

Mental Health Issues Implementation Task Force
Draft Annual Agenda—2013
Approved by RUPRO: March 11, 2013

I. COMMITTEE INFORMATION

Chair:	Hon. Richard J. Loftus, Jr., Judge, Superior Court of California, County of Santa Clara
Staff:	Ms. Nancy Taylor and Ms. Karen Moen, Center for Families, Children & the Courts
Committee's Charge: Mental Health Issues Implementation Task Force charge is to: <ol style="list-style-type: none">1. Identify the recommendations of the Task Force for Criminal Justice Collaboration on Mental Health Issues (TFCJCMHI) that are under the Judicial Council's purview to implement;2. Identify potential branch implementation activities related to the recommendations under the purview of the Judicial Council; and3. Develop a plan with key milestones for implementing the recommendations of the TFCJCMHI	
Committee Membership: Membership consists of thirteen judges and two court executive officers and includes representation from large, mid-size, and smaller courts as well as from urban, suburban, and rural courts.	
Subcommittees/Working Groups: Court Responses/Rules of Court Subcommittee Justice System Partners Outreach Subcommittee Education Subcommittee Legislative Subcommittee	
Committee's Key Objectives for 2013: <ol style="list-style-type: none">1. To develop and implement a plan that will address the recommendations of the Task Force for Criminal Justice Collaboration on Mental Health Issues;2. To identify and prioritize recommendations that fall within the purview of the Judicial Council and can be implemented within the Judicial Branch and begin implementation on recommendations within branch purview; and3. To identify and prioritize recommendations that require partnerships with justice system, treatment, or other partners to be implemented and engage in outreach to address those recommendations.	

II. COMMITTEE PROJECTS

#	Project ¹	Priority ²	Specifications	Completion Date/Status
1.	Develop a plan to implement recommendations from the TFCJCMHI that are under Judicial Council purview.	1	<p>Judicial Council Direction: Task Force charge <i>Strategic Plan:</i> Goal IV: Quality of Justice and Service to the Public <i>Operational Plan:</i> Objective 1. Foster excellence in public service to ensure that all court users receive satisfactory services and outcomes.</p> <p>Origin of Project: The work of the Mental Health Issues Implementation Task Force originated with a charge by the Judicial Council that a task force be appointed to implement the recommendations of the TFCJCMHI. The Judicial Council specifically charged the Task Force with identifying recommendations from the final report of the TFCJCMHI that are under Judicial Council purview.</p> <p>Resources: N/A Key Objective Supported: 1, 2</p>	June 30, 2013
2.	Identify and refer to justice system partners recommendations from TFCJCMHI that are not within the purview of the Judicial Council.	1	<p>Judicial Council Direction: Task Force charge <i>Strategic Plan:</i> Goal IV: Quality of Justice and Service to the Public <i>Operational Plan:</i> Objective 1. Foster excellence in public service to ensure that all court users receive</p>	June 30, 2013

¹ 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.

² 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 the law; 1(b) Urgently needed to respond to a recent change in the law; 1(c) Adoption or amendment of rules or forms by a specified date required by statute or council decision; 1(d) Provides significant cost savings and efficiencies, generates significant revenue, or avoids a significant loss of revenue; 1(e) Urgently needed to remedy a problem that is causing significant cost or inconvenience to the courts or the public; 1(f) Otherwise urgent and necessary, such as a proposal that would mitigate exposure to immediate or severe financial or legal risk; 2(a) Useful, but not necessary, to implement statutory changes; 2(b) Helpful in otherwise advancing Judicial Council goals and objectives.

#	Project ¹	Priority ²	Specifications	Completion Date/Status
			<p>satisfactory services and outcomes.</p> <p>Origin of Project: The work of the Mental Health Issues Implementation Task Force originated with a charge by the Judicial Council that a task force be appointed to implement the recommendations from the final report of the TFCJCMHI and to identify recommendations that are under Judicial Council purview.</p> <p>Resources: N/A</p>	
3.	<p>Per recommendations #11 & 12 related to implementation of the TFCJCMHI, propose strategies for implementation, including development of proposed amendments to specified Rules of Court, to be submitted for 2014 public comment cycle.</p> <p>*Recommendation 11 recommends amending Rule of Court 10.952 to include additional agencies in the court's regular meetings with justice system partners, to ensure courts coordinate with agencies that have responsibility for offenders with mental health issues.</p> <p>*Recommendation 12 recommends amending Rule of Court 10.951 to require courts and the justice system partners identified in Rule of Court 10.952 to develop local case protocols for cases involving offenders with mental illness or co-occurring disorders.</p>	1	<p>Judicial Council Direction: Task Force Charge <i>Strategic Plan:</i> Goal IV: Quality of Justice and Service to the Public <i>Operational Plan:</i> Objective 1. Foster excellence in public service to ensure that all court users receive satisfactory services and outcomes.</p> <p>Origin of Project: The Judicial Council specifically charged the Task Force with developing a plan with key milestones noted for implementation of the recommendations from the final report of the TFCJCMHI.</p> <p>Resources: Probate and Mental Health Advisory Committee, Collaborative Justice Courts Advisory Committee, Criminal Law Advisory Committee; Presiding Judges and Court Executive Officers Advisory Committees</p> <p>Key Objective Supported: 1,2</p>	January 1, 2014

#	Project ¹	Priority ²	Specifications	Completion Date/Status
			Rules and Forms Proposals Priority Level: ³ 1(e) (recommendation 11) 1(d) (recommendation 12)	
4.	<p>Per recommendations #26, 36 and 55 of the TFCJCMHI, prepare proposed legislation for review by relevant Judicial Council advisory bodies and justice system partners, for submission through the Judicial Council process or through justice system partners.</p> <p>* Recommendation 26 recommends giving judicial officers hearing criminal proceedings involving defendants with mental illness the authority to order a conservatorship evaluation and the filing of a petition when there is reasonable cause to believe that a defendant is gravely disabled within the meaning of Welfare & Institutions Code §5008(h).</p> <p>*Recommendation 36 recommends giving judicial officers hearing competency matters access to a variety of alternative procedural and dispositional tools, such as the jurisdiction to conditionally release a defendant found incompetent to stand</p>	1	<p>Judicial Council Direction: Task Force Charge <i>Strategic Plan:</i> Goal IV: Quality of Justice and Service to the Public <i>Operational Plan:</i> Objective 1. Foster excellence in public service to ensure that all court users receive satisfactory services and outcomes.</p> <p>Origin of Project: The Judicial Council specifically charged the Task Force with identifying potential branch implementation activities.</p> <p>Resources: Office of Governmental Affairs, Collaborative Justice Courts Advisory Committee, Probate and Mental Health Advisory Committee, Criminal Law Advisory Committee; Presiding Judges and Court Executive Officers Advisory Committee</p> <p>Key Objective Supported: 1,2</p>	January 1, 2014

³ Priority levels for rules and forms proposals are: 1(a) Urgently needed to conform to the law; 1(b) Urgently needed to respond to a recent change in the law; 1(c) Adoption or amendment of rules or forms by a specified date required by statute or council decision; 1(d) Provides significant cost savings and efficiencies, generates significant revenue, or avoids a significant loss of revenue; 1(e) Urgently needed to remedy a problem that is causing significant cost or inconvenience to the courts or the public; 1(f) Otherwise urgent and necessary, such as a proposal that would mitigate exposure to immediate or severe financial or legal risk; 2(a) Useful, but not necessary, to implement statutory changes; 2(b) Responsive to identified concerns or problems; 2(c) Helpful in otherwise advancing Judicial Council goals and objectives.

#	Project ¹	Priority ²	Specifications	Completion Date/Status
	<p>trial to the community rather than in a custodial or hospital setting, to receive mental health treatment with supervision until competency is restored.</p> <p>*Recommendation 55 recommends providing courts with jurisdiction to join to the proceedings those agencies and providers that already have legal obligations to provide service and support to probationers and parolees with mental illness, giving the agency or provider advance notice of and an opportunity to be heard on the issue.</p>			
5.	Per recommendation of the TFCJCMHI, identify and make recommendations for implementing best and promising practices for cases involving mental health issues. Activities related to dissemination of best and promising practices will begin in 2013 and dissemination of best and promising practices will be included in the Annual Agenda for 2014.	1	<p>Judicial Council Direction: Task Force Charge <i>Strategic Plan:</i> Goal IV: Quality of Justice and Service to the Public <i>Operational Plan:</i> Objective 1. Foster excellence in public service to ensure that all court users receive satisfactory services and outcomes.</p> <p>Origin of Project: The Judicial Council specifically charged the Task Force with identifying potential branch implementation activities.</p> <p>Resources: Collaborative Justice Courts Advisory Committee, Criminal Law Advisory Committee, Probate and Mental Health Advisory Committee</p> <p>Key Objective Supported: 1, 2, 3</p>	December 31, 2013

#	Project ¹	Priority ²	Specifications	Completion Date/Status
6.	Develop recommendations for implementation of judicial education and multi-disciplinary education activities, in conjunction with the CJER Governing Committee and relevant Judicial Council advisory bodies. Implementation activities will be included in Annual Agenda for 2014.	1	<p>Judicial Council Direction: Task Force Charge <i>Strategic Plan:</i> Goal IV: Quality of Justice and Service to the Public <i>Operational Plan:</i> Objective 1. Foster excellence in public service to ensure that all court users receive satisfactory services and outcomes.</p> <p>Origin of Project: The Judicial Council specifically charged the Task Force with identifying potential branch implementation activities.</p> <p>Resources: Center for Judiciary Education and Research (CJER), Office of Communications, Criminal Justice Services Office, Collaborative Justice Courts Advisory Committee, Family and Juvenile Law Advisory Committee, Probate and Mental Health Advisory Committee, Criminal Law Advisory Committee</p> <p>Key Objective Supported: 1, 2</p>	December 31, 2013
7.	Develop implementation plan for studies regarding effective practices that address juvenile competency and process evaluation of mental health. To enrich recommendations to the Judicial Council and avoid duplication of effort, members of the Task Force will collaborate with the Family and Juvenile Law Advisory Committee and Collaborative Justice Courts Advisory Committee to consider (1) revising rule 5.645 to define appropriate evaluation tools for use with juveniles, (2) developing legislative language to clarify the	1	<p>Judicial Council Direction: Task Force Charge <i>Strategic Plan:</i> Goal IV: Quality of Justice and Service to the Public <i>Operational Plan:</i> Objective 1. Foster excellence in public service to ensure that all court users receive satisfactory services and outcomes.</p> <p>Origin of Project: The Judicial Council specifically charged the Task Force with identifying potential branch implementation activities.</p>	December 31, 2013

#	Project ¹	Priority ²	Specifications	Completion Date/Status
	presumption of competency, and (3) other legislative changes necessary to improve the handling of cases where competency issues are raised. Implementation activities will be included in Annual Agenda for 2014.		Rules and Forms Proposals Priority Level: 1(e)	
8.	Identify implementation activities that require collaborative justice and treatment system partners and engage partners in developing collaborative implementation strategies to be reported to the Judicial Council. Implementation activities will be included in Annual Agenda for 2014.	1	<p>Judicial Council Direction: Task Force Charge <i>Strategic Plan:</i> Goal IV: Quality of Justice and Service to the Public</p> <p><i>Operational Plan:</i> Objective 1. Foster excellence in public service to ensure that all court users receive satisfactory services and outcomes.</p> <p>Origin of Project: The Judicial Council specifically charged the Task Force with identifying potential branch implementation activities.</p>	December 31, 2013

III. STATUS OF 2012 PROJECTS:

[List each of the projects that were included in the 2012 Annual Agenda and provide the status for the project. If the project is on the proposed 2013 Annual Agenda, include cross-reference to the 2013 project number above under Completion Date/Status.]

#	Project	Completion Date/Status
1	Identify the recommendations from the final report of the TFCJCMHI that are under Judicial Council purview.	Completion Date: June 30, 2012
2	Identify potential branch implementation activities, including activities that would assist justice partners improve outcomes for persons in the justice system with mental illness.	Completion Date: June 30, 2012; Partially Completed December 31, 2012 (2013 Annual Agenda #1)
3	Develop a plan with key milestones noted for implementation of the identified recommendations from the final report of the TFCJCMHI	Completed November 1, 2012
4	Review proposed legislation related to implementation of the TFCJCMHI recommendations and provide recommendations based on review and develop recommendations for additional legislation as needed, with the initial focus to be on pending legislation related to realignment.	Completion Date: December 31, 2012; Initiated; Partially Completed December 31, 2012 (2013 Annual Agenda #4)
5	Identify best practices for court responses to mentally ill court users based on recommendations of TFCJCMHI and proposed strategies to implement these responses, including recommendations for Rules of Court, as needed.	Completion Date: December 31, 2012; Initiated and Partially Completed December 31, 2012 (2013 Annual Agenda #5)
6	Develop recommendations for judicial education and for multi-disciplinary education activities for submission to the CJER Governing Committee and to relevant Judicial Council advisory bodies.	Completion Date: December 31, 2012; Initiated and Partially Completed December 31, 2012 (2013 Annual Agenda #6)
7	Identify research gaps and prioritize research activities for the Judicial Branch and for collaborative efforts with justice system and treatment partners.	Completion Date: December 31, 2012; Initiated November 1, 2012 (2013 Annual Agenda #7)
8	Identify implementation activities that require collaborative justice and treatment system partners and engage partners in developing collaborative implementation strategies.	Completion Date: December 31, 2012; Initiated and Partially Completed December 31, 2012

IV. RESOURCE INFORMATION

[For the committee year (11/1/2012 - 10/31/2013), provide the position classifications and hours spent by staff relating to this committee (including subcommittee and working group activities) in the table below broken out between logistical versus substantive activities.]

Office	Position Classification	Hours/Year		Total Hours/Year
		Logistical	Substantive	
CFCC	Manager		100	100
CFCC	Analyst		550	550
CFCC	Supervising Attorney		100	100
CFCC	Administrative Coordinator	60		60
CFCC	Attorney		140	140
CFCC	Research Analyst		340	340
CFCC	Admin Coordinator		75	75

- V. **COST INFORMATION** *[Provide the following estimated cost information for the committee year (11/1/2012 - 10/31/2013), as well as separate cost information (if appropriate) for any subcommittees or working groups.]*

	<i>In-person meeting(s)</i> Number: 1	<i>Video- /teleconference(s)</i> Number: 0	Total
TRAVEL			
Airfare	\$ 2450	\$	2450
Hotel/Meals (allowable per diem)	\$ 980	\$	980
All other travel costs (mileage, parking etc.)	\$ 681	\$	681
Total Cost for Travel Expenses	\$	\$	\$ 4111
CATERING			
Total Catering Costs	\$ 150	\$	\$ 150
MATERIALS/MAILING/OTHER			
<i>[Specify]</i>	\$	\$	
<i>[Specify]</i>	\$	\$	
<i>[Specify]</i>	\$	\$	
Total Materials/Mailing/Other	\$	\$	
Grand Total		\$	\$ 4261

VI. Subcommittees/Working Groups - Detail

Subcommittees/Working Groups: *[For each group listed in section I, include the below information. For working groups that include members who are not on this advisory group, provide information about the additional members (e.g., from which other advisory committees), and include the number of representatives from this advisory group as well as additional members on the working group.]*

Subcommittee or working group name: Court Responses/Rules of Court Subcommittee

Purpose of subcommittee or working group: To develop proposals for rules or best practices for recommendation to Task Force; to identify timelines/activities required to propose rules to Judicial Council; to coordinate outreach to relevant advisory bodies and stakeholders regarding proposals

Number of advisory group members: 9

Number and description of additional members (not on this advisory group): There are no members other than Task Force members.

Date formed: April 2012

Number of meetings or how often the group meets: No in-person subcommittee meetings, teleconferences as needed

Ongoing or date work is expected to be completed: December 31, 2014

Subcommittee or working group name: Justice System Partners Outreach Subcommittee

Purpose of subcommittee or working group: To propose to the Task Force recommendations for justice system, treatment, and other stakeholders for partnerships in implementing Task Force recommendations; to coordinate outreach to partners; to develop implementation plans and activities with partners

Number of advisory group members: 4

Number and description of additional members (not on this advisory group): There are no members other than Task Force members.

Date formed: April 2012

Number of meetings or how often the group meets: No in-person subcommittee meetings, teleconferences as needed

Ongoing or date work is expected to be completed: December 31, 2014

Subcommittee or working group name: Education Subcommittee

Purpose of subcommittee or working group: To advise the Task Force regarding education programs and needs to implement Task Force recommendations related to education; to coordinate with CJER and relevant advisory bodies in order to implement education programs; to coordinate and advise AOC staff in implementation activities

Number of advisory group members: 10

Number and description of additional members (not on this advisory group): There are no members other than Task Force members.

Date formed: April 2012

Number of meetings or how often the group meets: No in-person subcommittee meetings, teleconferences as needed

Ongoing or date work is expected to be completed: December 31, 2014

Subcommittee or working group name: Legislative Subcommittee

Purpose of subcommittee or working group: To develop legislative proposals to recommend to the Task Force; to develop timelines and implementation plans related to proposed legislation; to respond to requests to review legislative proposals; to coordinate outreach to relevant advisory bodies and stakeholders regarding legislative proposals

Number of advisory group members: 7

Number and description of additional members (not on this advisory group): There are no members other than Task Force members.

Date formed: April 2012

Number of meetings or how often the group meets: No in-person subcommittee meetings, teleconferences as needed

Ongoing or date work is expected to be completed: December 31, 2014