Judicial Council *of* California

Trial Court Budget Advisory Committee

TRIAL COURT BUDGET ADVISORY COMMITTEE

MATERIALS AUGUST 27, 2026
VIRTUAL MEETING

Meeting Contents

Judicial Council *of* California

Trial Court Budget Advisory Committee
Notice and Agenda of Open Electronic Meeting

Thursday, August 27, 2026

12:00 p.m. – 1:00 p.m.

Public Access: https://jcc.granicus.com/player/event/5797

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

Meeting materials for open portions of the meeting will be posted on the Trial Court Budget Advisory Committee webpage on the California Courts website at least three business days before the meeting.

Request for ADA accommodations should be made at least three business days before the meeting and directed to: JCCAccessCoordinator@jud.ca.gov.

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

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

I. Open meeting (Cal. Rules of Court, Rule 10.75(c)(1))

Call to Order and Roll Call

Approval of Minutes

Approve minutes of the May 7, 2026, Trial Court Budget Advisory Committee meeting, June 3, 2026, Trial Court Budget Advisory Committee action by email between meetings, and July 30, 2026, Trial Court Budget Advisory Committee action by email between meetings.

II. Public Comment (Cal. Rules of Court, Rule 10.75(k))

This meeting will be conducted by electronic means. As such, the public may make comments in writing or remotely.

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 emailed to tcbac@jud.ca.gov. Only written comments received by 12:00 p.m.

August 26, 2026, will be provided to advisory body members prior to the start of the meeting.

Remote Public Comment

Members of the public requesting to speak during the public comment portion of the meeting must provide the speaker's name, the name of the organization that the speaker represents if any, and the agenda item that the public comment will address. Requests to make a remote public comment must be received by 12:00 p.m. August 26, 2026, via email to tcbac@jud.ca.gov. The chair will establish speaking limits at the beginning of the public comment session. While the advisory body welcomes and encourages public comment, time may not permit all persons requesting to speak to be heard at this meeting.

III. Discussion and Possible Action Items (Items 1–4)

Item 1

Involuntary Medication Orders (Senate Bill 820) Allocations for Fiscal Year 2026–27 (Action Required)

Consideration of allocations to implement the new hearing process for involuntary medication orders established by Senate Bill 820 for fiscal year 2026–27.

Presenter: Ms. Jenny Clarke, Supervising Analyst, Judicial Council Criminal Justice Services

Item 2

Workload Formula Adjustment Request Process Update (Action Required)

Consideration of updates to Judicial Council instructions for submitting annual Workload Formula policy adjustment requests.

Presenter: Mr. Jarret Yee, Fiscal Supervisor, Judicial Council Budget Services

Item 3

Workload Formula Policy Base Funding Floor Adjustment Process (Action Required)

Consideration of potential changes to the Workload Formula base funding floor policy.

Presenter: Mr. Jarret Yee, Fiscal Supervisor, Judicial Council Budget Services

Item 4

Funding Methodology Subcommittee Annual Work Plan (Action Required)

Consideration of updates to the Funding Methodology Subcommittee work plan for fiscal year 2026–27.

Presenter: Ms. Megan Ellis, Senior Fiscal Analyst, Judicial Council Budget Services

IV. ADJOURNMENT

Adjourn

Judicial Council *of* California

TRIAL COURT BUDGET ADVISORY COMMITTEE
DRAFT MINUTES OF OPEN MEETING

May 7, 2026

12:00 p.m. – 3:00 p.m.

Videoconference

Members Present: Judges: Hon. Jonathan B. Conklin (Chair), Hon. J. Eric Bradshaw, Hon. Christopher R. Bowen, Hon. Judith C. Clark, Hon. Judith K. Dulcich, Hon. David C. Kalemkarian, and Hon. Patricia L. Kelly.

Executive Officers: Ms. Rebecca Fleming (Vice-Chair), Ms. Stephanie Cameron, Mr. Jake Chatters, Mr. Chad Finke, Mr. Kevin Harrigan, Mr. Michael M. Roddy, Mr. Chris Ruhl, Mr. David W. Slayton, Ms. Kim Turner, Hon. Scott R. L. Young, and Mr. David H. Yamasaki

Members Absent: Hon. Julie A. Emede, Hon. Samantha P. Jessner, Hon. Sonny S. Sandhu, and Ms. Kate Bieker

Others Present: Hon. Lawrence Brown (Liaison), Mr. Zlatko Theodorovic, Ms. Fran Mueller, Ms. Joleen Allgood, Ms. Audrey Fancy, Ms. Daphne Light, Ms. Kelly Meehleib, Ms. Megan Ellis, Ms. Aman Singh, and Ms. Oksana Tuk

OPEN MEETING

Call to Order and Roll Call

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

Approval of Minutes

The advisory body approved the minutes of the March 26, 2026, Trial Court Budget Advisory Committee (TCBAC) meeting.

DISCUSSION AND ACTION ITEMS (ITEMS 1–3)

Item 1

Court-Appointed Juvenile Dependency Counsel Allocations for Fiscal Year 2026–27 (Action Required)

Consideration of court-appointed juvenile dependency counsel allocations for fiscal year 2026-2027.

***Action:** The TCBAC unanimously voted to approve the following recommendations for consideration by the Judicial Branch Budget Committee and then the Judicial Council at its business meeting on July 17, 2026:*

1. *Allocate funding according to the existing court-appointed juvenile dependency counsel funding methodology approved by the Judicial Council. Proposed allocations are detailed in Attachment 1A, including any technical adjustments and contingent on funding included in the enacted budget for FY 2026–27.*
2. *Direct Judicial Council staff to conduct a spending plan survey of all the trial courts in May 2026 to determine whether any courts do not anticipate fully spending their proposed allocation for FY 2026–27. Any identified savings will be made available for allocation to (1) small courts impacted by funding reductions due to the existing methodology to provide a glide path to adjust to FY 2026–27 reductions. Subject to available funding, permit small courts to request up to 50 percent of the difference, if any, between their proposed allocation and the allocation calculated after applying small court adjustments, but before being capped at 100 percent of their total need; and (2) if remaining funds are available, allocate to large courts to offset funding for small court adjustments. Council staff will bring updated proposed allocations back to TCBAC for consideration once the survey results are available.*

Item 2
Allocations from the State Trial Court Improvement and Modernization Fund for Fiscal Year 2026–27 (Action Required)

Consideration of allocations from the State Trial Court Improvement and Modernization Fund in support of the trial courts for fiscal year 2026–27.

Action: *TCBAC unanimously voted to approve the proposed FY 2026–27 IMF allocations, totaling $47.8 million, detailed in Attachment 2A. This includes $798,000 for rent costs and personal services costs for four vacant positions within the Judicial Branch Technology Services program. These costs were not included in the report previously considered by the Revenue & Expenditure Subcommittee. The recommended allocations will be considered by the Judicial Branch Budget Committee and then the Judicial Council at its business meeting on July 17, 2026.*

Item 3
Allocations for Trial Court Operations for Fiscal Year 2026–27 (Action Required)

Consideration of allocations from the Trial Court Trust Fund and General Fund in support of the trial courts for fiscal year 2026–27.

Action: *TCBAC unanimously voted to approve the following recommendations to be considered by the Judicial Branch Budget Committee and then the Judicial Council at its business meeting on July 17, 2026:*

1. *Approve base, discretionary, and nondiscretionary program allocations from the Trial Court Trust Fund and General Fund of $3.2 billion (Attachment 3B, column W), including any needed technical adjustments and contingent on funding included in the enacted budget for FY 2026–27. This includes a General Fund allocation of $68.8 million for employee benefits (Attachment 3B, column P).*
2. *Approve Workload Formula policy calculation of $2.7 billion for FY 2026–27 based on methodologies approved by the Judicial Council (Attachment 3C, column Q).*

INFORMATION ONLY ITEMS (NO ACTION REQUIRED)

Item 1

Court-Approved Juvenile Dependency Counsel Allocation Methodology Working Group Update

Update on the working group's initial meeting and upcoming activities.

Action: *Information item only. No action was taken.*

Item 2

Fund Held on Behalf of the Trial Courts Annual Report for Fiscal Year 2024-25

Annual report for the Funds Held on Behalf of the Trial Courts program regarding open projects and projects completed in fiscal year 2024–25.

Action: *Information item only. No action was taken.*

ADJOURNMENT

There being no further business, the meeting was adjourned at 1:25 p.m.

Approved by the advisory body on enter date.

Judicial Council of California

TRIAL COURT BUDGET ADVISORY COMMITTEE
DRAFT MINUTES OF ACTION BY EMAIL

June 3, 2026

11:00 a.m.

Members Present: Judges: Hon. Jonathan B. Conklin (Chair), Hon. J. Eric Bradshaw, Hon. Christopher R. Bowen, Hon. Judith C. Clark, Hon. Judith K. Dulcich, Hon. Julie A. Emede, Hon. Samantha P. Jessner, Hon. Patricia L. Kelly, Hon. Sonny S. Sandhu, and Hon. Scott R. L. Young

Executive Officers: Ms. Rebecca Fleming (Cochair), Ms. Kate Bieker, Ms. Stephanie Cameron, Mr. Jake Chatters, Mr. Chad Finke, Mr. Kevin Harrigan, Mr. Michael M. Roddy, Mr. Chris Ruhl, Mr. David W. Slayton, Ms. Kim Turner, and Mr. David H. Yamasaki

Members Absent: Judges: Hon. Lisa M. Rogan and Hon. David C. Kalemkarian

Others Present: Ms. Megan Ellis

ACTION BY EMAIL

As provided in the California Rules of Court, rule 10.75 (o)(1)(B), the chair concluded that prompt action was needed. This action by email concerned matters that would otherwise be discussed in an open meeting; therefore, in accordance with rule 10.75(o)(2), public notice and the proposal were posted on June 1, 2026, to allow at least one complete business day for public comment before the committee took action. No public comments were received.

ACTION ITEMS (ITEMS 1–2)

Item 1

Court-Appointed Juvenile Dependency Counsel Allocations for Fiscal Year 2026–27

Consideration of updated court-appointed juvenile dependency counsel allocations for fiscal year 2026–27.

Action: *The Trial Court Budget Advisory Committee unanimously voted to approve the following recommendations for consideration by the Judicial Branch Budget Committee and then the Judicial Council at its business meeting on July 17, 2026:*

1. *Approve the fiscal year (FY) 2026–27 allocations for court-appointed juvenile dependency counsel allocations which reflect the results of the spending plan survey conducted in May 2026, as detailed in Attachment 1A, column H, including any needed technical adjustments and contingent on funding included in the final enacted budget.*

2. *Authorize Judicial Council staff to (1) conduct a midyear survey of trial courts in FY 2026–27 to assess projected court-appointed counsel expenditures and determine if any courts will not fully spend their allocations and how much funding is available to reallocate to courts that need additional resources, and (2) implement a reallocation of this funding based on the existing methodology to maximize the appropriation to serve children and families in dependency proceedings.*
3. *Direct Judicial Council staff to report the results of the FY 2026–27 reallocation at the time the Judicial Council considers the next year's proposed allocations, ensuring transparency in how the funds were redistributed to meet program needs.*

Item 2
Court Interpreter Allocations for Fiscal Year 2026–27

Consideration of court interpreter allocations for FY 2026–27 to include the $20 million augmentation included in the May Revision.

Action: *The Trial Court Budget Advisory Committee unanimously voted to approve the following recommendations for consideration by the Judicial Branch Budget Committee and then the Judicial Council at its business meeting on July 17, 2026:*

1. *Approve the FY 2026–27 allocations for the court interpreter program, which reflect the $20 million augmentation, as detailed in Attachment 2A, including any needed technical adjustments and contingent on funding included in the final enacted budget.*

   Direct Judicial Council staff to conduct a midyear survey of trial courts in FY 2026–27 to identify court expenditures and any courts experiencing a shortfall for a potential reallocation of available funds, up to the appropriated amount.

CLOSURE OF ACTION

Voting closed at 5:11 p.m. on June 3, 2026.

Approved by the advisory body on enter date.

Judicial Council of California

Trial Court Budget Advisory Committee
DRAFT Minutes of Action by Email

July 30, 2026

11:00 a.m.

Members Present: Judges: Hon. Jonathan B. Conklin (Chair), Hon. J. Eric Bradshaw, Hon. Judith C. Clark, Hon. Judith K. Dulcich, Hon. Julie A. Emede, Hon. Samantha P. Jessner, Hon. David C. Kalemkarian, Hon. Patricia L. Kelly, Hon. Lisa M. Rogan, and Hon. Scott R.L. Young

Executive Officers: Ms. Rebecca Fleming (Cochair), Ms. Kate Bieker, Ms. Stephanie Cameron, Mr. Jake Chatters, Mr. Chad Finke, Mr. Kevin Harrigan, Mr. Michael M. Roddy, Mr. David W. Slayton, Ms. Kim Turner, and Mr. David H. Yamasaki

Members Absent: Hon. Christopher R. Bowen

Others Present: Ms. Megan Ellis

Action by Email

As provided in the California Rules of Court, rule 10.75 (o)(1)(B), the chair concluded that prompt action was needed. This action by email concerned matters that would otherwise be discussed in an open meeting; therefore, in accordance with rule 10.75(o)(2), public notice and the proposal were posted on July 27, 2026, to allow at least one complete business day for public comment before the committee took action. No public comments were received. Voting was opened at 11:01 a.m. on July 30, 2026.

Action Item

Pretrial Release Program Supplemental Allocations for Fiscal Year 2026–27

Consideration of the supplemental one-time $20 million General Fund allocations for the Pretrial Release Program for fiscal year (FY) 2026–27.

Action: *The Trial Court Budget Advisory Committee unanimously voted to approve the FY 2026–27 supplemental allocations of $20 million for the Pretrial Release Program as outlined in Attachment B. These recommendations will be considered by the Judicial Branch Budget Committee and then the Judicial Council through Circulating Order.*

Closure of Action

Voting closed at 5:02 p.m. on July 30, 2026.

Approved by the advisory body on enter date.

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES

Report to the Trial Court Budget Advisory Committee

(Action Item)

Title: Involuntary Medication Orders (Senate Bill 820) Allocations for Fiscal Year 2026–27

Date: 8/12/2026

Contact: Jenny Clarke, Supervising Analyst, Criminal Justice Services | 415-865-7958 | jenny.clarke@jud.ca.gov

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Issue

Consideration of a funding methodology and allocations to the trial courts for fiscal year (FY) 2026–27 for the implementation of Senate Bill (SB) 820 (Stats. 2025, ch. 330).

Background

The Budget Act of 2026 included $4.25 million General Fund annually for four years, beginning FY 2026–27 through FY 2029–30, for the trial courts to implement the new responsibilities and workload required by SB 820.

SB 820 creates an alternative process to allow involuntary medication of individuals who are confined in the county jail and have been found incompetent to stand trial (IST) after being charged with a misdemeanor.[1] The bill allows involuntary medication in an emergency situation, as defined, or where a court has found a defendant to be gravely disabled and without capacity to refuse treatment with psychiatric medication.

While Penal Code (PC) section 2603 allows involuntary medication orders (IMO) in county jails under certain conditions, SB 820 allows for IMOs through a hearing process for IST trial misdemeanor cases. Additionally, this bill will require the court to review the medication order at least every 60 days.

This bill creates additional court workload by requiring new evidentiary hearings, increased medical evaluations, and additional efforts to manage defendant rights.

Both psychiatrists and licensed psychologists are authorized to recommend antipsychotic medication and its manner of administration. However, psychiatrists remain the only licensure type that can prescribe medication. Some larger counties benefit from having teaching hospitals,

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[1] Chapter 330, Statutes of 2025 (Senate Bill 820), https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=202520260SB820.

which help retain psychiatric professionals. In contrast, smaller and rural counties that lack such infrastructure are disproportionately impacted by these shortages.

Analysis and Rationale

The funding structure included in the approved budget change proposal (BCP) was developed to address the new hearing requirements, increased court-ordered psychiatric evaluations, and the need to uphold defendants' procedural rights, such as the right to cross-examine expert witnesses.[2] Since psychiatrists are in short supply and typically charge higher fees than psychologists, they are employed specifically to provide opinions regarding the medication portion of competency assessments. In most instances, this focused aspect of the evaluation can be conducted remotely.

To establish a funding methodology, Judicial Council staff identified two consistently reported data metrics in the Judicial Branch Statistical Information System: PC 1368 IST filings, which directly relate to SB 820, and total non-traffic misdemeanor filings to capture relevant trends in misdemeanor cases. Although PC 1368 IST filings are not broken down by charge type or level and represent total filings for each county, analyzing both metrics allowed staff to examine yearly trends and assess their impact on future funding allocations.

A funding floor is also considered to ensure that any court receiving less than the estimated cost for a full IMO process would still receive sufficient funding to maintain operational readiness in the event of a case.

Data trends and Alternatives Considered

To establish a funding baseline, staff analyzed filings using historical averages, looking at the past 3, 5, and 10 years. Over the past 10 years, PC 1368 IST filings have shown a consistent upward trend, with the most recent FY 2024–25 data showing a notable spike that exceeds pre-pandemic levels. In contrast, misdemeanor filing data reveal a large decline from pre-pandemic years, followed by a rebound starting in FY 2023–24 and continuing through FY 2024–25. Although misdemeanor filings are increasing, they have not reached pre-pandemic numbers.

With the goal of providing a stable and accurate funding baseline that accounts for each county's resource needs and factors such as the pandemic, operational disruptions, and policy changes, the figures in the attachments are calculated using the three-year average of filings.

Staff evaluated various funding methodologies using the two available data sets, including options that relied exclusively on IST filings and a combination of both variables, with and without a funding floor. The outcomes of these options are displayed in Attachment A.

Staff found that methods that incorporated both IST and misdemeanor filings were overall more balanced. Although this approach reduced unpredictability compared to IST-only models, it did

[2] Incompetent to Stand Trial Procedures (SB 820) budget change proposal for FY 2026–27, 0250-084-BCP-2026-GB, https://bcp.dof.ca.gov/2627/FY2627_ORG0250_BCP8621.pdf.

not fully address the needs of all courts, especially those with consistently low filings, leaving some with allocations below the cost of an evaluation.

Funding floor calculations were based on the estimated cost outlined in the BCP. The data show the likelihood of even small counties encountering IST cases with an emergency medication component is increasing.

At its meeting on July 22, 2026, the Funding Methodology Subcommittee (FMS) considered three different allocation methodologies presented by Judicial Council staff. Discussions led to the development of a fourth allocation methodology option, described as Option 4 below, to be used for the first two fiscal years. Concurrently, data is to be collected from trial courts on the number of felony IST cases and misdemeanor IST cases so that the funding methodology can be reevaluated in 2028. The evaluation is meant to assess the percentage split between IST and non-traffic misdemeanor filings and determine if the recommended methodology should be applied in FY 2028–29 and FY 2029–30.

FMS approved allocation methodology Option 4 for FY 2026–27 and FY 2027–28 with concurrent data collection for consideration by the Trial Court Budget Advisory Committee.

Allocation Methodology Options

FMS considered Options 1–3 and determined that the best approach would be to revise Option 3 to create Option 4. Option 1 would result in no funding or limited funding to some courts that would not reflect the minimum operational need. Similarly, Option 2 would result in some courts receiving amounts that would not cover the estimated cost of one evaluation. The fifty-fifty split in Option 3 is based on national trends and is not necessarily representative of data cited for certain California counties, such as Los Angeles. Ultimately, the development of Option 4 resolved the limitations of the Options 1–3 and was more closely representative of caseloads observed by FMS.

Option 1 – Methodology based on IST data only

Funding models that rely exclusively on IST filings have demonstrated variability over time. Counties with temporary increases in IST cases would receive greater funding allocations, while counties with occasional decreases receive less, leading to year-to-year fluctuations and gaps in resource distribution. Additionally, since IST filing data is not categorized by charge type, courts with inconsistent IST activity may receive allocations that do not fully reflect their operational needs.

Analysis shows under this approach, two courts would receive no funding, three courts would receive less than the cost of two evaluations, and another three courts would receive limited funding equivalent to the estimated cost for two evaluations.

Option 2 – Methodology based on 50% IST filings and 50% non-traffic misdemeanor filings

This option considers both IST and misdemeanor filings to assess resource needs, resulting in a more inclusive method for allocating funds. By incorporating broader data trends, Option 2 lessens the impact of fluctuations in IST filings and provides a balanced framework for funding distribution. Under this methodology, analysis shows that two courts would receive funding amounts that may not fully cover the estimated cost of one evaluation.

Option 3 – Methodology based on 50% IST filings, 50% non-traffic misdemeanor filings, and $1,200 funding floor

This approach would ensure that courts with lower filing volumes receive a minimum level of financial support, promoting equity in resource distribution across jurisdictions, while avoiding the short-term fluctuations in data described above. The introduction of a funding floor is to ensure minimum operational capacity for IMO-related workload.

Option 4 – Methodology based on 60% IST filings, 40% non-traffic misdemeanor filings, and $1,200 funding floor with ongoing data collection

This option correlates more closely with the intent of the SB 820 legislation, which is to fund the new misdemeanor IST workload, and signals an alignment of policy and program. The observed experiences of the FMS members indicated that a methodology of 60 percent IST filing and 40 percent non-traffic misdemeanor filings would be more representative of caseloads. The funding floor would enable minimum operational capacity for IMO-related workload.

Data on the number of IST cases that are misdemeanors and felonies will be collected from trial courts in an annual survey. This information will be used to guide allocation methodology decisions for Fiscal Years 2028–29 and 2029–30.

Expenditure and Reporting Requirements

The approved methodology will be used for the first two of the four fiscal years in which funding is available to implement SB 820 (FY 2026–27 through FY 2027–28). For the remaining two fiscal years (FY 2028–29 through FY 2029–30), data collected from trial courts will be used to reevaluate this funding methodology and to determine if modification to the funding methodology is necessary.

Trial courts will receive their FY 2026–27 allocations as a lump sum in a single monthly distribution, following Judicial Council approval. The FY 2026–27 allocation is available for expenditure or encumbrance until June 30, 2027, and courts have an additional two years to liquidate any funding for allowable encumbrances until June 30, 2029. Courts are required to monitor their approved allocations using the Work Breakdown Structure element (WBSE) designated within the Phoenix financial system for this funding.

Trial courts should use their approved allocations on eligible costs necessary to implement SB 820. No additional operational agreement will be issued to provide further expenditure or reporting guidance. Qualifying expenditures must be recorded in the Phoenix financial system under the appropriate WBSE by the established system closing deadlines, or at least once per quarter. This will ensure current expenditure information is available if needed. Final year-end expenditures must be recorded in the Phoenix financial system by July 31 of each reportable year to ensure sufficient time to reconcile and report annual expenditures.

Recommendation

Approve FMS' recommendation for the FY 2026–27 allocations to support trial courts in the implementation of SB 820 in accordance with allocation methodology Option 4, where sixty percent of the funding is allocated based on each trial court's IST filing data and forty percent of the funding is allocated based on each trial court's non-traffic misdemeanor filings.

The recommendation will be considered by the Judicial Branch Budget Committee and then the Judicial Council at its business meeting on October 16, 2026.

Attachments

Attachment 1A: Comparison of proposed allocation methods

Attachment 1B: PC 1368 filings per county from FY 2018–19 to FY 2024–25

Attachment 1C: Non-traffic misdemeanor filings from FY 2018–19 to FY 2024–25

Attachment 1A: Comparison of proposed allocation methods

County	Option 1: IST Only	Option 2: 50% IST and 50% Misdemeanor	Option 3: 50% IST and 50% Misdemeanor + Funding Floor*	Option 4: 60% IST and 40% Misdemeanor + Funding Floor*
Alameda	$78,217	$79,621	$79,585	$79,303
Alpine	0	122	1,200	1,200
Amador	7,647	7,148	7,113	7,211
Butte	31,692	26,197	26,161	27,259
Calaveras	4,975	4,654	4,619	4,681
Colusa	2,672	3,722	3,686	3,475
Contra Costa	32,614	32,801	32,766	32,727
Del Norte	1,244	2,938	2,902	2,562
El Dorado	13,174	12,602	12,566	12,679
Fresno	138,470	142,432	142,396	141,602
Glenn	1,474	2,411	2,375	2,186
Humboldt	35,101	28,484	28,448	29,770
Imperial	11,885	14,004	13,968	13,543
Inyo	2,073	3,768	3,733	3,392
Kern	253,769	217,181	217,145	224,462
Kings	35,838	28,847	28,812	30,208
Lake	19,716	21,249	21,214	20,905
Lassen	2,119	2,489	2,453	2,378
Los Angeles	1,383,454	1,049,499	1,049,463	1,116,253
Madera	10,595	19,301	19,266	17,523
Marin	26,441	21,969	21,934	22,827
Mariposa	2,119	2,604	2,568	2,470
Mendocino	12,069	15,775	15,739	14,996
Merced	1,013	20,450	20,415	16,526
Modoc	1,244	1,932	1,896	1,757
Mono	921	1,474	1,439	1,327
Monterey	92,451	80,300	80,265	82,693
Napa	16,261	15,465	15,429	15,587
Nevada	3,086	6,950	6,914	6,140
Orange	94,156	330,681	330,646	283,339
Placer	46,940	49,894	49,858	49,266
Plumas	691	1,785	1,749	1,529
Riverside	108,804	199,964	199,929	181,695
Sacramento	204,803	175,596	175,560	181,400
San Benito	3,271	6,845	6,810	6,093
San Bernardino	211,528	256,001	255,965	247,069
San Diego	126,815	166,682	166,646	158,672

County	Option 1: IST Only	Option 2: 50% IST and 50% Misdemeanor	Option 3: 50% IST and 50% Misdemeanor + Funding Floor*	Option 4: 60% IST and 40% Misdemeanor + Funding Floor*
San Francisco	33,074	36,959	36,923	36,145
San Joaquin	168,043	138,229	138,193	144,155
San Luis Obispo	68,728	66,830	66,794	67,172
San Mateo	33,397	69,197	69,162	62,000
Santa Barbara	86,970	78,055	78,019	79,801
Santa Clara	177,348	170,506	170,470	171,837
Santa Cruz	25,428	30,244	30,209	29,244
Shasta	37,404	43,978	43,942	42,626
Sierra	0	284	1,200	1,200
Siskiyou	5,159	7,752	7,717	7,197
Solano	68,728	48,771	48,736	52,726
Sonoma	113,963	93,183	93,147	97,302
Stanislaus	134,508	113,288	113,252	117,495
Sutter	19,255	20,598	20,562	20,292
Tehama	23,355	20,640	20,605	21,146
Trinity	276	1,700	1,664	1,378
Tulare	80,659	82,508	82,472	82,101
Tuolumne	15,662	13,910	13,875	14,223
Ventura	90,240	106,298	106,263	103,050
Yolo	33,765	33,541	33,506	33,549
Yuba	14,695	19,692	19,657	18,656
Total	**$4,250,000**	**$4,250,000**	**$4,250,000**	**$4,250,000**

** Funding floor amount is $1,200*

Attachment 1B: PC 1368 filings per county from FY 2018–19 to 2024–25

County	2018–19	2019–20	2020–21	2021–22	2022–23	2023–24	2024–25
Alameda	253	238	422	500	470	534	694
Alpine	0	0	0	0	0	0	0
Amador	20	25	16	52	45	60	61
Butte	330	220	297	352	226	228	234
Calaveras	26	27	20	23	21	44	43
Colusa	4	6	7	10	11	21	26
Contra Costa	121	139	160	96	0	299	409
Del Norte	0	0	0	0	0	2	25
El Dorado	0	0	0	28	132	47	107
Fresno	959	679	693	725	881	1,008	1,117
Glenn	2	0	28	30	5	17	10
Humboldt	181	154	237	213	193	265	304
Imperial	113	70	78	106	103	91	64
Inyo	0	6	16	17	14	15	16
Kern	1,430	1,301	1,429	1,494	1,510	1,829	2,170
Kings	210	212	326	393	303	266	209
Lake	70	108	102	170	176	99	153
Lassen	19	19	21	11	16	19	11
Los Angeles	8,252	6,998	5,255	8,313	10,412	9,554	10,067
Madera	52	47	53	74	68	90	72
Marin	90	60	107	132	200	161	213
Mariposa	0	0	0	0	17	15	14
Mendocino	94	108	117	106	103	80	79

County	2018–19	2019–20	2020–21	2021–22	2022–23	2023–24	2024–25
Merced	0	0	0	14	10	1	11
Modoc	0	0	2	1	12	5	10
Mono	1	6	1	0	2	12	6
Monterey	367	326	443	578	757	696	554
Napa	76	66	99	136	125	101	127
Nevada	42	29	49	38	16	9	42
Orange	381	493	398	525	581	618	845
Placer	169	186	162	267	375	362	282
Plumas	0	1	4	5	5	4	6
Riverside	538	436	538	597	473	513	1,376
Sacramento	984	947	1,189	1,248	1,296	1,398	1,752
San Benito	35	18	66	38	13	23	35
San Bernardino	983	1,328	1,495	1,460	1,439	1,469	1,684
San Diego	1,060	834	517	710	909	899	945
San Francisco	160	66	102	103	180	239	299
San Joaquin	967	738	1,154	1,247	1,202	1,268	1,178
San Luis Obispo	211	256	369	400	479	492	521
San Mateo	183	155	170	200	262	252	211
Santa Barbara	376	309	389	611	718	563	607
Santa Clara	480	477	702	569	1,106	1,350	1,394
Santa Cruz	82	87	202	175	213	180	159
Shasta	328	249	254	169	251	279	282
Sierra	0	0	0	0	0	0	0
Siskiyou	0	7	40	51	18	0	94

County	2018–19	2019–20	2020–21	2021–22	2022–23	2023–24	2024–25
Solano	397	472	328	434	417	458	617
Sonoma	908	756	742	625	689	787	998
Stanislaus	599	590	602	717	927	978	1,015
Sutter	44	73	125	118	170	133	115
Tehama	97	28	141	138	173	138	196
Trinity	17	17	2	0	6	0	0
Tulare	531	445	511	876	579	593	579
Tuolumne	50	75	90	85	98	158	84
Ventura	364	381	421	517	487	720	752
Yolo	2	3	115	227	213	235	285
Yuba	1	41	117	93	110	104	105

Attachment 1C: Non-traffic misdemeanor filings from FY 2018–19 to 2024–25

County	2018–2019	2019–2020	2020–2021	2021–2022	2022–2023	2023–2024	2024–2025
Alameda	7,820	6,895	4,990	5,455	5,136	5,069	6,062
Alpine	25	23	26	20	24	12	13
Amador	516	380	312	317	374	442	519
Butte	3,432	2,671	2,537	1,907	1,613	1,606	937
Calaveras	426	411	356	323	278	301	291
Colusa	425	318	424	318	307	351	300
Contra Costa	4,622	4,024	2,772	2,462	2,009	2,025	2,589
Del Norte	396	308	233	403	343	325	262
El Dorado	768	635	735	691	525	777	1,113
Fresno	14,548	11,444	9,931	8,029	8,538	9,916	10,937
Glenn	528	436	356	367	302	260	110
Humboldt	2,024	1,865	1,161	1,414	1,495	1,591	1,304
Imperial	1,909	1,291	1,385	1,196	885	1,177	1,175
Inyo	530	451	469	424	378	387	332
Kern	16,481	14,061	10,895	11,260	11,223	11,325	13,709
Kings	2,678	2,661	3,402	2,377	1,990	1,104	1,294
Lake	1,404	1,673	1,387	1,383	1,761	1,341	1,472
Lassen	275	229	172	183	194	200	180
Los Angeles	102,123	93,257	52,291	42,414	45,187	45,151	53,319
Madera	2,646	1,768	2,543	2,158	1,925	1,894	1,804
Marin	1,734	1,587	1,107	1,186	1,119	1,060	1,334

County	2018–2019	2019–2020	2020–2021	2021–2022	2022–2023	2023–2024	2024–2025
Mariposa	454	373	367	290	187	244	189
Mendocino	1,556	1,317	1,228	1,246	1,414	1,217	1,280
Merced	3,297	3,850	2,634	2,929	2,368	2,525	3,115
Modoc	195	153	197	167	164	168	194
Mono	615	381	247	80	99	120	188
Monterey	6,822	6,078	5,089	5,504	4,839	4,412	4,431
Napa	1,355	1,256	1,120	1,029	968	957	1,020
Nevada	912	1,020	864	587	496	746	929
Orange	44,490	45,322	42,415	35,984	36,445	37,867	39,564
Placer	4,070	3,743	3,850	3,080	3,233	3,451	3,926
Plumas	388	295	258	218	192	173	213
Riverside	20,292	21,901	18,368	19,804	16,173	20,123	22,152
Sacramento	10,129	9,406	8,339	7,435	7,801	10,177	11,412
San Benito	998	501	589	650	692	771	629
San Bernardino	36,438	30,608	24,299	19,440	18,196	18,358	23,771
San Diego	26,814	21,485	15,487	10,422	11,000	15,410	15,058
San Francisco	3,316	2,108	1,039	1,488	1,694	2,736	3,770
San Joaquin	12,361	10,207	7,985	6,841	6,307	6,333	9,126
San Luis Obispo	5,604	4,990	4,469	4,181	4,473	4,107	4,456
San Mateo	8,063	7,251	5,775	6,316	7,130	7,266	6,684
Santa Barbara	6,953	6,231	4,042	4,273	4,180	4,688	5,013

County	2018–2019	2019–2020	2020–2021	2021–2022	2022–2023	2023–2024	2024–2025
Santa Clara	11,744	13,682	10,021	8,443	9,852	11,437	11,569
Santa Cruz	3,757	3,113	2,237	2,270	2,188	2,369	2,482
Shasta	4,941	4,270	5,565	1,810	4,238	4,196	1,715
Sierra	63	38	34	28	37	37	40
Siskiyou	1,058	869	684	547	638	622	817
Solano	3,234	2,800	2,458	2,304	1,869	1,912	2,004
Sonoma	5,497	4,789	3,694	3,352	4,029	5,195	5,312
Stanislaus	5,645	5,509	4,464	4,904	5,266	6,924	6,294
Sutter	1,675	1,872	1,279	1,549	1,163	1,592	1,650
Tehama	1,687	1,595	1,420	1,198	1,228	1,218	1,153
Trinity	200	157	220	232	242	238	147
Tulare	7,691	8,635	7,338	7,894	5,414	6,040	5,482
Tuolumne	1,056	1,474	1,191	860	975	884	582
Ventura	11,454	9,942	7,993	8,260	7,788	8,212	8,565
Yolo	4,702	2,803	1,863	1,742	2,000	2,100	2,589
Yuba	1,308	1,247	1,593	1,282	1,482	1,737	1,738

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES

Report to the Trial Court Budget Advisory Committee
(Action Item)

Title: Workload Formula Adjustment Request Process Update

Date: 8/13/2026

Contact: Jarret Yee, Fiscal Supervisor, Judicial Council Budget Services | 916-263-1385 | Jarret.Yee@jud.ca.gov

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Issue

Consideration of updates to the current process for submitting annual requests from the trial courts to propose changes to the Workload Formula to improve clarity and streamline the process.

Background

The Judicial Council–approved Workload Formula is used to allocate certain funding to the trial courts guided by the principles of equity, stability, and predictability. The Workload Formula methodology includes an adjustment request process that allows the trial courts to submit annual requests for consideration when workload-related factors arise that are not currently accounted for in the model but are essential to court operations.

On April 26, 2013, the Judicial Council approved the Workload-based Allocation and Funding Methodology (WAFM) for use in allocating trial court funding.[1] At that time, the Trial Court Budget Working Group indicated that specific elements of the model would require further refinement based on input from trial courts and stakeholders, subject to final Judicial Council approval.

On August 22, 2013, the Judicial Council approved the WAFM adjustment request process.[2] Since then, a series of updates have been made:

- **July 28, 2017:** Minor updates to align terminology, including replacing references to the "Administrative Office of the Courts" with "Judicial Council," and adjusting process timelines.[3]

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[1] Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget Working Group: Recommendation of New Budget Development and Allocation Methodology* (April 24, 2013).
[2] Judicial Council of Cal., Advisory Com. Rep., *Trial Court Workload-based Allocation and Funding Methodology: Adjustment Request Process* (August 19, 2013).
[3] Judicial Council of Cal., Advisory Com. Rep., *Trial Court Allocations: Revisions to the Workload-Based Allocation and Funding Methodology (WAFM) Adjustment Request Procedures* (July 14, 2017).

- **May 17, 2019:** Broader revisions, including updating the name from "Workload-based Allocation and Funding Methodology" to "Workload Formula", removing references to workload need, and clarifying and streamlining the instructions. The updates also allowed the Trial Court Budget Advisory Committee chair to more quickly refer adjustment requests to other advisory committees as appropriate.[4]

Based on recent feedback from the trial courts, additional changes are recommended to further improve clarity and streamline the process. The proposed updates include:

- Require all new adjustment requests to be submitted directly to the Director of Judicial Council Budget Services rather than to the Administrative Director of the Judicial Council.
- Adjust process timelines to align with current practice and improve workflow efficiency.
- Update the title of the adjustment request instructions from "Procedures" to "Process Instructions" to better align with the document's purpose.
- Include a brief summary of the Workload Formula at the beginning of the instructions to provide context for courts submitting requests.
- Provide courts an opportunity to present their requests directly to the advisory committee responsible for evaluating them, enhancing transparency and ensuring accurate understanding.
- Make non-substantive narrative improvements throughout to strengthen organization, wording, and the use of plain language.

The proposed Workload Formula Adjustment Request Process Instructions are included in Attachment 2A. For reference, the current Workload Formula Adjustment Request Procedures are included in Attachment 2B. The proposed instructions were considered and unanimously approved by the Funding Methodology Subcommittee at its July 22, 2026, meeting.[5]

Recommendation

Approve the proposed updates to the Workload Formula Adjustment Request Process Instructions as shown in Attachment 2A. This recommendation will be considered by the Judicial Branch Budget Committee, and then by the Judicial Council at its October 16, 2026, business meeting.

Attachments

Attachment 2A: Judicial Council Workload Formula Adjustment Request Process Instructions – Proposed July 22, 2026

Attachment 2B: Current Workload Formula Adjustment Request Procedures

[4] Judicial Council of Cal., Advisory Com. Rep., *Judicial Branch Budget: Workload Formula Adjustment Request Process Policy Update* (April 26, 2019).
[5] Funding Methodology Subcommittee meeting materials (July 22, 2026), *Item 3 - Workload Formula Adjustment Request Process Update*

Judicial Council Workload Formula Adjustment Request ~~Procedures~~ Process Instructions – Proposed July 22, 2026

The Judicial Council–approved Workload Formula is used to allocate certain funding to the trial courts guided by the principles of equity, stability, and predictability. This includes an adjustment request process that allows the trial courts to submit annual requests to consider potential modifications when workload-related factors arise that are not currently accounted for in the model but are essential to court operations.

Submission, review, and approval

The submission, review, and approval process is under the direction of the Judicial Council and is as follows:

1. Annual Workload Formula adjustment requests must be submitted to the ~~Administrative~~ Director of Judicial Council Budget Services by the trial court's presiding judge or executive officer by January 15 of each year.

2. ~~The Administrative Director shall forward the request to the Director of Judicial Council Budget Services.~~ The Director of Judicial Council Budget Services, in consultation with the Chair of the Trial Court Budget Advisory Committee (TCBAC), will review each request and refer the request to the Funding Methodology Subcommittee (FMS) or other advisory committee, as appropriate, by April 30. The chair will notify TCBAC no later than May 15 of requests that have been received and referred to either FMS or other advisory bodies.

3. FMS or the appropriate advisory committee will review the referral from TCBAC.[1] Courts are encouraged to present their requests directly to the advisory committee responsible for evaluating the requests to support transparency and ensure accurate understanding.

4. FMS may recommend that the request be included in the subcommittee's proposed annual work plan for the upcoming fiscal year, with or without prioritization, to be ~~submitted back to TCBAC no later than July~~ approved by TCBAC. In some circumstances, TCBAC may direct FMS to conduct an expedited review of a request.

5. The review of Workload Formula adjustment requests is a three-step process:

    1. Initial review to determine whether the factor identified in a court's request should form the basis of potential modifications to the Workload Formula;
    2. Evaluation of whether and how the modification should occur; and
    3. Evaluation of whether—for those circumstances where it is determined that the factor should ultimately be included in the underlying Resource Assessment Study (RAS)

[1] California Rules of Court, Rule 10.34 subdivision (a), https://courts.ca.gov/cms/rules/index/ten/rule10_34.

model—an interim adjustment should be made to a trial court's Workload Formula calculation pending a more formal adjustment to the RAS model.

6. To the extent possible, FMS or the responsible advisory committee will review the requests and present their recommendation to TCBAC no later than January prior to the year proposed for implementation.

7. TCBAC will make final recommendations to the Judicial Council for consideration no later than April prior to the year proposed for implementation. Requested adjustments that are approved by the Judicial Council will be included in the allocation based on the timing included in the recommendation.

Upon approval by the Judicial Council of an adjustment to the Workload Formula, the Director of Judicial Council Budget Services, in consultation with TCBAC, will notify trial courts of the change.

Trial court adjustment requests

Trial courts requesting an adjustment to the Workload Formula must submit a letter to the Director of Judicial Council Budget Services by January 15 of each year that includes the following information:

1. A description of how the workload-based factor is not currently accounted for in the Workload Formula;

2. Identification and description of the basis for which the adjustment is requested;

3. A detailed analysis of why the adjustment is necessary;

4. A description of whether the unaccounted-for factor is unique to the applicant court(s) or has broader applications;

5. A detailed description of staffing needs and/or costs required to support the factor that is unaccounted for by the Workload Formula;

6. A description of the consequence to the public and access to justice without the funding;

7. A description of the consequences to the requesting court(s) of not receiving the funding; and

8. Any additional information requested by Judicial Council Budget Services, FMS or other advisory committee, and TCBAC that is necessary to fully evaluate the request.

Current Workload Formula Adjustment Request Procedures

Submission, review, and approval

The submission, review, and approval process is under the direction of the Judicial Council and is as follows:

1. Initial requests shall be submitted to the Administrative Director either by the trial court's Presiding Judge or Executive Officer no later than January 15 of each year.

2. The Administrative Director shall forward the request to the Director of Judicial Council Budget Services. The Director, in consultation with the Chair of the Trial Court Budget Advisory Committee (TCBAC) shall review each request and refer the request to the Funding Methodology Subcommittee (FMS) no later than April. If the request is more appropriately referred to another advisory committee, the Chair may do so immediately. The Chair will notify TCBAC no later than April of requests that have been referred to other advisory bodies.

3. FMS shall review the referral from TCBAC and prioritize the request into the proposed annual work plan to be submitted back to TCBAC no later than July.

4. Once prioritized, requests will be evaluated by FMS. The review of Workload Formula Adjustment Requests is a three-step process:

   a. Initial review to determine whether the factor identified in a court's request should form the basis of a potential modification to the Workload Formula;
   b. Evaluation of whether and how the modification should occur; and
   c. Evaluation of whether—for those circumstances where it is determined that the factor should ultimately be included in the underlying Resource Assessment Study model (RAS)—an interim adjustment should be made to a trial court's Workload Formula pending a more formal adjustment to the RAS model.

5. FMS shall review any requests and present its recommendation(s) to TCBAC no later than January prior to the year proposed for implementation.

6. TCBAC shall make final recommendations to the Judicial Council for consideration no later than April. Requested adjustments that are approved by the Judicial Council shall be included in the allocation based on the timing included in the recommendation. TCBAC will make no further recommendations for changes to the Workload Formula impacting the next fiscal year.

7. Upon approval by the Judicial Council of an adjustment to the Workload Formula, the Director, in consultation with TCBAC, shall notify all trial courts. In some circumstances, the nature of the adjustment will automatically apply to all courts.

8. This policy does not preclude FMS from taking expedited action per the direction of TCBAC.

Trial court adjustment requests

Trial courts requesting an adjustment in accordance with the Workload Formula Adjustment Request Procedures shall be required to submit detailed information documenting the need for such adjustment as follows:

1. A description of how the factor is not currently accounted for in the Workload Formula;
2. Identification and description of the basis for which the adjustment is requested;
3. A detailed analysis of why the adjustment is necessary;
4. A description of whether the unaccounted-for factor is unique to the applicant court(s) or has broader applications;
5. A detailed description of staffing need(s) and/or costs required to support the factor that is unaccounted for by the Workload Formula;
6. A description of the consequence to the public and access to justice without the funding;
7. A description of the consequences to the requesting court(s) of not receiving the funding; and
8. Any additional information requested by Judicial Council Budget Services, FMS, and/or TCBAC deemed necessary to fully evaluate the request.

JUDICIAL COUNCIL OF CALIFORNIA
BUDGET SERVICES

Report to the Trial Court Budget Advisory Committee
(Action Item)

Title: Workload Formula Policy Base Funding Floor Adjustment Process

Date: 8/13/2026

Contact: Jarret Yee, Fiscal Supervisor, Judicial Council Budget Services | 916-263-1385 | Jarret.Yee@jud.ca.gov

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Issue

Consideration of clarification and potential changes to the application of the Workload Formula policy's annual base funding floor adjustment process for the two funding floor courts.

Background

To ensure that the two smallest trial courts—the Superior Courts of Alpine and Sierra Counties—have sufficient funding to support minimum staffing levels and operational needs, the Judicial Council established a base funding floor policy. When the Workload-Based Allocation and Funding Methodology was implemented in fiscal year (FY) 2013–14, it was determined that the standard workload metrics did not accurately represent the funding needs of these very small courts. As a result, the Judicial Council approved an initial base funding floor of $750,000, effective FY 2014–15, for Alpine and Sierra courts.[1]

The current process includes an annual review of the base funding floor amount. Each year, the two funding floor courts may submit requests for augmentations if additional resources are needed to maintain their core operations and staffing.

During the review of allocations for FY 2025–26, the court executive officers from Alpine and Sierra courts requested clarification on how the base funding floor policy is applied in determining their annual allocations. They also expressed interest in revisiting the methodology to improve transparency and ensure the policy continues to meet their operational needs.

Base Funding Floor Adjustments

After the base funding floor was first established in FY 2014–15, no adjustments were made for approximately five years. In March 2019, the Judicial Council approved a $50,000 inflationary

[1] Judicial Council Judicial Council of Cal., Advisory Com. Rep., *Trial Court Allocations: Revisions to the Workload-Based Allocation and Funding Methodology* (Feb. 10, 2014).

adjustment, increasing the funding floor from $750,000 to $800,000, effective FY 2019–20.[2] This increase responded to rising personnel and operating expenditures, equipment costs, and other pressures that the courts attempted to absorb through cost-cutting measures and limited fund balance resources. These efforts were insufficient and were adversely impacting core business operations and essential services.

In March 2022, the Judicial Council approved another $150,000 inflationary adjustment, raising the base funding floor to $950,000, effective FY 2022–23.[3] This increase reflected growing costs in information technology, case management systems, modernization projects, employee benefits, and staffing, as well as recruitment, and retention needs to sustain operations.

Workload Formula Policy Update for Inflationary Funding

In March 2023, the Judicial Council updated the Workload Formula policy to ensure that the two base funding floor courts receive inflation-based increases that are consistent with the percentage increase included in the statewide trial court budget for operational cost growth.[4] Under this update, Alpine and Sierra courts receive an adjustment equal to the same percentage applied to the other courts' Workload Formula allocations. Recent adjustments to the base funding floor include the following:

In FY 2023–24, the budget included $74.1 million for the trial courts, representing a 3 percent ongoing inflationary increase. The funding was allocated to all 58 courts as a 3 percent increase over each court's FY 2022–23 Workload Formula allocation[5]. This resulted in a 3 percent increase to the base funding floor amount, raising it from $950,000 to $978,500.

In FY 2025–26, the budget included $40 million to address ongoing trial court operational cost increases. The funding was allocated to all 58 courts as a 1.6 percent increase over each court's FY 2024–25 Workload Formula allocation[6]. This resulted in a 1.6 percent increase to the base funding floor amount, increasing it from $978,500 to $994,000.

In FY 2026–27, the budget included $70 million for trial court operational costs increases. The funding was allocated to all 58 courts as a 2.7 percent increase over each court's FY 2025–26 Workload Formula allocation[7]. This resulted in a 2.7 percent increase for the base funding floor amount, increasing it from $994,000 to $1,021,000.

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[2] Judicial Council Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Base Funding Floor Allocation* (Feb. 13, 2019).
[3] Judicial Council Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Base Funding Floor Allocation* (Feb. 18, 2022).
[4] Judicial Council Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Base Funding Floor Inflationary Increases* (Mar. 3, 2023).
[5] Judicial Council Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Allocations from the Trial Court Trust Fund and Trial Court Allocations for 2023–24* (June 23, 2023).
[6] Judicial Council Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Allocations from the Trial Court Trust Fund and Trial Court Allocations for Fiscal Year 2025–26* (June 24, 2025).
[7] Judicial Council Judicial Council of Cal., Advisory Com. Rep., *Trial Court Budget: Allocations for Trial Court Operations for Fiscal Year 2026–27* (June 18, 2026).

Workload Formula Policy Funding Floor Adjustments

As part of the multi-step Workload Formula methodology used to calculate annual trial court allocations, the final step is the funding floor adjustment. This step ensures that the two smallest courts receive at least their established base funding floor amount. Under the existing application of the policy:

- If the Workload Formula allocation amount for a base funding floor court *is lower* than the established base funding floor amount, then the other 56 courts contribute funding on a proportional basis to bring the funding floor amount to the required level.
- If the Workload Formula allocation amount for a base funding floor court *is higher* than the current floor amount, then the funding floor courts are reduced to the floor with the other 56 courts sharing the overage amount as a proportional increase.

Every August, the two funding floor courts are provided an opportunity to request an increase to their base funding floor amount for the next fiscal year. The requests are reviewed by the Funding Methodology Subcommittee (FMS) and the Trial Court Budget Advisory Committee. If an increase is approved by the Judicial Council, it will take effect in the next fiscal year.

Methodology Options for Consideration

To improve clarity and transparency in how the Workload Formula policy's base funding floor adjustments are applied, and to ensure the two floor courts have adequate resources to meet their operational needs, FMS considered the following options during its July 22, 2026, meeting:[8] FMS recommended Option 2 which would provide stable funding for floor courts and aligns with the Workload Formula policy's intent to ensure they receive adequate funding.

Option 1 – Treat the base funding floor amount as a ceiling, which means the court's allocations cannot exceed this amount. This option reflects current practice in the Workload Formula methodology.

Option 2 – Treat the base funding floor amount as a minimum floor, which will allow the floor court to retain its full Workload Formula allocation if it is higher than the established base funding floor amount without any downward adjustment.

Option 3 – Establish a ceiling cap (e.g., 5 percent or 10 percent) for the base funding floor court's Workload Formula allocation. If the calculated allocation exceeds the base floor amount but remains below the established ceiling, the court will receive the full allocation. If the allocation exceeds the ceiling cap, it will be reduced to the ceiling level.

Option 4 – Evaluate the established process for funding floor adjustments on a recurring schedule (e.g., every two or three years) to determine whether modifications are needed.

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[8] Funding Methodology Subcommittee meeting materials (July 22, 2026), *Item 4 - Workload Formula Policy Base Funding Floor Adjustment Process*

Recommendation

Approve FMS's recommended change to the application of the Workload Formula policy's base funding floor adjustment when calculating annual allocations for the two funding floor courts by treating the base funding floor amount as a minimum floor. This will allow the floor courts to retain their full Workload Formula allocation calculated in years where that exceeds the floor, to ensure they have sufficient resources to meet essential operational needs and maintain minimum staffing levels.

The recommended methodology will be considered by the Judicial Branch Budget Committee, and then the Judicial Council at its October 16, 2026, business meeting.

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

Title: Funding Methodology Subcommittee Annual Work Plan

Date: 8/3/2026

Contact: Megan Ellis, Senior Fiscal Analyst, Budget Services | 916-263-2445
megan.ellis@jud.ca.gov

Issue

Consideration of updates to the Funding Methodology Subcommittee (FMS) annual work plan for fiscal year (FY) 2026–27.

Background

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 goals 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) at the beginning of each fiscal year. The current work plan, updated and approved by TCBAC on October 29, 2025, is provided as Attachment 4A.

TCBAC's annual agenda for 2026 includes several major projects that appear in the FMS work plan. These projects include, but are not limited to (1) evaluation of the current court cluster system, (2) reevaluation of the trial court minimum operating and emergency fund balance policy to determine the impact of existing reserve funding on trial court operations, and (3) consideration of a revised allocation methodology for court-appointed juvenile dependency counsel funding to improve outcomes in the dependency system. The current TCBAC 2026 annual agenda is provided as Attachment 4B.

Work Plan Items for Consideration

The proposed updates to the FMS work plan for FY 2026–27 were approved by FMS on July 22, 2026[1], and are described below:

[1] Funding Methodology Subcommittee Meeting Materials (Jul. 22, 2026), https://courts.ca.gov/system/files/file/tcbac-20260722-fms-materials-r.pdf.

Ongoing Through FY 2026–27

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.**

   This item was on the work plan for FY 2025–26. Move this item to FY 2026–27 to allow additional time for the Data Analytics Advisory Committee (DAAC) to review the statewide four-cluster model and its criteria. Trial courts' cluster placement is one of the factors under review in the Resource Assessment Study (RAS), which measures trial court workload. This item is included in the DAAC work plan for FY 2026–27.

2. **Consider updates to the Trial Court Minimum Operating and Emergency Fund Balance Policy to reflect current conditions regarding trial court operations and reserve needs.**

   This item was on the work plan for FY 2025–26, originally considering repeal of the policy. Move this item to FY 2026–27 as directed by the Judicial Council at its business meeting on April 24, 2026.[2] The council suspended the policy for one additional year until June 30, 2027, to provide time to revise the policy so that it better aligns with current financial realities and the reserve needs of the trial courts.

   This policy has been continuously suspended since FY 2012–13 while statewide evaluation of the emergency reserve and fund balance cap was underway to determine the impact on trial court operations.

3. **Evaluate the Workload Formula equity-based reallocation policy including technical refinements and clarification of the application of the existing methodology.**

   This item was on the work plan for FY 2025–26. Move this item to FY 2026–27 to continue evaluating how the current equity-based reallocation policy is interpreted and applied in the Workload Formula methodology. The review will address several technical aspects of the policy, including (1) band penetration criteria for courts above and below the statewide funding level, (2) surplus reallocation funding when contributing courts generate more funding than is needed by the receiving courts, and (3) defining the "second year of no new money" and its role in the reallocation process.

   FY 2025–26 was the first year the equity-based reallocation policy was incorporated into the allocation methodology. TCBAC directed this item to FMS for further evaluation to improve transparency in budget planning and adjustments, and to help the courts more accurately anticipate and prepare for changes in their allocations.

[2] Judicial Council Judicial Council of Cal., Advisory Com. Rep., https://jcc.legistar.com/View.ashx?M=F&ID=15386311&GUID=19191F30-CEE2-49D8-8E63-226C3F3D5BE5 (Apr. 2, 2026).

4. **Evaluate the impact of the RAS data on the Workload Formula calculation and timing of implementation of new caseweights in the model.**

   This item was on the work plan for FY 2025–26. Remove this item from the work plan since the project is complete. The RAS output is used as a key metric in the trial court workload funding model, which is used by TCBAC and the council to allocate funds to the trial courts. Due to the close proximity between adoption of the 2024 RAS model and the annual update of the FY 2025–26 trial court workload funding model, a one-year pause was instituted on the use of the 2024 RAS model to allow DAAC time for additional stakeholder engagement. DAAC initiated a supplemental review to validate the study findings and to articulate the factors driving changes in staff processing times more fully. The FY 2026–27 Workload Formula calculation used the 2024 caseweights, as approved by the Judicial Council at its business meeting on July 17, 2026.

5. **Evaluate the impact of the Bureau of Labor Statistics factor on the Workload Formula calculation.**

   This item was on the work plan for FY 2025–26. Move this item to FY 2026–27 to allow more time to evaluate the impact of the Bureau of Labor Statistics factor in the Workload Formula and whether its current application, used to account for regional cost variances across the state, is still appropriate in the model.

6. **Consider a revised allocation methodology for court-appointed juvenile dependency counsel funding.**

   This item was on the work plan for FY 2025–26. Move this item to FY 2026–27 to allow time for the Court-Appointed Juvenile Dependency Counsel Allocation Methodology Working Group to complete its work. The working group was convened by the TCBAC chair in early 2026 and is currently evaluating the existing allocation methodology for potential updates, identifying challenges faced by the trial courts, and gathering feedback from stakeholders to maximize use of available resources. It is anticipated that recommendations from the working group will be considered by FMS in fall 2026.

<u>Ongoing Annual Updates</u>

7. **Review the Workload Formula policy to address adjustments as needed.**

   Retain this item in the work plan as an ongoing responsibility of FMS. This reflects one of the primary duties of the subcommittee to review and refine the existing Workload Formula policy to ensure that it stays current and continues to advance the goals 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.**

Retain this item in the work plan as an ongoing process. The Superior Court of Alpine County and Superior Court of Sierra County may submit annual requests for augmentations to ensure they have sufficient funding to support minimum staffing levels and operational needs. These courts are provided an opportunity at the beginning of each fiscal year to request an increase to their base funding floor amount for the next fiscal year, with recommendations to TCBAC due no later than December.

9. **Review Workload Formula adjustment request process submissions as referred by the TCBAC chair.**

   Retain this item in the work plan, as the Workload Formula policy requires FMS to review annual adjustment request process submissions from the trial courts to consider factors not accounted for in the model and include the requests in its work plan. There are currently five requests from trial courts that are in the review pipeline.

   In January 2026, three submissions were received for the most recent annual cycle:

   - The submission from the Superior Court of Sacramento County was referred to the DAAC for consideration as the proposal may impact RAS.
   - Two submissions from the Superior Court of San Francisco County were referred to FMS for review as they relate to Workload Formula methodology adjustments. Presentation of these two requests is included on the agenda for the July 22, 2026, FMS meeting (Discussion Item 2).

   In January 2025, two submissions were received for the prior annual cycle:

   - One from the Superior Court of Alameda County
   - One from the Superior Court of Stanislaus County

   Both proposals could potentially impact RAS and were therefore referred to DAAC for review. The outcomes of DAAC's analyses will be provided once available.

Recommendation

Approve the proposed updates to the FMS annual work plan for FY 2026–27 as follows:

1. **Move Item 1 to FY 2026–27.** Reevaluate the court cluster system, which is determined by the number of authorized judicial positions, and the impact of trial courts' cluster placement in RAS;

2. **Move Item 2 to FY 2026–27.** Consider updates to the Trial Court Minimum Operating and Emergency Fund Balance Policy so that it better aligns with current financial realities and the reserve needs of the trial courts;

3. **Move Item 3 to FY 2026–27.** Evaluate the Workload Formula equity-based reallocation policy including technical refinements and clarification of the application of the existing methodology;

4. **Remove Item 4.** Evaluate the impact of the RAS data on the Workload Formula calculation and timing of implementation of new caseweights in the model is complete;

5. **Move Item 5 to FY 2026–27.** Evaluate the impact of the Bureau of Labor Statistics factor on the Workload Formula calculation;

6. **Move Item 6 to FY 2026–27.** 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;

7. **Retain Item 7.** Review the Workload Formula policy to address adjustments as needed to ensure the policy stays current to advance the goal of funding equity, stability, and predictability to support trial court operations;

8. **Retain Item 8.** Review the base funding floor amounts annually, if requested by the applicable courts, for consideration by the TCBAC no later than December of each year, to determine whether an inflationary adjustment is needed; and

9. **Retain Item 9.** Review the Workload Formula adjustment request process submissions as referred by the TCBAC chair.

<u>**Attachments**</u>

Attachment 4A: FMS Fiscal Year 2025–26 Work Plan Approved as of October 29, 2025

Attachment 4B: TCBAC Annual Agenda—January 1, 2026 – December 31, 2026

Attachment 4C: MS Fiscal Year 2026–27 Work Plan Proposed as of August 27, 2026

Funding Methodology Subcommittee
Fiscal Year 2025–26 Work Plan
Approved 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).

Trial Court Budget Advisory Committee
Annual Agenda[1]— January 1, 2026 – December 31, 2026
Approved by Judicial Branch Budget Committee on November 13, 2025

I. COMMITTEE INFORMATION

Chair:	Hon. Jonathan B. Conklin, Judge, Superior Court of Fresno County
Lead Staff:	Ms. Donna Newman, Manager, Judicial Council Budget Services

Advisory Body's Charge/Membership:

Rule 10.64(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. Rule 10.64(b) sets forth additional duties of the advisory body.

Rule 10.64(c) sets forth the membership position of the advisory body. The Trial Court Budget Advisory Committee currently has 22 members. The current advisory body roster is available on the advisory body's webpage.

Subgroups of the Advisory Body[2]:

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.
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.
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.

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[1] 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.

[2] 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[3]

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.

[3] 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

<table>
<tr><th>#</th><th colspan="7">New or One-Time Projects</th></tr>
<tr><td rowspan="3">1.</td><td colspan="6">Project Title: Workload Formula Equity-Based Reallocation Policy Updates</td><td>Priority: 1</td></tr>
<tr><td colspan="7">Supported Strategic Plan Branch Goals:

I Access ☒   II Independence ☐   III Modernization ☐   IV Quality ☐   V Education ☐   VI Infrastructure ☐   VII Funding ☒</td></tr>
<tr><td colspan="7">Project Summary: 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.

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.

Status/Timeline: New and one-time.

Fiscal Impact/Staff Resources: Judicial Council Budget Services staff.
☒ Check this box if this project may result in an allocation or distribution of funds to the courts. Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.

Internal/External Stakeholders: External stakeholders include the trial courts.

AC Collaboration: Judicial Branch Budget Committee.</td></tr>
</table>

#	New or One-Time Projects	
2.	***Project Title:*** Pretrial Release Program	***Priority: 1***
	Supported Strategic Plan Branch Goals: I *Access* ☒ · II *Independence* ☐ · III *Modernization* ☐ · IV *Quality* ☐ · V *Education* ☐ · VI *Infrastructure* ☐ · VII *Funding* ☒	
	Project Summary: 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. 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. ***Status/Timeline:*** New and one-time. ***Fiscal Impact/Staff Resources:*** Judicial Council Criminal Justice Services and Budget Services staff. ☒ Check this box if this project may result in an allocation or distribution of funds to the courts. ***Internal/External Stakeholders:*** External stakeholders include the trial courts. ***AC Collaboration:*** Judicial Branch Budget Committee.	
3.	***Project Title:*** Court-Appointed Juvenile Dependency Counsel Funding	***Priority: 1***
	Supported Strategic Plan Branch Goals: I *Access* ☒ · II *Independence* ☐ · III *Modernization* ☐ · IV *Quality* ☐ · V *Education* ☐ · VI *Infrastructure* ☐ · VII *Funding* ☒	
	Project Summary: 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	

<table>
<tr><th>#</th><th colspan="7">New or One-Time Projects</th></tr>
<tr><td></td><td colspan="7">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.

Status/Timeline: New and one-time.

Fiscal Impact/Staff Resources: Judicial Council Center for Families, Children & the Courts and Budget Services staff.
☒ Check this box if this project may result in an allocation or distribution of funds to the courts.

Internal/External Stakeholders: External stakeholders include the trial courts and dependency providers.

AC Collaboration: Family and Juvenile Law Advisory Committee and Judicial Branch Budget Committee.</td></tr>
<tr><td rowspan="4">4.</td><td colspan="6">Project Title: Sargent Shriver Civil Counsel Pilot Program</td><td>Priority: 1</td></tr>
<tr><td colspan="7">Supported Strategic Plan Branch Goals:</td></tr>
<tr><td>I
Access
☒</td><td>II
Independence
☐</td><td>III
Modernization
☐</td><td>IV
Quality
☐</td><td>V
Education
☐</td><td>VI
Infrastructure
☐</td><td>VII
Funding
☒</td></tr>
<tr><td colspan="7">Project Summary: 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.

Status/Timeline: One-time.

Fiscal Impact/Staff Resources: Judicial Council Center for Families, Children & the Courts and Budget Services staff.
☒ Check this box if this project may result in an allocation or distribution of funds to the courts.

Internal/External Stakeholders: External stakeholders include the trial courts.

AC Collaboration: Shriver Civil Counsel Act Implementation Committee and Judicial Branch Budget Committee.</td></tr>
</table>

#	New or One-Time Projects	
5.	***Project Title:*** Trial Court Minimum Operating and Emergency Fund Balance Policy	***Priority: 1***
	Supported Strategic Plan Branch Goals: I *Access* ☒ · II *Independence* ☐ · III *Modernization* ☐ · IV *Quality* ☐ · V *Education* ☐ · VI *Infrastructure* ☐ · VII *Funding* ☒	
	Project Summary: 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. ***Status/Timeline:*** New and one-time. ***Fiscal Impact/Staff Resources:*** Judicial Council Budget Services staff. ☒ Check this box if this project may result in an allocation or distribution of funds to the courts. ***Internal/External Stakeholders:*** External stakeholders include the trial courts. ***AC Collaboration:*** Judicial Branch Budget Committee.	
6.	***Project Title:*** Court Cluster System	***Priority: 2***
	Supported Strategic Plan Branch Goals: I *Access* ☒ · II *Independence* ☐ · III *Modernization* ☐ · IV *Quality* ☐ · V *Education* ☐ · VI *Infrastructure* ☐ · VII *Funding* ☒	
	Project Summary: 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	

#	New or One-Time Projects
	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. ***Status/Timeline:*** One-time. ***Fiscal Impact/Staff Resources:*** Judicial Council Research, Analytics, and Data and Budget Services staff. ☒ Check this box if this project may result in an allocation or distribution of funds to the courts. ***Internal/External Stakeholders:*** External stakeholders include the trial courts. ***AC Collaboration:*** Data Analytics Advisory Committee and Judicial Branch Budget Committee.

#	Ongoing Projects and Activities	
1.	***Project Title:*** Funding Adjustments for Annual Governor's Budget, May Revision, and Enacted Budget	***Priority: 1***
	Supported Strategic Plan Branch Goals: I *Access* ☒ · II *Independence* ☐ · III *Modernization* ☐ · IV *Quality* ☐ · V *Education* ☐ · VI *Infrastructure* ☐ · VII *Funding* ☒	
	Project Summary: 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. ***Status/Timeline:*** Ongoing. ***Fiscal Impact/Staff Resources:*** Judicial Council Budget Services staff. ☒ Check this box if this project may result in an allocation or distribution of funds to the courts. ***Internal/External Stakeholders:*** External stakeholders include the trial courts. ***AC Collaboration:*** Judicial Branch Budget Committee.	
2.	***Project Title:*** Workload Formula Policy and Allocations to Trial Courts	***Priority: 1***
	Supported Strategic Plan Branch Goals: I *Access* ☒ · II *Independence* ☐ · III *Modernization* ☐ · IV *Quality* ☐ · V *Education* ☐ · VI *Infrastructure* ☐ · VII *Funding* ☒	
	Project Summary: 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.	

#	Ongoing Projects and Activities	
	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. ***Status/Timeline:*** Ongoing. ***Fiscal Impact/Staff Resources:*** Judicial Council Budget Services staff. ☒ Check this box if this project may result in an allocation or distribution of funds to the courts. ***Internal/External Stakeholders:*** External stakeholders include the trial courts. ***AC Collaboration:*** Court Executives Advisory Committee, Judicial Branch Budget Committee, and Data Analytics Advisory Committee.	
3.	***Project Title:*** Workload Formula Policy Adjustment Request Process	***Priority: 1***
	Supported Strategic Plan Branch Goals: I *Access* ☒ — II *Independence* ☐ — III *Modernization* ☐ — IV *Quality* ☐ — V *Education* ☐ — VI *Infrastructure* ☐ — VII *Funding* ☒	
	Project Summary: 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. 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. ***Status/Timeline:*** Ongoing.	

#	Ongoing Projects and Activities
	Fiscal Impact/Staff Resources: Judicial Council Research, Analytics, and Data and Budget Services staff. ☒ Check this box if this project may result in an allocation or distribution of funds to the courts. ***Internal/External Stakeholders:*** External stakeholders include the trial courts. ***AC Collaboration:*** Data Analytics Advisory Committee and Judicial Branch Budget Committee.

III. LIST OF 2025 PROJECT ACCOMPLISHMENTS

#	Project Highlights and Achievements
1.	**Workload Formula Policy, State Trial Court Improvement and Modernization Fund, and Trial Court Trust Fund Allocations** 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.
2.	**Allocation for Partial Restoration of Trial Court Funding for FY 2024–25** 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.
3.	**Workload Formula Allocation Methodologies for Potential Future Budget Reductions and Funding Restoration** 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.
4.	**Community Assistance, Recovery, and Empowerment (CARE) Act** 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.

#	Project Highlights and Achievements
5.	**Court Reporter Funding Reallocation** 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.
6.	**Court Interpreter Funding Augmentation and Reallocation** 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.
7.	**Trial Court Trust Fund Allocation Increase for Judicial Council Offices for FY 2024–25** 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.

Funding Methodology Subcommittee
Fiscal Year 2026–27 Work Plan
Proposed as of August 27, 2026

The Funding Methodology Subcommittee (FMS) 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 2026–27

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. Consider updates to the Trial Court Minimum Operating and Emergency Fund Balance Policy to reflect current conditions regarding trial court operations and reserve needs.

3. Evaluate the Workload Formula equity-based reallocation policy including technical refinements and clarification of the application of the existing methodology.

4. Evaluate the Bureau of Labor Statistics factor on the Workload Formula calculation.

5. Consider a revised allocation methodology for court-appointed juvenile dependency counsel funding.

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 (TCBAC) 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 TCBAC chair.

The following proposals were received in response to the 2026 Workload Formula adjustment request process.

1. Superior Court of Sacramento County – proposed that the current methodology does not capture workload for required post-conviction activities, including sealing arrests not resulting in conviction and sealing dismissed convictions. Since the request involves workload measurement for specific case activities and potential new data elements for RAS, TCBAC is forwarding it to the Data Analytics Advisory Committee for analysis.

2. Superior Court of San Francisco – proposed a revision for distributing civil assessment backfill that was added to courts' base funding in fiscal year (FY) 2023–24. Since the request involves formula adjustments for specific court activities, TCBAC is forwarding it to FMS for analysis.

3. Superior Court of San Francisco – proposed a locality adjustment to operating expenditures and equipment in the Workload Formula to account for significant regional variations in the costs of goods and services. Since the request involves formula adjustments for specific court activities, TCBAC is forwarding it to FMS for analysis.