

Trial Court Budget Advisory Committee

Annual Agenda¹—2025

Approved by Judicial Branch Budget Committee on December 10, 2024

I. COMMITTEE INFORMATION

Chair:	Hon. Jonathan B. Conklin, Judge, Superior Court of Fresno County
Lead Staff:	Ms. Rose Lane, Senior Analyst, Judicial Council Budget Services
Committee’s Charge/Membership: Rule 10.64(a) of the California Rules of Court states the charge of the Trial Court Budget Advisory Committee is to make recommendations to the Judicial Council on the preparation, development, and implementation of the budget for trial courts and provide input to the council on policy issues affecting trial court funding. Rule 10.64(b) sets forth additional duties of the committee. Rule 10.64(c) sets forth the membership requirements of the committee. The Trial Court Budget Advisory Committee currently has 24 membership positions, of which 22 are filled. The current committee roster is available on the committee’s web page.	
Subgroups of the Advisory Committee²: <ol style="list-style-type: none">1. Fiscal Planning Subcommittee – Review recommendations regarding trial court requests to set aside funds to be held on their behalf that would have reverted to the Trial Court Trust Fund pursuant to the fund balance cap as specified in Government Code section 77203. This subcommittee also reviews requests from trial courts related to Children’s Waiting Room funding.2. Funding Methodology Subcommittee – Ongoing review and refinement of the Workload Formula, develop methodologies for allocations from the Trial Court Trust Fund Court Interpreters Program (0150037) in the event of funding shortfalls, and consider allocation methodologies for funding augmentations and reductions as necessary. Additionally, the subcommittee will continue its ongoing work to evaluate existing allocation methodologies and consider alternative allocation approaches based on the Workload Formula’s core principles to advance the goal of funding equity, stability, and predictability to support trial court operations.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.	

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

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

Meetings Planned for 2025³

Trial Court Budget Advisory Committee

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

Funding Methodology Subcommittee

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

Fiscal Planning Subcommittee

October 2025/Videoconference

Revenue and Expenditure Subcommittee

April 2025/Videoconference

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

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

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

II. COMMITTEE PROJECTS

#	New or One-Time Projects ⁴	
1.	Project Title: Workload Formula Allocation Methodologies for Potential Future Budget Reductions and Funding Restoration	Priority 1⁵ Strategic Plan Goal⁶VII
<p>Project Summary: Part of the charge of the committee pursuant to rule 10.64. The project originated from a new item added to the approved Funding Methodology Subcommittee’s annual work plan for fiscal year 2024–25. The project is to further refine the Workload Formula policy, including methodologies to allocate future budget reductions and/or the restoration of funding that had previously been reduced due to budget shortfalls. The Budget Act of 2024 included an ongoing reduction of \$97 million to trial court baseline funding due to the state’s projected multi-year budget deficit. The Judicial Council approved the allocation of this reduction in July 2024, with the understanding that the Trial Court Budget Advisory Committee will continue to explore additional methodologies for future allocations. In October 2024, the Funding Methodology Subcommittee started to work on this project. The expected outcome is potential updates to the Workload Formula policy that may include changes to existing allocation methodologies to address future budget reductions and the restoration of funding to ensure they align with the policy’s core principles to advance the goal of funding equity, stability, and predictability to support trial court operations. The targeted completion date is for the Trial Court Budget Advisory Committee to make a recommendation at the April 2025 Judicial Council business meeting for implementation in fiscal year 2025–26.</p> <p>Status/Timeline: One-time.</p> <p>Fiscal Impact/Staff Resources: Judicial Council Budget Services staff.</p> <p><input checked="" type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p> <p>Internal/External Stakeholders: External stakeholders include the trial courts.</p> <p>AC Collaboration: Court Executives Advisory Committee and Judicial Branch Budget Committee.</p>		

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

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

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

#	New or One-Time Projects⁴	
2.	Project Title: Court Interpreter Program Funding	Priority 1
		Strategic Plan Goal VII
	<p>Project Summary: Part of the charge of the committee pursuant to rule 10.64. The project originated as a result of a \$4.6 million shortfall of Trial Court Trust Fund Court Interpreters Program funding in fiscal year 2023–24 and projected future shortfalls. On January 20, 2023, the Judicial Council approved a Trial Court Budget Advisory Committee recommendation for when courts experience a shortfall, in which courts with a shortage will first be covered by other court savings up to the appropriation amount, after which the Court Interpreters Program funding balance will be used to make courts whole, and funds will be allocated proportionally based on the percentage of the shortfall if the savings or funding balance is insufficient to cover the shortage. This item will be considered by the Judicial Council at its February 21, 2025, business meeting.</p> <p>Status/Timeline: New.</p> <p>Fiscal Impact/Staff Resources: Judicial Council Center for Families, Children & the Courts and Budget Services staff.</p> <p><input checked="" type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p> <p>Internal/External Stakeholders: External stakeholders include the trial courts.</p> <p>AC Collaboration: Court Executives Advisory Committee and Judicial Branch Budget Committee.</p>	
3.	Project Title: Court Reporter Funding	Priority 1
		Strategic Plan Goal VII
	<p>Project Summary: Part of the charge of the committee pursuant to rule 10.64. The project originated as a result of ongoing funding of \$30 million beginning in fiscal year 2021–22 to increase the number of court reporters in family law and civil law case types. At its July 12, 2024, business meeting, the Judicial Council directed council staff to survey the courts after allocations are distributed to the trial courts, no later than mid-year of fiscal year 2024–25, for a one-time redistribution of unspent funds to ensure the full appropriation is maximized to increase the number of court reporters. The expected outcome is to redistribute funding in the current year to be used by the courts to increase the number of court reporters in family and civil law case types.</p> <p>Status/Timeline: New.</p> <p>Fiscal Impact/Staff Resources: Judicial Council Business Management Services and Budget Services staff.</p>	

#	New or One-Time Projects⁴	
	<p><input checked="" type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p> <p>Internal/External Stakeholders: External stakeholders include the trial courts.</p> <p>AC Collaboration: Court Executives Advisory Committee and Judicial Branch Budget Committee.</p>	
4.	<p>Project Title: Firearms Relinquishment Grant Program</p>	<p>Priority 1</p> <p>Strategic Plan Goal VII</p>
	<p>Project Summary: Part of the charge of the committee pursuant to rule 10.64. The project originated as a result of \$40 million one-time General Fund included in the Budget Act of 2022 to support court-based firearm relinquishment programs. In fiscal years 2022–23 and 2023–24, the Trial Court Budget Advisory Committee recommended \$20.1 million in allocations to eight trial courts in the first two grant cycles. In fiscal year 2024–25, the budget for this program was reduced by \$9.2 million due to the state’s fiscal deficit and \$9.1 million was retained for a third grant cycle and \$1.6 million for the required program evaluation. The \$9.1 million for the third grant cycle, which included awards to six trial courts, was approved by the Judicial Council at its November 15, 2024, business meeting. The funding for this program must be spent or encumbered by June 30, 2025.</p> <p>Status/Timeline: One-time.</p> <p>Fiscal Impact/Staff Resources: Judicial Council Center for Families, Children & the Courts and Budget Services staff.</p> <p><input checked="" type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p> <p>Internal/External Stakeholders: External stakeholders include the trial courts.</p> <p>AC Collaboration: Family and Juvenile Law Advisory Committee and Judicial Branch Budget Committee.</p>	
5.	<p>Project Title: Sargent Shriver Civil Counsel Pilot Program</p>	<p>Priority 1</p> <p>Strategic Plan Goal VII</p>

#	New or One-Time Projects⁴	
	<p>Project Summary: Part of the charge of the committee pursuant to rule 10.64. At its July 12, 2024, business meeting, the Judicial Council approved a \$21 million Trial Court Trust Fund allocation for fiscal year 2024–25 for the Sargent Shriver Civil Counsel Pilot Program, which included \$5 million of additional funding for a mid-cycle allocation. On October 4, 2024, the Trial Court Budget Advisory Committee approved the Shriver Committee’s recommendation to allocate \$3.6 million of the \$5 million to existing pilot participants. The Shriver program will hold the unrequested amount of \$1.4 million in the program’s reserves to be allocated in the 2026–29 grant cycle. After the allocation of the \$3.5 million, total reserve funding for the program is \$20 million. This item was approved by the Judicial Council at its November 15, 2024, business meeting. The Trial Court Budget Advisory Committee will collaborate with the Shriver Civil Counsel Act Implementation Committee as needed to support future grant cycles.</p> <p>Status/Timeline: New and one-time.</p> <p>Fiscal Impact/Staff Resources: Judicial Council Center for Families, Children & the Courts and Budget Services staff.</p> <p><input checked="" type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p> <p>Internal/External Stakeholders: External stakeholders include the trial courts.</p> <p>AC Collaboration: Shriver Civil Counsel Act Implementation Committee and Judicial Branch Budget Committee.</p>	
6.	<p>Project Title: Court Cluster System</p>	<p>Priority 2</p> <p>Strategic Plan Goal VII</p>
	<p>Project Summary: Part of the charge of the committee pursuant to rule 10.64. The project originated from a Funding Methodology Subcommittee recommendation made on February 20, 2020, to initiate an ad hoc subcommittee to reevaluate the cluster system to identify potential opportunities for refinement or change. On July 6, 2023, the Trial Court Budget Advisory Committee approved updates to the annual Funding Methodology Subcommittee workplan, which referred the court cluster system project to the Data Analytics Advisory Committee. The Data Analytics Advisory Committee met on September 25, 2024, to begin their evaluation. The project outcome could potentially impact the statewide four-cluster system and/or its criteria, which is informed by the number of authorized judicial positions.</p> <p>Status/Timeline: One-time.</p> <p>Fiscal Impact/Staff Resources: Judicial Council Business Management Services’ Office of Court Research and Budget Services staff.</p> <p><input checked="" type="checkbox"/> <i>This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</i></p>	

#	New or One-Time Projects ⁴
	<p data-bbox="176 191 1184 224"><i>Internal/External Stakeholders:</i> External stakeholders include the trial courts.</p> <p data-bbox="176 264 1415 297"><i>AC Collaboration:</i> Data Analytics Advisory Committee and Judicial Branch Budget Committee.</p>

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

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

III. LIST OF 2024 PROJECT ACCOMPLISHMENTS

#	Project Highlights and Achievements
1.	<p>Workload Formula, State Trial Court Improvement and Modernization Fund, and Trial Court Trust Fund Allocations</p> <p>The Trial Court Budget Advisory Committee made recommendations to the Judicial Council that included State Trial Court Improvement and Modernization Fund and Trial Court Trust Fund allocations for 2024–25 to support trial court programs and operations. On July 12, 2024, the Judicial Council approved allocations totaling \$46.6 million from the State Trial Court Improvement and Modernization Fund and an allocation of \$3 billion, which includes \$2.8 billion from the Trial Court Trust Fund, \$137.8 million from the General Fund, and an ongoing \$97 million General Fund reduction to the trial courts’ operational funding due to the state’s fiscal deficit.</p>
2.	<p>Funds Held on Behalf Policy Update</p> <p>In October 2023, the Fiscal Planning Subcommittee’s Ad Hoc Funds Held on Behalf Working Group was established. The working group was charged with evaluating the process, application, and distribution components of the Funds Held on Behalf of the Trial Courts program. The recommendations from the working group included newly defined criteria, streamlining of the submission process, and implementation of a reimbursement model to distribute funding to the participating trial courts, which support improved transparency and accountability of the program. The recommendations were approved by the Judicial Council at its March 24, 2024, business meeting and were implemented in fiscal year 2024–25.</p>
3.	<p>Workload Formula Definition for “New Money”</p> <p>At its July 12, 2024, business meeting, the Judicial Council approved a recommendation from the Trial Court Budget Advisory Committee that Consumer Price Index funding included in the budget to address inflationary costs for the trial courts is not considered “new money” for the purpose of allocating funding via the Workload Formula. As a result, the definition of “new money” in the Workload Formula policy was revised to exclude Consumer Price Index funding.</p>
4.	<p>State Trial Court Improvement and Modernization Allocation Increase for the Litigation Management Program for 2023–24</p> <p>In fiscal year 2023–24, the Trial Court Budget Advisory Committee acted promptly to recommend a \$2 million State Trial Court Improvement and Modernization Fund allocation for the Litigation Management Program to address increased legal services for the trial courts. The \$2 million request was to supplement the annual appropriation of \$6.2 million General Fund for the Litigation Management Program and was approved by the Judicial Council at its May 17, 2024, business meeting. As a result of increasing program costs, the Judicial Council also approved (1) an increased allocation for the program in 2024–25 from the State Trial Court Improvement and Modernization Fund and (2) a budget change proposal requesting additional funding for the program for consideration in the fiscal year 2025–26 Governor’s Budget.</p>

#	Project Highlights and Achievements
5.	<p data-bbox="201 238 758 272">Court Interpreter Funding Methodology</p> <p data-bbox="201 313 1938 493">At its July, 2, 2024 meeting, the Trial Court Budget Advisory Committee approved updates to the Funding Methodology Subcommittee’s annual work plan for fiscal year 2024–25. The multi-year project for the development of an ongoing workload-based allocation methodology for Court Interpreter Program funding was removed from the plan. The final components of this project, related to the use of data collected in the Court Interpreter Data Collection System for video remote interpreting and a mechanism for courts to bill each other for cross assignments, were recently completed and no further action is needed.</p>