,335,633                      | 180,887                         | 130,816                     | 0           | 0                                                             | 0                                | 0                                               | 0                                        | 1,023,930                    | 873,811                | 0                     | 0                         | 873,811               |                           | 873,811                                          |
| BUTTE           | 591,895          | 2,173,476                      | 1,018,030                       | 511,598                     | 24,987      | 0                                                             | 0                                | 0                                               | 0                                        | 618,860                      | 0                      | 0                     | 48,134                    | 48,134                |                           | 48,134                                           |
| CALAVERAS       | 134,035          | 804,464                        | 76,121                          | 284,923                     | 279,333     | 0                                                             | 0                                | 0                                               | 0                                        | 164,087                      | 29,035                 | 0                     | 1,018                     | 30,052                | 29,500                    | 553                                              |
| COLUSA          | 98,738           | 1,325,719                      | 386,563                         | 381,491                     | 557,666     | 168,065                                                       | 0                                | 0                                               | 168,065                                  | 0                            | 0                      | 0                     | 0                         | 0                     |                           | 0                                                |
| CONTRA COSTA    | 2,071,357        | 9,509,414                      | 5,659,937                       | 1,882,438                   | 18,129      | 0                                                             | 0                                | 0                                               | 0                                        | 1,948,910                    | 0                      | 0                     | 0                         | 0                     |                           | 0                                                |
| DEL NORTE       | 131,059          | 874,638                        | 79,614                          | 396,895                     | 0           | 0                                                             | 0                                | 0                                               | 0                                        | 398,129                      | 267,071                | 0                     | 0                         | 267,071               | 267,000                   | 71                                               |
| EL DORADO       | 356,646          | 1,742,142                      | 800,349                         | 323,560                     | 136,996     | 0                                                             | 0                                | 0                                               | 0                                        | 481,236                      | 124,590                | 0                     | 0                         | 124,590               | 124,590                   | 0                                                |
| FRESNO          | 2,517,436        | 6,996,347                      | 3,322,969                       | 1,179,701                   | 0           | 0                                                             | 0                                | 0                                               | 0                                        | 2,493,677                    | 0                      | 0                     | 0                         | 0                     |                           | 0                                                |
| GLENN           | 142,353          | 615,480                        | 148,845                         | 157,397                     | 0           | 0                                                             | 0                                | 0                                               | 0                                        | 309,238                      | 162,143                | 0                     | 4,743                     | 166,886               | 162,143                   | 4,743                                            |
| HUMBOLDT        | 330,790          | 170,421                        | 0                               | 118,640                     | 6,729       | 0                                                             | 0                                | 0                                               | 0                                        | 45,053                       | 0                      | 0                     | 0                         | 0                     |                           | 0                                                |
| IMPERIAL        | 447,471          | 2,086,620                      | 191,278                         | 882,237                     | 236,548     | 0                                                             | 0                                | 0                                               | 0                                        | 776,557                      | 264,972                | 0                     | 64,114                    | 329,086               | 329,086                   | 0                                                |
| INYO            | 116,810          | 398,604                        | 0                               | 340,879                     | 0           | 0                                                             | 0                                | 0                                               | 0                                        | 57,726                       | 0                      | 0                     | 260                       | 260                   |                           | 260                                              |
| KERN            | 3,105,589        | 9,055,184                      | 2,080,936                       | 3,831,407                   | 206,088     | 0                                                             | 0                                | 0                                               | 0                                        | 2,936,752                    | 0                      | 0                     | 0                         | 0                     |                           | 0                                                |
| KINGS           | 428,648          | 1,291,720                      | 206,000                         | 268,469                     | 165,316     | 0                                                             | 0                                | 0                                               | 0                                        | 651,935                      | 223,287                | 0                     | 0                         | 223,287               | 223,287                   | 0                                                |
| LAKE            | 182,390          | 1,071,092                      | 228,565                         | 375,367                     | 0           | 0                                                             | 0                                | 0                                               | 0                                        | 467,159                      | 223,779                | 0                     | 60,991                    | 284,769               | 283,538                   | 1,232                                            |
| LASSEN          | 123,163          | 176,421                        | 0                               | 144,530                     | 0           | 0                                                             | 0                                | 0                                               | 0                                        | 31,891                       | 0                      | 0                     | 0                         | 0                     |                           | 0                                                |
| LOS ANGELES     | 32,030,184       | 192,864,052                    | 109,536,373                     | 48,350,898                  | 5,349,048   | 0                                                             | 0                                | 0                                               | 0                                        | 29,627,733                   | 0                      | 0                     | 0                         | 0                     |                           | 0                                                |
| MADERA          | 525,557          | 1,251,205                      | 274,754                         | 491,923                     | 0           | 0                                                             | 0                                | 0                                               | 0                                        | 484,529                      | 0                      | 0                     | 264                       | 264                   |                           | 264                                              |
| MARIN           | 536,571          | 1,065,931                      | 4,470                           | 802,850                     | 57,973      | 0                                                             | 0                                | 0                                               | 0                                        | 200,638                      | 0                      | 0                     | 0                         | 0                     |                           | 0                                                |
| MARIPOSA        | 77,362           | 374,174                        | 65,905                          | 62,293                      | 238,169     | 0                                                             | 0                                | 0                                               | 0                                        | 7,807                        | 0                      | 0                     | 449                       | 449                   |                           | 449                                              |
| MENDOCINO       | 300,838          | 1,382,225                      | 305,116                         | 254,567                     | 0           | 0                                                             | 0                                | 0                                               | 0                                        | 822,542                      | 521,705                | 0                     | 0                         | 521,705               | 521,705                   | 0                                                |
| MERCED          | 713,931          | 3,993,905                      | 104,029                         | 3,238,156                   | 0           | 0                                                             | 0                                | 0                                               | 0                                        | 651,719                      | 0                      | 0                     | 0                         | 0                     |                           | 0                                                |
| MODOC           | 58,227           | 167,604                        | 0                               | 63,460                      | 0           | 0                                                             | 0                                | 0                                               | 0                                        | 104,144                      | 45,917                 | 0                     | 0                         | 45,917                |                           | 45,917                                           |
| MONO            | 94,480           | 708,028                        | 385,035                         | 145,629                     | 58,673      | 0                                                             | 0                                | 0                                               | 0                                        | 118,691                      | 19,950                 | 0                     | 4,260                     | 24,210                | 24,210                    | 0                                                |
| MONTEREY        | 1,034,562        | 3,638,695                      | 1,133,121                       | 1,416,732                   | 24,955      | 20,000                                                        | 0                                | 0                                               | 20,000                                   | 1,063,887                    | 0                      | 0                     | 29,379                    | 29,379                | 0                         | 29,379                                           |
| NAPA            | 393,893          | 1,259,091                      | 158,064                         | 948,068                     | 3,697       | 3,201                                                         | 0                                | 0                                               | 3,201                                    | 149,262                      | 0                      | 0                     | 0                         | 0                     |                           | 0                                                |
| NEVADA          | 287,257          | 845,440                        | 0                               | 619,956                     | 645         | 0                                                             | 0                                | 0                                               | 0                                        | 224,838                      | 0                      | 0                     | 0                         | 0                     |                           | 0                                                |
| ORANGE          | 8,072,960        | 20,095,018                     | 3,673,197                       | 6,290,293                   | 145,969     | 0                                                             | 0                                | 0                                               | 0                                        | 9,985,559                    | 927,016                | 0                     | 985,583                   | 1,912,599             | 1,912,599                 | 0                                                |
| PLACER          | 927,893          | 7,209,130                      | 770,251                         | 909,721                     | 3,046,977   | 0                                                             | 0                                | 0                                               | 0                                        | 2,482,182                    | 432,385                | 0                     | 1,121,904                 | 1,554,289             | 1,554,289                 | 0                                                |
| PLUMAS          | 55,261           | 702,113                        | 4,362                           | 130,115                     | 306,092     | 0                                                             | 0                                | 0                                               | 0                                        | 261,544                      | 205,233                | 0                     | 1,050                     | 206,283               | 190,000                   | 16,283                                           |
| RIVERSIDE       | 6,572,636        | 15,934,562                     | 1,879,518                       | 7,482,738                   | 0           | 0                                                             | 0                                | 0                                               | 0                                        | 6,572,306                    | 0                      | 0                     | 0                         | 0                     |                           | 0                                                |
| SACRAMENTO      | 3,998,162        | 8,170,093                      | 755,242                         | 4,765,529                   | 0           | 0                                                             | 0                                | 0                                               | 0                                        | 2,649,322                    | 0                      | 0                     | 66,907                    | 66,907                | 66,907                    | 0                                                |
| SAN BENITO      | 190,796          | 173,343                        | 65,965                          | 53,831                      | 8,128       | 186                                                           | 0                                | 0                                               | 186                                      | 45,419                       | 0                      | 0                     | 209                       | 209                   | 0                         | 209                                              |
| SAN BERNARDINO  | 5,849,455        | 18,740,087                     | 4,116,071                       | 2,588,425                   | 348,007     | 0                                                             | 0                                | 0                                               | 0                                        | 11,687,583                   | 5,611,419              | 0                     | 226,710                   | 5,838,129             | 5,838,129                 | 0                                                |
| SAN DIEGO       | 6,982,618        | 18,574,169                     | 1,227,699                       | 11,713,913                  | 305,229     | 0                                                             | 0                                | 0                                               | 0                                        | 5,327,328                    | 0                      | 0                     | 0                         | 0                     |                           | 0                                                |
| SAN FRANCISCO   | 2,902,837        | 1,133,046                      | 1,000                           | 1,067,987                   | 5,000       | 0                                                             | 0                                | 0                                               | 0                                        | 59,059                       | 0                      | 0                     | 0                         | 0                     |                           | 0                                                |
| SAN JOAQUIN     | 1,803,408        | 10,961,151                     | 1,157,466                       | 2,738,323                   | 619,619     | 54,327                                                        | 0                                | 0                                               | 54,327                                   | 6,445,743                    | 4,616,785              | 0                     | 25,549                    | 4,642,334             | 4,616,785                 | 25,549                                           |
| SAN LUIS OBISPO | 723,970          | 3,056,810                      | 40,378                          | 2,332,251                   | 0           | 0                                                             | 0                                | 0                                               | 0                                        | 684,182                      | 0                      | 0                     | 0                         | 0                     | 0                         | 0                                                |
| SAN MATEO       | 1,893,163        | 3,059,703                      | 2,500                           | 749,718                     | 689,140     | 0                                                             | 0                                | 0                                               | 0                                        | 1,618,345                    | 0                      | 0                     | 3,901                     | 3,901                 | 3,901                     | 0                                                |
| SANTA BARBARA   | 1,155,472        | 1,960,878                      | 42,095                          | 1,540,295                   | 44,615      | 0                                                             | 0                                | 0                                               | 0                                        | 333,872                      | 0                      | 0                     | 0                         | 0                     |                           | 0                                                |
| SANTA CLARA     | 3,870,139        | 10,822,492                     | 5,112,206                       | 1,641,163                   | 553,481     | 0                                                             | 0                                | 0                                               | 0                                        | 3,515,642                    | 0                      | 0                     | 20,541                    | 20,541                |                           | 20,541                                           |
| SANTA CRUZ      | 611,209          | 1,751,261                      | 135,558                         | 1,104,965                   | 0           | 0                                                             | 0                                | 0                                               | 0                                        | 510,738                      | 0                      | 0                     | 0                         | 0                     |                           | 0                                                |
| SHASTA          | 812,900          | 1,360,048                      | 80,126                          | 681,344                     | 124         | 0                                                             | 0                                | 0                                               | 0                                        | 598,454                      | 0                      | 0                     | 0                         | 0                     |                           | 0                                                |
| SIERRA          | 50,541           | 6,764                          | 0                               | 6,758                       | 0           | 0                                                             | 0                                | 0                                               | 0                                        | 6                            | 0                      | 0                     | 0                         | 0                     |                           | 0                                                |
| SISKIYOU        | 180,921          | 515,745                        | 0                               | 379,790                     | 795         | 0                                                             | 0                                | 0                                               | 0                                        | 135,160                      | 0                      | 0                     | 0                         | 0                     |                           | 0                                                |
| SOLANO          | 1,126,738        | 3,521,729                      | 558,805                         | 1,791,294                   | 144,003     | 0                                                             | 0                                | 0                                               | 0                                        | 1,027,627                    | 0                      | 0                     | 0                         | 0                     |                           | 0                                                |
| SONOMA          | 1,123,317        | 5,947,153                      | 1,345,935                       | 1,975,651                   | 560,337     | 0                                                             | 0                                | 0                                               | 0                                        | 2,065,230                    | 941,913                | 0                     | 0                         | 941,913               |                           | 941,913                                          |
| STANISLAUS      | 1,224,226        | 3,355,699                      | 106,199                         | 677,808                     | 1,090,606   | 0                                                             | 0                                | 0                                               | 0                                        | 1,481,086                    | 255,967                | 0                     | 894                       | 256,860               | 255,967                   | 894                                              |
| SUTTER          | 338,080          | 1,014,130                      | 6,355                           | 309,098                     | 121,602     | 0                                                             | 0                                | 0                                               | 0                                        | 577,075                      | 238,055                | 0                     | 940                       | 238,995               | 238,055                   | 940                                              |
| TEHAMA          | 219,598          | 1,105,170                      | 101,622                         | 468,364                     | 0           | 0                                                             | 0                                | 0                                               | 0                                        | 535,183                      | 315,585                | 0                     | 0                         | 315,585               | 315,585                   | 0                                                |
| TRINITY         | 81,734           | 504,054                        | 0                               | 55,273                      | 6,233       | 0                                                             | 0                                | 0                                               | 0                                        | 442,547                      | 360,813                | 0                     | 0                         | 360,813               |                           | 360,813                                          |
| TULARE          | 1,373,832        | 4,692,625                      | 1,635,823                       | 733,705                     | 511,652     | 0                                                             | 0                                | 0                                               | 0                                        | 1,811,445                    | 0                      | 0                     | 521,844                   | 521,844               |                           | 521,844                                          |
| TUOLUMNE        | 215,517          | 178,805                        | 31,342                          | 141,927                     | 0           | 0                                                             | 0                                | 0                                               | 0                                        | 5,536                        | 0                      | 0                     | 0                         | 0                     |                           | 0                                                |
| VENTURA         | 1,794,458        | 3,836,865                      | 699                             | 954,710                     | 405,232     | 0                                                             | 0                                | 0                                               | 0                                        | 2,476,224                    | 440,363                | 0                     | 241,404                   | 681,766               | 681,705                   | 61                                               |
| YOLO            | 660,800          | 1,216,697                      | 23,938                          | 563,106                     | 0           | 0                                                             | 0                                | 0                                               | 0                                        | 629,653                      | 0                      | 0                     | 0                         | 0                     |                           | 0                                                |
| YUBA            | 248,818          | 531,983                        | 0                               | 290,103                     | 60,971      | 0                                                             | 0                                | 0                                               | 0                                        | 180,909                      | 0                      | 0                     | 0                         | 0                     |                           | 0                                                |
| TOTAL           | 105,747,323      | 405,040,076                    | 151,505,325                     | 123,963,045                 | 16,477,918  | 245,779                                                       | 0                                | 0                                               | 245,779                                  | 113,093,787                  | 17,145,239             | -                     | 3,431,046                 | 20,576,285            | 17,682,424                | 2,893,860                                        |

¹ Variance in total is due to rounding.

² Approved TCTF FHOB requests include those requests pending before the Judicial Council at its December 12, 2025 business meeting.

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

**Title:** Funding Methodology Subcommittee Work Plan Update for Fiscal Year 2025–26

**Date:** 10/29/2025

**Contact:** Rose Lane, Senior Analyst, Judicial Council Leadership Support Services  
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**Issue**

Consideration of an update to the Funding Methodology Subcommittee (FMS) work plan for fiscal year (FY) 2025–26 to revise the existing methodology used to allocate court-appointed dependency counsel funding to the trial courts.

**Background**

The FMS prepares an annual work plan that guides its work to (1) review and refine the Workload Formula policy and (2) evaluate existing allocation methodologies and consider alternative methodologies to advance the goal of funding equity, stability, and predictability to support trial court operations. The annual work plan is reviewed and approved by the Trial Court Budget Advisory Committee (TCBAC) in July of each year. The current work plan, approved by the TCBAC on July 2, 2025<sup>1</sup>, is provided as Attachment 3A.

On September 2, 2025<sup>2</sup>, the Judicial Council approved the FY 2025–26 allocations for court-appointed juvenile dependency counsel and directed the TCBAC to add an additional item to its FY 2025–26 work plan to consider a revised methodology for this funding for an appropriate and effective way to address unique challenges faced by the trial courts.

Court-appointed juvenile dependency counsel funding is distributed to the courts based on a workload model adopted by the Judicial Council in 2016<sup>3</sup> and amended in 2022<sup>4</sup>. During the budget development process for FY 2025–26, stakeholders raised concerns that the existing allocation methodology may no longer address the realities of current juvenile dependency practice due to various factors, including changes in federal and state law. The trial courts also

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<sup>1</sup> Trial Court Budget Advisory Committee Meeting Materials (July 2, 2025), <https://courts.ca.gov/system/files/file/tcbac-20250702-materials.pdf>

<sup>2</sup> Judicial Council of Cal., Circulating Order CO 25-05 (Sept. 2, 2025), <https://jcc.legistar.com/View.ashx?M=M&ID=1335073&GUID=7EA97284-5FF5-49CA-A5BD-A86123AB9CCD>

<sup>3</sup> Judicial Council of Cal., Advisory Com. Rep., *Juvenile Dependency: Court-Appointed Dependency Counsel Workload and Funding Methodology* (Apr. 15, 2016), <https://jcc.legistar.com/View.ashx?M=F&ID=4382676&GUID=E8BCCA8A-5DED-48C3-B946-6E21EBB0BEAF>.

<sup>4</sup> Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Fiscal Year 2022–23 Allocation of Court-Appointed Juvenile Dependency Counsel Funding* (July 15, 2022), <https://jcc.legistar.com/View.ashx?M=F&ID=11019079&GUID=CB0A2EE1-B3CF-43AC-B92B-F4724B5D209C>.

noted concerns that the small court adjustment, which provides additional funding to smaller courts to help them meet minimum staffing and service standards despite having fewer cases, should be revisited to ensure it reflects current program needs. Thus, a reevaluation of the entire methodology was recommended to improve outcomes in the dependency system.

The FMS met on October 9, 2025<sup>5</sup>, and recommends updating the work plan as shown in Attachment 3B. The item is proposed as item 6 in the section “Ongoing Through FY 2025–26”.

### **Recommendation**

Approve the proposed update to the FMS work plan for FY 2025–26 to revise the existing allocation methodology for court-appointed juvenile dependency counsel funding to determine an appropriate and effective way to address challenges faced by the trial courts in providing quality representation for children and families.

### **Attachments**

**Attachment 3A:** Funding Methodology Subcommittee Fiscal Year 2025–26 Work Plan  
Approved as of July 2, 2025

**Attachment 3B:** Funding Methodology Subcommittee Fiscal Year 2025–26 Work Plan  
Proposed as of October 29, 2025

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<sup>5</sup> Funding Methodology Subcommittee meeting materials (Oct. 9, 2025),  
<https://courts.ca.gov/system/files/file/tcbac-20251009-fms-materials.pdf>

**Funding Methodology Subcommittee  
Fiscal Year 2025–26 Work Plan  
Approved as of July 2, 2025**

The Funding Methodology Subcommittee is responsible for (1) the ongoing review and refinement of the Workload Formula policy and (2) the development of allocation methodologies for funding augmentations and reductions for the trial courts as necessary. The subcommittee will continue its ongoing work to evaluate existing allocation methodologies and consider alternative allocation approaches based on the Workload Formula's core principles to advance the goal of funding equity, stability, and predictability to support trial court operations.

**Ongoing Through FY 2025–26**

1. Reevaluate the court cluster system, which is determined by the number of authorized judicial positions, and the impact of trial courts' cluster placement in the Resource Assessment Study (RAS).
2. Reevaluate the Trial Court Minimum Operating and Emergency Fund Balance Policy and consider if it should be repealed.
3. Evaluate the equity-based reallocation policy including technical refinements and clarification of the application of the existing methodology.
4. Evaluate the impact of the RAS data on the Workload Formula calculation and timing of implementation of new caseweights in the model.
5. Evaluate the Bureau of Labor Statistics factor and its impact on the Workload Formula calculation.

**Ongoing Annual Updates**

6. Review the Workload Formula policy to address adjustments as needed to ensure that it stays current to advance the goal of funding equity, stability, and predictability to support trial court operations.
7. Review the base funding floor amounts annually, if requested by the applicable courts, for consideration by the Trial Court Budget Advisory Committee no later than December of each year, to determine whether an inflationary adjustment is needed.
8. Review the Workload Formula adjustment request process submissions as referred by the Trial Court Budget Advisory Committee chair.



The following proposals were received in response to the 2025 Workload Formula adjustment request process. As these proposals could impact the RAS, which calculates different caseweights to determine the workload-based funding need for the trial courts, the requests are under consideration by the Data Analytics Advisory Committee.

1. Superior Court of Alameda County – proposed a minimum staff-to judge ratio be factored into the RAS as a supplemental need and included in the Workload Formula calculations.
2. Superior Court of Stanislaus County – proposed a factor in the RAS model to be included in the Workload Formula calculations that accounts for the additional time and costs to conduct background checks using the Automated Firearms System for domestic violence restraining orders required by the Domestic Violence Prevention Act (AB 3083; Stats. 2024, ch. 541).

**Funding Methodology Subcommittee  
Fiscal Year 2025–26 Work Plan  
Proposed as of October 29, 2025**

The Funding Methodology Subcommittee is responsible for (1) the ongoing review and refinement of the Workload Formula policy and (2) the development of allocation methodologies for funding augmentations and reductions for the trial courts as necessary. The subcommittee will continue its ongoing work to evaluate existing allocation methodologies and consider alternative allocation approaches based on the Workload Formula's core principles to advance the goal of funding equity, stability, and predictability to support trial court operations.

**Ongoing Through FY 2025–26**

1. Reevaluate the court cluster system, which is determined by the number of authorized judicial positions, and the impact of trial courts' cluster placement in the Resource Assessment Study (RAS).
2. Reevaluate the Trial Court Minimum Operating and Emergency Fund Balance Policy and consider if it should be repealed.
3. Evaluate the equity-based reallocation policy including technical refinements and clarification of the application of the existing methodology.
4. Evaluate the impact of the RAS data on the Workload Formula calculation and timing of implementation of new caseweights in the model.
5. Evaluate the Bureau of Labor Statistics factor and its impact on the Workload Formula calculation.
6. Consider a revised allocation methodology for court-appointed juvenile dependency counsel funding to determine an appropriate and effective way to address challenges faced by the trial courts in providing quality representation for children and families.

**Ongoing Annual Updates**

7. Review the Workload Formula policy to address adjustments as needed 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 Trial Court Budget Advisory Committee no later than December of each year, to determine whether an inflationary adjustment is needed.

9. Review the Workload Formula adjustment request process submissions as referred by the Trial Court Budget Advisory Committee chair.

The following proposals were received in response to the 2025 Workload Formula adjustment request process. As these proposals could impact the RAS, which calculates different caseweights to determine the workload-based funding need for the trial courts, the requests are under consideration by the Data Analytics Advisory Committee.

1. Superior Court of Alameda County – proposed a minimum staff-to judge ratio be factored into the RAS as a supplemental need and included in the Workload Formula calculations.
2. Superior Court of Stanislaus County – proposed a factor in the RAS model to be included in the Workload Formula calculations that accounts for the additional time and costs to conduct background checks using the Automated Firearms System for domestic violence restraining orders required by the Domestic Violence Prevention Act (AB 3083; Stats. 2024, ch. 541).

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

**Title:** Trial Court Budget Advisory Committee Annual Agenda for 2026  
**Date:** 10/29/2025  
**Contact:** Rose Lane, Senior Analyst, Leadership Support Services  
916-643-6926 | [rosemary.lane@jud.ca.gov](mailto:rosemary.lane@jud.ca.gov)

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**Issue**

The annual agenda for the Trial Court Budget Advisory Committee outlines the work the committee will focus on in the coming year and identifies areas of collaboration with other advisory bodies and Judicial Council staff resources. The draft annual agenda for 2026 is proposed for consideration.

**Background**

Rule 10.64(a)<sup>1</sup> of the California Rules of Court states the charge of the Trial Court Budget Advisory Committee is to make recommendations to the Judicial Council on the preparation, development, and implementation of the budget for trial courts and provide input to the council on policy issues affecting trial court funding.

The annual agenda provides the work plan for the committee and the chair determines the projects and activities to include in the agenda for the coming year. These projects include, but are not limited to, the following:

- Determine the funding priorities for the trial courts to guide the development of the annual judicial branch budget;
- Recommend allocation methodologies, including changes to existing methodologies, for funding adjustments included in the annual budget. From a statewide perspective, these methodologies align with the Workload Formula policy's core principles of funding equity, stability, and predictability to support trial court operations; and
- Review of trial court budget policies and procedures, as needed.

The Judicial Branch Budget Committee provides oversight to the Trial Court Budget Advisory Committee and is responsible for approving the annual agenda. The oversight committee may add or delete specific projects and reassign priorities as needed.

The current 2025 annual agenda, approved by the Judicial Branch Budget Committee on

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<sup>1</sup> California Rule of Court 10.64(a), [https://www.courts.ca.gov/cms/rules/index.cfm?title=ten&linkid=rule10\\_64](https://www.courts.ca.gov/cms/rules/index.cfm?title=ten&linkid=rule10_64)

December 10, 2024<sup>2</sup>, is provided as Attachment A.

### **2026 Proposed Annual Agenda**

The 2026 draft annual agenda reflects new or one-time projects, ongoing projects and activities, and summarizes 2025 project highlights and achievements (see Attachment B) for the Trial Court Budget Advisory Committee. All proposed projects are identified by priority of *The Strategic Plan for California's Judicial Branch*.<sup>3</sup>

The proposed 2026 annual agenda will be considered by the Judicial Branch Budget Committee at its meeting on November 13, 2025.

### **Recommendation**

Approve the Trial Court Budget Advisory Committee's draft annual agenda for 2026 for consideration by the Judicial Branch Budget Committee at its meeting on November 13, 2025.

### **Attachments**

- 1. Attachment A:** Trial Court Budget Advisory Committee, Annual Agenda 2025, Approved by Judicial Branch Budget Committee on December 10, 2024
- 2. Attachment B:** Trial Court Budget Advisory Committee, Annual Agenda (January 1, 2026 – December 31, 2026), Pending Approval by Judicial Branch Budget Committee: November 13, 2025

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<sup>2</sup> Judicial Branch Budget Committee Meeting Materials (Dec. 10, 2024), <https://courts.ca.gov/system/files/file/jbbc-20241210-materials.pdf>

<sup>3</sup> The Strategic Plan of California's Judicial Branch, <https://www.courts.ca.gov/3045.htm>

# **Trial Court Budget Advisory Committee**

## **Annual Agenda<sup>1</sup>—2025**

**Approved by Judicial Branch Budget Committee on December 10, 2024**

### **I. COMMITTEE INFORMATION**

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                                                                  |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------|
| <b>Chair:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Hon. Jonathan B. Conklin, Judge, Superior Court of Fresno County |
| <b>Lead Staff:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Ms. Rose Lane, Senior Analyst, Judicial Council Budget Services  |
| <p><b>Committee’s Charge/Membership:</b></p> <p><a href="#">Rule 10.64(a)</a> of the California Rules of Court states the charge of the Trial Court Budget Advisory Committee is to make recommendations to the Judicial Council on the preparation, development, and implementation of the budget for trial courts and provide input to the council on policy issues affecting trial court funding. <a href="#">Rule 10.64(b)</a> sets forth additional duties of the committee.</p> <p><a href="#">Rule 10.64(c)</a> sets forth the membership requirements of the committee. The Trial Court Budget Advisory Committee currently has 24 membership positions, of which 22 are filled. The current committee <a href="#">roster</a> is available on the committee’s web page.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                  |
| <p><b>Subgroups of the Advisory Committee<sup>2</sup>:</b></p> <ol style="list-style-type: none"> <li>1. Fiscal Planning Subcommittee – Review recommendations regarding trial court requests to set aside funds to be held on their behalf that would have reverted to the Trial Court Trust Fund pursuant to the fund balance cap as specified in Government Code section 77203. This subcommittee also reviews requests from trial courts related to Children’s Waiting Room funding.</li> <li>2. Funding Methodology Subcommittee – Ongoing review and refinement of the Workload Formula, develop methodologies for allocations from the Trial Court Trust Fund Court Interpreters Program (0150037) in the event of funding shortfalls, and consider allocation methodologies for funding augmentations and reductions as necessary. Additionally, the subcommittee will continue its ongoing work to evaluate existing allocation methodologies and consider alternative allocation approaches based on the Workload Formula’s core principles to advance the goal of funding equity, stability, and predictability to support trial court operations.</li> <li>3. Revenue and Expenditure Subcommittee – Ongoing review of Trial Court Trust Fund and State Trial Court Improvement and Modernization Fund allocations supporting trial court projects and programs as well as any cash flow issues affecting the trial courts.</li> </ol> |                                                                  |

<sup>1</sup> The annual agenda outlines the work a committee will focus on in the coming year or cycle and identifies areas of collaboration with other advisory bodies and the Judicial Council staff resources.

<sup>2</sup>For the definition of “subcommittee” see Cal. Rules of Court, rule 10.30(c); “working group” see rule 10.70, “workstream,” see rule 10.53(c); and “education curriculum committee,” see rule 10.50(c)(6).

## Meetings Planned for 2025<sup>3</sup>

### **Trial Court Budget Advisory Committee**

January 2025/Videoconference; February 2025/Videoconference; May 2025/Videoconference; July 2025/ Videoconference; October 2025/Videoconference

### **Funding Methodology Subcommittee**

January 2025/Videoconference; April 2025/Videoconference; June 2025/ Videoconference; September 2025/Videoconference

### **Fiscal Planning Subcommittee**

October 2025/Videoconference

### **Revenue and Expenditure Subcommittee**

April 2025/Videoconference

☐ Check here if in-person meeting is approved by the internal committee oversight chair.

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<sup>3</sup> Refer to section IV. 2. of the [Operating Standards for Judicial Council Advisory Bodies](#) for governance on in-person meetings.

Note: Because of the current budget and staffing constraints, advisory body chairs and staff must first consider meeting remotely. The chair of the Executive and Planning Committee is suspending advisory body in-person meetings for the 2024–2025 annual agenda cycle. If an in-person meeting is needed, the responsible Judicial Council office head must seek final approval from the advisory body’s internal oversight committee chair. Please see the prioritization memo dated July 1, 2024, for additional details.

## II. COMMITTEE PROJECTS

| #  | New or One-Time Projects <sup>4</sup>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                            |
|----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------|
| 1. | <b>Project Title:</b> Workload Formula Allocation Methodologies for Potential Future Budget Reductions and Funding Restoration                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <b>Priority 1<sup>5</sup></b>              |
|    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | <b>Strategic Plan Goal<sup>6</sup> VII</b> |
|    | <p><b>Project Summary:</b> Part of the charge of the committee pursuant to rule 10.64. The project originated from a new item added to the approved Funding Methodology Subcommittee’s annual work plan for fiscal year 2024–25. The project is to further refine 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. The Budget Act of 2024 included an ongoing reduction of \$97 million to trial court baseline funding due to the state’s projected multi-year budget deficit. The Judicial Council approved the allocation of this reduction in July 2024, with the understanding that the Trial Court Budget Advisory Committee will continue to explore additional methodologies for future allocations. In October 2024, the Funding Methodology Subcommittee started to work on this project. The expected outcome is potential updates to the Workload Formula policy that may include changes to existing allocation methodologies to address future budget reductions and the restoration of funding to ensure they align with the policy’s core principles to advance the goal of funding equity, stability, and predictability to support trial court operations. The targeted completion date is for the Trial Court Budget Advisory Committee to make a recommendation at the April 2025 Judicial Council business meeting for implementation in fiscal year 2025–26.</p> <p><b>Status/Timeline:</b> One-time.</p> <p><b>Fiscal Impact/Staff Resources:</b> Judicial Council Budget Services staff.</p> <p><input checked="" type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p> <p><b>Internal/External Stakeholders:</b> External stakeholders include the trial courts.</p> <p><b>AC Collaboration:</b> Court Executives Advisory Committee and Judicial Branch Budget Committee.</p> |                                            |

<sup>4</sup> All proposed projects for the year must be included on the Annual Agenda. If a project implements policy or is a program, identify it as *implementation* or a *program* in the project description and attach the Judicial Council authorization/assignment or prior approved Annual Agenda to this Annual Agenda.

<sup>5</sup> For non-rules and forms projects, select priority level 1 (must be done) or 2 (should be done). For rules and forms proposals, select one of the following priority levels: 1(a) Urgently needed to conform to or accurately reflect the law; 1(b) Council has directed the committee to consider new or amended rules and forms; 1(c) Change is urgently needed to remedy a problem that is causing significant cost or inconvenience to the courts or the public; or 1(d) Proposal is otherwise urgent and necessary, such as a proposal that would mitigate exposure to immediate or severe financial or legal risk. *For each priority level 1 proposal, the advisory body must provide a specific reason why it should be done this year and how it fits within the identified category.* 2(a) Useful, but not necessary, to implement changes in law; 2(b) Responsive to identified concerns or problems; or 2(c) Helpful in otherwise advancing Judicial Council goals and objectives. *If an advisory committee is interested in pursuing any Priority Level 2 proposals, please include justification as to why the proposal should be approved at this time.*

<sup>6</sup> Indicate which goal number of The Strategic Plan for California’s Judicial Branch the project most closely aligns.



| #  | New or One-Time Projects <sup>4</sup>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                |
|----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|
| 2. | <b>Project Title:</b> Court Interpreter Program Funding                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Priority 1</b>              |
|    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <b>Strategic Plan Goal VII</b> |
|    | <p><b>Project Summary:</b> Part of the charge of the committee pursuant to rule 10.64. The project originated as a result of a \$4.6 million shortfall of Trial Court Trust Fund Court Interpreters Program funding in fiscal year 2023–24 and projected future shortfalls. On January 20, 2023, the Judicial Council approved a Trial Court Budget Advisory Committee recommendation for when courts experience a shortfall, in which courts with a shortage will first be covered by other court savings up to the appropriation amount, after which the Court Interpreters Program funding balance will be used to make courts whole, and funds will be allocated proportionally based on the percentage of the shortfall if the savings or funding balance is insufficient to cover the shortage. This item will be considered by the Judicial Council at its February 21, 2025, business meeting.</p> <p><b>Status/Timeline:</b> New.</p> <p><b>Fiscal Impact/Staff Resources:</b> Judicial Council Center for Families, Children &amp; the Courts and Budget Services staff.</p> <p><input checked="" type="checkbox"/> This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</p> <p><b>Internal/External Stakeholders:</b> External stakeholders include the trial courts.</p> <p><b>AC Collaboration:</b> Court Executives Advisory Committee and Judicial Branch Budget Committee.</p> |                                |
| 3. | <b>Project Title:</b> Court Reporter Funding                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | <b>Priority 1</b>              |
|    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <b>Strategic Plan Goal VII</b> |
|    | <p><b>Project Summary:</b> Part of the charge of the committee pursuant to rule 10.64. The project originated as a result of ongoing funding of \$30 million beginning in fiscal year 2021–22 to increase the number of court reporters in family law and civil law case types. At its July 12, 2024, business meeting, the Judicial Council directed council staff to survey the courts after allocations are distributed to the trial courts, no later than mid-year of fiscal year 2024–25, for a one-time redistribution of unspent funds to ensure the full appropriation is maximized to increase the number of court reporters. The expected outcome is to redistribute funding in the current year to be used by the courts to increase the number of court reporters in family and civil law case types.</p> <p><b>Status/Timeline:</b> New.</p> <p><b>Fiscal Impact/Staff Resources:</b> Judicial Council Business Management Services and Budget Services staff.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                |

| #  | New or One-Time Projects <sup>4</sup>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                |
|----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|
|    | <p><input checked="" type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p> <p><b>Internal/External Stakeholders:</b> External stakeholders include the trial courts.</p> <p><b>AC Collaboration:</b> Court Executives Advisory Committee and Judicial Branch Budget Committee.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                |
| 4. | <b>Project Title:</b> Firearms Relinquishment Grant Program                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | <b>Priority 1</b>              |
|    | <p><b>Project Summary:</b> Part of the charge of the committee pursuant to rule 10.64. The project originated as a result of \$40 million one-time General Fund included in the Budget Act of 2022 to support court-based firearm relinquishment programs. In fiscal years 2022–23 and 2023–24, the Trial Court Budget Advisory Committee recommended \$20.1 million in allocations to eight trial courts in the first two grant cycles. In fiscal year 2024–25, the budget for this program was reduced by \$9.2 million due to the state’s fiscal deficit and \$9.1 million was retained for a third grant cycle and \$1.6 million for the required program evaluation. The \$9.1 million for the third grant cycle, which included awards to six trial courts, was approved by the Judicial Council at its November 15, 2024, business meeting. The funding for this program must be spent or encumbered by June 30, 2025.</p> <p><b>Status/Timeline:</b> One-time.</p> <p><b>Fiscal Impact/Staff Resources:</b> Judicial Council Center for Families, Children &amp; the Courts and Budget Services staff.</p> <p><input checked="" type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p> <p><b>Internal/External Stakeholders:</b> External stakeholders include the trial courts.</p> <p><b>AC Collaboration:</b> Family and Juvenile Law Advisory Committee and Judicial Branch Budget Committee.</p> |                                |
| 5. | <b>Project Title:</b> Sargent Shriver Civil Counsel Pilot Program                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Priority 1</b>              |
|    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | <b>Strategic Plan Goal VII</b> |

| #  | New or One-Time Projects <sup>4</sup>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | <p><b>Project Summary:</b> Part of the charge of the committee pursuant to rule 10.64. At its July 12, 2024, business meeting, the Judicial Council approved a \$21 million Trial Court Trust Fund allocation for fiscal year 2024–25 for the Sargent Shriver Civil Counsel Pilot Program, which included \$5 million of additional funding for a mid-cycle allocation. On October 4, 2024, the Trial Court Budget Advisory Committee approved the Shriver Committee’s recommendation to allocate \$3.6 million of the \$5 million to existing pilot participants. The Shriver program will hold the unrequested amount of \$1.4 million in the program’s reserves to be allocated in the 2026–29 grant cycle. After the allocation of the \$3.5 million, total reserve funding for the program is \$20 million. This item was approved by the Judicial Council at its November 15, 2024, business meeting. The Trial Court Budget Advisory Committee will collaborate with the Shriver Civil Counsel Act Implementation Committee as needed to support future grant cycles.</p> <p><b>Status/Timeline:</b> New and one-time.</p> <p><b>Fiscal Impact/Staff Resources:</b> Judicial Council Center for Families, Children &amp; the Courts and Budget Services staff.</p> <p><input checked="" type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p> <p><b>Internal/External Stakeholders:</b> External stakeholders include the trial courts.</p> <p><b>AC Collaboration:</b> Shriver Civil Counsel Act Implementation Committee and Judicial Branch Budget Committee.</p> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 6. | <p><b>Project Title:</b> Court Cluster System</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <p><b>Priority 2</b></p> <p><b>Strategic Plan Goal VII</b></p> <p><b>Project Summary:</b> Part of the charge of the committee pursuant to rule 10.64. The project originated from a Funding Methodology Subcommittee recommendation made on February 20, 2020, to initiate an ad hoc subcommittee to reevaluate the cluster system to identify potential opportunities for refinement or change. On July 6, 2023, the Trial Court Budget Advisory Committee approved updates to the annual Funding Methodology Subcommittee workplan, which referred the court cluster system project to the Data Analytics Advisory Committee. The Data Analytics Advisory Committee met on September 25, 2024, to begin their evaluation. The project outcome could potentially impact the statewide four-cluster system and/or its criteria, which is informed by the number of authorized judicial positions.</p> <p><b>Status/Timeline:</b> One-time.</p> <p><b>Fiscal Impact/Staff Resources:</b> Judicial Council Business Management Services’ Office of Court Research and Budget Services staff.</p> <p><input checked="" type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p> |

| # | New or One-Time Projects <sup>4</sup>                                                                                                                                                                 |
|---|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|   | <p><i>Internal/External Stakeholders:</i> External stakeholders include the trial courts.</p> <p><i>AC Collaboration:</i> Data Analytics Advisory Committee and Judicial Branch Budget Committee.</p> |

| #  | Ongoing Projects and Activities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                |
|----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|
| 1. | <b>Project Title:</b> Workload Formula and Allocations to the Trial Courts                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | <b>Priority 1</b>              |
|    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <b>Strategic Plan Goal VII</b> |
|    | <p><b>Project Summary:</b> Part of the charge of the committee pursuant to rule 10.64. The Trial Court Budget Advisory Committee recommends that the Judicial Council make annual allocations to the trial courts. For fiscal year 2024–25, this included a total of \$3 billion, \$2.8 billion from the Trial Court Trust Fund and \$137.8 million General Fund for support of trial court operations, based on recommended methodologies and the Workload Formula. The allocations were approved by the Judicial Council at its July 12, 2024, business meeting.</p> <p>The Trial Court Budget Advisory Committee will continue to make recommendations to the council on the preparation, development, and implementation of the budget for trial courts and provide input on policy issues affecting trial court funding. This will include an ongoing evaluation of existing allocation methodologies and consideration of alternative allocation approaches based on the Workload Formula’s core principles to advance the goal of funding equity, stability, and predictability to support trial court operations. The Trial Court Budget Advisory Committee will continue to collaborate with other advisory committees including, but not limited to, the Data Analytics Advisory Committee on relevant issues affecting the Workload Formula and trial court funding priorities.</p> <p><b>Status/Timeline:</b> Ongoing.</p> <p><b>Fiscal Impact/Staff Resources:</b> Judicial Council Budget Services staff.</p> <p><input checked="" type="checkbox"/> This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</p> <p><b>Internal/External Stakeholders:</b> External stakeholders include the trial courts.</p> <p><b>AC Collaboration:</b> Court Executives Advisory Committee, Judicial Branch Budget Committee, and Data Analytics Advisory Committee.</p> |                                |
| 2. | <b>Project Title:</b> Community Assistance, Recovery, and Empowerment (CARE) Act                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Priority 1</b>              |
|    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <b>Strategic Plan Goal VII</b> |
|    | <p><b>Project Summary:</b> Part of the charge of the committee pursuant to rule 10.64. The project originated as a result of a new court-based mental health services engagement and oversight program beginning in fiscal year 2022–23. In fiscal years 2022–23 and 2023–24, a total of \$32.2 million was allocated to the trial courts in Cohorts One and Two for planning and program implementation. The Trial Court Budget Advisory Committee recommended utilizing the Workload Formula methodology to allocate CARE Act funding to all participating courts in 2023–24 and in subsequent years. The Budget Act of 2024 includes \$26.5 million to fund court operations related to the CARE Act. All trial courts are required to implement the CARE Act by December 30, 2024. A methodology to reallocate unspent funding during fiscal year 2024–25 will be considered.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                |

| #  | Ongoing Projects and Activities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                |
|----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------|
|    | <p><b>Status/Timeline:</b> Ongoing.</p> <p><b>Fiscal Impact/Staff Resources:</b> Judicial Council Center for Families, Children &amp; the Courts and Budget Services staff.</p> <p><input checked="" type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p> <p><b>Internal/External Stakeholders:</b> External stakeholders include the trial courts, the Department of Finance, and the Department of Health Care Services.</p> <p><b>AC Collaboration:</b> Judicial Branch Budget Committee.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                |
| 3. | <p><b>Project Title:</b> Workload Formula Adjustment Request Process</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | <p><b>Priority 2</b></p> <p><b>Strategic Plan Goal VII</b></p> |
|    | <p><b>Project Summary:</b> Part of the charge of the committee pursuant to rule 10.64. At its August 22, 2013, business meeting, the Judicial Council approved the Trial Court Budget Advisory Committee's recommendation to adopt the Workload Formula adjustment request process to provide the trial courts with an annual opportunity to submit recommendations for changes to the Workload Formula as needed. The Judicial Council last received a Workload Formula adjustment request proposal in January 2024 from the Superior Court of Fresno County. However, after review of the request by the Judicial Council's Office of Court Research, it was determined that the adjustments were already accounted for in the Workload Formula model. This process is in place to assist the Judicial Council with the ongoing review and refinement of the Workload Formula to respond to potential changes in the funding needs of the trial courts.</p> <p><b>Status/Timeline:</b> Ongoing.</p> <p><b>Fiscal Impact/Staff Resources:</b> Judicial Council Business Management Services' Office of Court Research and Budget Services staff.</p> <p><input checked="" type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p> <p><b>Internal/External Stakeholders:</b> External stakeholders include the trial courts.</p> <p><b>AC Collaboration:</b> Data Analytics Advisory Committee and Judicial Branch Budget Committee.</p> |                                                                |

### III. LIST OF 2024 PROJECT ACCOMPLISHMENTS

| #  | Project Highlights and Achievements                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | <p><b>Workload Formula, State Trial Court Improvement and Modernization Fund, and Trial Court Trust Fund Allocations</b></p> <p>The Trial Court Budget Advisory Committee made recommendations to the Judicial Council that included State Trial Court Improvement and Modernization Fund and Trial Court Trust Fund allocations for 2024–25 to support trial court programs and operations. On July 12, 2024, the Judicial Council approved allocations totaling \$46.6 million from the State Trial Court Improvement and Modernization Fund and an allocation of \$3 billion, which includes \$2.8 billion from the Trial Court Trust Fund, \$137.8 million from the General Fund, and an ongoing \$97 million General Fund reduction to the trial courts’ operational funding due to the state’s fiscal deficit.</p>                                                                                                                                                                      |
| 2. | <p><b>Funds Held on Behalf Policy Update</b></p> <p>In October 2023, the Fiscal Planning Subcommittee’s Ad Hoc Funds Held on Behalf Working Group was established. The working group was charged with evaluating the process, application, and distribution components of the Funds Held on Behalf of the Trial Courts program. The recommendations from the working group included newly defined criteria, streamlining of the submission process, and implementation of a reimbursement model to distribute funding to the participating trial courts, which support improved transparency and accountability of the program. The recommendations were approved by the Judicial Council at its March 24, 2024, business meeting and were implemented in fiscal year 2024–25.</p>                                                                                                                                                                                                            |
| 3. | <p><b>Workload Formula Definition for “New Money”</b></p> <p>At its July 12, 2024, business meeting, the Judicial Council approved a recommendation from the Trial Court Budget Advisory Committee that Consumer Price Index 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. As a result, the definition of “new money” in the Workload Formula policy was revised to exclude Consumer Price Index funding.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 4. | <p><b>State Trial Court Improvement and Modernization Allocation Increase for the Litigation Management Program for 2023–24</b></p> <p>In fiscal year 2023–24, the Trial Court Budget Advisory Committee acted promptly to recommend a \$2 million State Trial Court Improvement and Modernization Fund allocation for the Litigation Management Program to address increased legal services for the trial courts. The \$2 million request was to supplement the annual appropriation of \$6.2 million General Fund for the Litigation Management Program and was approved by the Judicial Council at its May 17, 2024, business meeting. As a result of increasing program costs, the Judicial Council also approved (1) an increased allocation for the program in 2024–25 from the State Trial Court Improvement and Modernization Fund and (2) a budget change proposal requesting additional funding for the program for consideration in the fiscal year 2025–26 Governor’s Budget.</p> |

| #  | Project Highlights and Achievements                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
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|    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 5. | <p><b>Court Interpreter Funding Methodology</b></p> <p>At its July, 2, 2024 meeting, the Trial Court Budget Advisory Committee approved updates to the Funding Methodology Subcommittee’s annual work plan for fiscal year 2024–25. The multi-year project for the development of an ongoing workload-based allocation methodology for Court Interpreter Program funding was removed from the plan. The final components of this project, related to the use of data collected in the Court Interpreter Data Collection System for video remote interpreting and a mechanism for courts to bill each other for cross assignments, were recently completed and no further action is needed.</p> |



**Trial Court Budget Advisory Committee**  
**Annual Agenda<sup>1</sup>— January 1, 2026 – December 31, 2026**  
**Pending Approval by Judicial Branch Budget Committee: November 13, 2025**

**I. COMMITTEE INFORMATION**

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                  |
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| <b>Chair:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Hon. Jonathan B. Conklin, Judge, Superior Court of Fresno County |
| <b>Lead Staff:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Ms. Donna Newman, Manager, Judicial Council Budget Services      |
| <p><b>Advisory Body’s Charge/Membership:</b></p> <p><a href="#">Rule 10.64(a)</a> of the California Rules of Court states the charge of the Trial Court Budget Advisory Committee, which is to make recommendations to the Judicial Council on the preparation, development, and implementation of the budget for trial courts and provide input to the council on policy issues affecting trial court funding. <a href="#">Rule 10.64(b)</a> sets forth additional duties of the advisory body.</p> <p><a href="#">Rule 10.64(c)</a> sets forth the membership position of the advisory body. The Trial Court Budget Advisory Committee currently has 22 members. The current advisory body <a href="#">roster</a> is available on the advisory body’s webpage.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                                                  |
| <p><b>Subgroups of the Advisory Body<sup>2</sup>:</b></p> <ol style="list-style-type: none"> <li>1. Fiscal Planning Subcommittee – Review annual recommendations for trial court requests, related to the fund balance cap as specified in Government Code section 77203, to set aside funds to be held on behalf of those courts in the Trial Court Trust Fund for specific projects. This subcommittee also reviews requests from trial courts related to Children’s Waiting Room funding.</li> <li>2. Funding Methodology Subcommittee – Ongoing review and refinement of the Workload Formula policy, evaluation of existing allocation methodologies and consideration of alternative allocation approaches for funding augmentations and reductions as needed based on the Workload Formula policy’s core principles of funding equity, stability, and predictability to support trial court operations. Additionally, the subcommittee will develop methodologies for allocations from the Trial Court Trust Fund Court Interpreters Program (0150037) as needed or in the event of funding shortfalls.</li> <li>3. Revenue and Expenditure Subcommittee – Ongoing review of Trial Court Trust Fund and State Trial Court Improvement and Modernization Fund allocations supporting trial court projects and programs, as well as any cash flow issues affecting the trial courts.</li> </ol> |                                                                  |

<sup>1</sup> The Annual Agenda outlines the work an advisory body will focus on in the coming year or cycle and identifies areas of collaboration with other advisory bodies and Judicial Council staff resources.

<sup>2</sup> For the definition of “subcommittee” see Cal. Rules of Court, rule 10.30(c); for “working group,” see rule 10.70; for “workstream,” see rule 10.53(c); and for “education curriculum committee,” see rule 10.50(c)(6).

### Advisory Body and Subgroup Meetings Planned for 2026<sup>3</sup>

#### **Trial Court Budget Advisory Committee**

January 2026/Remote Meeting; February 2026/Remote Meeting; May 2026/Remote Meeting; July 2026/Remote Meeting; October 2026/Remote Meeting

#### **Funding Methodology Subcommittee**

January 2026/Remote Meeting; April 2026/Remote Meeting; June 2026/Remote Meeting; September 2026/Remote Meeting

#### **Fiscal Planning Subcommittee**

October 2026/Remote Meeting

#### **Revenue and Expenditure Subcommittee**

April 2026/Remote Meeting

☐ Check here if in-person meeting is approved by the internal committee oversight chair.

<sup>3</sup> Refer to section IV. 2 (Meeting frequency) of the [Operating Standards for Judicial Council Advisory Bodies](#) for governance on in-person meetings.

Note: Because of the current budget and staffing constraints, advisory body chairs and staff must first consider meeting remotely. The chair of the Executive and Planning Committee is extending the suspension of advisory body in-person meetings for the 2025–2026 annual agenda cycle. If an in-person meeting is needed, the responsible Judicial Council office head must seek approval from their advisory body's internal oversight committee chair. Please see the prioritization memo dated July 1, 2025, for additional details.

## II. COMMITTEE PROJECTS

| #                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | New or One-Time Projects                                                        |                                                  |                                                    |                                                |                                                  |                                                       |                                            |                                                  |                                                       |
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| 1.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <b>Project Title:</b> Workload Formula Equity-Based Reallocation Policy Updates | <b>Priority:</b> 1                               |                                                    |                                                |                                                  |                                                       |                                            |                                                  |                                                       |
| <b>Supported Strategic Plan Branch Goals:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                 |                                                  |                                                    |                                                |                                                  |                                                       |                                            |                                                  |                                                       |
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| I<br>Access<br><input checked="" type="checkbox"/>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | II<br>Independence<br><input type="checkbox"/>                                  | III<br>Modernization<br><input type="checkbox"/> | IV<br>Quality<br><input type="checkbox"/>          | V<br>Education<br><input type="checkbox"/>     | VI<br>Infrastructure<br><input type="checkbox"/> | VII<br>Funding<br><input checked="" type="checkbox"/> |                                            |                                                  |                                                       |
| <p><b>Project Summary:</b> The project originated from a new item added to the approved Funding Methodology Subcommittee’s annual work plan for fiscal year (FY) 2025–26. The project is to clarify certain aspects of how the equity-based reallocation policy is interpreted and applied including, but not limited to, band penetration criteria and surplus reallocation funding. This clarification will improve transparency in budget planning and funding adjustments, and help courts anticipate and prepare for changes in their allocations. The equity-based reallocation was implemented for the first time in FY 2025–26.</p> <p>In October 2025, the Funding Methodology Subcommittee initiated work on this project which will continue throughout FY 2025–26. At the conclusion of the project, the Trial Court Budget Advisory Committee will consider recommendations for potential updates to the Workload Formula policy. This project aligns with the policy’s core principles of funding equity, stability, and predictability to support trial court operations.</p> <p><b>Status/Timeline:</b> New and one-time.</p> <p><b>Fiscal Impact/Staff Resources:</b> Judicial Council Budget Services staff.</p> <p><input checked="" type="checkbox"/> Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i></p> <p><b>Internal/External Stakeholders:</b> External stakeholders include the trial courts.</p> <p><b>AC Collaboration:</b> Judicial Branch Budget Committee.</p> |                                                                                 |                                                  |                                                    |                                                |                                                  |                                                       |                                            |                                                  |                                                       |

| #                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | New or One-Time Projects                                                  |                                                  |                                                    |                                                |                                                  |                                                       |                                            |                                                  |                                                       |
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| 2.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <b>Project Title:</b> Pretrial Release Program                            | <b>Priority:</b> 1                               |                                                    |                                                |                                                  |                                                       |                                            |                                                  |                                                       |
| <b>Supported Strategic Plan Branch Goals:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                                           |                                                  |                                                    |                                                |                                                  |                                                       |                                            |                                                  |                                                       |
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| I<br>Access<br><input checked="" type="checkbox"/>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | II<br>Independence<br><input type="checkbox"/>                            | III<br>Modernization<br><input type="checkbox"/> | IV<br>Quality<br><input type="checkbox"/>          | V<br>Education<br><input type="checkbox"/>     | VI<br>Infrastructure<br><input type="checkbox"/> | VII<br>Funding<br><input checked="" type="checkbox"/> |                                            |                                                  |                                                       |
| <p><b>Project Summary:</b> Beginning in FY 2021–22, the budget included funding for the operation of ongoing court programs and practices that promote the safe, efficient, fair, and timely pretrial release of individuals booked into jail. The Budget Act of 2025 reduced the overall appropriation for the Pretrial Release Program by \$5 million from \$68.95 million to \$63.95 million.</p> <p>In September 2025, the Judicial Council approved the FY 2025–26 pretrial release allocations of \$63.95 million for the trial courts according to the methodology authorized in budget language. Additionally, the council directed staff to conduct a midyear survey and recommend a methodology for reallocating funding among the trial courts based on demonstrated need in the current year. The reallocation will maximize the use of available funding in FY 2025–26 to support program operations.</p> <p><b>Status/Timeline:</b> New and one-time.</p> <p><b>Fiscal Impact/Staff Resources:</b> Judicial Council Criminal Justice Services and Budget Services staff.</p> <p><input checked="" type="checkbox"/> Check this box if this project may result in an allocation or distribution of funds to the courts.</p> <p><b>Internal/External Stakeholders:</b> External stakeholders include the trial courts.</p> <p><b>AC Collaboration:</b> Judicial Branch Budget Committee.</p> |                                                                           |                                                  |                                                    |                                                |                                                  |                                                       |                                            |                                                  |                                                       |
| 3.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <b>Project Title:</b> Court-Appointed Juvenile Dependency Counsel Funding | <b>Priority:</b> 1                               |                                                    |                                                |                                                  |                                                       |                                            |                                                  |                                                       |
| <b>Supported Strategic Plan Branch Goals:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                                           |                                                  |                                                    |                                                |                                                  |                                                       |                                            |                                                  |                                                       |
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| I<br>Access<br><input checked="" type="checkbox"/>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | II<br>Independence<br><input type="checkbox"/>                            | III<br>Modernization<br><input type="checkbox"/> | IV<br>Quality<br><input type="checkbox"/>          | V<br>Education<br><input type="checkbox"/>     | VI<br>Infrastructure<br><input type="checkbox"/> | VII<br>Funding<br><input checked="" type="checkbox"/> |                                            |                                                  |                                                       |
| <p><b>Project Summary:</b> In September 2025, the Judicial Council approved court-appointed counsel allocations of \$186.7 million for FY 2025–26 for the trial courts. The council also directed the Trial Court Budget Advisory Committee to add an additional item to the Funding Methodology Subcommittee’s FY 2025–26 work plan to consider a revised methodology to allocate funding for court-appointed juvenile dependency counsel to address unique challenges faced by the trial courts. Stakeholders have raised concerns that the existing methodology</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                           |                                                  |                                                    |                                                |                                                  |                                                       |                                            |                                                  |                                                       |

| #                                                  | New or One-Time Projects                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                  |                                                    |                                                |                                                  |                                                       |                                            |                                                  |                                                       |
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|                                                    | <p>does not address the realities of current juvenile dependency practice. Trial courts have also noted concerns that the small court adjustment, which provides additional funding to smaller courts to help them meet minimum staffing and service standards despite having fewer cases, should be revisited to ensure it reflects current program needs. The revised allocation methodology is intended to improve outcomes in the dependency system.</p> <p><b>Status/Timeline:</b> New and one-time.</p> <p><b>Fiscal Impact/Staff Resources:</b> Judicial Council Center for Families, Children &amp; the Courts and Budget Services staff.</p> <p><input checked="" type="checkbox"/> Check this box if this project may result in an allocation or distribution of funds to the courts.</p> <p><b>Internal/External Stakeholders:</b> External stakeholders include the trial courts and dependency providers.</p> <p><b>AC Collaboration:</b> Family and Juvenile Law Advisory Committee and Judicial Branch Budget Committee.</p>                                                                                                                                                                                                                                    |                                                  |                                                    |                                                |                                                  |                                                       |                                            |                                                  |                                                       |
| 4.                                                 | <p><b>Project Title:</b> Sargent Shriver Civil Counsel Pilot Program</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p><b>Priority:</b> 1</p>                        |                                                    |                                                |                                                  |                                                       |                                            |                                                  |                                                       |
|                                                    | <p><b>Supported Strategic Plan Branch Goals:</b></p> <table border="0"> <tr> <td>I<br/>Access<br/><input checked="" type="checkbox"/></td> <td>II<br/>Independence<br/><input type="checkbox"/></td> <td>III<br/>Modernization<br/><input type="checkbox"/></td> <td>IV<br/>Quality<br/><input type="checkbox"/></td> <td>V<br/>Education<br/><input type="checkbox"/></td> <td>VI<br/>Infrastructure<br/><input type="checkbox"/></td> <td>VII<br/>Funding<br/><input checked="" type="checkbox"/></td> </tr> </table>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                  | I<br>Access<br><input checked="" type="checkbox"/> | II<br>Independence<br><input type="checkbox"/> | III<br>Modernization<br><input type="checkbox"/> | IV<br>Quality<br><input type="checkbox"/>             | V<br>Education<br><input type="checkbox"/> | VI<br>Infrastructure<br><input type="checkbox"/> | VII<br>Funding<br><input checked="" type="checkbox"/> |
| I<br>Access<br><input checked="" type="checkbox"/> | II<br>Independence<br><input type="checkbox"/>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | III<br>Modernization<br><input type="checkbox"/> | IV<br>Quality<br><input type="checkbox"/>          | V<br>Education<br><input type="checkbox"/>     | VI<br>Infrastructure<br><input type="checkbox"/> | VII<br>Funding<br><input checked="" type="checkbox"/> |                                            |                                                  |                                                       |
|                                                    | <p><b>Project Summary:</b> In July 2025, the Judicial Council approved an \$18.2 million Trial Court Trust Fund allocation for FY 2025–26 for the Sargent Shriver Civil Counsel Pilot Program. In October 2025, the council approved an augmentation of \$1.4 million from program reserves to address the urgent need for legal aid services due to recent wildfires that caused widespread housing loss, in addition to cuts in federal funding. This resulted in a total program allocation of \$19.6 million for FY 2025–26. In spring 2026, the Trial Court Budget Advisory Committee will consider recommendations from the Shriver Civil Counsel Act Implementation Committee for the FY 2026–29 grant cycle.</p> <p><b>Status/Timeline:</b> One-time.</p> <p><b>Fiscal Impact/Staff Resources:</b> Judicial Council Center for Families, Children &amp; the Courts and Budget Services staff.</p> <p><input checked="" type="checkbox"/> Check this box if this project may result in an allocation or distribution of funds to the courts.</p> <p><b>Internal/External Stakeholders:</b> External stakeholders include the trial courts.</p> <p><b>AC Collaboration:</b> Shriver Civil Counsel Act Implementation Committee and Judicial Branch Budget Committee.</p> |                                                  |                                                    |                                                |                                                  |                                                       |                                            |                                                  |                                                       |

| #                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | New or One-Time Projects                                                              |                                                  |                                                    |                                                |                                                  |                                                       |                                            |                                                  |                                                       |
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| 5.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <b>Project Title:</b> Trial Court Minimum Operating and Emergency Fund Balance Policy | <b>Priority:</b> 1                               |                                                    |                                                |                                                  |                                                       |                                            |                                                  |                                                       |
| <b>Supported Strategic Plan Branch Goals:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                       |                                                  |                                                    |                                                |                                                  |                                                       |                                            |                                                  |                                                       |
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| I<br>Access<br><input checked="" type="checkbox"/>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | II<br>Independence<br><input type="checkbox"/>                                        | III<br>Modernization<br><input type="checkbox"/> | IV<br>Quality<br><input type="checkbox"/>          | V<br>Education<br><input type="checkbox"/>     | VI<br>Infrastructure<br><input type="checkbox"/> | VII<br>Funding<br><input checked="" type="checkbox"/> |                                            |                                                  |                                                       |
| <p><b>Project Summary:</b> The Judicial Council’s trial court minimum operating and emergency fund balance policy was established in FY 2006–07 and requires trial courts to set aside a percentage of funds for use in emergency situations or due to budgetary shortfalls. The policy has been suspended by the council since FY 2012–13 due to changes in statute and to consider additional changes that would provide reserve funding for emergencies or unanticipated costs. The current suspension expires on June 30, 2026. In May 2024, the council directed the Funding Methodology Subcommittee to consider whether the policy should be repealed at a future time based on the current reserve options available to the courts including the \$5 million state-level emergency reserve and 3 percent fund balance cap. In spring 2026, the Trial Court Budget Advisory Committee will consider recommendations to determine the impact of existing reserve funding on trial court operations and a potential repeal of the policy before the current suspension expires.</p> <p><b>Status/Timeline:</b> New and one-time.</p> <p><b>Fiscal Impact/Staff Resources:</b> Judicial Council Budget Services staff.</p> <p><input checked="" type="checkbox"/> Check this box if this project may result in an allocation or distribution of funds to the courts.</p> <p><b>Internal/External Stakeholders:</b> External stakeholders include the trial courts.</p> <p><b>AC Collaboration:</b> Judicial Branch Budget Committee.</p> |                                                                                       |                                                  |                                                    |                                                |                                                  |                                                       |                                            |                                                  |                                                       |
| 6.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <b>Project Title:</b> Court Cluster System                                            | <b>Priority:</b> 2                               |                                                    |                                                |                                                  |                                                       |                                            |                                                  |                                                       |
| <b>Supported Strategic Plan Branch Goals:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                       |                                                  |                                                    |                                                |                                                  |                                                       |                                            |                                                  |                                                       |
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| I<br>Access<br><input checked="" type="checkbox"/>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | II<br>Independence<br><input type="checkbox"/>                                        | III<br>Modernization<br><input type="checkbox"/> | IV<br>Quality<br><input type="checkbox"/>          | V<br>Education<br><input type="checkbox"/>     | VI<br>Infrastructure<br><input type="checkbox"/> | VII<br>Funding<br><input checked="" type="checkbox"/> |                                            |                                                  |                                                       |
| <p><b>Project Summary:</b> The project originated from a Funding Methodology Subcommittee work plan item for FY 2020–21 to establish an ad hoc subcommittee to reevaluate the court cluster system and the impact of trial courts’ placement in the Resource Assessment Study. The statewide four-cluster system is determined by the number of authorized judicial positions and is used in the Resource Assessment Study to determine court workload. In July 2023, the Trial Court Budget Advisory Committee approved updates to the Funding Methodology Subcommittee workplan, which referred the court cluster project to the Data Analytics Advisory Committee. The Data Analytics Advisory</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                       |                                                  |                                                    |                                                |                                                  |                                                       |                                            |                                                  |                                                       |

| # | New or One-Time Projects                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|---|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|   | <p>Committee will meet on November 4, 2025, to continue its evaluation of the system and will report its findings and recommendations to the Trial Court Budget Advisory Committee.</p> <p><b>Status/Timeline:</b> One-time.</p> <p><b>Fiscal Impact/Staff Resources:</b> Judicial Council Research, Analytics, and Data and Budget Services staff.</p> <p><input checked="" type="checkbox"/> Check this box if this project may result in an allocation or distribution of funds to the courts.</p> <p><b>Internal/External Stakeholders:</b> External stakeholders include the trial courts.</p> <p><b>AC Collaboration:</b> Data Analytics Advisory Committee and Judicial Branch Budget Committee.</p> |

| #                                                  | Ongoing Projects and Activities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                  |                                                    |                                                |                                                  |                                                       |                                            |                                                  |                                                       |
|----------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|----------------------------------------------------|------------------------------------------------|--------------------------------------------------|-------------------------------------------------------|--------------------------------------------|--------------------------------------------------|-------------------------------------------------------|
| 1.                                                 | <b>Project Title:</b> Funding Adjustments for Annual Governor’s Budget, May Revision, and Enacted Budget                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | <b>Priority:</b> 1                               |                                                    |                                                |                                                  |                                                       |                                            |                                                  |                                                       |
|                                                    | <b>Supported Strategic Plan Branch Goals:</b> <table border="0"> <tr> <td>I<br/>Access<br/><input checked="" type="checkbox"/></td> <td>II<br/>Independence<br/><input type="checkbox"/></td> <td>III<br/>Modernization<br/><input type="checkbox"/></td> <td>IV<br/>Quality<br/><input type="checkbox"/></td> <td>V<br/>Education<br/><input type="checkbox"/></td> <td>VI<br/>Infrastructure<br/><input type="checkbox"/></td> <td>VII<br/>Funding<br/><input checked="" type="checkbox"/></td> </tr> </table>                                                                                                                                                                                                                                                                                                                                                                             |                                                  | I<br>Access<br><input checked="" type="checkbox"/> | II<br>Independence<br><input type="checkbox"/> | III<br>Modernization<br><input type="checkbox"/> | IV<br>Quality<br><input type="checkbox"/>             | V<br>Education<br><input type="checkbox"/> | VI<br>Infrastructure<br><input type="checkbox"/> | VII<br>Funding<br><input checked="" type="checkbox"/> |
| I<br>Access<br><input checked="" type="checkbox"/> | II<br>Independence<br><input type="checkbox"/>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | III<br>Modernization<br><input type="checkbox"/> | IV<br>Quality<br><input type="checkbox"/>          | V<br>Education<br><input type="checkbox"/>     | VI<br>Infrastructure<br><input type="checkbox"/> | VII<br>Funding<br><input checked="" type="checkbox"/> |                                            |                                                  |                                                       |
|                                                    | <p><b>Project Summary:</b> The Trial Court Budget Advisory Committee makes recommendations to the Judicial Council for funding adjustments included in the annual Governor’s Budget, May Revision, and enacted budget. The committee will address funding proposals that impact the trial courts and collaborate with Judicial Council program offices, other advisory committees, and stakeholders, to implement budget proposals as needed.</p> <p><b>Status/Timeline:</b> Ongoing.</p> <p><b>Fiscal Impact/Staff Resources:</b> Judicial Council Budget Services staff.</p> <p><input checked="" type="checkbox"/> Check this box if this project may result in an allocation or distribution of funds to the courts.</p> <p><b>Internal/External Stakeholders:</b> External stakeholders include the trial courts.</p> <p><b>AC Collaboration:</b> Judicial Branch Budget Committee.</p> |                                                  |                                                    |                                                |                                                  |                                                       |                                            |                                                  |                                                       |
| 2.                                                 | <b>Project Title:</b> Workload Formula Policy and Allocations to Trial Courts                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | <b>Priority:</b> 1                               |                                                    |                                                |                                                  |                                                       |                                            |                                                  |                                                       |
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|                                                    | <p><b>Project Summary:</b> The Trial Court Budget Advisory Committee makes recommendations to the Judicial Council regarding annual allocations to the trial courts. For FY 2025–26, this included total allocations of \$3.1 billion (\$3 billion from the Trial Court Trust Fund and \$117.8 million General Fund) based on recommended methodologies and the Workload Formula policy. The allocations were approved by the council at its July 2025 business meeting.</p>                                                                                                                                                                                                                                                                                                                                                                                                                 |                                                  |                                                    |                                                |                                                  |                                                       |                                            |                                                  |                                                       |



| #                                                  | Ongoing Projects and Activities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                    |                                                |                                                  |                                                  |                                                       |                                                  |                                                       |                           |
|----------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|------------------------------------------------|--------------------------------------------------|--------------------------------------------------|-------------------------------------------------------|--------------------------------------------------|-------------------------------------------------------|---------------------------|
|                                                    | <p>The Trial Court Budget Advisory Committee will continue to make recommendations to the council on the preparation, development, and implementation of the budget for the trial courts and provide input on policy issues affecting trial court funding. This will include an ongoing evaluation of existing allocation methodologies and consideration of alternative allocation approaches based on the Workload Formula policy's goal of funding equity, stability, and predictability. The committee will continue to collaborate with other advisory committees including, but not limited to, the Court Executives Advisory Committee and the Data Analytics Advisory Committee on issues affecting the Workload Formula policy and trial court funding matters.</p> <p><b>Status/Timeline:</b> Ongoing.</p> <p><b>Fiscal Impact/Staff Resources:</b> Judicial Council Budget Services staff.</p> <p><input checked="" type="checkbox"/> Check this box if this project may result in an allocation or distribution of funds to the courts.</p> <p><b>Internal/External Stakeholders:</b> External stakeholders include the trial courts.</p> <p><b>AC Collaboration:</b> Court Executives Advisory Committee, Judicial Branch Budget Committee, and Data Analytics Advisory Committee.</p> |                                                    |                                                |                                                  |                                                  |                                                       |                                                  |                                                       |                           |
| 3.                                                 | <p><b>Project Title:</b> Workload Formula Policy Adjustment Request Process</p> <p><b>Supported Strategic Plan Branch Goals:</b></p> <table border="0"> <tr> <td>I<br/>Access<br/><input checked="" type="checkbox"/></td> <td>II<br/>Independence<br/><input type="checkbox"/></td> <td>III<br/>Modernization<br/><input type="checkbox"/></td> <td>IV<br/>Quality<br/><input type="checkbox"/></td> <td>V<br/>Education<br/><input type="checkbox"/></td> <td>VI<br/>Infrastructure<br/><input type="checkbox"/></td> <td>VII<br/>Funding<br/><input checked="" type="checkbox"/></td> </tr> </table>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | I<br>Access<br><input checked="" type="checkbox"/> | II<br>Independence<br><input type="checkbox"/> | III<br>Modernization<br><input type="checkbox"/> | IV<br>Quality<br><input type="checkbox"/>        | V<br>Education<br><input type="checkbox"/>            | VI<br>Infrastructure<br><input type="checkbox"/> | VII<br>Funding<br><input checked="" type="checkbox"/> | <p><b>Priority:</b> 1</p> |
| I<br>Access<br><input checked="" type="checkbox"/> | II<br>Independence<br><input type="checkbox"/>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | III<br>Modernization<br><input type="checkbox"/>   | IV<br>Quality<br><input type="checkbox"/>      | V<br>Education<br><input type="checkbox"/>       | VI<br>Infrastructure<br><input type="checkbox"/> | VII<br>Funding<br><input checked="" type="checkbox"/> |                                                  |                                                       |                           |
|                                                    | <p><b>Project Summary:</b> In August 2013, the Judicial Council approved the Trial Court Budget Advisory Committee's recommendation to adopt the Workload Formula policy's adjustment request process to provide the trial courts with an annual opportunity to submit recommendations for changes to the policy as needed. The most recent requests were received in January 2025 from the Superior Court of Alameda County and the Superior Court of Stanislaus County. It was determined the proposals could impact the Resource Assessment Study, which calculates different caseweights to determine the workload-based funding need for the trial courts.</p> <p>In February 2025, the requests were referred to the Data Analytics Advisory Committee for review. The Data Analytics Advisory Committee will meet on November 4, 2025, to continue its evaluation of the requests and will report its findings and recommendations to the Trial Court Budget Advisory Committee.</p> <p><b>Status/Timeline:</b> Ongoing.</p>                                                                                                                                                                                                                                                                 |                                                    |                                                |                                                  |                                                  |                                                       |                                                  |                                                       |                           |

| # | Ongoing Projects and Activities                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|---|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|   | <p><b><i>Fiscal Impact/Staff Resources:</i></b> Judicial Council Research, Analytics, and Data and Budget Services staff.</p> <p><input checked="" type="checkbox"/> Check this box if this project may result in an allocation or distribution of funds to the courts.</p> <p><b><i>Internal/External Stakeholders:</i></b> External stakeholders include the trial courts.</p> <p><b><i>AC Collaboration:</i></b> Data Analytics Advisory Committee and Judicial Branch Budget Committee.</p> |

### III. LIST OF 2025 PROJECT ACCOMPLISHMENTS

| #  | Project Highlights and Achievements                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | <p><b>Workload Formula Policy, State Trial Court Improvement and Modernization Fund, and Trial Court Trust Fund Allocations</b></p> <p>The Trial Court Budget Advisory Committee made recommendations to the Judicial Council that included State Trial Court Improvement and Modernization Fund and Trial Court Trust Fund allocations for FY 2025–26 to support trial court programs and operations. In July 2025, the Judicial Council approved allocations totaling \$46.6 million from the State Trial Court Improvement and Modernization Fund and an allocation of \$3.1 billion (\$3 billion from the Trial Court Trust Fund, \$117.8 million General Fund, and an ongoing \$55 million reduction to the trial courts’ operational funding) included in the Budget Act of 2024.</p>                                                                         |
| 2. | <p><b>Allocation for Partial Restoration of Trial Court Funding for FY 2024–25</b></p> <p>In February 2025, the Judicial Council approved a recommendation from the Trial Court Budget Advisory Committee to partially restore \$42 million of the \$97 million reduction for trial court operations included in the Budget Act of 2024 beginning in FY 2024–25. This resulted in a revised \$55 million ongoing reduction. The Judicial Council–approved methodology to allocate the \$55 million reduction supports the Workload Formula policy’s core principles of funding equity, stability, and predictability as higher funder courts took a larger share of the reduction than lower funded courts.</p>                                                                                                                                                     |
| 3. | <p><b>Workload Formula Allocation Methodologies for Potential Future Budget Reductions and Funding Restoration</b></p> <p>In July 2025, the Judicial Council approved recommendations from the Trial Court Budget Advisory Committee to update the Workload Formula policy to include allocation methodologies to address future budget situations including (1) budget reductions, (2) funding restorations in the same fiscal year as the reduction occurred, and (3) funding restorations that occur in a future fiscal year following a reduction in a prior fiscal year. Having specific methodologies in the policy for these situations increases transparency regarding how funding is allocated to the trial courts so they can plan for changes in funding levels and the Judicial Council can address budget changes more efficiently going forward.</p> |
| 4. | <p><b>Community Assistance, Recovery, and Empowerment (CARE) Act</b></p> <p>Beginning in FY 2022–23, the budget included funding to implement the CARE Act, a new court-based mental health services engagement and oversight program. The program was implemented in two cohorts of courts and all 58 courts had an operational program by December 2024. The Judicial Council approved a recommendation from the Trial Court Budget Advisory Committee to establish an allocation methodology using the Workload Formula policy to allocate CARE Act funding to all participating courts in FY 2023–24 and in subsequent years. In April 2025, the Judicial Council also approved the Trial Court Budget Advisory Committee’s recommendation to reallocate unspent FY 2024–25 CARE Act funding to maximize the appropriation to support program needs.</p>        |

| #  | <b>Project Highlights and Achievements</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
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| 5. | <p><b>Court Reporter Funding Reallocation</b></p> <p>Beginning in FY 2021–22, the Judicial Council has approved recommendations from the Trial Court Budget Advisory Committee to allocate \$30 million annually to the trial courts to increase the number of court reporters in family and civil law cases. In July 2024, the council directed staff to survey the courts for a one-time redistribution of unspent funds in FY 2024–25. In February 2025, the council approved a midyear reallocation of \$820,000. The reallocation maximized the use of available funding to increase the number of court reporters in these case types.</p>                                                                                                                                                               |
| 6. | <p><b>Court Interpreter Funding Augmentation and Reallocation</b></p> <p>In January 2023, the Judicial Council approved recommendations from the Trial Court Budget Advisory Committee to address funding shortfalls in the Court Interpreters Program. Shortages would first be covered by savings from courts with unspent funding up to the appropriation amount in the budget, and then Court Interpreters Program fund balance, if available, would be used. In FY 2024–25, the council approved an augmentation of \$16.2 million from program reserves to address shortfalls in both FY 2023–24 and FY 2024–25. The council also approved a FY 2024–25 midyear reallocation of \$510,000 of unspent funding to support interpreter services.</p>                                                        |
| 7. | <p><b>Trial Court Trust Fund Allocation Increase for Judicial Council Offices for FY 2024–25</b></p> <p>In February 2025, the Judicial Council approved a recommendation from the Trial Court Budget Advisory Committee for an increase of \$1.3 million to the FY 2024–25 allocation from the Trial Court Trust Fund for the Audit Services office to reflect funding included in the Budget Act of 2024 for required audits conducted by the State Controller’s Office. The council also approved an increase of \$150,000 to the FY 2024–25 allocation for the Budget Services office based on a reevaluation of budget workload for the collections program funded by the Trial Court Trust Fund. The increased allocations provided the necessary funding to the offices for the required activities.</p> |